

National Documentation Standards



October 2005

Version 1.1

Department of Veterans Affairs (VA)

Revision History

Date	Revision	Description	Author
4/15/2005	1.0	Initial Publication	SEPG/SQA
10/2005	1.1	Various edits based on field comments	SEPG/SQA

Table of Contents

1. Purpose	9
2. Policy	9
3. Definitions	9
4. Responsibilities	9
5. Procedures	10
6. National Software Documentation Components	10
6.1. First Version of a Product	10
6.2. Subsequent Versions of a Product	10
6.3. Combined Manuals	10
6.4. Patches to a Product	11
6.5. Distribution of National Software Documentation	11
6.6. Miscellaneous Considerations	11
6.7. Naming Conventions	12
6.8. Displaying Sensitive Data	12
7. National Software Documentation Components for Vista	13
7.1. Software Documentation Component: Installation Guide	13
7.1.1. Table of Contents	13
7.1.2. Pre-installation Considerations	13
7.1.3. Installation Procedure	14
7.1.4. Post-Installation Considerations	14
7.2. Software Documentation Component: Technical Manual	15
7.2.1. Revision History	15
7.2.2. Table of Contents	15
7.2.3. Introduction	15
7.2.4. Implementation and Maintenance	15
7.2.5. Files	16
7.2.6. Routines	16
7.2.7. Exported Options	16
7.2.8. Archiving	16
7.2.9. Callable Routines/Entry Points/Application Programmer Interfaces	16
7.2.10. External Relationships	16
7.2.11. Internal Relationships	17
7.2.12. Global Variables	17
7.2.13. Glossary	17
7.2.14. Additional Useful Information	17
7.3. Software Documentation Component: Security Guide	18
7.3.1. Revision History	18
7.3.2. Table of Contents	18
7.3.3. Legal Requirements	19
7.3.4. Mail Groups, Alerts, and Bulletins	19
7.3.5. Remote Systems	19
7.3.6. Archiving	19
7.3.7. Contingency Planning	19
7.3.8. Interfacing	19
7.3.9. Electronic Signatures	19
7.3.10. Menus	20
7.3.11. Security Keys	20
7.3.12. File Security	20
7.3.13. References	20
7.3.14. Official Policies	20
7.3.15. Glossary	20
7.4. Software Documentation Component: User Manual	21
7.4.1. Revision History	21

7.4.2.	Table of Contents	21
7.4.3.	Introduction	21
7.4.4.	User Instructions	21
7.4.5.	Glossary	21
7.4.6.	Index	21
7.4.7.	Additional Useful Information	21
7.5.	Software Documentation Component: Release Notes	22
8.	Documentation Components for HealthVet-VistA	23
8.1.	Software Documentation Component: Installation Guide	23
8.1.1.	Table of Contents	23
8.1.2.	Introduction	23
8.1.3.	Deployment Overview	23
8.1.4.	Pre-Install Instructions and Preparation	24
8.1.5.	Database Information	24
8.1.6.	Instructions for Installing M Server (or Database) Components	24
8.1.7.	M Environment	24
8.1.8.	Instructions for Installing Middle Tier Applications (e.g., Application Servers)	24
8.1.9.	Instructions for Starting Applications on the Middle Tier Application Server	25
8.1.10.	Instructions for Installing Client Components	25
8.1.11.	Post-Installation Review	25
8.1.12.	Post-Installation (Setup and Configuration)	25
8.1.13.	Starting the Client-Side Desktop Software	25
8.1.14.	M Installation Example	25
8.1.15.	Zipped File Contents, Where Applicable	25
8.1.16.	Troubleshooting	26
8.2.	Software Documentation Component: Security Guide	26
8.2.1.	Revision History	26
8.2.2.	Table of Contents	26
8.2.3.	Legal Requirements	26
8.2.4.	Auditing	27
8.2.5.	Authentication and Authorization	27
8.2.6.	Access Control	27
8.2.7.	Application Dependencies	27
8.2.8.	Mail Groups, Alerts, and Bulletins	27
8.2.9.	Remote Access/Transmission	27
8.2.10.	Archiving	28
8.2.11.	Contingency Planning	28
8.2.12.	Exported Groups and/or Options and Menus	28
8.2.13.	Security Keys and/or Roles	28
8.2.14.	Interfacing	28
8.2.15.	Electronic Signatures	28
8.2.16.	File Security	28
8.2.17.	Troubleshooting	28
8.2.18.	Glossary	29
8.2.19.	References and Official Policies	29
8.3.	Software Documentation Component: Developer's Guide	30
8.3.1.	Revision History	30
8.3.2.	Table of Contents	30
8.3.3.	Orientation	30
8.3.4.	Introduction	30
8.3.5.	Public Interfaces	31
8.3.6.	Configuration Information	31
8.3.7.	Developer Workstation Setup	31
8.3.8.	Tools and Utilities	31
8.3.9.	Troubleshooting	31
8.3.10.	Javadocs	31

8.4.	Software Documentation Component: Systems Management Guide.....	32
8.4.1.	Revision History.....	32
8.4.2.	Table of Contents.....	32
8.4.3.	Orientation.....	32
8.4.4.	Introduction.....	32
8.4.5.	System Requirements.....	32
8.4.6.	Parameters.....	32
8.4.7.	Remote Procedure Calls.....	33
8.4.8.	Database Information.....	33
8.4.9.	Exported Groups and/or Options and Menus.....	33
8.4.10.	Security Keys and/or Roles.....	33
8.4.11.	Java Components (Client-Side Java Components).....	33
8.4.12.	Set-up and Configuration.....	33
8.4.13.	Troubleshooting.....	34
8.5.	Software Documentation Component: User Guide.....	34
8.5.1.	Revision History.....	34
8.5.2.	Table of Contents.....	34
8.5.3.	Introduction.....	34
8.5.4.	User Instructions.....	35
8.5.5.	Glossary.....	35
8.5.6.	Index.....	35
8.5.7.	Additional Useful Information.....	35
8.6.	Software Documentation Component: Release Notes.....	35
9.	National Documentation Standards for Online Help.....	36
9.1.	Online Help Types for Multiple Platforms.....	36
9.1.1.	Help Files.....	36
9.1.2.	Help Menu.....	40
9.1.3.	Help Access.....	41
10.	National Documentation Style Guide.....	43
10.1.	General Considerations.....	43
10.1.1.	Designed for Print Presentation.....	43
10.1.2.	Portable Document Format Documents.....	43
10.2.	Software Documentation Style Guidelines.....	43
10.2.1.	Abbreviations/Acronyms.....	43
10.2.2.	Appendices.....	43
10.2.3.	Artwork Text.....	44
10.2.4.	Blank Pages.....	44
10.2.5.	Caret.....	44
10.2.6.	Computer Dialogue.....	44
10.2.7.	Dingbats.....	44
10.2.8.	Divider Pages (Optional).....	44
10.2.9.	Key Names.....	44
10.2.10.	Field Names.....	44
10.2.11.	File Names.....	44
10.2.12.	Fonts.....	45
10.2.13.	Footers.....	45
10.2.14.	Headers (Optional).....	46
10.2.15.	HealthVet-VistA.....	46
10.2.16.	Index.....	46
10.2.17.	Major Headings.....	46
10.2.18.	Margins.....	46
10.2.19.	Menu Text.....	46
10.2.20.	Mouse vs. Keyboard Procedures.....	47
10.2.21.	Page Numbers.....	47
10.2.22.	Prompts and Labels.....	47
10.2.23.	Release Date.....	47

10.2.24.	Software Names	47
10.2.25.	Table of Contents	47
10.2.26.	Table Text	47
10.2.27.	Title Page.....	48
10.2.28.	User Response	48
10.2.29.	Version Number.....	48
10.2.30.	VistA Used in Text	48

1. Purpose

The purpose of the National Documentation Standards is to:

- Establish a policy for all external product documentation released nationally as a deliverable with the software
- Establish the responsibilities for maintaining the integrity of all national software documentation standards
- Provide documentation standards and style guidelines for national software documentation created after the effective date of the standards. It is not necessary to retrofit the standards to documentation previously published in the Vista Documentation Library (VDL)

2. Policy

National Software Documentation:

- Must be clear, accurate, and provide sufficient detail for the appropriate audience
- Must be compliant with the National Documentation Standards

3. Definitions

The terms must, should, may, must not, should not, and may not have the following meaning:

- must, must not – The feature is required or forbidden, respectively. (standard)
- should, should not – The feature is not absolutely required or forbidden, but there must be a compelling reason to take the opposite action. (convention)
- may, may not – The feature is entirely optional, or its omission is entirely optional. (convention)

Standards and/or Requirements. Standards and/or requirements are documentation rules that all national software must observe.

4. Responsibilities

Software Engineering Process Group/Software Quality Assurance (SEPG/SQA). SEPG/SQA is responsible for maintaining and coordinating documentation policy and standards.

Project Manager. Project managers are responsible for the documentation preparation oversight of documentation for their assigned software.

Technical Writers. All technical writers have these responsibilities:

- Preparation of documentation for their assigned software
- Review and recommend revisions to the documentation policy and standards via the SEPG/SQA Web site (<http://vista.med.va.gov/sepg>)
- Recommend formulation of style, guidelines, and reference materials via the SEPG/SQA Web site (<http://vista.med.va.gov/sepg>)

5. Procedures

Updates to National Documentation Standards

- At the scheduled review date, SEPG/SQA will form an expert panel to recommend and update these standards.
- Based on the type or importance of proposed change(s), SEPG/SQA may update the standards prior to the scheduled review date.
- Office of Information (OI) staff may submit recommendations on National Documentation Standards to SEPG/SQA.

Documentation Review and Approval

- Project teams are responsible for reviewing the national software documentation for technical and functional accuracy, clarity of presentation, and completeness.
- Refer appeals for exemption from the National Documentation Standards to the project team's project manager for review and resolution. The project manager may consult with the technical writers on the appropriateness of the exemption. For documents that receive an exemption from these standards, use the formatting in the original document. Project manager must document what exemptions are given for a project to forward to the appropriate review body (e.g., SQA and/or EVS).

6. National Software Documentation Components

6.1. First Version of a Product

For the first version of a product, the minimum required documentation components must address installation instructions, technical issues, security concerns, and end user information. This documentation may vary in form (such as manuals, guides, online help); however, the content must consistently address the specific areas detailed in the sections that follow.

6.2. Subsequent Versions of a Product

After the first version of a product, a release notes document is a required component.

6.3. Combined Manuals

Documents addressing security concerns may be combined with those that cover the technical issues. Provide a separate security guide if the product contains highly sensitive information (e.g., Personnel and Accounting Integrated Data System (PAID)).

The release notes should *not* be combined with the installation guide.

6.4. Patches to a Product

Technical writers must revise documentation to reflect patch-related functionality changes to national software. Specifically, for each manual or guide affected by a patch, the assigned technical writer must update the following:

- Document text (describe patch-related functionality changes)
- Revision history (add an entry that includes: the revision date, a brief description of the revision, the patch number, the name of the project manager, and the name of the technical writer)
- Table of Contents, if applicable
- Index, if applicable

Exceptions:

- If a project manager determines that the patch description contains sufficiently detailed installation instructions, technical writers do not need to update installation documents.
- At the project manager's discretion, document components for a patch may be consolidated into a single guide.

Technical writers must also:

- Determine whether change pages should be published separately
- Submit updated documentation to SQA for review and approval
- Ensure SQA-reviewed/approved documentation is submitted to Enterprise VistA Support (EVS)
- Post finalized documentation on the VDL Web site after the patch is released nationally

6.5. Distribution of National Software Documentation

Prior to the release of a software product and/or patch, technical writers must provide portable document format (PDF) versions of software documentation to EVS for placement on the Anonymous directories.

Technical writers must supply EVS with final software documents as well as publishing those documents to the VDL concurrent with the software release.

Technical writers must follow these directions to place documentation on the VDL:

http://vista.med.va.gov/wmt/Documentation/VDLMGR_directions.asp.

Technical writers must keep the product documents on the VDL current with the software release, as well as coordinating placement of the documentation on the VistA Anonymous directories with EVS.

6.6. Miscellaneous Considerations

- Manuals should contain a link to the software application's Web site.
- Manuals should contain a link to the software documentation's VDL Web page.
- After the initial release of documentation, include the revision date of the documentation in the release date field of the VDL manager. For example: December 1997 (Revised October 2004).
- For manuals requiring glossaries, abbreviations and acronyms should be included in that section.

6.7. Naming Conventions

Audience-specific titles may be used when doing so increases the usability of the manual.

For example:

- CPRS-R Installation Guide for EMC Staff
- Care Management Installation Guide for IRM Staff
- Health_eVet Desktop Deployment Guide

6.8. Displaying Sensitive Data

- Ensure any documentation (including screen shot examples) containing social security numbers in documentation begin with either 000 or 666.
- Patient names must be constructed from the abbreviated application name combined with *patient* for the last name and the use of textual numbers or a numeric for the first name (e.g., *CPRSpatient, One* or *CPRSpatient, Two*).
- Provider names must be constructed from the abbreviated name combined with *provider* for the last name and the use of textual numbers or a numeric for the first name (e.g., *CPRSp provider, One* or *CPRSp provider, Two*).
- For additional information on data sensitivity requirements see SOP 192-352. Visit http://vista.med.va.gov/SEPG_lib/Standard%20Operating%20Procedures/192-352%20Displaying%20Sensitive%20Data.htm.

7. National Software Documentation Components for VistA

This section contains the national standards to use for Veterans Health Information Systems and Technology Architecture (VistA)-Legacy software documentation, categorized by the software documentation components (i.e., manual types) required with the national release of VistA software release. These manual types are:

- [Installation Guide](#) (Required)
- [Technical Manual](#) (Required)
- [Security Guide](#) (Required. It may be combined with the Technical Manual if it does not contain highly sensitive information.)
- [User Manual](#) (Required)
- [Release Notes](#) (Required after the first release of software)

7.1. Software Documentation Component: Installation Guide

The Installation Guide is a required user documentation component for national releases of full versions of VistA software applications and for national releases of software applications/patches to be installed on multiple platforms (e.g., client/server installations). It provides the information necessary to install the software with little or no assistance from the software developers or Enterprise VistA Support (EVS) support staff.

At a minimum, the Installation Guide must contain the following sections:

7.1.1. Table of Contents

Provide page references to major chapters and/or sections of the manual.

7.1.2. Pre-installation Considerations

Describe potential actions to be taken before sites install the software.

- Reference any requirements (e.g., disable scheduled options, stop journaling, etc.) that may be needed during the installation process.
- List minimum versions of software that must be installed in the site's accounts before installing this software. (This should be the same information as in the [External Relationships](#) section of the Technical Manual.)
- Describe any unique or unusual resources required by the software, such as Central Processing Unit (CPU) capacity, disk space (i.e., disk space may need to be increased if your software requires that you turn on tracking or auditing), devices (e.g., servers, smart card readers, barcode readers, etc.), and other pertinent resources.
- Provide a formula for sizing, (e.g., how global growth is impacted), if applicable.
- Recommend that sites install the software in test accounts prior to installing it in production accounts.
- List any reports that Information Resources Management (IRM) service staff should produce from the system before installing the software.

- Provide instructions for coordinating the installation with other teams, if applicable.
 - Include installation sequence information for multiple patches
 - Specify mandated installation dates, if applicable
- Instruct users to log off the system during installation, if applicable.
- Indicate if the software should be installed during off-peak hours.
- Indicate the average amount of time required to install the software.

7.1.3. Installation Procedure

Provide step-by-step instructions for installing the software (optionally, include a sample installation screen capture).

7.1.4. Post-Installation Considerations

Describe potential actions to be taken after sites install the software.

- List reports that the IRM service staff should produce from the system after installation of the software.
- Provide information to assist in determining the parameters or other site-specific data that need to be entered for the site, if applicable. (This information should be the same as what is in the Implementation and Maintenance section of the Technical Manual.)
- Provide instructions to notify external entities of the potential impact(s) when the software is installed in production accounts, if applicable. (For example, the Health Eligibility Center (HEC) needs to notify the Austin Automation Center (AAC) if the software installed produces new letters or modifications to existing letters; VistA needs to notify the HEC and/or the AAC if there are modifications to messaging transmissions, etc.)

7.2. Software Documentation Component: Technical Manual

The Technical Manual is a required documentation component that provides sufficient technical information about the VistA software for programmers and IRM technical personnel to operate and maintain the software with only minimal assistance from EVS.

The following elements are required in a VistA Technical Manual:

7.2.1. Revision History

Include a Revision History section to be inserted after the title page and before the Table of Contents. This section should include at a minimum:

- Date of the revision – List entries in reverse chronological order, with the most recent entry first
- Description of Change – High-level description of change, including the VistA patch number where applicable
- Author Information – Author's name and project manager's name

7.2.2. Table of Contents

Provide page references to major chapters and/or sections of the manual.

7.2.3. Introduction

Supply a brief statement identifying the document in terms of its purpose, scope, and target audience. Provide an overview that describes the function(s) and purpose(s) of the VistA software, and how the software accomplishes the objective(s). Note related manuals and other reference materials.

7.2.4. Implementation and Maintenance

This section is required unless published in a separate manual. If published in a separate manual, refer readers to where they can find the documentation. Provide information to assist IRM service staff with the implementation and maintenance of the VistA software. This section should include information regarding the entry of required site-specific data, including where applicable:

- Site parameters
- Worksheets to assist in determining the parameters for a site
- Sample configurations
- Process flow chart of operations

NOTE: *A process flow chart is a basic flow chart of what happens as the process flows along showing crucial decision points.*

7.2.5. Files

Provide a list of the VistA software files. For each file, include the file number, file name, a list of any special templates (print, sort, input, edit) that come with the file, and brief description of the data or instruct the user how/where to find this information online. Indicate what data comes with the files and whether or not that data overwrites existing data.

Optionally include information about file pointer relationships.

7.2.6. Routines

Provide a list of routines or instruct the user how/where to find this information online.

7.2.7. Exported Options

Provide a list of the options exported with the VistA software, indicating distribution of menus to users. Note any restrictions on menu distribution. If the option's availability is based on the level of system access granted by a security key, include the name of the key and personnel groups (e.g., site managers, Pharmacy Automated Data Processing Application Coordinators [ADPAC]) who are authorized holders.

7.2.8. Archiving

Describe the archiving capabilities of the VistA software. Provide any necessary instructions or guidelines.

7.2.9. Callable Routines/Entry Points/Application Programmer Interfaces

This section is required unless published in a separate manual dedicated to the topic. If published in a separate manual, refer readers to where they can find the documentation. List the callable routines, entry points, and Application Programmer Interfaces (APIs) that can be called by other software. Include a brief description of the functions, required variables, and any restrictions.

7.2.10. External Relationships

Explain any special relationships and agreements between the routines and/or files/fields in this VistA software and the routines and/or files/fields in other software (VistA or other). List any routines essential to the software functions, for example:

- Provide information on whether an outpatient facility could function without programs relating to inpatient activity and avoid system failure.
- Specify the version of VA FileMan, Kernel, and other software (VistA or other) required to run this software.
- Include a list of Integration Agreements (IA) with instructions for obtaining detailed information for each, or instruct the user how/where to find this information online.

7.2.11. Internal Relationships

Identify any routines, files, or options within this VistA software, which cannot function independently (e.g., Does the functioning of a particular option assume that entry/exit logic of another option has already occurred?), if applicable. List such options with their programming Standards and Conventions Committee (SACC) approval dates.

7.2.12. Global Variables

Provide a list of all non-standard variables that have received SACC exemptions together with their respective approval dates.

NOTE: *Global variables in M VistA are application namespaced. They are defined when the user accesses a VistA software application and remain static in the partition for use by other routines within that application. They are not killed upon exiting M routines. Hence, they are non-standard and require SACC exemptions and approval dates.*

7.2.13. Glossary

Provide a glossary of terms that relate to the specific software.

7.2.14. Additional Useful Information

The following elements may be helpful for users where applicable; however, they are not required in all VistA Technical Manuals:

7.2.14.1. Orientation

Address software- or audience-specific notations or directions (e.g., symbols used to indicate computer dialogues or user responses).

7.2.14.2. How to Obtain Technical Information Online

You may want to provide instructions for obtaining technical information online, such as Data Dictionary listings, menu diagrams, the Kernel Installation and Distribution System (KIDS) build file, and Integration Agreements (IAs), etc.

7.2.14.3. External Interfaces

List and describe or show how to get the information for any remote procedure calls (RPC) or VistA Health Level Seven (HL7) messages contained in the VistA software. Describe how other software, VistA or other, can use these calls or messages. Alternatively, these may be included in a separate manual (e.g., a Programmer Manual).

7.2.14.4. Cross-References

Provide information on non-standard or special cross-references (e.g., M-style cross-references).

7.2.14.5. Software Security

You have the option of either creating a stand alone security guide or a separate section that contains this information. Refer to Section 7.3 Software Documentation Component: Security Guide.

7.2.14.6. Troubleshooting

List error messages, Frequently Asked Questions (FAQ), and common problems with solutions or point the reader to where solutions can be found. Include this section a separate chapter or appendix.

7.2.14.7. Index

Provide a software-specific index.

7.3. Software Documentation Component: Security Guide

A Security Guide is created for controlling the release of sensitive information related to national software. If national software contains highly sensitive information (e.g., Personnel and Accounting Integrated Data System [PAID]), this component of the software documentation will not be included in any Freedom of Information Act (FOIA) request releases. Because certain keys and authorizations must be delegated for proper management of the system, information about these items may be found elsewhere in the Technical and User Manuals. Identify and explain any unique and/or atypical features and miscellaneous information that may be of particular interest to Information Security Officers (ISOs).

A security guide is a required documentation component. It can be released as a standalone manual, or be included as a security section in the Technical Manual. If the software contains highly sensitive information (e.g., PAID) the two manuals must not be combined.

A security guide is a required documentation component.

The following elements are required in a VistA Security Guide:

7.3.1. Revision History

Include a Revision History section to be inserted after the title page and before the Table of Contents. This section should include at a minimum:

- Date of the revision – It may be useful to list entries in reverse chronological order, with the most recent entry first
- Description of Change – High-level description of change, including the VistA patch number where applicable
- Author Information – Author's name and project manager's name

7.3.2. Table of Contents

Provide page references to major chapters and/or sections of the manual.

7.3.3. Legal Requirements

Address any legal requirements pertaining to the software. Identify any security measures necessary to protect the integrity of the software and database in accordance with the following directives:

- Modifications to VHA Class 1 Software, VHA Directive 2004-038 dated July 23, 2004 (http://vaww1.va.gov/vhapublications/ViewPublication.asp?pub_ID=1129)
- Information Technology Security Certification and Accreditation Program, VA Directive 6214 dated March 15, 2002 ([http://vaww.va.gov/pubs/directives/Information-Resources-Management-\(IRM\)/6214d.doc](http://vaww.va.gov/pubs/directives/Information-Resources-Management-(IRM)/6214d.doc))
- The Health Insurance Portability and Accountability Act (HIPAA) of 1996 (PL 104-191) (<http://vista.med.va.gov/hipaa/>) and Federal Information Security Management Act (FISMA) (<http://csrc.nist.gov/policies/FISMA-final.pdf>) Web sites address encryption of data exchanged over any facility connection

7.3.4. Mail Groups, Alerts, and Bulletins

Identify and explain the purpose of any mail groups, alerts, and bulletins that are created/required/used by the software. Refer the reader to the software Technical Manual for more detailed information.

7.3.5. Remote Systems

If the software transmits data to any remote system/facility database, identify the data, the method and frequency, and confirmation or acknowledgement of receipt. The Health Insurance Portability and Accountability Act (HIPAA) of 1996 (PL 104-191) (<http://vista.med.va.gov/hipaa/>) and Federal Information Security Management Act (FISMA) (<http://csrc.nist.gov/policies/FISMA-final.pdf>) Web sites address encryption of data exchanged over any facility connection.

7.3.6. Archiving

Describe the archiving capabilities of the VistA software. Provide any necessary instructions or guidelines.

7.3.7. Contingency Planning

Recommend that facilities develop a local contingency plan to be used in the event of software problems in a live environment. The facility contingency plan must identify the procedure for maintaining functionality provided by this software in the event of system outage.

7.3.8. Interfacing

Identify any non-VA hardware and/or software embedded within or required by the VistA software. Describe its use, authority, and/or restrictions.

7.3.9. Electronic Signatures

If electronic signatures are utilized in the software, address requirements of Health Information Management And Health Records, VHA HANDBOOK 1907.1 April 15, 2004 (http://vaww1.va.gov/vhapublications/ViewPublication.asp?pub_ID=434). List any software functions that require electronic signatures.

7.3.10. Menus

Provide a list of menu assignments recommended for managing software security.

7.3.11. Security Keys

List and briefly explain the function of all security keys associated with the software.

7.3.12. File Security

List all files associated with the software and the default VA FileMan security for each.

7.3.13. References

List the regulations, VHA manuals, directives, and other reference materials that relate to the software.

7.3.14. Official Policies

List any official policy(s) unique to the software regarding the modification and distribution of the software.

7.3.15. Glossary

Provide a glossary of terms that relate to the specific software.

7.4. Software Documentation Component: User Manual

Multiple user type manuals can be produced for any given VistA software (for example, Programmer Manual, Setup Guide, Deployment Guide, etc.)

A user manual is a required documentation component. The following elements are required in a VistA User Manual:

7.4.1. Revision History

Include a Revision History section to be inserted after the title page and before the Table of Contents. This section should include at a minimum:

- Date of the revision – It may be useful to list entries in reverse chronological order, with the most recent entry first
- Description of Change – High-level description of change, including the VistA patch number where applicable
- Author Information – Author's name and project manager's name

7.4.2. Table of Contents

Provide page references to major chapters and/or sections of the manual.

7.4.3. Introduction

Supply a brief statement identifying the document in terms of its purpose, scope, and targeted audience. Provide an overview that describes the function(s) and purpose(s) of the software, and how the software accomplishes the objective(s). Note related manuals and other reference materials.

7.4.4. User Instructions

Provide instructions that allow users to operate the software with little or no assistance from software developers, EVS staff, or IRM service staff. A task-oriented approach, with brief, systematic instructions, is encouraged.

7.4.5. Glossary

Provide a glossary of terms that relate to the specific software.

7.4.6. Index

Provide a software-specific index.

7.4.7. Additional Useful Information

The following element may be helpful for users where applicable; however, it is not required in all VistA User Manuals:

7.4.7.1. Orientation

Address software- or audience-specific notations or directions (e.g., symbols used to indicate terminal dialogues or user responses).

7.5. Software Documentation Component: Release Notes

Release Notes describe changes to existing software and new features and functions of a subsequent release of software, which makes them useful as a marketing tool.

For the initial distribution of software, Release Notes are optional. For all subsequent distributions of software, Release Notes are required. The following elements are required in VistA Release Notes:

- New features and functions added to the software
- Enhancements and modifications to existing software

8. Documentation Components for HealthVet-VistA

This section contains the national standards to use for HealthVet-Veterans Health Information Systems and Technology Architecture (VistA) software documentation, categorized by the software documentation components (i.e., manual types) required with a HealthVet-VistA national software release: These manual types are:

- [Installation Guide](#) (Required)
- [Security Guide](#) (Required. It may be combined with the Systems Management Guide if it does not contain highly sensitive information.)
- [Developer's Guide](#) (Required if pertinent to your project)
- [Systems Management Guide](#) (Required)
- [User Guide](#) (Required if pertinent to your project)
- [Release Notes](#) (Required after the first release of software)

8.1. Software Documentation Component: Installation Guide

This section contains the national documentation standards for creating installation guides for HealthVet-VistA applications. The intended audience for this documentation includes software support/management (e.g., Information Resource Management [IRMs], Enterprise VistA Support [EVS], Enterprise Management Center [EMC], etc.) and development personnel involved in deploying and installing rehosted/re-engineered applications.

An Installation Guide is a required documentation component. Sections 8.1.1 through 8.1.15 are required documentation elements if pertinent to your project. The categories of information can be reordered and section headings renamed as logic dictates. Other significant information for installation or deployment of national software may be included, based on project needs.

Installation and deployment information may be split into separate manuals.

8.1.1. Table of Contents

Provide page references to major chapters and/or sections of the manual.

8.1.2. Introduction

Supply a brief statement identifying the document in terms of its purpose, scope, and targeted audience. Provide an overview that describes the function(s) and purpose(s) of the software product, and how the software accomplishes the objective(s). Note related manuals and other reference materials.

8.1.3. Deployment Overview

Include an overview of all the pieces for readying a site for a new application, including application server installs, third-party software, data migration instructions, and special hardware setups. The instructions might point to other, more detailed documents (e.g., documentation for software upon which the application depends).

8.1.4. Pre-Install Instructions and Preparation

Describe server and workstation software dependencies, such as version requirements for Java® 2 Enterprise Edition (J2EE), BEA WebLogic, VistALink, operating system, and any other pertinent software. Also, include any software/patch dependencies prior to installation.

8.1.5. Database Information

Provide a description of databases relevant to this application.

- List and describe new VA FileMan globals and Java files
- VA FileMan global space allocation
- Provide information on relational tables or diagrams
- Additional relevant information

8.1.6. Instructions for Installing M Server (or Database) Components

8.1.6.1. Pre-Installation Instructions for the M-Server/Database Component

- Ensure the necessary files are backed up and any pre-installation reports are generated
- Determine whether the installation will take a significant amount of time or longer than a “average” installation
- Determine whether users can be on the system during installation

8.1.6.2. Installing M Server/Database Components

Provide an instructional guide for installing M Server components in a logical step-by-step sequence.

8.1.7. M Environment

For information necessary to install M-based VistA software, see the section titled *7.1 Software Documentation Component: Installation Guide* documentation in this document.

8.1.8. Instructions for Installing Middle Tier Applications (e.g., Application Servers)

- Provide instructions for creating a directory on the middle tier server, if applicable.
- Provide configuration instructions for the middle tier components.
- Provide installation instructions. Choose one or both methods, where applicable:
 - Automated—Provide logical step-by-step instructions for using middle tier component install scripts or wizards for installing the software. Also, for each install script or wizard, provide instructions for alternate manual installation.
 - Manual—Provide an instructional guide for manually installing middle tier components in logical step-by-step sequence for installing the software.

8.1.9. Instructions for Starting Applications on the Middle Tier Application Server

Provide instructions for starting applications on the middle-tier application server.

8.1.10. Instructions for Installing Client Components

Provide installation instructions. Choose one or both methods where applicable:

- Automated installation—Provide logical step-by-step instructions for using client components install scripts or wizards for installing the software. Also, for each install script or wizard, provide instructions for alternate manual installation.
- Manual installation—Provide an instructional guide for installing client components in a logical step-by-step sequence.

8.1.11. Post-Installation Review

Verify the correct installation of the components (e.g., M system and Java files, checksums, and exported options), test, and run the application, if applicable.

8.1.12. Post-Installation (Setup and Configuration)

Where applicable, provide the steps on how to do the following procedures:

- Assigning menus/options
- Assigning HealthVet desktop perspective
- Setting activation date
- Security key and/or role assignments
- Conversion instructions
- Check that VistALink or messaging calls between systems, if used, are live and communicating
- Configuration information

Your specific software may require additional post-installation procedures.

8.1.13. Starting the Client-Side Desktop Software

Provide instructions or recommendations on how to start the client-side desktop software.

8.1.14. M Installation Example

Include a screen capture of the M installation process. Provide examples of both a clean install and/or an install over existing software, if applicable. This may be included as an appendix

8.1.15. Zipped File Contents, Where Applicable

Include a list of what is in the zipped file, such as the install file and program executable.

8.1.16. Troubleshooting

Customize the troubleshooting section for the installation guide.

- Error messages and definitions
 - Include the details of a typical error and information about the error components and what they mean
- Frequently asked questions (FAQ) (Provide a link if available on the application's Web site)
- Common executable errors
- General troubleshooting

8.2. Software Documentation Component: Security Guide

A Security Guide is created for controlling the release of sensitive information related to national software. If national software contains highly sensitive information, this component of the software documentation will not be included in any Freedom of Information Act (FOIA) request releases. Identify and explain any unique and/or atypical features and miscellaneous information that may be of particular interest to security personnel (e.g., Information Security Officers [ISOs]), IRMs, and other support groups. Because certain keys and/or roles and authorizations must be delegated for proper management of the system, information about these items may be found elsewhere in the software documentation.

A Security Guide is a required documentation component. The Security Guide can be released as a standalone manual, or it can be included as a security section in the Systems Management Guide. If the software contains highly sensitive information, the two manuals must not be combined.

The following categories of information can be reordered and section headings renamed as logic dictates. These are required documentation elements if pertinent to your project. Other significant categories of information not listed in these standards can be included based on project needs at the project manager and technical writers' discretion.

8.2.1. Revision History

Include a Revision History section to be inserted after the title page and before the Table of Contents. This section should include at a minimum:

- Date of the revision – It may be useful to list entries in reverse chronological order, with the most recent entry first
- Description of Change – High-level description of change, including the HealthVet-VistA patch number where applicable
- Author Information – Author's name and project manager's name

8.2.2. Table of Contents

Provide page references to major chapters and/or sections of the manual.

8.2.3. Legal Requirements

Address any legal requirements pertaining to the software. Identify any security measures necessary to protect the integrity of the software and database in accordance with the following directives:

- Modifications to VHA Class 1 Software, VHA Directive 2004-038 dated July 23, 2004 (http://vaww1.va.gov/vhapublications/ViewPublication.asp?pub_ID=1129)
- Information Technology Security Certification and Accreditation Program, VA Directive 6214 dated March 15, 2002 ([http://vaww.va.gov/pubs/directives/Information-Resources-Management-\(IRM\)/6214d.doc](http://vaww.va.gov/pubs/directives/Information-Resources-Management-(IRM)/6214d.doc))
- The Health Insurance Portability and Accountability Act (HIPAA) of 1996 (PL 104-191) (<http://vista.med.va.gov/hipaa/>) and Federal Information Security Management Act (FISMA) (<http://csrc.nist.gov/policies/FISMA-final.pdf>) Web sites address encryption of data exchanged over any facility connection

8.2.4. Auditing

In order to reduce healthcare fraud and abuse and guarantee security and privacy of patient data, HIPAA requires keeping track of all activity related to a patient's record. Include in your security documentation a detailed description of what, if any, auditing is available and performed by the software. Also include how to turn the auditing on and off.

8.2.5. Authentication and Authorization

Describe the authentication and authorization processes used to validate users' access to the system. Identify which levels of access (e.g., roles) to information and services users have as implemented by the software.

8.2.6. Access Control

Project teams must ensure that software roles authenticate and authorize the appropriate levels of access to patient data. As such, verify that access control has been addressed by the project team. Identify from a physical location, the software's role-based access to services and networks, and access rights these roles have to patient data.

8.2.7. Application Dependencies

Software or application dependences help reveal the complexity of an application when troubleshooting security concerns. Refer readers elsewhere if this is documented in another manual.

8.2.8. Mail Groups, Alerts, and Bulletins

Identify and explain the purpose of any mail groups, alerts, and bulletins, if applicable, that are created/required/used by the software. Refer the reader to the software Systems Management Guide for more detailed information.

8.2.9. Remote Access/Transmission

If the software transmits data to any remote system/facility database, identify the data, the method and frequency of transmission, and the confirmation or acknowledgement of receipt. HIPAA standards specify that all patient data must be encrypted from point-to-point. Identify if the software encrypts patient data in transmission, and if so, what method of encryption (e.g., SSL 128-bit encryption) is used.

NOTE: HIPAA (PL 104-191) (<http://vista.med.va.gov/hipaa/>) and FISMA (<http://csrc.nist.gov/policies/FISMA-final.pdf>) Web sites address encryption of data exchanged over any facility connection.

8.2.10. Archiving

Describe the archiving capabilities of the Health_eVet-VistA software. Provide any necessary instructions or guidelines.

8.2.11. Contingency Planning

Recommend that facilities develop a local contingency plan to be used in the event of software/hardware problems in a live environment. The facility contingency plan must identify the procedure for maintaining functionality provided by this software in the event of system outage.

8.2.12. Exported Groups and/or Options and Menus

Provide a list and description of groups and/or menu and options distributed by the application, if applicable.

- Recommend group and/or menus and option assignments
- Recommend/discuss user business rules related to roles and groups

8.2.13. Security Keys and/or Roles

List and briefly explain the function of all security keys and/or roles associated with the software.

8.2.14. Interfacing

Identify any non-VA hardware and/or software embedded within or required by the Health_eVet-VistA software. Describe its use, authority, and/or restrictions.

8.2.15. Electronic Signatures

If electronic signatures are utilized in the software, address requirements of Health Information Management and Health Records, VHA HANDBOOK 1907.1 April 15, 2004 (http://vaww1.va.gov/vhapublications/ViewPublication.asp?pub_ID=434). List any software functions that require electronic signatures.

8.2.16. File Security

List all VA FileMan files associated with the software and the default security for each.

8.2.17. Troubleshooting

Troubleshooting section should contain differences in the structure of security that would be helpful during debugging.

- Show details of an error
 - Include the details of a typical error and information about the error components and what they mean

- Include FAQ. If available, provide a link to the application's Web site.
- Common executable errors (include error messages and resolutions required)
- General troubleshooting

8.2.18. Glossary

Provide a glossary of terms that relate to the specific software.

8.2.19. References and Official Policies

List the regulations, VHA manuals, directives, and other reference materials that relate to the software.

List any official policy(s) unique to the software regarding the modification and distribution of the software.

8.3. Software Documentation Component: Developer's Guide

This section contains the documentation standards for creating Developer's Guides for HealthVet-VistA applications.

The main purpose of a developers guide is to document an application's external programming application program interfaces (APIs) and/or other public interfaces. This information is used by developers of external applications, whose code makes use of the services supplied by the APIs. Any application fitting this criteria must provide a Developers Guide.

A developer's guide is a required documentation component if pertinent to your project.

The developers guide may also need to include the following types of information:

- How to configure developer workstations/servers
- How to troubleshoot and interpret exception messages
- How to use tools/utilities included in the application package
- Any dependency on other components / services (HealthVet-VistA Desktop is dependent on VistALink, for example) and version information of those components / services (especially if there are known compatibility issues).

However, the developer guide content will vary considerably between applications.

The following categories of information are included in a Developers Guide if pertinent to your project. This information can be reordered and section headings renamed as logic dictates. Other significant information for developing or enhancing the software may be included, based on project needs.

8.3.1. Revision History

Include a Revision History section to be inserted after the title page and before the Table of Contents. This section should include at a minimum:

- Date of the revision – It may be useful to list entries in reverse chronological order, with the most recent entry first
- Description of Change – High-level description of change, including the VistA patch number where applicable
- Author Information – Author's name and project manager's name

8.3.2. Table of Contents

Provide page references to major chapters and/or sections of the manual.

8.3.3. Orientation

Optional section that addresses software- or audience-specific notations or directions (e.g., symbols used to indicate terminal dialogues or user responses).

8.3.4. Introduction

Supply a brief statement identifying the document in terms of purpose, scope, and target audience. Provide an overview describing major function(s) and purpose(s) of the software, and how the software accomplishes the objective(s). Include links to the project's VDL Web site, application Web site, and the

project notebook. It may be helpful to provide information about where to find the latest release build of the software and related manuals.

8.3.5. Public Interfaces

Describe the details for all of the APIs and/or other public interfaces that can be called by other applications. Provide coding excerpts that demonstrate how to use the API. If the APIs are overloaded, coding excerpts should clearly show the different implementations as well. Parameters and return types should be explained in both cases.

8.3.6. Configuration Information

Describe the name of the configuration file, its location, and its contents. Provide sample configuration files with default or dummy values.

8.3.7. Developer Workstation Setup

Document how to configure developer workstations/servers so developers can install and use the application in order to test the code written that calls your application.

Identify all supporting software that needs to be installed on the local work station or remote servers in order to use the given application's services. Specify full software product names and version numbers of the supporting software.

Explain the directory structure, if any, that need to be in place for the service / component to work properly. Provide concrete working examples of an implementation of your service / component.

8.3.8. Tools and Utilities

Document how to use any tools/utilities included in the application package.

8.3.9. Troubleshooting

Describe symptoms and solutions to technical problems that developers might encounter using the application. If applicable, explain exception messages. Include the details of a typical error and information about the error components and what they mean

8.3.10. Javadocs

Provide a reference to Javadocs for the software.

8.4. Software Documentation Component: Systems Management Guide

This section contains the national documentation standards for creating a Systems Management Guide for Health_eVet-VistA applications. The intended audience for this documentation is software support/management (e.g., IRM, EVS, EMC, etc.) and development personnel for nationally-released Health_eVet-VistA applications.

A Systems Management Guide is a required documentation component. Sections 8.4.1 through 8.4.13 are required documentation elements if pertinent to your project. The categories of information can be reordered and section headings renamed as logic dictates. Other significant information may be included, based on project needs.

8.4.1. Revision History

Include a Revision History section to be inserted after the title page and before the Table of Contents. This section should include at a minimum:

- Date of the revision – It may be useful to list entries in reverse chronological order, with the most recent entry first
- Description of Change – High-level description of change, including the Health_eVet-VistA patch number where applicable
- Author Information – Author's name and project manager's name

8.4.2. Table of Contents

Provide page references to major chapters and/or sections of the manual.

8.4.3. Orientation

Optional section that addresses software- or audience-specific notations or directions (e.g., symbols used to indicate terminal dialogues or user responses).

8.4.4. Introduction

Supply brief statement identifying the document in terms of purpose, scope, and target audience. Provide overview describing major function(s) and purpose(s) of the software, and how the software accomplishes the objective(s). Include links to project Web sites and the project notebook, if applicable.

8.4.5. System Requirements

Describe the minimum server and workstation software dependencies such as version requirements for J2EE, BEA WebLogic, VistALink, operating system, and any other pertinent software. Also, include any software/patch dependencies prior to installation.

8.4.6. Parameters

This section should include application timeout parameters, date range parameters, etc.

8.4.7. Remote Procedure Calls

Describe entry points and parameters related to the software's RPCs.

8.4.8. Database Information

Provide a description of databases relevant to this application.

- List and describe the VA FileMan and other database files
- Provide information on relational tables or diagrams
- Additional relevant information

8.4.9. Exported Groups and/or Options and Menus

Provide a list and description of groups and/or menus and options distributed by the application, if applicable.

- Recommend groups and/or menus and options assignments
- Recommend/discuss user business rules related to roles and groups

8.4.10. Security Keys and/or Roles

List and briefly explain the function of all security keys and/or roles associated with the software.

8.4.11. Java Components (Client-Side Java Components)

Describe the functionality and location of the Java components such as Java Archive (JAR), Enterprise Application Archive (EAR), and Web Application Archive (WAR) files and plug-ins.

8.4.12. Set-up and Configuration

Where applicable, provide the steps on how to do the following procedures:

- Assigning menus/options
- Assigning HealthVet desktop perspective
- Setting activation date
- Security key assignment
- Conversion instructions
- Check that VistALink or messaging calls between systems, if used, are live and communicating
- Configuration information (e.g., where the database server is, what its name is, VistALink port number, Java-based file locations on the middle-tier server)
- Host file entry (machine name and address)

8.4.13. Troubleshooting

Customize the troubleshooting section for the Systems Management Guide.

- Showing details of an error
 - Include the details of a typical error and information about the error components and what they mean
- FAQ (Provide a link if available on the application's Web site)
- Common executable errors
- General troubleshooting
- A reference to the project ICD for messaging specifications, if possible (support personnel can use the ICD to reveal the contents of an HL7 message)

8.5. Software Documentation Component: User Guide

This section contains the documentation standards for creating user guides for HealthVet-VistA applications.

A User Guide is a required documentation component if pertinent to your project. Sections 8.5.1 through 8.5.7.1 are required documentation elements if pertinent to your project. The categories of information can be reordered and section headings renamed as logic dictates. Other significant information for using the software may be included, based on project needs.

8.5.1. Revision History

Include a Revision History section to be inserted after the title page and before the Table of Contents. This section should include at a minimum:

- Date of the revision – It may be useful to list entries in reverse chronological order, with the most recent entry first
- Description of Change – High-level description of change, including the HealthVet-VistA patch number where applicable
- Author Information – Author's name and project manager's name

8.5.2. Table of Contents

Provide page references to major chapters and/or sections of the manual.

8.5.3. Introduction

Supply a brief statement identifying the document in terms of its purpose, scope, and target audience. Provide an overview that describes the function(s) and purpose(s) of the software, and how the software accomplishes the objective(s). Note related manuals and other reference materials. Include instructions for accessing online help, if available (See the [Online Help Standards](#) section of this document).

8.5.4. User Instructions

Provide instructions that allow users to operate the software with little or no assistance from software developers and software support staff. A task-oriented approach, with brief, systematic instructions, is encouraged.

8.5.5. Glossary

Provide a glossary of terms that relate to the specific software.

8.5.6. Index

Provide a software-specific index.

8.5.7. Additional Useful Information

The following element may be helpful for users where applicable; however, it is not required in all user guides:

8.5.7.1. Orientation

Address software- or audience-specific notations or directions (e.g., symbols used to indicate terminal dialogues or user responses).

8.6. Software Documentation Component: Release Notes

Release notes describe changes to existing software and new features and functions of a subsequent release of software, which makes them useful as a marketing tool. After the first version of a product, a release notes document is a required component.

After the first release of software, a release notes document is a required documentation component.

The following elements are required in release notes:

- New features and functions added to the software
- Enhancements and modifications to existing software

9. National Documentation Standards for Online Help

These are requirements for developing Help files for the Department of Veterans Affairs (VA) Health_eVet-Veterans Health Information Systems and Technology Architecture (VistA) national software applications (products). All Health_eVet-VistA software products must have online help. This includes all national applications that are graphical user interface (GUI) or Web-based. They are minimum recommendations and do not include expanded functionality. Because of developing technologies, these guidelines are not intended to limit Help authors to any particular authoring tool. Warnings, cautions, notes, alerts, reminders, memos, clarifications etc., must be indicated in a consistent fashion across online help.

NOTE: *The examples of Help files in this document are (in some cases) out of date; however, they still represent the intended look and feel of the content.*

9.1. Online Help Types for Multiple Platforms

Distinctive differences exist between browser-based and non browser-based help systems. Browser-based online Help should all look the same (be consistent), regardless of the help authoring tool or application environment. There will be differences between Help files developed in different environments, but as much as possible an effort should be made to provide a consistent look.

Context-sensitive Help does not work with browser-based applications (i.e., The F1 key provides browser-specific Help, rather than VistA application-specific Help).

9.1.1. Help Files

- Help must open in a separate window from the application.
- All Help files should contain a link to the software application's Web site, if it exists.
- All Help files must contain a link to the software application's VistA Documentation Library (VDL) Web site.

Example:



- Help pages must be formatted in a standard way to include a Help contents pane (or column) on the left hand side of the window.
- Help pages may contain pop-up windows to provide supplementary information (e.g., field-level help, definitions) if they are Section 508 compliant.

NOTE: *Section 508 Compliant Pop-Ups In Web Pages*

Usually pop-ups in Web pages are done as Section 508 non-compliant scripts. In order for a popup window to be 508 compliant, it must provide an alternative method for users without JavaScript. To accomplish this, make an alternative page similar to the popup page and have the anchor tag call it. The JavaScript for the popup window can be placed in the onClick attribute. 'Return false' must be placed after the JavaScript call so that the calling page is not sent to the alternative page as well. This code snippet will result in a 508-compliant pop-up window:

```
<a href="alternative_page.html"
onclick="javascript:pop_up('pop_up.html');return false">Example
Link</a>
```

For more information on Section 508 compliant pop-ups in Web Pages see the following link:
<http://vista.med.va.gov/508workgroup>

- Help files should contain a table of contents (contents pane).
- If the contents pane contains more than 30 entries, Help pages should provide an online index and/or search mechanism.

NOTE: *Online Index*

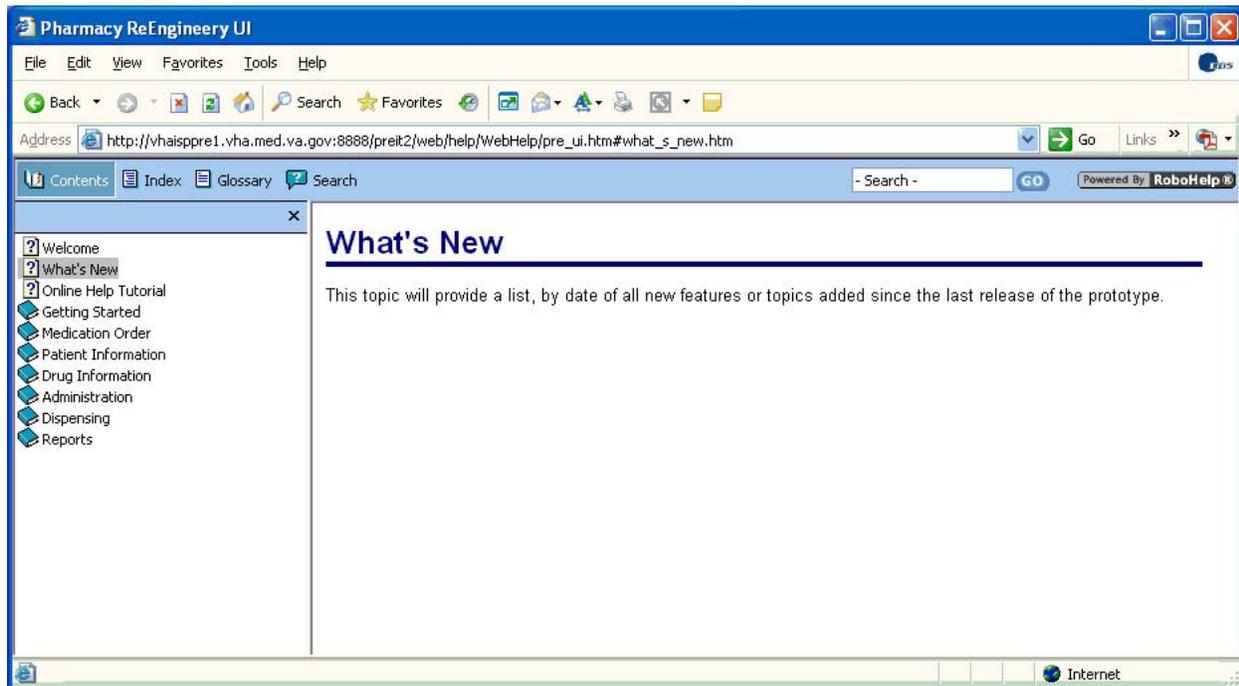
An online index is similar to a print index. It is a two-level index with indented subentries consisting of keywords and topics associated with specific tasks or sets of instructions in Help files. End users enter keywords or topics to locate specific information in a Help file. To use an online index effectively, end users must know specific keywords or topics associated with a task.

Search Mechanism

A search mechanism provides descriptive Help text by searching for keywords in documents or in a database. The output from a search consists of Help text containing occurrences of keywords and topics. The search results are less specific than the results of an index lookup. However, the advantage is that the end user can search the database or document using words and phrases that may not be listed in an online index. This is useful when an end user does not know how to ask the specific question associated with a task.

Figure 1 is an example of a Help file with a contents pane and index and search mechanisms provided for:

Figure 1: Help File With a Contents Pane and Index and Search Mechanism



- Help files must include step-by-step, task-oriented procedures that the user is likely to employ. These should be available through the contents pane.
- Context-sensitive Help provides immediate assistance to users without their having to leave the context in which they are working. It provides information about a particular object and its use.
- Context-sensitive Help should be accessible to users by using either the F1 key or the “What’s This?” feature of the user interface (UI). Context-sensitive Help must be sufficiently detailed to be useful. Information on how to access context-sensitive Help must be provided on the Help Contents page. Context-sensitive Help should be available for all major dialogs and windows within the application.
- Figure 2 and Figure 3 are examples of context-sensitive Help: (1) online Help for a Web-based application, and (2) one for a rich client desktop application. They are intended to specify standard features and provide consistency among Health_Vet software applications. Every windowing system-based VA software application should provide context-sensitive Help in exactly the same way.

Figure 2: F1 Key Context -Sensitive Help

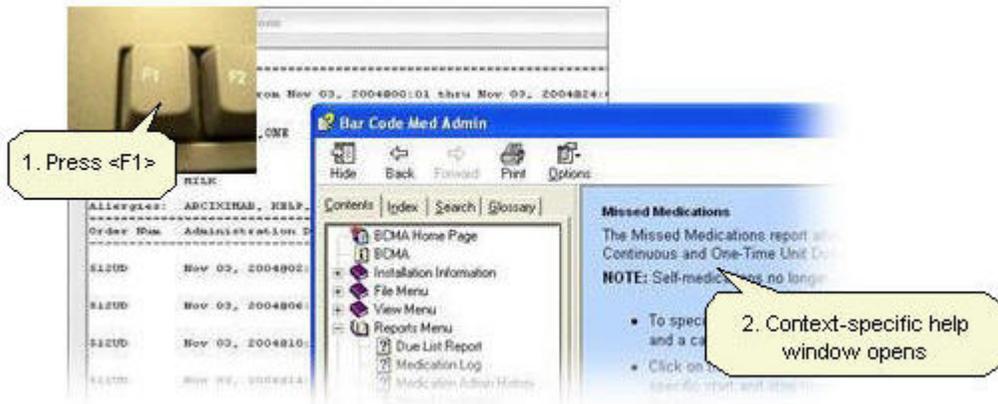


Figure 3: Menu-based What's This?

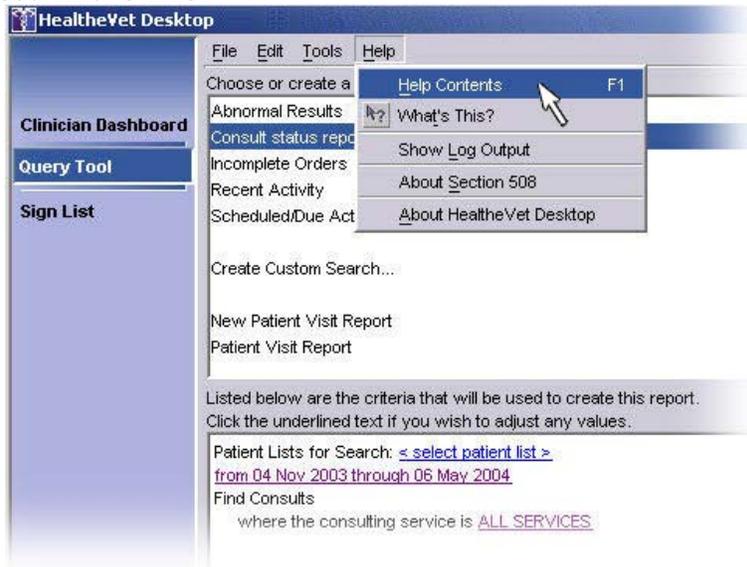
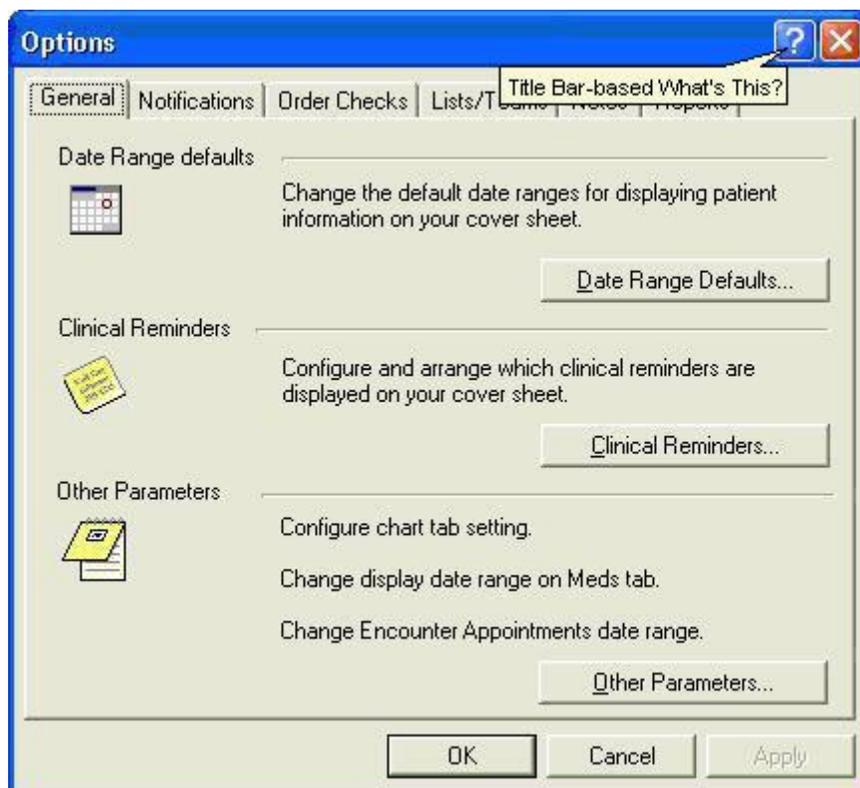


Figure 4: Title Bar-based What's This?



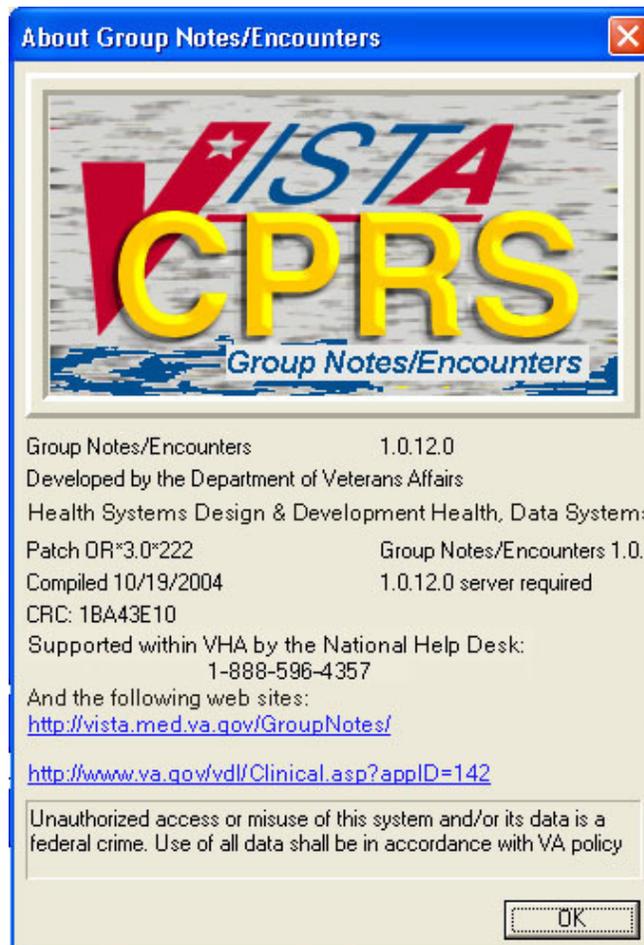
- Help files must use *only* sans serif fonts (e.g., Arial, Helvetica, and Tahoma).
- Help file headings must be displayed in a larger font than the body text.
- Formatting conventions in Help files must be used consistently throughout for Notes, Tips, Warnings, and other textual callouts.
- Minimize the use of graphics to situations in which it is necessary for clarity.

9.1.2. Help Menu

If the software application has a menu bar, it must include a Help menu. The Help menu must contain at least the following items:

1. Help Contents
2. Help menu should contain a link to the software application's Web site, if it exists.
3. A link to the software application's VDL Web site
4. An About [this software application] link
 - The About [this software application] screen must include the following information:
 - a. The name of the software application
 - b. The name of the service that produced the software application
 - c. The National Help Desk telephone number
 - d. Help menu should contain a link to the software application's Web site and the software application's VDL Web page
 - Figure 5 is an example of the About [this software application] screen containing all of the elements listed in item 4.

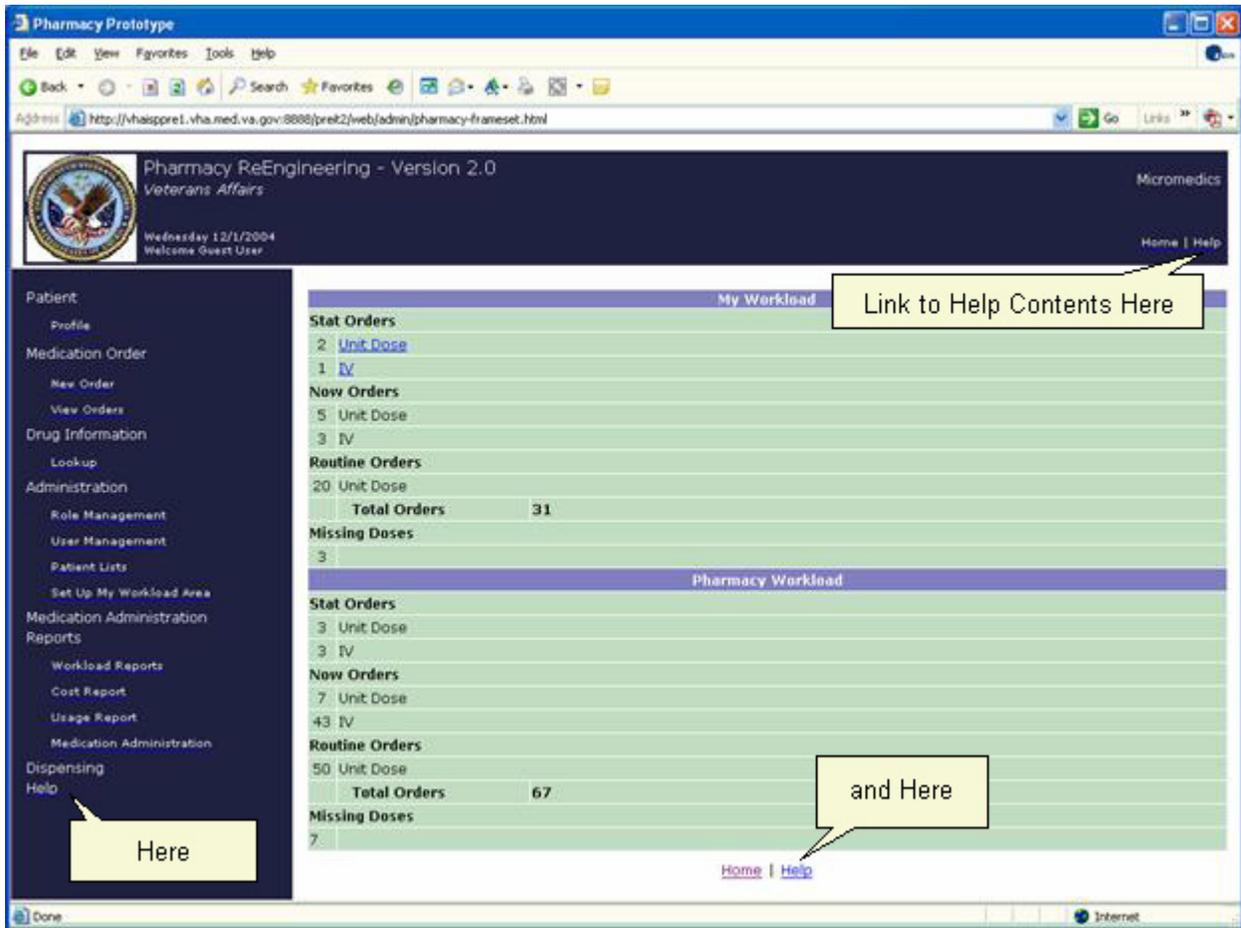
Figure 5: About [this software application] Example



9.1.3. Help Access

- If the national software application does not have a Help menu, it must display a link to Help Contents.
- Figure 6 is an example of links to Help Contents intended to provide consistency among HealthVet software applications:

Figure 6: Help Contents Access Examples



10. National Documentation Style Guide

This section covers the style guide for all nationally released software.

10.1. General Considerations

10.1.1. Designed for Print Presentation

- Software documentation components (i.e., manual types) for products must be formatted for print-presentation using an 8.5" x 11" page layout as applied to portrait, landscape, or a combination of both.
- Documentation sets for software products must have a consistent look and feel.
- Documentation should be designed for double-sided printing.

10.1.2. Portable Document Format Documents

- All software product documentation targeted for print format must be available as Adobe Acrobat Portable Document Format (PDF) documents.
- PDF documents must have bookmarks to major headings, the exception being small documents with few or no specific topic separations.
- When bookmarks are present, the PDF document must open with bookmarks displayed.
- All internal page references, including those on the Revision History page must be "hot" links to topics.
- All cross-references in Microsoft Word and resulting PDF documents must be functioning links.

NOTE: All PDF documents **must comply** with the *Guide to Creating Accessible PDF Documents* (http://vista.med.va.gov/wmt/Documentation/PDF_Guidance_for_Government.pdf) in order to comply with Section 508 of the Rehabilitation Act Amendments of 1998 or the current compliance directive(s).

10.2. Software Documentation Style Guidelines

This section is the style guide for all nationally printed software documentation.

10.2.1. Abbreviations/Acronyms

Spell out the full text represented by the abbreviation or acronym followed by its abbreviation/acronym in parentheses the first time it appears in the text of each chapter/major section of the manual or help topic. For example: Enterprise VistA Support (EVS). Avoid defining acronyms and abbreviations in headings. Use a lower case "s" *without* an apostrophe to form the plural of an acronym (e.g., Information Resource Managers [IRMs]).

10.2.2. Appendices

Create appendices for supplemental information. Appendices should be located between the glossary and the index.

10.2.3. Artwork Text

A smaller (than 11 pt.) font point size may be used for text in artwork.

10.2.4. Blank Pages

Use the standard header and footer on blank pages (except the blank page following the title page). Blank pages should always be even-numbered pages.

10.2.5. Caret

Sometimes referred to as Up-Arrow. Use the ^ when referring to the caret. Define the symbol in the manual's Orientation section, and describe its use. Do not use quotes around the caret.

10.2.6. Computer Dialogue

Recreate computer dialogues using the same uppercase and lowercase format that appears in the on-screen dialogs. See the [Fonts](#) section for font guidelines for computer dialogue. Graphical user interface (GUI) dialogs should be captured and included in the document as displayed by the software.

10.2.7. Dingbats

Dingbat symbols are allowed in your text to highlight points of interest. When used, define the dingbats used in the manual's Orientation section. Ensure any dingbats used are Section 508-compliant.

10.2.8. Divider Pages (Optional)

When the complexity of the documentation calls for it, use divider pages to differentiate major sections or chapters. Use Arial font. Upper and lowercase, 24 point, flush left is recommended for the first line. Use the standard footer and suppress the header for inside cover pages.

10.2.9. Key Names

Type key names in bold type exactly as they appear on a standard keyboard and enclose them in angle brackets. For example, the enter key would be shown as <**Enter**>. Define this in the manual's Orientation section.

10.2.10. Field Names

Use the capitalization format that the software uses. For example, VA FileMan field names appear in all uppercase.

10.2.11. File Names

For technical documentation, as opposed to end-user documentation, use the capitalization format that the program uses. For example, VA FileMan file names appear in all uppercase. For VA FileMan files, include the file number after the file name. (e.g., PATIENT file #2). Java files must be mixed case. For example, FatkattSample.jar.

10.2.12. Fonts

Use the following fonts in documentation designed for print presentation:

Type of Text	Font
Narrative Text	Times New Roman, 11 or 12 pt.
Computer Screen Recreation	Courier or Courier New, no larger than 10 pt.
Title Page	Arial
Divider Pages	Arial, 1st line 24 pt.
Major Headings	Arial, 18 pt.
Header/Footer	Times New Roman, 10 pt.

10.2.13. Footers

Format footers using 10 pt Times New Roman font (see [Fonts](#) section). Include the following information in the footer:

- Release Date (see Release Date section)
 - flush with inside margin
 - month (spelled out) and four digit year (e.g., March 2005)
 - initial capitalization
- Software name/version number/manual type (e.g., Kernel Programmer Manual 8.0)
 - centered
 - initial capitalization
 - can be two lines, if necessary
- Page number
 - flush with outside margin
 - do not use the word *page*

10.2.14. Headers (Optional)

Place headers flush left with the outside margin. Headers should contain the chapter or section name, using initial capitalization and should be in 10 pt. Times New Roman font. Suppress the header on the first page in which a major heading appears and include the footer on all pages.

Alternate headers (different headers on either side of an open page) are acceptable if they are used consistently throughout the documentation. For example, if you use divider pages to break a manual into sections, you could use alternating headers as illustrated by this example::

- For the left page header, use the Section name, e.g., Capacity Management
- For the right page header, use the Chapter name, e.g., Resource Usage

10.2.15. HealtheVet-VistA

The second “e” must be italicized and underlined. The “V” must be capitalized. The word must be followed by a dash and the word “VistA” (e.g., HealtheVet-VistA). Do not use HeV or HeV.

10.2.16. Index

Use the standard footer. Capitalization should be based on the context of the index entry. Use initial capitalization for proper nouns.

10.2.17. Major Headings

Major headings are the top-level of the Table of Contents. Major headings are flush left, Arial font, 18 pt, initial capitalization. In documentation designed for double-sided printing, all major headings must be on odd-numbered pages. If the content of a major heading is brief (i.e., less than a few sentences), major headings may be combined on the same page.

10.2.18. Margins

Use at least one-inch margins on all sides for text; 1/2 inch for headers and footers.

10.2.19. Menu Text

Do not use quotes with option names. When using menu text in the narrative portion of the manual, format text in the same manner as it displays on the user’s screen. Use bold in order to differentiate menu text in the narrative sections of the manual. Capitalize menu text in the same manner as it displays on the screen.

10.2.20. Mouse vs. Keyboard Procedures

Document these procedures in one of three ways:

- Mouse-only actions, using terms such as *click*, *double-click*, and *point to*.
- When it is necessary to combine mouse and keyboard actions, use procedural terms such as click or press to distinguish between the two methods. For example, use descriptive phrases such as “Click OK” or “Press <Enter>”.
- Separate mouse and keyboard actions, explaining first the mouse method and then the keyboard method. Whenever possible, avoid a page break between the keyboard and the mouse versions of a procedure.

10.2.21. Page Numbers

Use page numbers in the footer (except the title page and its reverse side). If a manual is large and complex, pages may be numbered by section or chapter (e.g., 2-13).

10.2.22. Prompts and Labels

In documentation for rehosted/re-engineered software, recreate the format of online prompts and use bold typeface (e.g., **Select Patient Name:**).

10.2.23. Release Date

The date used on the title page and in the footer will be the software or patch release date, when the software is submitted for national release to the field. Use initial capitalization with the month spelled out (e.g., August 2005).

10.2.24. Software Names

Completely spell out software names when initially used in the narrative. Subsequently, the abbreviated software name should be used. Avoid defining acronyms and abbreviations in headings. See the rules for [abbreviations and acronyms](#).

10.2.25. Table of Contents

Use initial capitalization for table of contents entries.

- Suppress the header on the first page and include the footer on all pages of the Table of Contents.
- Use dot leaders, and place page references flush right.

At a minimum, list all components required by the documentation standards (excluding title page and preface).

10.2.26. Table Text

A smaller (than 11 pt.) font point size may be used for text in tables. Table headings must be formatted so they are readily apparent as headings. Heading rows must repeat at the top of each page of a table.

10.2.27. Title Page

The title page must contain the following:

- a. Approved logo found on this Web page: <http://vaww.vhaco.va.gov/vhacio/oilogos.asp>.
- b. Software product name optionally followed by its acronym.
- c. Type of manual (that is, Release Notes, Installation Guide, etc.) as the title.
- d. Version number of the software (e.g., Version 8.0).
- e. Date software was released.
- f. Revision date when documentation is updated after initial publication.
- g. The following information centered at the bottom of the page:
 - o Department of Veterans Affairs
 - o Organization Name (e.g., Health Systems Design and Development)
 - o [Service Line]

10.2.28. User Response

In computer dialogue (see the [Computer Dialogue](#) section), use boldface type for all user responses. Underlining (instead of boldface type) may be used if package constraints prohibit the use of boldface type.

10.2.29. Version Number

Spell out and capitalize the word “Version” on the title pages of manuals. In the narrative, spell out the word version the first time it is used. After the first use in the narrative, it is not necessary to use any abbreviation for version such as “v” or “ver” (e.g., Care Management 1.0).

10.2.30. VistA Used in Text

The V and the A must be uppercase. The middle text, “ist”, must be lower case. (e.g., VistA).