



# JRA4

## DOCUMENTATION MANAGEMENT PLAN

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*LAOG/JMMC*

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*CHANGE RECORD*

REVISION	DATE	AUTHOR	SECTIONS/PAGES AFFECTED
	REMARKS		
0.1	03/12/2003	Gérard Zins	All
	First draft		
0.2	09/12/2003	Gérard Zins	Sections 2.3.6 3.2.4 and 3
	Detailed list of document files to be kept under configuration control Added 'Submitted' stamp		
0.3	15/01/04	Gérard Zins	Table of contents
	Added table of contents		
1.0	20/01/04	Gérard Zins	
	Released document		
1.1	27/02/04	Gérard Zins	Section 2.3.1.1
	Added Id for chromatic and achromatic model, image reconstruction teams.		
2.0	27/02/04	Gérard Zins	
	Released document		
2.1	01/03/04	Gérard Zins	Section 2.3.1.1
	Removed Id for chromatic and achromatic model teams.		
3.0	01/03/04	Gérard Zins	
	Released document		
3.1	08/05/04	Gérard Zins	Section 1.2
	Updated list of reference documents + typos		
4.0	08/05/04	Gérard Zins	
	Released document		

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## 1 Introduction

### 1.1 Object

This document establishes the methods, procedures and responsibilities relative to the documentation management of the JRA4 project. It also outlines the JRA4's documentation template standard.

The appearance and the content of this document have been influenced by the 'The ALMA<sup>1</sup> Software Documentation Standard' document.

### 1.2 Reference documents

- [1] JRA4-SOW-0000-0001, Revision 1.0, JRA4 Contract: Statement of Work
- [2] JRA4-MOD-0000-0001, Revision 1.0, JRA4 Word Document Template

### 1.3 Abbreviations and acronyms

DM	Documentation Manager
JRA	Join Research Activity
PI	Principal Investigator
WPL	Work Package Leader

## 2 Documentation Management

### 2.1 Organization and responsibilities

The Documentation Manager (DM) is in charge of the documentation management under the responsibility of the Principal Investigator (PI).

### 2.2 Document cycle of life

For each document an author is identified before the document establishment. The author is responsible of the document writing. Each document is identified by a unique reference which is given by the DM. Once document has been written, the author must submit the document to the DM.

The document must be approved by someone else, called the "approbator" which has to verify the document content. Then, the document must be authorized by the PI or another project team member, called the "authorisator". Finally the document is diffused.

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<sup>1</sup> Atacama Large Millimeter Array

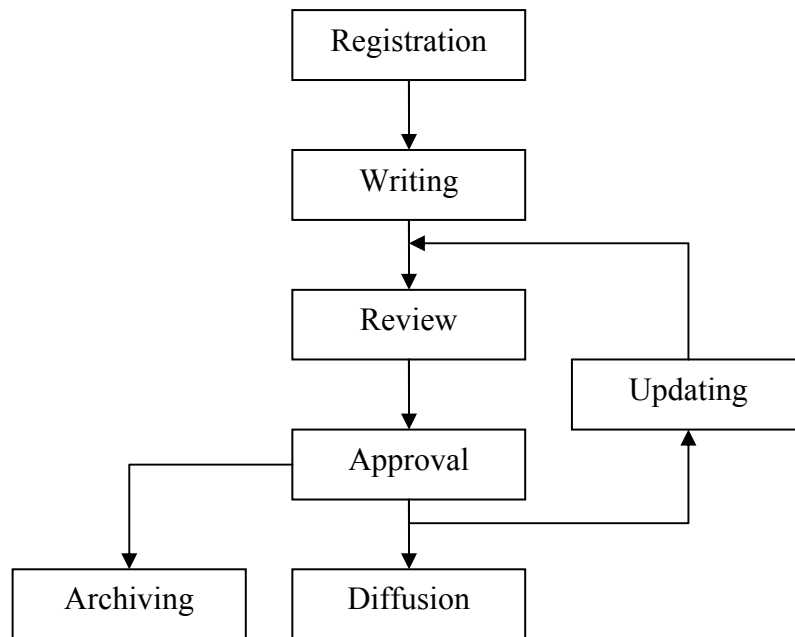


Figure 1 : Document cycle of life

## 2.3 Instructions for the document life

### 2.3.1 Document Registration

Before writing a new document, the author has to register it so that he gets a reference for this document. He can either register the document through the document Web server at <http://www.eii-jra4.ujf-grenoble.fr>, or by sending an e-mail to the DM at [docmgr@eii-jra4.ujf-grenoble.fr](mailto:docmgr@eii-jra4.ujf-grenoble.fr) specifying the author, the document title, the document type and the working group issuing the document. The DM will register the document in the list of JRA4 documents and send him back a new reference for this document.

#### 2.3.1.1 Document reference

The following scheme will be used for the reference of the documents produced for the project:

JRA4-*typ*-FFFF-NNNN

Where :

- *typ* correspond to the document type. It shall be as follows:
 

ICD	Interface Control Document
MAN	Manuals
MEM	Memo
MIN	Meeting minutes
MOD	Model of document
LIS	List
PLA	Plans
PRE	Presentation
PRO	General procedures
SOW	Statement of Work
SPE	Specifications
TRE	Technical reports

- *FFFF* is a block of 4 digits which corresponds to the working group issuing the document. The following codes are already defined :

0000	General project document
1000	General document related to Advanced Instruments
1100	Concept to Feasibility
1200	Co-Phasing and Fringe Tracking
2000	General document related to Software
2100	User Support
2200	Data Interpretation & Mining tool
2300	Chromatic and achromatic models
2400	Astrometry
2500	Image reconstruction
2510	CRAL/ONERA - Image reconstruction
2520	Cambridge - Image reconstruction
2530	MPIA - Image reconstruction
2540	UGR/IAA-CSIC/UAM - Image reconstruction
9000	Other : Opticon, ESO, ESA, etc.

- *NNNN* is a zero-filled number (i.e. number 1 is 0001) so that alphabetic and numeric lists are the same.

### 2.3.1.2 Document revision

The version of a document is given by the revision number which consists of two parts: a major revision number, followed by a period, followed by a minor revision number. The major revision number is used to identify the approved versions of a document. It is updated by the DM when the document has been approved. The minor revision number is used to identify the successive draft versions during elaboration of a new version. It is changed by the author during the preparation of the document, every time a new draft is submitted for proof-reading or review. The revision number starts from 0.1. For example, the version number 0.2 corresponds to the 2<sup>nd</sup> draft of the document, and 1.0 is the 1<sup>st</sup> approved version of the document.

### 2.3.2 Document writing

The author is in charge of the document writing. He can be helped by other contributors. Once done, the document has to be submitted to a list of reviewers, which is at least the “approbator” and “authorisator” of the document.

### 2.3.3 Document review

The document review could be a simple proof-reading of the document or an official project review during either a teleconference or a face-to-face meeting.

Once the document has been reviewed and corrected, the author must submit the document to the DM through the document Web server at <http://www.eii-jra4.ujf-grenoble.fr>, or by sending an e-mail to the DM at [docmgr@eii-jra4.ujf-grenoble.fr](mailto:docmgr@eii-jra4.ujf-grenoble.fr), with the document as attachment. The document must be provided either in Word or Latex format. The DM checks the integrity of document (all referred graphs, images, etc. have been provided with document) and eventually completes the document with the appropriate document reference, adds the ‘Submitted’ stamp (see 3.2.4), generates the PDF file and then asks via e-mail, the “approbator” and

“authorisator” of the document, for approval. The “approbator” and “authorisator” have to send back an e-mail informing the DM whether they accept or reject the document.

### **2.3.4 Document approval**

When “approbator” and “authorisator” have approved the document, the DM updates the revision number (i.e. increase the major revision number and reset minor revision number), adds the ‘Approved’ and ‘Released’ stamps on front page (see 3.2.5 and 3.2.5) and updates the version number of the list of JRA4 documents.

### **2.3.5 Document diffusion**

All the approved documents are made available on the document server in PDF format.

### **2.3.6 Document archiving**

Document originals of all approved versions, with the document in PDF format, will be kept under configuration control by the DM. The configuration control of intermediary versions (i.e. draft versions) must be done by authors.

Document originals will be available (i.e. extraction from a configuration management repository) only on request to the DM via e-mail.

### **2.3.7 Document modifying**

Each new version of a document must be reviewed and approved before diffusion.

## **3 Documentation standard**

In addition to describing the JRA4 Document Standard this document also serves as an example use of that standard. The following sections describe and explain the parts of the standard.

### **3.1 Language**

All documents must be written in English, except for the procedure documents, only applicable in one institute, which can be written in the official language of the institute.

### **3.2 Front Page**

The front pages acts as the banner page for the document. The contents of the page are constrained in text boxes and tables.

#### **3.2.1 Front Page Header**

On the front page header there is the normal artist's impression of OPTICON and EEI. The other component is a table containing the document number, the revision number, and the creation date of the document (at latest revision).

#### **3.2.2 Institutes**

The only institute recognition is by authorship.

### 3.2.3 Document Title

The front page contains the title of the document, using the *title* style. It should also be entered into the Properties of the file (File/Properties/Summary) so that it will be available as a Word Document Field.

### 3.2.4 Author(s) and Institute(s)

The author style is used for each author, with the institute style used for their institute on a different line. Authors from the same institute may be put on to the same author line.

One, and only one, of the authors must provide an email address to act as a default contact point for the document.

An author (usually the contact point) must normally sign the document in the appropriate box. For an informal document ("memo") this is not necessary.

It has been decided to use the 'Submitted' stamp, shown below, instead of signature, which will be added by the DM when document is submitted by author for approval.



### 3.2.5 Approval

The "Approved By" box is to be used as a signing off box for use by the "approver" of the document. The "approver" is either the PI or the Work Package Leader. The name of the "approver" and his institute should appear in this box. For an informal document ("memo") this is not necessary.

It has been decided to use the 'Approved' stamp, shown below, instead of signature, which will be added by the DM when document is accepted by releaser.



### 3.2.6 Document Release

The "Released By" box is to be used as a signing off box for use by the "releaser" of the document. Who is the "releaser" is determined by the Work Package Leader and/or the PI. The name of the "releaser" and his institute should appear in this box. For an informal document ("memo") this is not necessary.

It has been decided to use the 'Released' stamp, shown below, instead of signature, which will be added by the DM when document is accepted by releaser.



## 3.3 Change Record Page

The change record page has a table of changes and should be updated with every new revision. Each row is identified by the revision, with the rest of the row being split to provide space for the other details. The "remarks" area will expand to accommodate what is entered. For this reason the default length of the change record is less than the whole page. Should the table need to be expanded the copy/paste facilities of Word should be used on a row.



### **3.4 Document Body**

This section does not attempt to address the detailed structure of the document. This structure needs to be derived from the formal processes in use. In addition not setting out those standards here allows this template to be used for the less formal "memo" style of documents.

#### **3.4.1 Overall Structure**

This standard does not attempt to define the internal structure of a document - the main structure and headings will vary according to discipline and type of document. This is left to the Working Group team.

#### **3.4.2 Glossary**

Document should include the list of acronyms/glossary definitions used that document. The *glossary* style may be used for this list, e.g.

EII                      European Interferometry Initiative

#### **3.4.3 References**

The reference list is a numbered list created using the *reference* style.

Only cited references should be listed. If it is desired to reference an applicable text then an explicit reference to it should be made in the body text of the document at an appropriate point. Similarly pages in a cited reference should be mentioned in the body text, and not in the reference. References should appear at the end of the document. This document is used as an example at the end.

The reference style to be used is as follows:

[1]     Document number, revision, date (optional), title, author.

or

[2]     Book title, author, publisher, year

#### **3.4.4 Main Body**

Body text in a document should normally be written using the *Normal* style. Other styles are permitted where required for emphasis/clarity etc., but no others have been specifically defined. Some other styles are defined and available for use: e.g. *Source Code* for including code fragments.

#### **3.4.5 Contents List**

This is generated from Word's insert table of contents function. It is begun on the page following the Change Record and should finish with a page break.

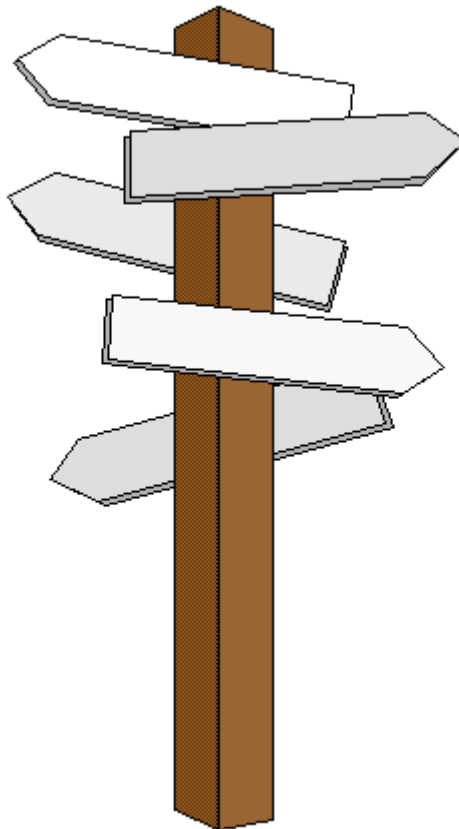
#### **3.4.6 Headings**

The *Heading n* styles should be used for headings and sub-headings in the document. These are currently defined from *Heading 1* down to *Heading 5*. More heading levels will make a document hard to read and should not be used.

### 3.4.7 Diagrams and Tables

The only style or restriction specified for diagrams and tables is that captions and titles should be placed below the diagram or table, numbered and not boxed. Some documents might also wish to include a list of diagrams and/or tables: such lists should be based on the contents list style specified here and included immediately after the contents list.

Here is an example diagram, using the *Caption* style for the figure caption:



*Figure 2 : The Road Ahead*

### 3.4.8 Lists

No particular provision is made for lists. Standard styles for bullet lists and numbered lists are available, and may be modified.

### 3.4.9 Appendices

Titles for appendices use the *Appendix* style. It is similar to the *Heading 1* style but numbered separately.

## 3.5 Headers and Footers

Regular pages have identical left and right footers and headers.

**3.5.1 The header**

It contains the static text "JRA4" and the title of the document (from the document properties).

**3.5.2 The footer**

It contains the revision number of the document, and the page count.

## Appendix A. Web documents

As well as serving as an example appendix this section also highlights the fact that, although MS Word may be the standard documentation tool, most or all documents should be available on the WWW. The publishing of documents on the WWW is not addressed completely here but to cover some obvious questions:

- Documents should be published as PDF. Any other format, including Word or Latex source, should be only published in rare, exceptional, cases where good reason exists.
- Document originals will be kept under configuration control.
- Document originals will be available only with more effort - e.g. extraction from a configuration management repository.
- This template style, in particular its accompanying .dot style file, is only for documents originating in Word. However, it does represent the JRA standard style and if it is necessary or desirable to create documents using another tool then meeting the style is not the responsibility of this author.

## Appendix B. Using the Word Document Template

Brief instructions are given here on the use of the Word Document Template [2].

To install the template file:

1. Download the file from the JRA4 site <http://www.eii-jra4.ujf-grenoble.fr>. If using a web browser to download there is evidence that some browser versions may "corrupt" the file. If you have difficulty in using the template following download then try again with a different browser or with dedicated ftp software (set to "binary" or "image" mode).
2. Copy the template into the templates directory of Microsoft Office. For Office97 this is "C:\Program Files\Microsoft Office\Templates". This directory may be divided into various subdirectories to help your classification, this is up to you. Similarly the name of the template file may be changed if this will help you (but retain the ".dot").
3. It should now be available for use.

To use the template file:

1. For new files open a new Word document with "File/New" or select "New Office Document" from the "Start" menu.

To use the title, reference and revision number of the document:

1. Edit the Properties of the file (File/Properties/Summary)
  - enter the title in the *Title* field,
  - enter the document reference (i.e. JRA4-*typ-FFFF-NNNN*) in the *Subject* field,
  - and enter the revision number in the *Category* field.