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[**Editor's Note:** The following excerpt is from Chapter 1 of the free eBook *The Administrator Shortcut Guide to Software Packaging for Desktop Migrations* (Realtimepublishers.com) written by Chris Long and available at [http://www.installshield.com/microsite/packaging\\_ebook2/](http://www.installshield.com/microsite/packaging_ebook2/).]

## Documenting the Package

Documentation is a unique item for each company and each package. Some prefer to have extensive details for everything; other companies only require simple statements about a package. There are also some places that don't have any requirements for documentation; those are generally the small shops.

Documentation is an area that few administrators enjoy, but when problems occur, the documentation is one of the first places administrators look for answers. Thus, although creating it is a pain, it is the source of complaints if it does not exist. While planning the repacking effort, be sure to set aside time for documentation. If the desktop migration project is large, now might be a good time to set up or revamp standards for documentation. The goal of the documentation should be to provide enough data for problem solving. Ensure that the detail level is deep enough so that the entire package is laid out in black and white or at a minimum, that there are enough details to provide directions on where to go for the answers.


For off-the-shelf software, the documentation could consist of a copy of the software manual. If the software is packaged in MSI format, it will have a list of the codes and options for the MSI setup. Most documentation covers three general topics: cover sheet, trouble shooting data, and package details. Again, the level of detail is up to your company's standards. I suggest that application cover sheets contain:

- An overview—A paragraph or two about what the application (package) does and who the users are; this overview is written at a high level.
- Contacts
  - Vendors—List which vendor(s) created the software, their contact numbers, and any support numbers that are needed to access support.
  - Company—Who in the company is responsible for the program? List the department and a name or two; if the application is critical, off-hour contact numbers should be included here
- Package prerequisites—What is needed for the package to run on the desktop? Are other applications required to be installed? Is there a memory minimum? What about CPU speed? Anything that the application must have to function properly should be listed here.
- Installation directions—Short, simple, concise steps about how to get the application installed. The content level here is aimed at a knowledgeable administrator. It should contain step-by-step directions to get the application to install and run. Screen shots to help present the information are a good idea, just don't go overboard.
- Post installation—What tasks are required after the install of the application? Is there any required clean up?
- Troubleshooting—This section should list certain areas to check for details when problems are being researched. Where are the logs located? This area of documentation is an overview for troubleshooting assistance.

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- Application flowchart—If the application is an off-the-shelf application, the documentation will provide this information. If the application is an in-house creation, the programmers should provide a flowchart of how the application works. The flowchart can take many forms: a programmer’s detailed chart, a chart of functions, or a list of menus.
  - Known issues—This area of documentation is often overlooked. During the creation of the package, certain issues are likely to appear; detail them here if there is a possibility that errors may appear in the production world.
  - General comments—Always leave an area open for added notes, diagrams, print outs of scripts, error messages, or links for added data.

The next section of documentation should cover any troubleshooting data that could be beneficial in the future. During the repackaging process, the information is readily available and easily located. However, the goal of the documentation is to provide information to help the administrator 18 months from now at 2AM on the Sunday of a 3-day weekend. Whatever information is available to meet this level of need should be included:

- Registry keys and values
- Copies of any scripts
- A list of the files and their locations
- A list of all files listing the version data for each file
- Any listing of conflicts with OS files (or other applications); this list comes in handy down the road when a new service pack is installed by the user without going through the normal application packaging process (yes, it happens a lot!)

 Basic documentation should be created with two goals in mind: There is enough data in the documents to begin troubleshooting issues under the most stressful of situations and that the creation of documentation does not take longer than the repackaging process.

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