LIN
COM
LAURIE

PTW 330 B SU 20: TECHNICAL WRITING: PRODUCTION
TECHNIQUES & TECHNOLOGIES

Introduction and Week 1

Word Templates and Styles

LIN
COM
LAURIE

INTRODUCTION

- Was a software developer for ten years and found she liked doing the technical documentation and training better than developing custom financial applications.

- Began being a "real" technical writer in 1987 for Microsoft. My first project was the Windows System Developer's Kit (SDK) which is what developers used to create applications to run in Windows.

- Received a certificate in Technical Writing and Editing from University of WA and then was immensely more hirable.

- Went back to school and obtained a M.Ed. in Educational Technology and started doing teaching as well as technical writing.

INTRODUCTION

More Fun Facts!

- Developed documentation from end user to development audience levels

- Created web-based, online help, SharePoint, Wiki, API, e-learning, and other outputs

- Created documentation and/or training in pharma, lab management, health care, software, donation management, cell technology, defense, recruitment

- Has certificates in Web Development and Design, Distance Education, Project Management, and Business Process Improvement

- Also has certificates in Forensic Science and in Mystery and Suspense Writing (for fun)

- Certified trainer for Adobe RoboHelp and Captivate

- Am a contributing writer in Joe Welinske's [Developing Online Help for Windows 95](#) and in [HTML in Action](#), by Bruce Morris

- Wrote 4 books that are available on Amazon

- Currently the president of the local chapter of the Society for Technical Communication, a professional development society for technical writers and editors

AGENDA

- **Contact Information**

- **Logistics**
  - **Class schedule**
  - **Breaks**
  - **Office hours**

- **Expectations**
  - **Equipment**
  - **Textbooks and software**
  - **Attendance**
  - **Homework**

- **Projects**
  - **Portfolio**
  - **2-minute movie**

- **Plagiarism**
  - **New signoff when submitting homework**

CONTACT INFORMATION

Instructor: Lin Laurie

Phone: 206.900.1861 **Don't use text messaging. Do not call after 8 pm.**

E-mail: llaurie@uw.edu   Alternate emergency: lin@linlaurie.com

Office Hours:
Before class starting at 5:30 pm, After class, Or by appointment (phone, online, or in person)

Please conduct course correspondence through Canvas email.

LOGISTICS: BREAK AND CLASS SCHEDULE

Class Hours

Wednesdays 6-9 pm (will try to leave last 15 minutes for questions)

Break(s)

7:20-7:30 pm*

Office Hours

5:30-6 pm on Wednesdays

Other office hours available on request by sending an email to me at llaurie@uw.edu

Approximate times and we will try with one break. We may have a second "energy" break after we try it for a couple of weeks and see how you're doing.

EXPECTATIONS: EQUIPMENT

Equipment in a Virtual Class Environment

As technical communication in the workplace is largely done digitally and often remotely, you should expect to have remote access capabilities to submit your in-class writing and homework assignments. Homework should be submitted in a digital format. You should bring a laptop or other device to each class.

You will need access to Wi-Fi through your NetID.

Your device should have web browsing capabilities.

The main tools and formats we will use are text files, Microsoft Word.docx and Adobe Creative Suite. Microsoft Office 365 is freely available to students with your UW credentials. Creative Suite is available on a monthly basis for a reduced fee with your UW Credentials.

EXPECTATIONS: TEXTBOOKS AND SOFTWARE

Textbooks

We will not be requiring any textbooks for this course. All reading will either be in documents provided, or links to web sites.

Software

We will be using the following software:

- Microsoft Outlook 365 Pro (which you should already be using and is available from the UW software site)

- Adobe Creative Suite (available on the UW website for a reduced subscription rate) The Adobe Creative Cloud Suite is available as an annual subscription. The license period runs from July 14 through July 13 of the following year. Verify that you have to pay by reading the site carefully. They say you have to pay for the year but I accidently had two versions and I was able to cancel one without any problems because I installed in on two computers.

8

EXPECTATIONS: TEXTBOOKS AND SOFTWARE CONT

- <u>SnagIt</u> from TechSmith (this is a very inexpensive screenshot utility that costs $49) and will let you create professional screenshots, automate inserting them into Word, and much more. Totally worth the money. They do have a short trial. While I can't likely teach in class, I can teach it in a free, 2-hour Saturday class if you purchase it and you will be delighted to have gotten it.

- <u>Grammarly</u> Is a writing and editing tool that is highly recommended. You can get a free version, but I recommend the Pro version, which you can get on a monthly basis for $11 per month. If you don't feel that it is helpful to your writing, you can cancel after the 10-week class is complete if you sign up for the monthly version.

EXPECTATIONS: TEXTBOOKS AND SOFTWARE CONT

- **Envato** is a repository of templates for PowerPoint, voice, WordPress, Music, PowerPoint Presentations, and Sound, Fonts, and even stock photos. They also offer courses and tutorials. The have a student price at $11.50 but to get it you must pay for the year.

EXPECTATIONS: ATTENDANCE

Need to update for April class!!!

COURSE OBJECTIVES

After completing this course students should be able to:

- Create multiple, professionally designed documents suitable for multiple audiences and for multiple outputs (video, print documentation, online help, web sites, and other communication types)

- Use design elements such as color, typography, images, fonts, contrast, and more to create effective communication pieces

- Conduct simple document or help usability testing to determine the efficacy of deliverables

- Evaluate their own work and that of team members to make sure it measures up to best practices

TYPES OF TECHNICAL WRITING DELIVERABLES

- Contracts

- Customer Service scripts
- Demonstrations

- Design documents
- FAQs (Frequently Asked Questions)
- How-to videos

- Instructions
- Knowledge base articles

- Online and embedded help
- Policy documents
- Process flows

- Project documents
- Product catalogs

- Product packaging

- Proposals
- Release notes
- Reference guides

- Requirements specifications

- Simulations
- Training course materials
- User manuals
- Warning labels
- Web-based Training
- Websites
- White papers

Note: This is not an exhaustive list.

EXPECTATIONS: EPORTFOLIOS

What's an ePortfolio?

ePortfolios are a place where you can display and discuss the significant submissions and experiences that are happening during your learning process. You can use an ePortfolio to:

- Display the papers you're proud of for more than just your instructor to see

- Talk about all the thought and work that went into your class submissions

- Gather an overview of your educational experience as a whole

- Share your work with friends, future employers, etc.

- ePortfolios can be public for everyone to see, or private so only those you allow can see, and you can change that setting at any time.

INTRODUCTION TO TECHNICAL WRITING (CONTD) PROFILE OF A TECHNICAL WRITER

Here is the real profile of someone responsible for documenting how things work and how they should be used:

- You are someone who wants to save people from frustration, anger, and upset.

- You like to help people find information.

- You enjoy writing in a way that helps people understand complicated subjects.

- You like to empower others with information.

You are an unsung hero to your audience when you do your job well!

PORTFOLIO PROJECT

- The Portfolio Project is an extremely important part of this course.

- The objective is for you to create a form of technical communication that you can show to others for the purposes of gaining a job, grant, scholarship, internship, etc.

Portfolio projects work best when they are completed to a high level of writing, design, and execution. They should represent a topic and format that matches your own personal and professional interests.

- Portfolio Project milestones are due online by the **beginning of class** on the day they are due.
- You will receive a Complete or Incomplete at some time following the class period.
- **Incomplete:** An Incomplete will be accompanied by feedback about converting it to a Complete.
- **Complete: You have 48 hours** from receiving an Incomplete to submit the necessary adjustments or the Incomplete will stand.

INTRODUCTION TO TECHNICAL WRITING (CONTD)
THE TECHNICAL WRITING LIFECYCLE

Technical writing follows a development lifecycle that often parallels an organization's product development lifecycle:
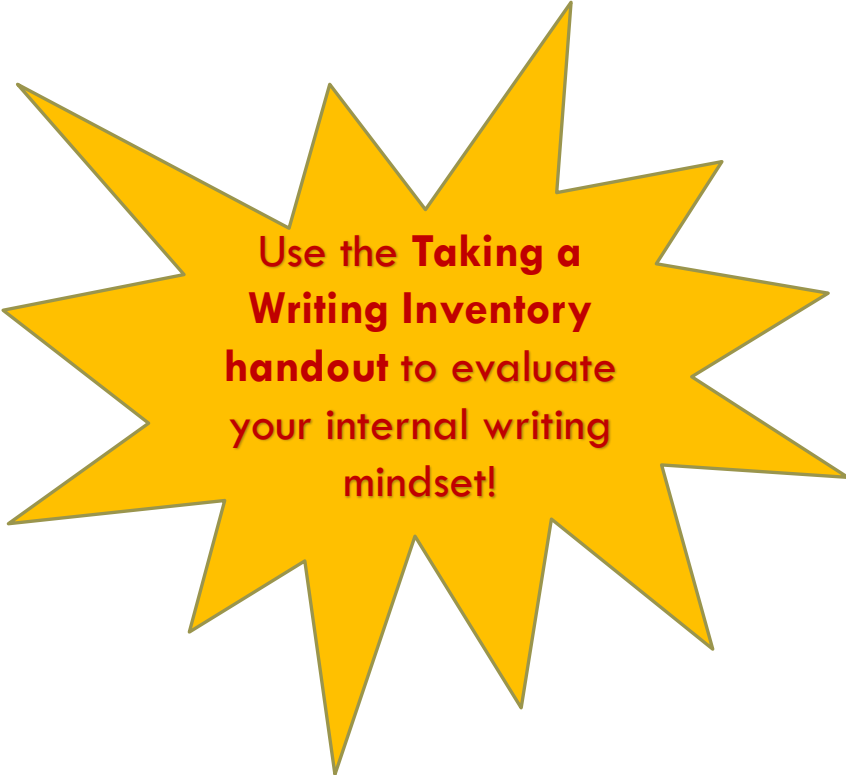
- **Scoping** – Identification of needs, audience(s), and scope

- **Planning** – Defining deliverables and resources

- **Content** – Includes research and content development

- **Testing** – Includes use cases (if appropriate), review, and revision

- **Implementation** – Includes delivery, rollouts, and production

- **Evaluation** – Includes feedback, post mortem, or document review

- **Disposition** – Includes future plans for the document (revision, archiving, or destruction)

Technical Writing Lifecycle

- Scoping
- Planning
- Content
- Testing
- Implement-ation
- Evaluation
- Disposition
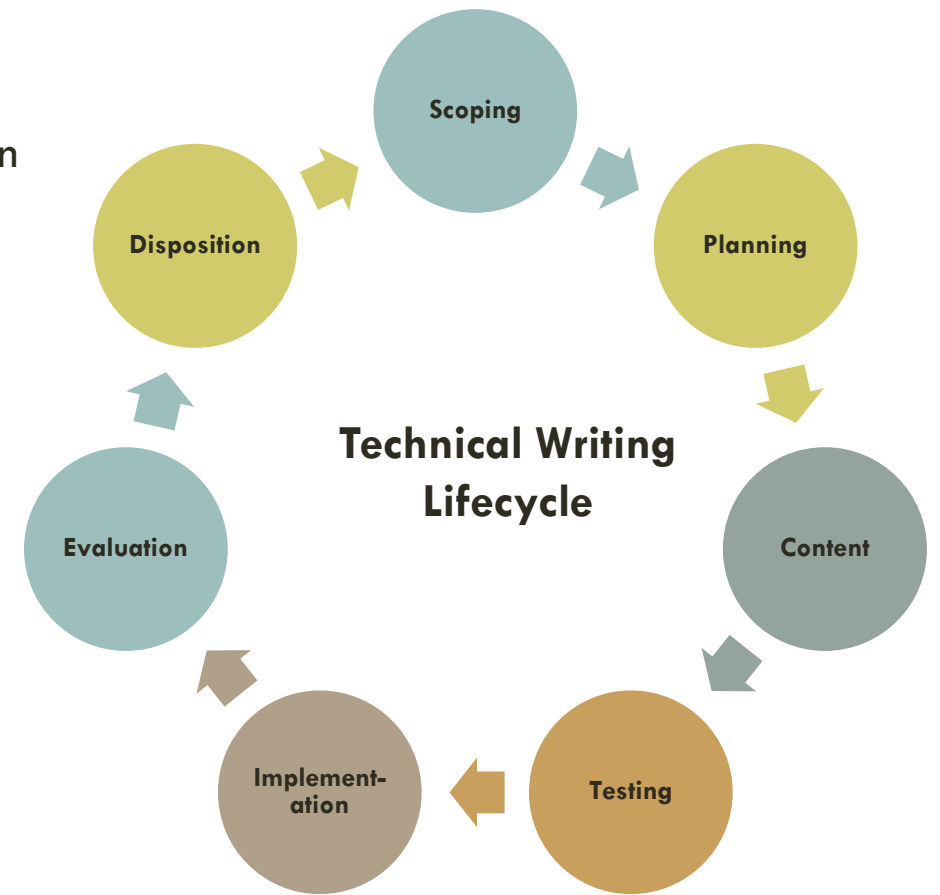
INTRODUCTION TO TECHNICAL WRITING (CONTD)
TAKING A PERSONAL WRITING INVENTORY

- How do you feel about writing?

- How does it feel when you receive criticism of your writing?

- Can you separate yourself (your ego) from your work?

- Do you like revising and rewriting something you've already worked on?

- Can you let your work go before you feel it is perfect?

Use the **Taking a Writing Inventory handout** to evaluate your internal writing mindset!

Let's take out our Taking a Writing Inventory handout and spend the next 10 minutes evaluating how we feel about the writing process to see if this is really a field you'll enjoy working in.

INTRODUCTION TO TECHNICAL WRITING (CONTD)
TAKING AN INVENTORY OF YOUR OTHER TRAITS

Circle the following qualities to describe the type of person you are:

- Thoughtful
- Likes to Research Information
- Quiet
- Introspective
- Detail Oriented
- Organized
- Determined to get answers

- Outspoken
- Inquisitive
- Investigative
- Great Technical Knowledge
- Great Communication Skills
- Innate Curiosity

INTRODUCTION TO TECHNICAL WRITING (CONTD)
CLEARING UP ASSUMPTIONS

If you think that technical writing can:

- **Provide you with a creative outlet,** it won't and shouldn't. It's purpose is to convey the information your audience needs in as few words as possible so they may quickly perform an action. The creative challenge that is available to you within those confines is to figure out how to convey information quickly and provide the fastest access to it.

- **Become an ego builder to turn you into an expert,** it usually won't but some people have been able to turn their technical knowledge into a second career as a trainer, consultant, etc. It takes a long time to get there and the path requires a lot of free writing to establish yourself.

- **Lead you into another career as a trainer,** it might if you really want it, but the education required to become a technical writer is much less than that to become a trainer, teacher, or instructional designer. You usually need a master's degree in Education or Ed Tech to really do well in this field because that's what your competition brings to the table.

YOUR ROLE AS A TECHNICAL WRITER

Section Objectives:

At the end of this section you should be able to:

- List ways of using aspects for critical thinking to facilitate your writing process

- Talk about how you can establish common ground with an intended reader.

- List the four types of audiences you will be writing for.

- Describe how to analyze your audiences needs.

- Discuss ways to engage subject matter experts in the technical writing process.

- Discuss your ethical and legal obligations as a technical writer.

YOUR ROLE AS A TECHNICAL WRITER (CONTD)
REQUIRED SKILLS

Really good technical writers use a variety of methods to work with a diverse group of people and pull information from those people on topics they may know nothing about. Those skills and techniques include:

- **Critical thinking –** You'll learn what it is and how to use those skills to generate ideas for your writing.

- **Establishing common ground** with an unknown audience. There are steps you can take to do this while never speaking to that defined audience.

- **Analyzing needs** of an audience that you may never directly interact with can be challenging but is a very much needed skill to have.

- **Subject Matter Experts** - Establishing relationships with people who know a lot more than you do about a technical subject. Those are your Subject Matter Experts (SMEs).

- **Researching** using a variety of tools such as Google, developing other resources in a company, and finding documentation that might help you. I call this the Snooping skill.

YOUR ROLE AS A TECHNICAL WRITER (CONTD)
USING CRITICAL THINKING

What is critical thinking when applied to technical writing?

Critical thinking is a process that involves 6 steps from learning new information to being able to synthesize it into your own writing with clear comprehension.

The six steps involve:

1. Knowledge
2. Comprehension
3. Analysis

4. Application
5. Synthesis
6. Evaluation

YOUR ROLE AS A TECHNICAL WRITER (CONTD)
THE SIX STEPS OF CRITICAL THINKING

The six steps of critical thinking are:

1. **Knowledge** – Acquire knowledge to identify what is being discussed: the topic, the issue, the thesis, and the main points.

2. **Comprehension** - Understanding the material that you read, hear or see. In comprehending, you make the new knowledge that you have acquired your own by relating it to what you already know.

   The more involved you are with the information, the better you will comprehend it. The primary test of whether you have comprehended something is whether you can put what you have read or heard into your own words.

YOUR ROLE AS A TECHNICAL WRITER (CONTD)
THE SIX STEPS OF CRITICAL THINKING

3. **Application** - Application requires that you know what you have read, heard, or seen, that you comprehend it, and that you carry out some task to apply what you comprehend to an actual situation.

4. **Analysis** - Analysis involves breaking what you read or hear into its component parts, in order to make clear how the ideas are ordered, related, or connected to other ideas. Analysis deals with both form and content.

5. **Synthesis** - Synthesis involves the ability to put together the parts you analyzed with other information to create something original.

6. **Evaluation** - Evaluation occurs once you have understood and analyzed what is said or written and the reasons offered to support it.

YOUR ROLE AS A TECHNICAL WRITER (CONTD)
CRITICAL THINKING PROCESS

1. Define the problem – We need documentation to support operating the xyz product.

   - Start with what you know.

   - List what you know that you don't know or what is missing.

   - Identify your Subject Matter Experts (SMEs)

   - Gather information (ask SMEs, research, ask co-workers, develop specifications).

   - Start to write what you do know. Create an outline, start to fill in the skeletal structure with information even if it isn't fully baked.

2. Keep asking more questions:

   - What other documentation do we need?

   - Who will use the xyz? What do we know about them? Age? Reading level?

   - When do we need it by?

   - Will the product be ready by the document due date?

YOUR ROLE AS A TECHNICAL WRITER (CONTD)
CRITICAL THINKING PROCESS

3. What else should I know or be asking that I am not asking?

4. How does this impact other tools/products?

5. Is there any existing documentation I can use as a starting point for my document either structurally or as a stylesheet?

6. Are there any operating or other requirements I need to know about in order to use the xyz tool?

- Is there any negative impacts to using the tool/product? Will I need to warn the user about the tool?

Resource Questions
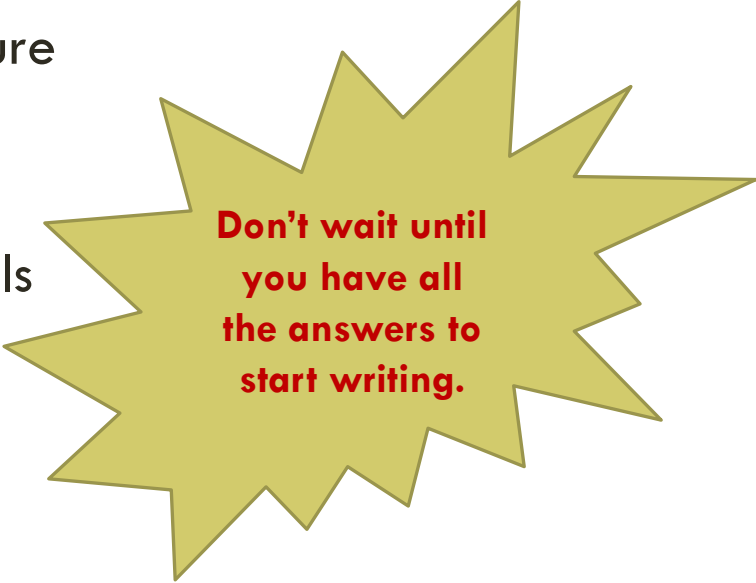
- What kind of graphics will I need?

- Do I have anyone to help me with graphic needs?

- Do I have editing resources?

- Who are my other SME sources?

Do not be embarrassed to tell someone you don't know or understand. It is better to identify your lack of information up front than to write bad documentation. However, the best place to do that is offline from a meeting so you don't take up the time of multiple people to address your needs.

YOUR ROLE AS A TECHNICAL WRITER (CONTD)
CRITICAL THINKING PROCESS

- Does my document need a table of contents or an index? Make sure to include time to generate these items.

- Do I have assumptions about my document, my responsibilities, my due dates, who is going to give me the information I need, the skills and tools I need, or any other part of my role in creating this document?

- Is there anything left that I don't understand about what I need to deliver?

- If you need more information at this point, request a meeting to gather a group of SMEs and other support personnel together and get the answers you need. Use this as a last resort.

Don't wait until you have all the answers to start writing.

YOUR ROLE AS A TECHNICAL WRITER (CONTD)
ESTABLISHING COMMON GROUND

Definition of common ground:

In rhetoric and communication, *common ground* is a basis of mutual interest or agreement that's found or established in the course of an argument.

Uses: This skill is useful when you are writing analytical material, in instances when you are trying to bring about common agreement. It could be used in proposal, policy, white paper, or abstract document writing.

Methods to find common ground:

- **Identify with your audience** – Step into their shoes and find out as much about them as you can.

- **Identify false assumptions** - Sometimes your audience member's interests or concerns are at odds because of misconceptions or inaccurate information. When you are speaking to stakeholders, you may uncover some of these false assumptions. Listen carefully to what people are saying and not saying. If you can clear up misconceptions, it can help audience members to see how their various interests align.

YOUR ROLE AS A TECHNICAL WRITER (CONTD)
ESTABLISHING COMMON GROUND

Methods to Find Common Ground (CONTD):

- **Connect with readers/users** - Once you know what your audience members have in common, you can craft your message in a way that makes each reader feel that you "get" them.

- **Use stories or metaphors** that everyone can relate to. Write in a conversational tone and a common language that all can understand.

For instance, a business leader talking about an upcoming product launch with a marketing group would not use "legalize" in his presentation.

When you connect with all readers, you have done your job and brought then to a point of shared understanding. They "get" it because you have found the common ground!

YOUR ROLE AS A TECHNICAL WRITER (CONTD)
AUDIENCE TYPES

When you start to analyze an audience, try to identify them by type. These tend to fall into four categories:

- **Executives** who make decisions regarding product development and its role in the company's overall success may have little technical knowledge but a firm grasp of how to position the product as a business asset.

- **Hardware or Software developers**, who are less concerned with sales and marketing activities, need to know other details, such as the specs and installation instructions.

- **Experts** will have in-depth technical knowledge. They are most likely to have designed and developed the product in question. They'll be interested in emerging trends and new technologies. How does it compare against the competition?

- **Users** will have the least technical knowledge. They simply want the product to work and 'do something' for them. They have little interest in its business goals, marketing promises, or technical architecture. Does it help solve their problems?

YOUR ROLE AS A TECHNICAL WRITER (CONTD)
ANALYZING AUDIENCE NEEDS

How do you know what your audience needs if you never met them?

- **Develop a profile** based on what you do know. Age, reading level, perquisite knowledge of software or hardware.

- **Marketing is a good resource.** They will know who their target customer is and can give you a good idea of your target audience.

- **Define their needs –** What does your audience need to know and why?

- **What are my deliverables** and do they meet my audiences needs? You may find that you need to document changes instead of creating an entire new user guide once you look at this question closely.

- **What is my user's most pressing need?** That will also help you determine what documents are needed to meet that need and help you prioritize your deliverables.

YOUR ROLE AS A TECHNICAL WRITER (CONTD)
ANALYZING AUDIENCE NEEDS

Other Considerations

In addition to the types discussed above, you also need to factor in their:

- **Delivery** – How will the document will be delivered (print, online, projection, PDA). Will it be read in the office, on the road, or in more stressful situations, for example, disaster recovery documents may be read in very hazardous conditions? Are there security issues around access and delivery?

- **Needs** – Why does the reader need this document and what do they hope to accomplish with it?

- **Preferred document type** – for example, do they have a preference or a need for printed or online material.

- **Experience** – The reader's knowledge of the application to date. Can we get away with delivering something simple?

- **Training** – likelihood that the user has had some (or no) training with the application. This may determine whether you need a Getting Started Guide and/or the Introduction chapters.

- **Access -** When and where the document will be accessed (work, home, travel).

YOUR ROLE AS A TECHNICAL WRITER (CONTD)
ANALYZING AUDIENCE NEEDS

Other factors to include:

- Age

- Culture

- Language

- Level of education

- Needs and interests

- Skills

All of those factors will contribute to how the document is written and delivered.
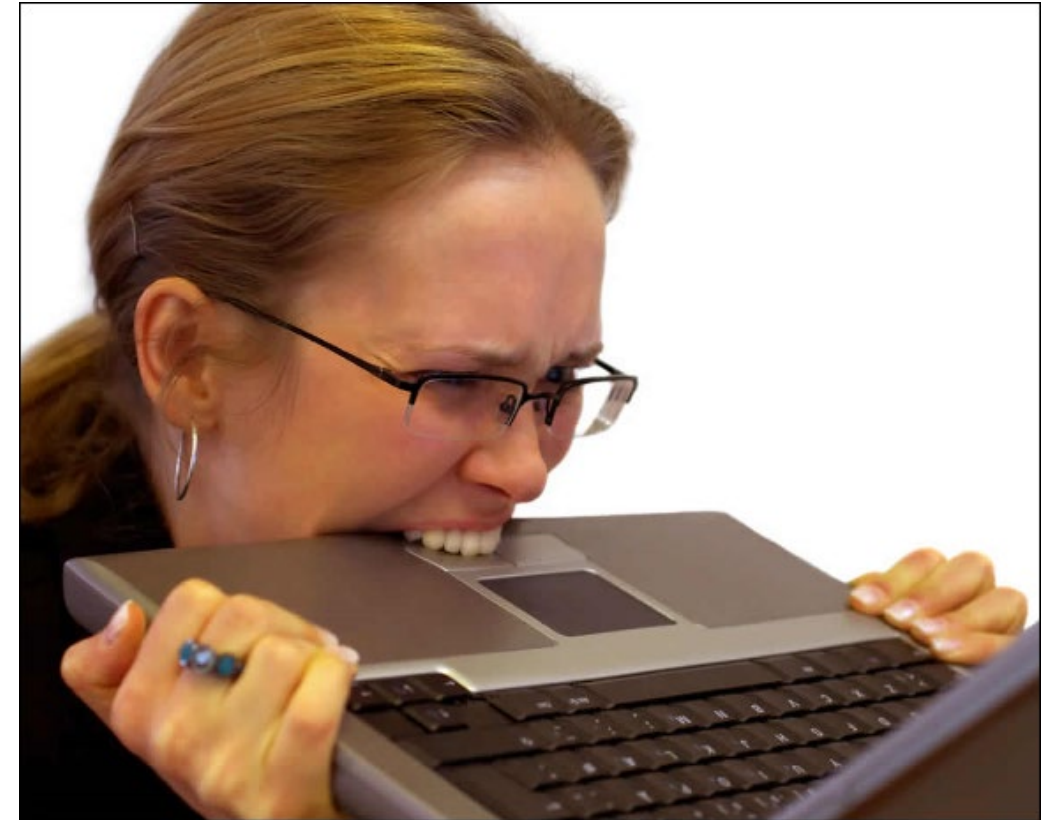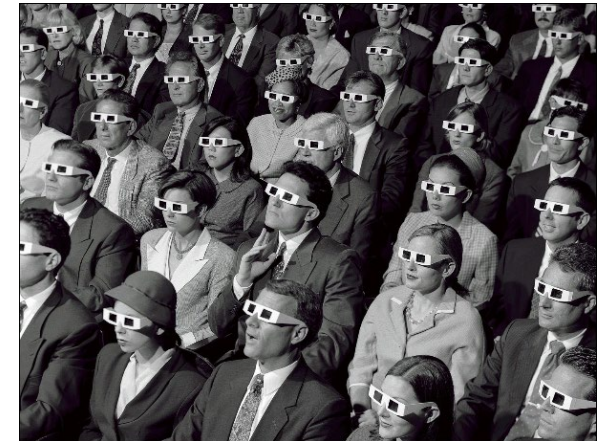
YOUR ROLE AS A TECHNICAL WRITER (CONTD)
ANALYZING AUDIENCE NEEDS

The Audience Acronym

The AUDIENCE acronym can help you remember the most important parts of defining an audience:

- **Analysis** – Who is the audience?

- **Understanding** – What is the audience's knowledge of the subject?

- **Demographics** – What is their age, gender, education, background etc.?

- **Interest** – Why are they reading your document?

- **Environment** – Where will this document be sent/viewed?

- **Needs** – What are the audience's needs associated with your document topic?

- **Customization** – What specific needs/interests should you the writer address relating to the specific audience?

- **Expectations** – What does the audience expect to learn from your document? The audience should walk away having their initial questions answered and explained.

YOUR ROLE AS A TECHNICAL WRITER (CONTD)
SUBJECT MATTER EXPERTS (SMES)

What is a Subject Matter Expert (SME)?

A subject-matter expert (SME) with knowledge in a particular area or body. They are sometimes referred to as a domain expert, but either way they are a person who is an authority in a particular area or topic.

Note: The term domain expert is frequently used in expert systems software development.

How Do We Use SMEs in Writing?

- In areas where you have little or no knowledge, they may give you guidance as to the organizational structure of your documentation.

- They will also give you content that while it should be checked for accuracy in terms of language or order, will likely be the ultimate source of truth for your content.

- They should also be used as reviewers on your material.

YOUR ROLE AS A TECHNICAL WRITER (CONTD)
SUBJECT MATTER EXPERTS (SMES)

How Do We Engage with SMEs?

- **Do not waste their time –** When you are ready to discuss content with them, come prepared to listen, take notes, (**recording them is recommended**) and bring a list of questions with you.

- **For follow up questions –** Prepare a list. When you submit the list, also give them context for your questions. For instance, if you have a question about what they said, find the recorded statement and quote it so they know what they said and how to clarify it.

- **Call a meeting and have them focus on what you need –** Sometimes it is easier to get a meeting placed on someone's schedule and then have them review/address questions in a quiet, focused place instead of sending them review requests.

YOUR ROLE AS A TECHNICAL WRITER (CONTD)
SUBJECT MATTER EXPERTS (SMES)

Questions to ask a SME to help you get started:

- What information, tools, access, software, or knowledge should my audience have before they begin?

- What is the goal for using this process, software, hardware, or change? What is being accomplished?

- Is this a new process or a change to an older process? IF it is a change, what changed and why?

- Could you walk me through the basic process from beginning to end?

- What if this part of the process didn't work? What should the user do and how would that effect the entire process?

- Where are there handoffs to other systems, users, processes, tools, or other connections?

- Is there a dashboard, reporting method, or other way of determining the state of data, the process, etc. as it moves through its path from start to finish?

YOUR ROLE AS A TECHNICAL WRITER (CONTD)
SUBJECT MATTER EXPERTS (SMES)

Commonalities in Most Software Projects or Processes:

- Is there a prerequisite process before we start?

- They all have a beginning, middle, and end.

- They usually have a place for data to be input (screen, web, a batch). Where did it come from?

- They usually have some method of seeing the status of data: reporting, dashboard, screen or web page, etc.

- They usually have some method of seeing the status of data: reporting, dashboard, screen or web page, etc.

- They usually have some type of output: reports, data that flows to a new application, a completed status.

- Reporting capabilities: usually to a screen or printed report.

- What happens next? Does it feed into something else?

YOUR ROLE AS A TECHNICAL WRITER (CONTD)
SUBJECT MATTER EXPERTS (SMES)

Commonalities in Most Hardware Projects or Processes:

- Is there a prerequisite process before we start?

- What is needed for the hardware to start the process? (Input) Materials, staff, knowledge, access (keys or codes), and anything else?

- They all have a start and stop button.

- They all have something that happens after you start and before you stop. What is that process and what is the output?

- What comes out when the process is completed? (Output)

- What happens next? Is this the input to another process?

YOUR ROLE AS A TECHNICAL WRITER (CONTD)
SUBJECT MATTER EXPERTS (SMES)

If you are inexperienced and feel they don't respect you – This happens to every new writer. The SME feels like they have to explain too much and it takes too much of their valuable time so they decide to ignore you. It is very important to try to keep this from happening by using the following tactics:

1. **Research!!!** When you are first assigned a topic, research it as best you can using the web, other material, and other people (such as a project manager) before you start discussing your topic and questions with a SME.

2. **Be prepared -** Make a list of questions for your SME and then try to answer them first by googling the answer or finding other sources of knowledge.

3. **Record meetings** with your SME. This way you can relax and listen to them without worrying about how well you're taking notes. And you will have an accurate transcript of their explanations. This will save you time, give you very accurate notes, and will cause the review process to go faster. You will get a reputation for speed and accuracy.

Note: Use their webinar tool and record even if you are in the same room. You just dial into the meeting center and press record and also have your computer linked to the meeting.

YOUR ROLE AS A TECHNICAL WRITER (CONTD)
SUBJECT MATTER EXPERTS (SMES)

- **If you are inexperienced and feel they don't respect you –** (CONTD)

4. **Make friends with your SME –** Sometimes this works. Invite them out for coffee and ask them for ways that you can beef up your knowledge so that you don't depend on them for basic subject matter knowledge—just for the details that are specific for the project. Enroll them in supporting you instead of seeing you as someone who will cost them time.

5. **Ask them to help identify other people you can go to for basic knowledge –** People are usually happy to give you the name of someone else to point you at.

6. **Bribe them** with brownies or another favorite treat. This will sometimes work when you get to the level of desperation.

7. **Request what you need in an email** and cc their manager and yours. This is a very last resort and you should discuss it with your manager before you do it.

YOUR ROLE AS A TECHNICAL WRITER (CONTD)
KNOWING HOW TO RESEARCH

Having super research skills is more than knowing how to basic search terms in Google. Here are some tips for becoming a super research sleuth!

- **Search on your company's intranet site** for earlier versions of a product's documentation or specs. Use your access to find out anything you can about a product that might not come directly from your higher ups (unless specifically told not to do so).

- **Find out the names of other people on the project** and befriend them. Find people who are willing to discuss parts of the project that you don't understand without involving your SMEs. Do not let shyness stop you from asking questions and getting to know the people who will help you on the project with the basic information you need to do your job.

Note: You want to save your SMEs for the technical material you will really need them for.

YOUR ROLE AS A TECHNICAL WRITER (CONTD)
KNOWING HOW TO RESEARCH

- **Become a Super Googler!** Type in "How to search on Google" and learn more than you thought you needed to know about using Google for the answers you need.

- **Google unknown terminology** as you work on your project and compile a glossary of terms. It is a good thing to include in your final deliverables for others to use.

- **Use Wikipedia** for unknown terminology. It is a great source.

YOUR ROLE AS A TECHNICAL WRITER (CONTD)
KNOWING HOW TO RESEARCH

- **Search for all unknown acronyms** and don't assume you know what they mean. Companies and even business units within a company can use the same acronym or abbreviation but have different understandings about its meaning.

- **Develop a system.** I copy and paste everything into my document and then as I actually write content, clean out the copied text, write my glossary term or use the pasted info in the content. But that pasted content does not become part of the final deliverable. It just acts as dump site for the information I've collected.

YOUR ROLE AS A TECHNICAL WRITER (CONTD)
KNOWING YOUR ETHICAL AND LEGAL OBLIGATIONS

Writers have ethical and legal obligations when writing technical material.

- **Physical Devices –** We are obligated to clearly describe how to use physical devices, and point out areas where there could be data loss or physical harm.

- **Software –** We are obligated to warn users when there is the possibility of data loss or corruption.

    In addition, we've got other legal and ethical responsibilities that are related to the company we work for and general responsibilities for how we use, quote, refer to other people's works.

Take out the handout Knowing Your Ethical Obligations.doc and discuss other areas of legal or ethical responsibilities.

PRINCIPLES OF EFFECTIVE TECHNICAL WRITING

Section Objectives:

At the end of this section you should be able to:

- Describe methods for developing content.

- List ways to use knowledge of your audience in content development.

- Discuss which organizational patterns you will use to create a good document.

- Describe why you would use a style guide.

- List some of the rules regarding word usage in business and technical writing.

- Talk about the correct voice to use in technical writing.

- List the reasons why you would use a dictionary other than to correct spelling.

- Discuss how to keep unity and focus on your document's content throughout the entire document.

PRINCIPLES OF EFFECTIVE TECHNICAL WRITING (CONTD)
BEGINNING TO DEVELOP CONTENT

There are five basic questions a technical writer has to ask themselves when starting a new project – who, why, what, how and when.

Answering these questions will allow the technical writer to be able to develop the content for any type of technical documentation.

For example, let's say the technical writer has to create a user guide for a new video recorder.

Before creating the user guide, they will have to plan the content of the user guide by applying following key questions to the situation:

- Who will read the user guide?

- Why do we need to create the user guide?

- What is this user guide going to offer its intended audience?

- How is the user guide going to be delivered?

- When does the user guide have to be ready (publishing date)?

PRINCIPLES OF EFFECTIVE TECHNICAL WRITING (CONTD)
AUDIENCE AND PURPOSE

Ask the following questions about your audience:

- Who will read the document?

- What are their biases?

- What are technical writer's ethical responsibilities when communicating this bias to the audience?

With regard to purpose, you should ask: What should this document accomplish? What should it do? Should it:

- Inform
- Report

- Request
- Reply

- Instruct
- Analyze or Critique

- Suggest
- Compare

- Order

PRINCIPLES OF EFFECTIVE TECHNICAL WRITING (CONTD)
ORGANIZATIONAL PATTERNS

All writers use some kind of organizational pattern to their documentation to provide consistency to their writing. Organizational patterns provide the document with continuity and structure so that audience can comprehend the ideas being discussed.

For example, writers can organize their ideas chronologically, spatially and categorically.

Organization patterns for a document as a whole include:

- Table of Contents

- Table of Figures

- Document Body Divided into Sections or Chapters

- Index

- Glossary of Terms

- Appendix

PRINCIPLES OF EFFECTIVE TECHNICAL WRITING (CONTD)
ORGANIZATIONAL PATTERNS

Within the body of the document writers also employ additional organizational patterns: Here are a few examples for a user guide:

- Organization of a chapter based on priority of information:
    - **Introduction** (contextual information about the subject)
    - **Process information** regarding what happens before, what is about to happen, and what the end results will be.
    - **Numbered steps** to instruct users on how to perform a procedure.

Quick Quiz!

Answers:

- **Additional processes** in order of required occurrence.

- **Notes or tips** about process being discussed.

- **Branching information** such as see also or for more information, see page *xxx*.

PRINCIPLES OF EFFECTIVE TECHNICAL WRITING (CONTD)
ORGANIZATIONAL PATTERNS

Within a procedure there are still organization patters to know about:

- The **order of the steps** in the procedure.
- The **order of the procedures** in a series.
- The simplicity of the **sentence structure** used to keep the steps clear and simple.
- Whether to include **images or screen shots** and where they should appear within a procedure.

Additional methods of applying structure to content:

- **Tables** are a way to apply order to the way information is displayed.
- **Bullets and numbered lists** can be used to help readers discern important information and also whether the information should occur in a certain order (numbered lists) or is just information that is needed (but without a required order (bullets).
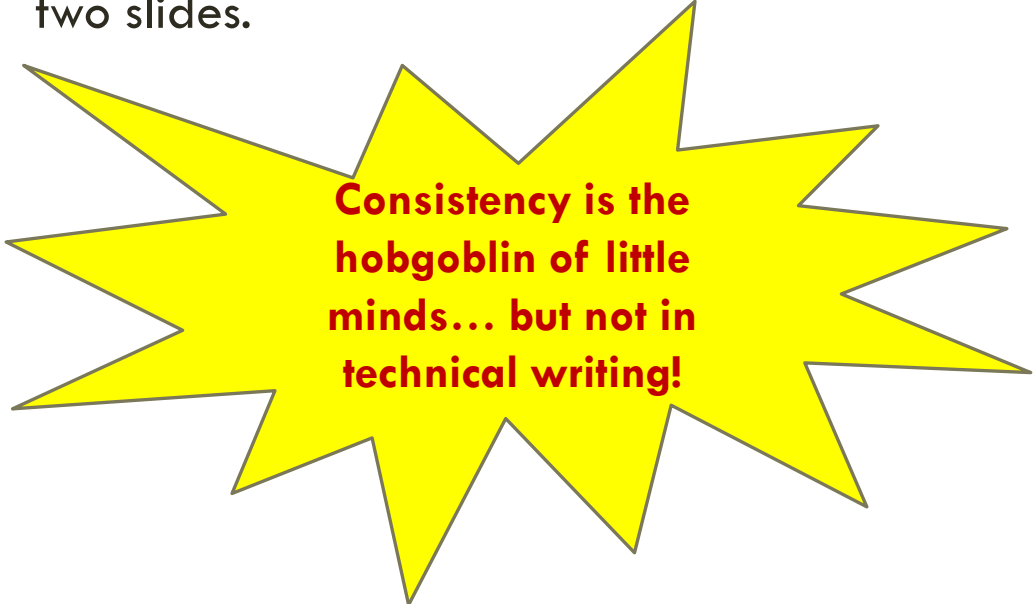
PRINCIPLES OF EFFECTIVE TECHNICAL WRITING (CONTD)
STYLE GUIDES

A style guide contains rules on grammar usage, punctuation, word or terminology usage, element names for software interfaces, and more.

Use a style guide to:

- **Provide a standard** that all employees can adapt.

- **Create a more homogenous writing voice** to all documentation.

- **Set standards for clarity and consistency** that will ensure that users receive information that is easy to understand and process.

Note: Style guides can be published and purchased for in-house used or developed by a company's technical writing team. Many grammatical and punctuation rules are subjective, as the ones described in the next two slides.
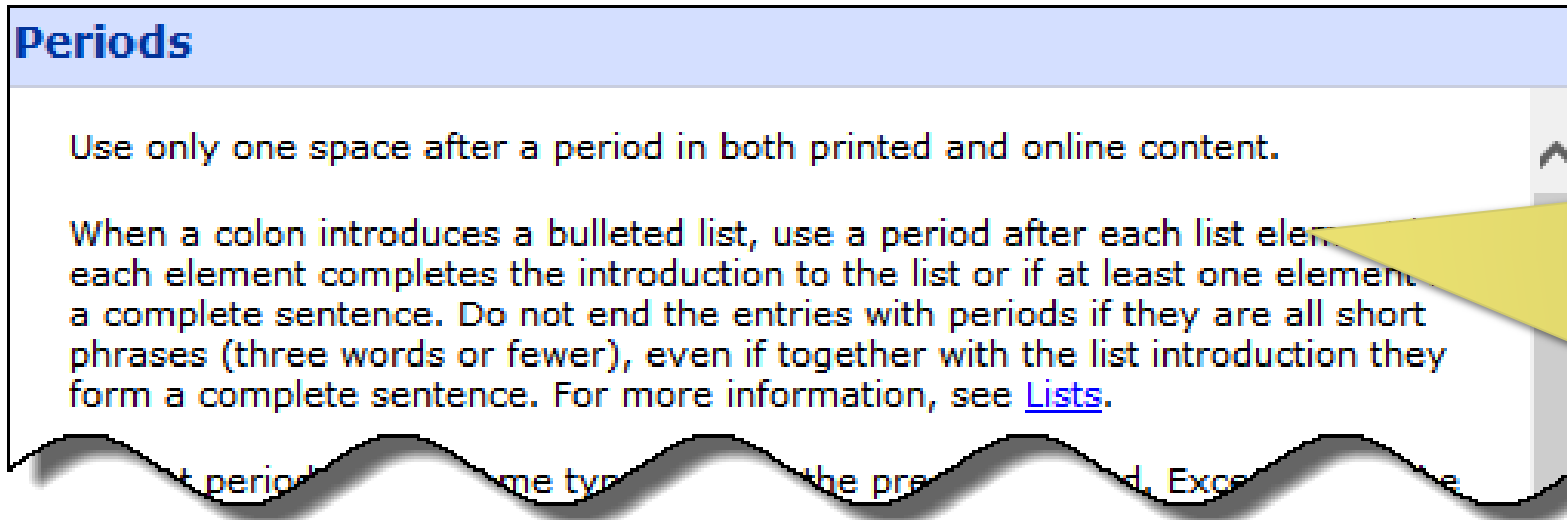
Consistency is the hobgoblin of little minds… but not in technical writing!

PRINCIPLES OF EFFECTIVE TECHNICAL WRITING (CONTD)
STYLE GUIDES

■ The 1 or 2 Space after a Period Rule:

Periods

Use only one space after a period in both printed and online content.

When a colon introduces a bulleted list, use a period after each list element if each element completes the introduction to the list or if at least one element a complete sentence. Do not end the entries with periods if they are all short phrases (three words or fewer), even if together with the list introduction they form a complete sentence. For more information, see Lists.

Did you know?
The reason for using two spaces after a period disappeared once we stopped using typewriters. But even today, technical writers will fight over this one, mainly because they have leftover bad habits.

Today, our software handles spacing between each word and period so it is no longer needed and can actually cause problems with kerning if you use more than one space after a period.

Source: The Microsoft Manual of Style for Technical Publications (Online version).

PRINCIPLES OF EFFECTIVE TECHNICAL WRITING (CONTD)
STYLE GUIDES

- The Serial Comma Rule:

Commas

Comma usage is governed by both convention and grammar. For more details about comma usage, see *Harbrace College Handbook*.

When to use commas

In a series consisting of three or more elements, separate the elements with commas. When a conjunction joins the last two elements in a series, use a comma before the conjunction.

Microsoft style
Chapter 15 is an alphabetical reference to commands, procedures, and related topics.
You need a hard disk, an EGA or VGA monitor, and a mouse.

Did you know?
Many people learned NOT to use a serial comma in their writing so using one is against all their rules. They aren't wrong or right. It is a subjective rule and that's one more example of why we need style guides.

If it matters to you that your writing have the same look and feel, then make a rule for this; otherwise, it isn't a big deal to users. Some will think you forgot it and your writing is sloppy and some will appreciate it depending on what they were taught in school. You can't really win except in being consistent.

Source: The Microsoft Manual of Style for Technical Publications (Online version).

PRINCIPLES OF EFFECTIVE TECHNICAL WRITING (CONTD)
WRITING STYLE AND WORD USAGE

Grade Levels and Word Usage – When you know who your audience is, you know what grade level you need to write to. For instance, you wouldn't use a word like egress to mean exit when writing an instruction telling readers with an 8th grade reading level to leave a building. They won't know what you mean.

Multiple Meanings – Also there are words that have multiple meanings and you will want to have determined ahead of time whether you want to use them, and what meaning you want to have attached to them for your documentation use.

Convulsion and Puffery – There are also words you want to avoid because you think they may appear to "puff" up the grade level of your writing but they really do nothing except make your document appear more convoluted and more difficult for your reader to understand.

Know the real meaning of the words you use – Some words imply permission and others imply capability: Can refers to capability and may implies possibility or permission. It is important to understand the meaning of words when you become responsible for communicating technical direction to people.

PRINCIPLES OF EFFECTIVE TECHNICAL WRITING (CONTD)
WORDS AND TERMS TO GENERALLY AVOID

- **Additionally** – a weak transition. Use and, or find another way to transition to the next part of your sentence.

- **Adjectives** are relative to a reader's experience and have no place in technical writing.

- **Avoid contractions** in technical writing.

- Do not use "**Do not**" unless you are writing a warning or danger item.

- **Basically, usually, or essentially.** These are filler words without any meaning.

- **Due to the fact** – Use either *because* or *due to* (depends on the sentence).

- **First or firstly** – As soon as you start with this, you know you need a numbered list.

- **Irregardless** – It is not a word.

- **Jargon** – try to avoid or make sure you define on first occurrence in paper documentation or in every topic in online help.

- **Often or frequently** – people have different opinions of what these mean. Use more specific terms to describe time and avoid these words.

- **On account of** – Use because instead.

- **Utilize** – Instead substitute use.

PRINCIPLES OF EFFECTIVE TECHNICAL WRITING (CONTD)
WORDS/TERMS TO GENERALLY AVOID

- **Use single words in place of circumlocution:**
  Avoid circumlocution or use of more words in a sentence than required to express the purpose in business writing.

- **Use technical words with care:**
  Every profession develops its own special vocabulary or technical words. The members of that professional group can easily understand these technical words. But, if you use these technical jargons in your business communication to an outsider, it will sound like a foreign language to him.

- **Avoid long sentences:**
  Avoid use of long sentences having many clauses. Sometimes the reader loses the beginning by the time he comes to the end of the sentence.

- **Avoid use of difficult words:**
  Use English words that are easy to use and understand instead of difficult and high-sounding words. Make your business writing more effective with simple and direct word, and avoid any possibility of misinterpretation of your words by the reader.

PRINCIPLES OF EFFECTIVE TECHNICAL WRITING (CONTD)
WORDS/TERMS TO GENERALLY AVOID

- **Use strong, powerful and direct words:**
  Use language that is direct and strong to clearly indicate action and results.

- **Use active verbs:**
  Active verbs make your business writing direct, clearer, more informative and easier to understand. They also make it clear who the actor is and what the action they should take is.

  Ex.: Take the cat outside. Vs. One should take the cat outside.

- **Avoid use of camouflaged verbs:**
  Camouflaged verbs are verbs that are unnecessarily changed to nouns. Avoid camouflaged verbs and strengthen your business writing.

  Ex: Camouflaged: I have sent you a reply to your letter.
  Better: I have replied to your letter.

- **Use correct idioms and phrases:**
  Be careful in the choice of idioms and phrases while writing business communication.

PRINCIPLES OF EFFECTIVE TECHNICAL WRITING (CONTD)
ACTIVE VS. PASSIVE WRITING STYLE

In technical writing, the preferred style is active voice.

This is especially true when writing procedural documentation so that there is no confusion between the action a user must take vs. the resulting behavior of the device or software.

The purpose of technical writing is to quickly convey information about how to do something.

You may provide some contextual information but the majority of it will likely be procedural.

Voice refers to the relationship between the grammatical subject of a sentence and the verb. In active voice, the person or thing performing the action of the verb is the grammatical subject. In passive voice, the receiver of the action is the grammatical subject.

In general, active voice should predominate. Passive voice is not a grammatical error, but it has the greatest impact when you use it sparingly.

PRINCIPLES OF EFFECTIVE TECHNICAL WRITING (CONTD)
ACTIVE VS. PASSIVE WRITING STYLE

Microsoft style (active voice)
You can divide your documents into as many sections as you want.
Data hiding provides a number of benefits.
Windows XP includes many multimedia features.

Not Microsoft style (unnecessary passive voice)
Your document can be divided into as many sections as you want.
A number of benefits are provided by data hiding.
Many multimedia features are included in Windows XP.

Voice refers to the relationship between the grammatical subject of a sentence and the verb. In active voice, the person or thing performing the action of the verb is the grammatical subject. In passive voice, the receiver of the action is the grammatical subject.

In general, active voice should predominate. Passive voice is not a grammatical error, but it has the greatest impact when you use it sparingly.

PRINCIPLES OF EFFECTIVE TECHNICAL WRITING (CONTD) DICTIONARIES — HELP MAINTAIN A CONSISTENT WRITING STYLE

- Find an online dictionary that you like and bookmark it.

- Check with your tech writing team to see if they have a recommended favorite.

- Always look things up instead of assuming a meaning. This is especially important when dealing with diverse audiences, multi-cultural audiences, or others that may have different understandings of words.
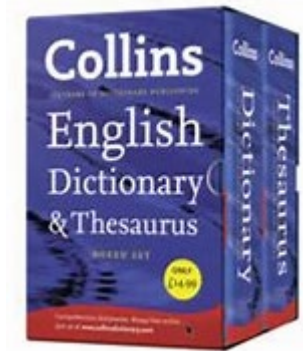
PRINCIPLES OF EFFECTIVE TECHNICAL WRITING (CONTD)
DICTIONARIES – HELP MAINTAIN A CONSISTENT WRITING STYLE

Pick the most commonly used definitions!

Usually the first or second definitions are the most commonly accepted ones so if neither of them are the ones you want, then you need to look for another word to use.

set¹

[set] 🔊

VERB

1. **put, lay, or stand (something) in a specified place or position:**
   "Dana set the mug of tea down" · [more]
   synonyms: **put (down)** · **place** · **lay** · **deposit** · **position** · **settle** · [more]

2. **put or bring into a specified state:**
   "plunging oil prices set in motion an economic collapse in Houston" · [more]

3. **adjust (a clock or watch), typically to show the right time.**
   synonyms: **adjust** · **regulate** · **synchronize** · **calibrate** · put right · [more]

4. **harden into a solid or semisolid state:**
   "cook for a further thirty-five minutes until the filling has set"
   synonyms: **solidify** · **harden** · **stiffen** · **thicken** · **jell** · **cake** · **congeal** · [more]

PRINCIPLES OF EFFECTIVE TECHNICAL WRITING (CONTD)
ACTIVE VS. PASSIVE WRITING STYLE

Quick Quiz!

Quick Assignment: Rewrite the following three sentences to remove the problem of passive voice:

1. Batches should be entered by 10 a.m.

2. The batch can then be given to the coordinator.

3. Ensure that all pays are entered in a timely manner.

Answers:

1. Enter batches by 10 a.m.

2. Give each batch to the coordinator as soon as you've entered it.

3. Make sure that all pays are entered on time.

PRINCIPLES OF EFFECTIVE TECHNICAL WRITING (CONTD)
FOCUS AND UNITY IN TECHNICAL WRITING

Unity Definition

In composition, *unity* is the quality of oneness in a paragraph or essay that results when all the words and sentences contribute to a single effect or main idea. Also called *wholeness*.

Focus Definition

Focus is the component of effective technical writing that answers the question "So What?" An effective piece of writing establishes a single focus and sustains that focus throughout the piece.

How can we keep the unity and focus of our document clearly related throughout?

PRINCIPLES OF EFFECTIVE TECHNICAL WRITING (CONTD)
FOCUS AND UNITY IN TECHNICAL WRITING

How can we keep the unity and focus of our document clearly related throughout?

Overall:

1. Set a goal for your document.

2. What is the reason for the document?

3. What problems is it solving?

4. Use organizational patterning to help the reader understand the structure of the document.

For Each Section:

On a more granular basis do the same thing:

1. Set a goal for your document.

2. What is the reason for the document?

3. What problems is it solving?

4. Use organizational patterning to help the reader understand the structure of the document.

DIFFERENT DOCUMENT DELIVERABLES

Section Objectives:

At the end of this section you should be able to:

- Describe how you would perform a content analysis during the development process.

- Describe the different parts of a memo.

- Define the different parts of a letter.

- List the various components that most reports have in common.

- Identify the components are needed to create a good user guide or similar manual.

- Define the common components of an abstract.

- Discuss the differences between writing a report vs. a proposal.

DIFFERENT DOCUMENT DELIVERABLES (CONTD)
ANALYZING NEEDED CONTENT

Work Analysis Overview

The process of gathering detailed information about the work that people do is called work analysis and encompasses four different kinds of investigations:

- **A job analysis** is a comprehensive examination of what people do, how they do it, and what results they achieve. It is performed to clarify work titles, activities, responsibilities, and entry qualifications.

- **A content analysis** investigates the information or knowledge requirements of work activities.

- **A task analysis** is an intensive examination of how people perform work activities. A task is a series of actions or behaviors that accomplishes a goal. Typically a task analysis deals with observable steps.

- **A goal analysis** is an objective means of transforming vague desires into specific targets for learner accomplishments and is used to establish performance goals which can then be used to develop organization and content of your documentation. This is the function of goal analysis.

DIFFERENT DOCUMENT DELIVERABLES (CONTD)
CONTENT ANALYSIS

Note: For the purposes of developing the content of a technical document, the Content Analysis is the only one we need to focus on. The other three are used more when developing training materials.

Used when doing strategic planning of your document's contents or at the end of a document process to review the entire content devoted to a subject matter in order to plan for the next round of documentation (the end of the Document Planning Lifecycle).

DIFFERENT DOCUMENT DELIVERABLES (CONTD)
PERFORMING A CONTENT ANALYSIS

A content analysis investigates the information or knowledge requirements of your document(s).

It can include analyzing existing documentation to find out what is missing or changed and then use that information in the creation of a new set of document requirements.

Content analysis is the process of breaking down large bodies of subject matter or tasks into smaller and instructionally useful units. These "instructionally useful units" may include facts, concepts, processes, procedures, or principles.

Content analysis is intended to:

- **Identify and isolate** single idea or skill units needed to be documented.

- **Act as an objective decision rule** for including or excluding topics.

- **Provide guidance** to the order or sequencing of topics.

DIFFERENT DOCUMENT DELIVERABLES (CONTD)
CONTENT ANALYSIS FOR A SOFTWARE DOCUMENT

To perform Content Analysis:

1. Create a table in Word or use an Outline format.

2. List the needs of the document. For instance, the document is needed to help users quickly begin using a new software tool.

3. Begin to break down the tasks the user will need.

4. Discuss with your team whether each task is a quick start task or something covered in a more comprehensive document. (The weaning process.)

5. Review the interface and start determining what screenshots would best help meet the objectives of the document.

DIFFERENT DOCUMENT DELIVERABLES (CONTD)
CONTENT ANALYSIS FOR A SOFTWARE DOCUMENT

6. Ask the following questions:
   - What order will best support the objective of the document? Make changes to your list of tasks.
   - What other organizational or document structures would help the user obtain information quickly? Do I need a table of contents, index or other structures?
   - Is there any other information I should include in the document? Review the contents and structure with your SMEs.

You now have the basic structure and preliminary contents of your quick start guide and can start developing the content according to the agreed upon content analysis.

DIFFERENT DOCUMENT DELIVERABLES (CONTD)
MEMOS

Dos and Don'ts About Memos:

Do:

- Keep the memo brief.

- Use bullets for important details. It also makes it easier for people to quickly scan and get the important points of the memo.

- Keep the writing style simple (almost to the point of curt) no first or second personal pronouns.

- **Do Not:**

- Begin sentences with and, but, or due to.

- Exceed two pages (less is better).

Did you know that you can set your email program to automatically spell check when you press send?

Memo

To:	Mrs. Karen Reaves
From:	"your name"
Re:	Case Study Analysis
Date:	"the date"

Subject: Title of the case or your own renaming of the case

Issue: Brief summary of the article. Put only the salient points in your summary. Write cleanly, clearly, and concisely.

Concept: Delineate the MIS theory discussed or to which the case alludes. Define any concepts needed for the reader to fully understand the case and discussion. Do not mention the case here specifically - only theory, concepts, and definitions.

Discussion: Now, discuss the case. Bring out salient points as they relate to your learning in class and MIS concepts

Recommendations: Give your recommendations and opinions. Put yourself in a top management role

Always remember to check spelling before you send!!!

DIFFERENT DOCUMENT DELIVERABLES (CONTD)
LETTERS

Find out your company's required style if you need to send out snail mail. The will likely have requirements regarding the address, a footer, and other possible components of the letter.

The following components are part of a letter:

- From – Does your company require this to be on the right or left side?

- To

- Date

- Salutation

- Body

- Closing

- Signature

- CC/ENC

Remember to check spelling before you send!!!

DIFFERENT DOCUMENT DELIVERABLES (CONTD)
REPORTS

There is a wide variety of reporting formats and they all have their own set of requirements but here's an example of the type of information required when writing a business report. Your company will likely have its own standard.

This is also an example of the kind of information you could include in a Style Guide if you develop your own in-house version.

- Cover
- Title Page
- Revision and Editing Dates and Names
- Letter of Authorization
- Letter of Acceptance
- Letter of Transmittal
- Table of Contents
- List of Illustrations
- Executive Summary or Synopsis
- Body of Report

DIFFERENT DOCUMENT DELIVERABLES (CONTD)
MANUALS

Most technical manuals, books, or user guides have the same components in common despite their topic content or use:

- Cover page

- Revisions, Editing, and Publishing Details page

- Table of Contents

- Table of Illustrations or Figures

- List of Tables

- Contents – Sections, Chapters, Contextual Information, Procedures, and Other Information

- Tables and Figures

- Glossary of Terms

- Index

- Appendices

Technical Handbook

LIN LAURIE

DIFFERENT DOCUMENT DELIVERABLES (CONTD)
ABSTRACTS

An abstract is a self-contained, short, and powerful statement that describes a larger work.

Components vary according to discipline.

- An abstract of a social science or scientific work may contain the scope, purpose, results, and contents of the work.

- An abstract of a humanities work may contain the thesis, background, and conclusion of the larger work.

- An abstract is not a review, nor does it evaluate the work being abstracted. While it contains key words found in the larger work, the abstract is an original document rather than an excerpted passage.

All abstracts share some of the same components:

- **Reason for writing –** Why is this research important?

- **Problem –** What problem does this work attempt to solve? What is the main argument?

- **Methodology –** An abstract of a scientific work may include specific models or approaches used. Other abstracts may describe the types of evidence used in the research.

- **Results –** A discussion of any findings or results.

- **Implications –** Recommended changes as a result of the review of the problem.

DIFFERENT DOCUMENT DELIVERABLES (CONTD)
GRANTS AND PROPOSALS

Usually a proposal is generated in order for your company to obtain new business.

A proposal should include the following elements:

Executive summary: State the reasons for writing the proposal and summarize.

Statement of need: Detail why the project is necessary.

Project description: Explain specifics of the project and how they will be performed and evaluated.

Budget analysis: Explain how the project will be financed and categorize operating expenses.

Things You Should Know About Writing Proposals:

If the proposal is being written to respond to a general request for proposal (RFP), the requestor could have a pre-defined format they require you to use so that all proposals contain the same information and make them easier to evaluate.

Some people develop careers solely to focus on this type of writing because it is so specific and rigorous and so important to growing companies.

The major difference between a grant and a proposal is that a grant is to request funding to provide a service or for research whereas a proposal is to perform specific work for payment and for the benefit of the company that requests the proposal.

DIFFERENT DOCUMENT DELIVERABLES (CONTD)
OTHER COMMON TYPES OF DOCUMENTS

Functional Specifications – For new software, these include rough drawings of screenshots, fields, and data flow diagrams or descriptions of data flow.

PowerPoint Presentations – You may be asked to develop a slide presentation using charts, graphs, bulleted points, and other forms of communication.

Job Aids or Quick Reference Cards – These are usually 1-page references that help users quickly perform often repeated tasks.

Project Plans – While projects are unique, the contents of a project plan are as well. Ask for a sample of a similar plan or Google samples to find one that fits your needs as a starting point.

Online Help – Online help can be similar to a document but everything is linked together and you have the ability to search the entire contents and other electronic features.

Visio Diagrams – These can include process flow diagrams, data flow diagrams, network diagrams, Gantt charts, etc.

MECHANICS OF TECHNICAL WRITING

Section Objectives:

At the end of this section you should be able to:

- Use a template and styles to control the look of your document.
- Use built-in styles to auto-create a table of contents.
- Enable readability statistics in a document.
- Display the reading level for the document.
- Perform a spell check of a document.
- Turn on Track Changes.
- Submit a document for review.
- Work with a reviewers comments.

MECHANICS OF TECHNICAL WRITING (CONTD)
USING TEMPLATES

Microsoft Word comes with a built-in template called Normal.dot. It contains the following components:

- Predefined styles for Headings, body, and a few other styles shown in the graphic.

- If you format your document using these styles, you can change the font or other components of a paragraph style and change the look of your document with a few clicks.
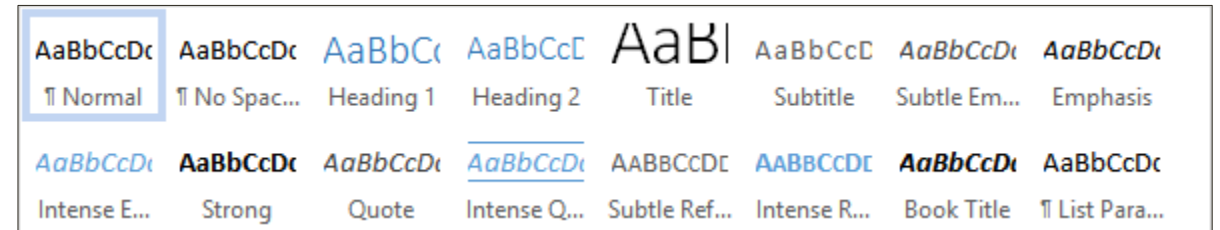
For instance, if you wanted your Normal body text to be 12 pt Arial and it is currently 10 pt Calibri, if you used Normal as the style applied to all body text, you would just have to make one change and it would change all instances of Normal body text throughout your document.

MECHANICS OF TECHNICAL WRITING (CONTD)
USING TEMPLATES

Other Reasons to Use Templates:

- Saves lots of formatting time when creating documentation.

- Lets you apply a homogenous corporate look and feel to all documentation.

- Lets you use built-in heading styles to auto-generate a table of contents.
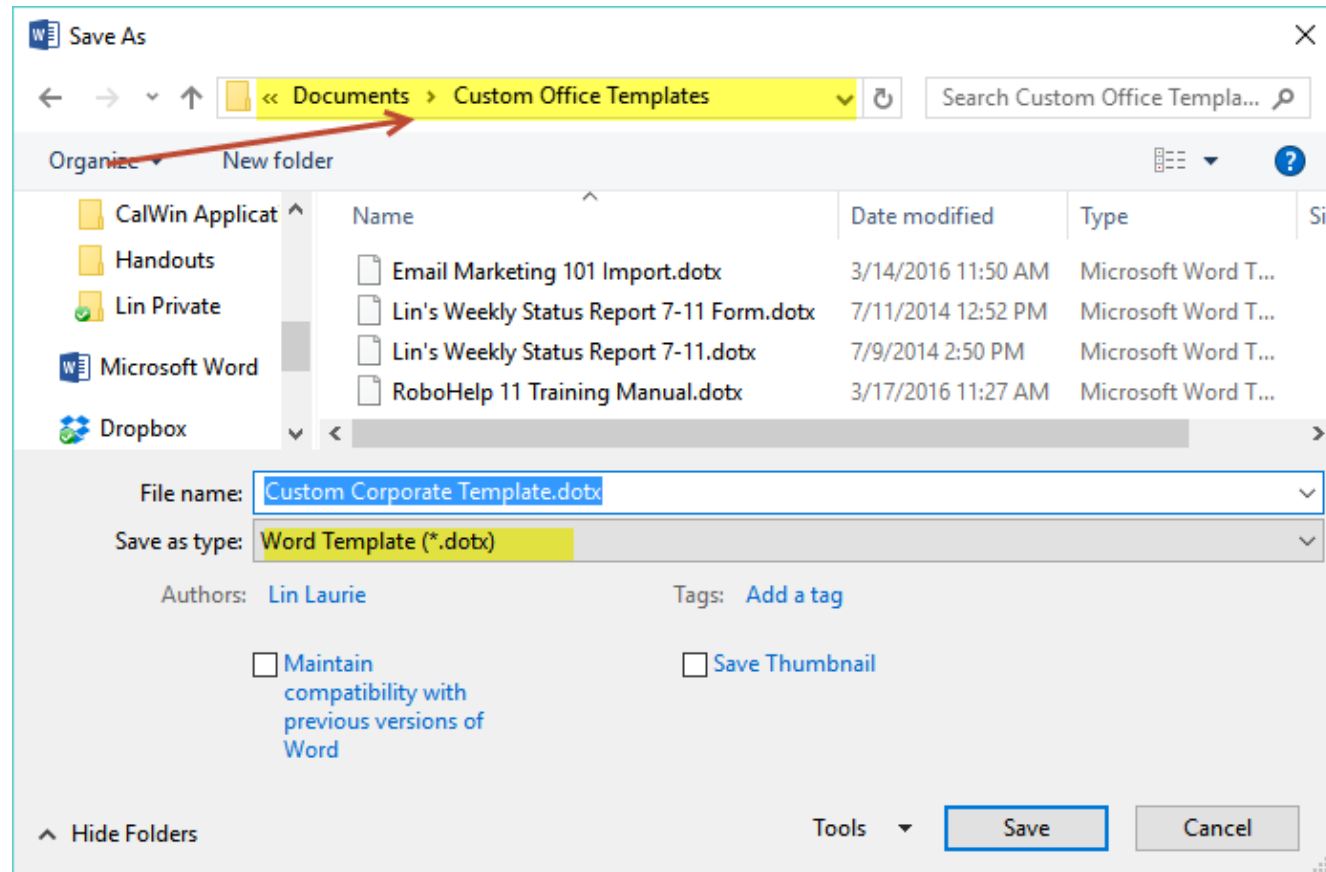
MECHANICS OF TECHNICAL WRITING (CONTD)
USING TEMPLATES

To Create a Customized Template for a Document:

1. Open a new document.

2. Save the document as a template by selecting File>Save As> and select Browse.

3. Change the Save as Type to Word Template *.dotx and the path will change to the default path for templates.

4. Open a new document.

5. Save the document as a template by selecting File>Save As> and select Browse.

6. Change the Save as Type to Word Template *.dotx and the path will change to the default path for templates.

7. Give the template a new name and click Save.

83

MECHANICS OF TECHNICAL WRITING (CONTD)
USING TEMPLATES

MECHANICS OF TECHNICAL WRITING (CONTD)
READABILITY

Readability is the ease with which a reader can understand written text. The readability of text depends on its content (the complexity of its vocabulary and syntax) and typography (font size, line height, and line length). Researchers have used various factors to measure readability, such as:

- Speed of perception

- Perceptibility at a distance

- Perceptibility in peripheral vision

- Visibility

- Reflex blink technique

- Rate of work (reading speed)

- Eye movements

- Fatigue in reading

MECHANICS OF TECHNICAL WRITING (CONTD)
READABILITY

Sadly, the average grade level of readability in the US has been declining.

Current statistics show that it is between the 7th and 8th grade. Your company will likely have a sense of its audience and the grade level they want to aim for in written documentation. It may be higher or lower than the 8th grade.

What is your company's guideline for reading grade level? *If you don't have a company guideline, use the 8th grade as the level to aim for.*

Microsoft Word has a tool to assess the readability of documents. Once you turn it on, it will always display the readability scores after you do a spell/grammar check.

MECHANICS OF TECHNICAL WRITING (CONTD)
READABILITY

To Turn on Readability Statistics:

1. From the File menu, select Options.

2. In the section called "When Correcting Spelling and Grammar in Word" check the Show readability statistics box.

    ☑ Show readability statistics

3. Click OK to keep your changes.

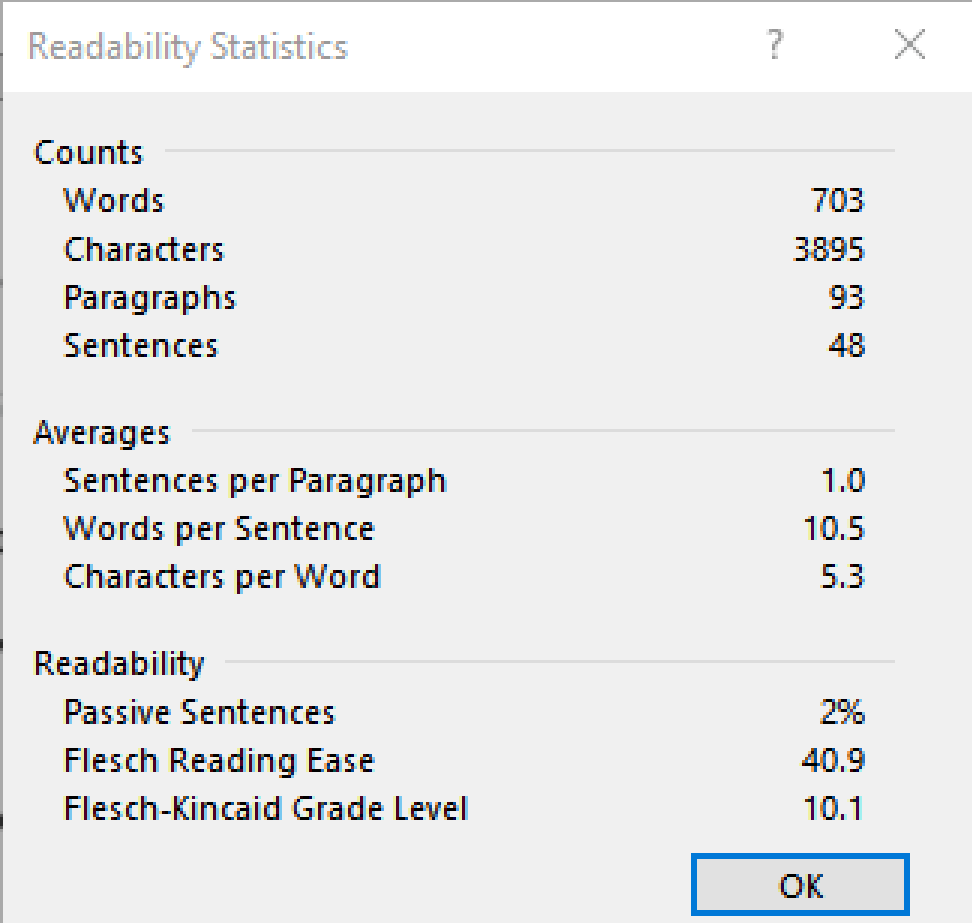**To Display Readability Statistics:**

1. Follow the directions to perform a Spell and Grammar check in the next set of slides.

2. After the Spell and Grammar checks have been completed, the readability statistics will display.

3. Click OK to close the dialog box.

MECHANICS OF TECHNICAL WRITING (CONTD)
READABILITY

To Review and Revise a Readability Score:

1. Review the score called the Flesch-Kincaid Grade Level.

2. Because the score is too high for the 8th grade level we want to aim for in our document, we need to edit the document and then rerun proofing to determine if our changes reduced the reading level.

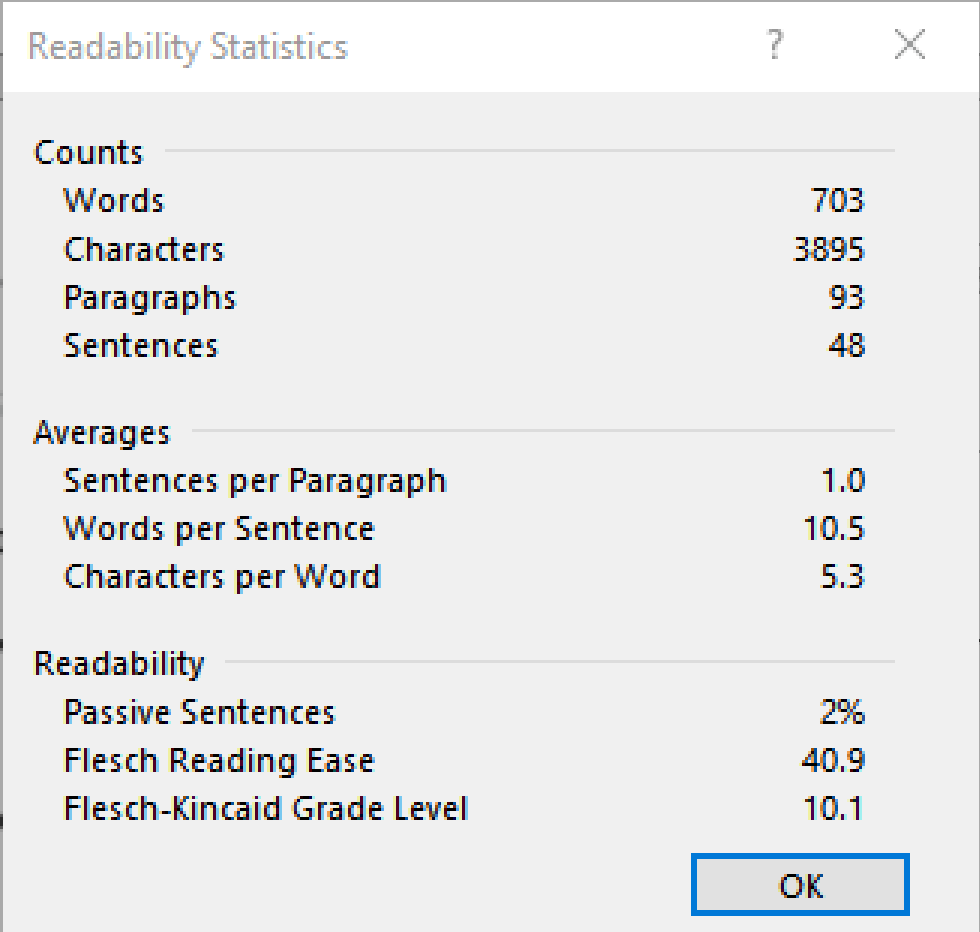| Readability Statistics	? ✕
Counts	
Words	703
Characters	3895
Paragraphs	93
Sentences	48
Averages	
Sentences per Paragraph	1.0
Words per Sentence	10.5
Characters per Word	5.3
Readability	
Passive Sentences	2%
Flesch Reading Ease	40.9
Flesch-Kincaid Grade Level	10.1
	OK

MECHANICS OF TECHNICAL WRITING (CONTD)
READABILITY

Changes You Can Make to Impact Readability Scores:
- Reduce the complexity of sentences.
- Substitute words with more commonly used versions.
- Restrict the sentence length to fewer than twenty words.
- Write in a brief and precise style.
- Avoid using words with more than three syllables.
- Avoid jargon and technical words as much as possible.

Readability Statistics ? ✕

Counts
Words	703
Characters	3895
Paragraphs	93
Sentences	48

Averages
Sentences per Paragraph	1.0
Words per Sentence	10.5
Characters per Word	5.3

Readability
Passive Sentences	2%
Flesch Reading Ease	40.9
Flesch-Kincaid Grade Level	10.1

OK

MECHANICS OF TECHNICAL WRITING (CONTD)
READABILITY

In addition to issues with word length and sentence structure, there are other things that impact readability. They are:

- **Fonts** – size, font family, and style (bold, italics, or regular). Serif vs. san serif fonts.

- **Paragraph** - alignment, spacing between lines in a paragraph, and indentation.

- **Page Layouts** – margins, page or screen size, columns, and other spatial parameters.

- Colors of text and background – The darkest text on the lightest background provides the best contrast for readability.

  Otherwise, the screen color will "absorb" the text and make it more difficult to discern letters. Experiment with other screen and font colors to discover why this is.

  Remember reading green text on a black screen?

LIN LAURIE C O M

MECHANICS OF TECHNICAL WRITING (CONTD)
SPELL CHECK AND GRAMMAR CHECK

Q: Why are spell checking and grammar checking so important for technical writers?

A: If readers find errors in your writing, they lose trust in the rest of your document. Every inaccuracy undermines the faith readers will have in your work.
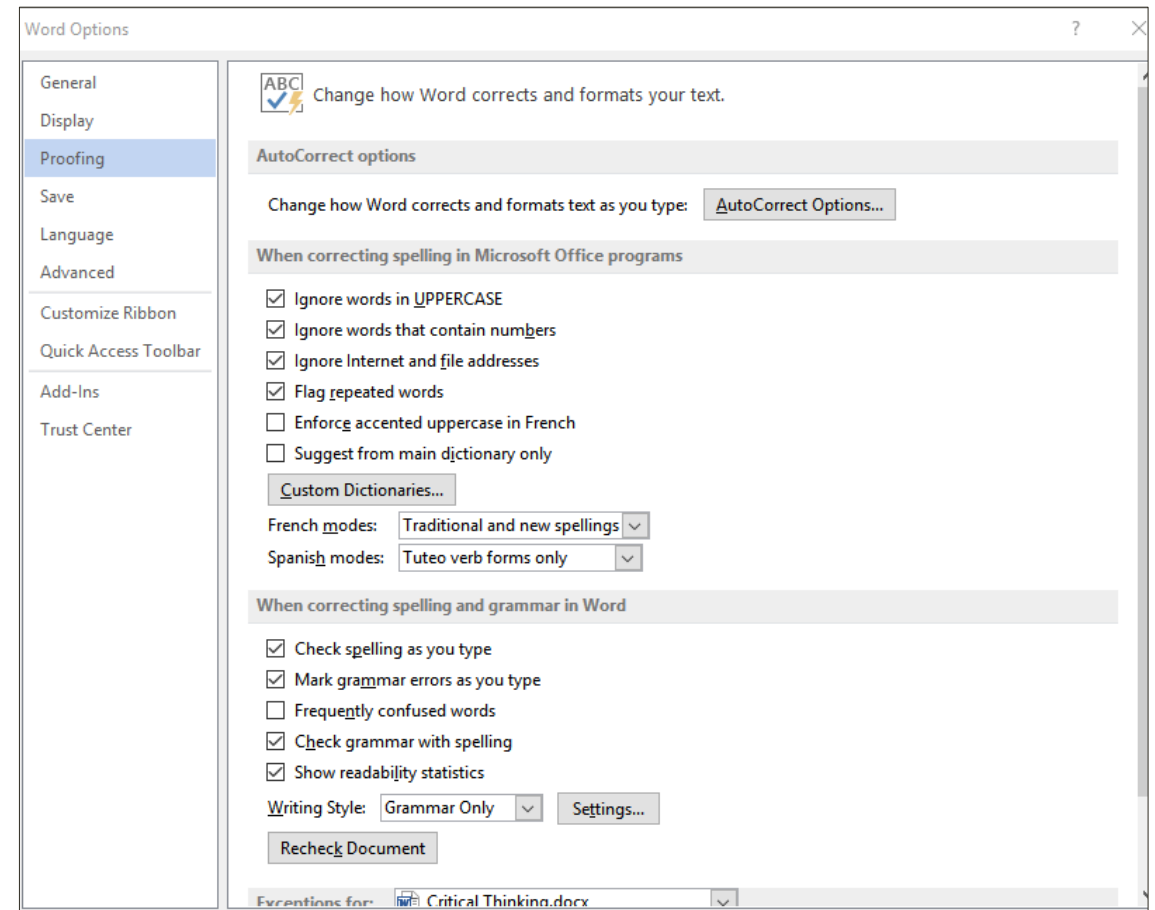
Those little red zig-zags underneath words are NOT for decoration.

Spellcheck is your FRIEND.

MECHANICS OF TECHNICAL WRITING (CONTD)
SPELL CHECK AND GRAMMAR CHECK

To Turn On Proofing in Word:

1. From the File menu, select Proofing, and then select the options you want to use in proofing your document.
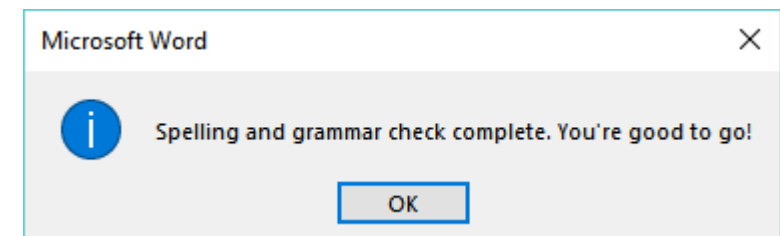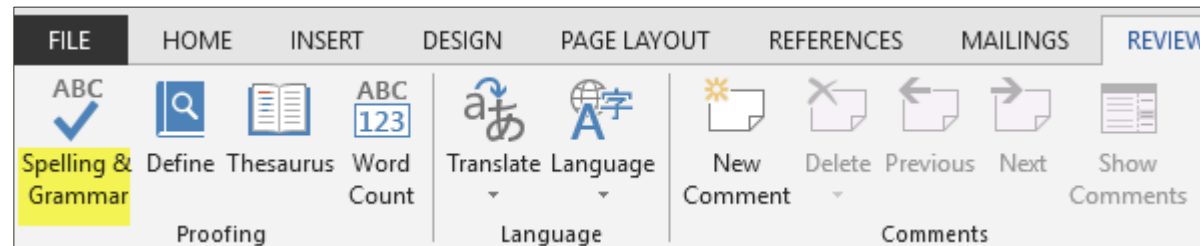
2. Click OK to save your changes.

MECHANICS OF TECHNICAL WRITING (CONTD)
SPELL CHECK AND GRAMMAR CHECK

To Spell and Grammar Check Your Document:

1. Open a Word document.

2. Click the Review tab.

3. Click the Spelling & Grammar icon.

4. In the Grammar or Spell Check pane, address issues as they come up to correct problems in your document.

5. Click OK when the review is complete.

MECHANICS OF TECHNICAL WRITING (CONTD)
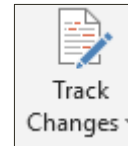## SUBMITTING YOUR DOCUMENT FOR REVIEW

Track Changes is a tool that lets you view changes that other reviews make to a version of your document.

Imagine that you have the source document and there are other versions containing work done by other reviewers.

You are able to view changes and comments, determine if they are relevant to your version of your document, and either allow or disallow them into your source version of your document. You can merge documents or just enter the changes into your document by viewing the reviewed document on another screen and typing in the ones you want to keep in your source document.

Turning On Track Changes:

1. Click on the Review tab.

2. Click on the Track Changes icon (Ctrl+Shift+E).

3. Select Track Changes.
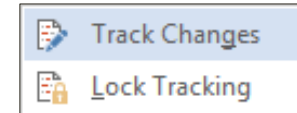
4. Save your document, and then you can attach it to an email and request reviewing. This way you won't have to request that reviewers remember to turn the tool on or off.

MECHANICS OF TECHNICAL WRITING (CONTD)
SUBMITTING YOUR DOCUMENT FOR REVIEW

Most companies have few resources for reviewing documentation. The days of having a sole editing resource are pretty much gone and so we learn to work as best we can with fewer resources. Working with few resources means using your tools well and developing other strategies to get what you need to turn out accurate work.

TIP – Perform spell checks, grammar checks, and even print out and review your document prior to sending it out for review so your reviewers can concentrate on the content and not be distracted by other issues with your document.

Before Submitting Your Document for Review:

In Your Document

1. Proof your document.

2. Check the readability.

3. Print it out and do a visual and a reading check of the document; make corrections.

4. Spell check again.

5. Turn on Track Changes and save the document.

MECHANICS OF TECHNICAL WRITING (CONTD)
SUBMITTING YOUR DOCUMENT FOR REVIEW

Before Submitting Your Document for Review:

Write an Email

1. Make a list of items that you want your reviewers to focus on.

2. Write an email directing them to review all or specific areas of your document. You could ask specific SMEs to look at sections they were responsible for helping you create.

3. Include a return by date.

4. Indicate how you want to receive comments – in a separate email, in comments within the document, or in another way.

5. Spell check everything!

6. Attach your document to the email and send it out!

MECHANICS OF TECHNICAL WRITING (CONTD)
## WORKING WITH REVIEWER'S COMMENTS

Once you receive reviewer comments, you have a decision to make:

Q: Do I want to use the reviewer's document as my new source and make future changes to it?

OR

Q: Do I want to merge or enter changes I agree with into a version 2 of my own document?

A: My recommendation: Rename your document to V2 and then with the review and your V2 copy open, make the reviewer changes that you like into your V2 version.
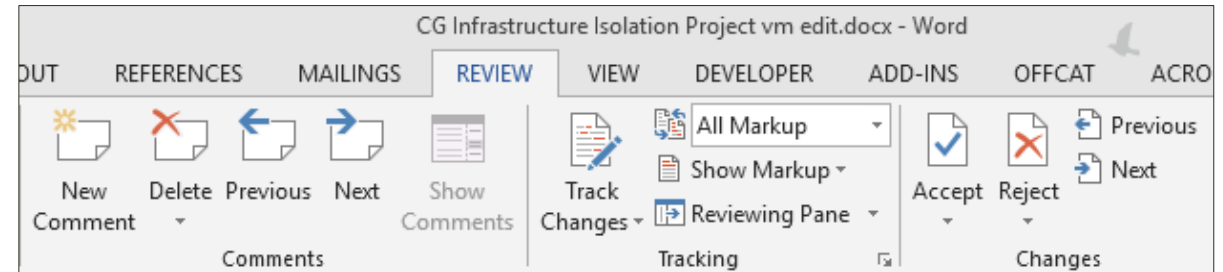
Using the Review Tab:
1. Use the Next button to navigate to a revision.
2. Review the change and make it in your V2 document.
3. Accept the change in the reviewer's copy and click Next.
4. Use the Comments Next to navigate through comments and either Accept or Delete the comments.
5. Once you've completed all the changes you should no longer be able to click Next and find a comment or other change.

MECHANICS OF TECHNICAL WRITING (CONTD)
TIPS AND TRICKS - WRITING

Another way to use reviewer's comments is to keep the ones that contain questions and use them throughout the document creation process to track questions that need resolution.

As you review your document, you will see the existing comments and can send out emails with a list of questions that exist for a specific SME to address. This is a great way to make sure that you don't release a document with remaining questions. It is also a great way to track your remaining questions inside the document.

Tips for Working with Documents

- **Branching to non-existing information -** If I have a need to branch to a section of content that doesn't exist in my document, I use this convention: For more information, see page xxx. Then I search on XXX before I complete my document.

- **Unclear content -** I use red font for content that I have written but I am not sure of and then search for red text to review and revise before I submit. Or I may also add a comment and direct the text to a SME for review.

MECHANICS OF TECHNICAL WRITING (CONTD)
TIPS AND TRICKS - FORMATTING

- **Page Breaks –** Do not add hard page breaks until you are working on the final version of your document. Content will change and you will end up changing page breaks.

- **Keep with Next –** At the same time you are adding page breaks, you can review your documentation and add the property "keep with next" to cause some content to float to the next page automatically. For example, if you have an introduction to a list on one page and the list itself starting on the next, you want to make the introduction "keep with next" so it will stay with the list.

  Also use this feature with graphics containing a caption.

- **Headers and Footers -** Wait until your content is pretty solid before you work on your section breaks, footers, and headers since those sometimes change as your document grows and content shifts.

- **Table of Contents and Index** – When you make changes to your content, first turn off paragraph marks, and then remember to select all (CTRL=A) and press F9 to automatically update the page numbers and any new entries for each.

- **Always proof your document!**

RECOMMENDED RESOURCES

How to Communicate Technical Information, by Jonathan Price and Henry Korman

Designing & Writing Online Documentation, by William K. Horton

The Chicago Manual of Style, by The University of Chicago Press

Handbook of Technical Writing, by Brusaw, Alred, and Oliu

The Microsoft Manual of Style for Technical Publications, by Microsoft Press*
Comes with an online version you can install and use instead of using the book!

THE END – LAST DETAILS

- Last Questions?

- Thanks for attending!

- Please turn off your computers before you leave.

- Please turn in your evaluations before you leave.