

Procedure for Managing Technical Documentation

This procedure describes how the documentation team manages document updates, revisions, and versions of OSIssoft technical documentation.

Background

The documentation team uses a content management system (CMS) called AuthorIT (AIT) to produce printed and online help documentation. We chose this tool primarily because it provides cost-savings and efficiencies when we localize documentation. It also has additional benefits. For example, it:

- ❑ Facilitates reuse of content across documents. Elements such as page layouts, copyrights, contact information, and technical support procedures are created once, maintained once, and used in all of our documents.
- ❑ Simplifies the reorganizing of content. This makes it easy for tech writers to move text around for more effective flow.
- ❑ Handles large documents better than Word.
- ❑ Generates online help and printed documents with no update to contents. AIT uses the same content regardless of media. The templates take care of all the formatting differences.
- ❑ Works with Word templates and styles to produce consistently formatted output for each output medium. This gives OSIssoft printed and online documentation a consistent look and feel.

Ownership

The documentation team has sole access to AIT for Engineering software documentation. As we update documents and import them to AIT, we take ownership of the revisable form of the document. We publish non-revisable PDFs, chm, and HTML help files as needed. When a developer needs to update a document, any documentation team member can generate the Word document from AIT and provide it to the developer for changes, as further detailed in [Content Updates](#) .

The documentation team designs and is responsible for the presentation formats.

The development team verifies and is responsible for the technical accuracy of the content.

Since we are all on the same team, we share ideas and suggestions. That is, developers may communicate style and format preferences, documenters may suggest GUI revisions or content clarifications.

Process

Documentation Plan

The document management process begins with a request from a developer to create or update a manual. The technical writer creates a documentation plan, which must be reviewed

and approved by the developer and each of their managers. The documentation plan defines the scope, inputs, deliverables, resources, time lines, quality standards, dependencies, and open issues.

Initial Input

If there is an initial document, it typically is a Word document, but may also be an HTML file. The input may come from a VSS library, a development team portal, or an email attachment. Technical writers print a copy of this initial document for reference as we edit.

If this document has never been imported to AIT, we must update the template and apply correct styles to the content before we can import the document to AIT.

Import and Editing

After technical writers clean up the document, we import the document to AIT. We perform the editing and updates as defined in the documentation plan.

We publish an initial draft, which is reviewed by the developers. We revise the document and publish the final draft in the required formats. After these are approved, we publish and distribute the final documents, as defined in the documentation plan.

Post Publication

The technical writers post the final PDF, chm, and HTML help files in a VSS database and folder designated by the release engineer. The release engineer labels the final documents with the software version.

Content Updates

Subsequent content updates are made to the AIT files. When a developer is ready to update a document, the developer must request the document from a documentation team member. The documentation team member generates a Word file and gives it to the developer. The Developer makes the changes and gives it back to the technical writer. The technical writer makes the changes in AIT and generates a Word file for reviews as defined in the documentation plan.

The documentation team only accepts updates to the Word document file that we generate from AIT. This ensures that all changes and corrections are included and avoids the confusion that can occur when updates are made to other than the most current version of a document.

Updates must go through the document review process, which includes a documentation plan, approvals, and technical and editorial reviews.

Corrections

OSIsoft employees can request modifications for clarity, accuracy, and typo corrections through Clientele or by email to documentation@data-doctor.indo. Customers can send requests for updates via the **Submit feedback on this topic** link in online help files. The documentation team makes the edits to the AIT files and sends them for developer approval when necessary.