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# Technical Writing Process An Overview



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# Technical Writing Process

*Technical documentation happens along with the product development and hence has a life cycle of its own. You need to follow these stages to ensure that the documents are technically accurate and are of a good quality. The five steps of the documentation development life cycle are depicted in the following graphic.*



# Environmental Factors

*Regardless of the changes in the industry and emergence of newer means of communication and help assimilation, the basic tenets of technical documentation have remained the same. As a writer, you are requested to understand the relationship between the following factors in a technical documentation environment, before understanding the process and its various phases.*

## *People*

*You have to work with different kinds of people in every project. There are many stakeholders involved in the process of technical documentation. Unlike other information technology job profiles, technical writers need to interact with various parties apart from their own team of writers - product engineers, marketing executives, support associates, quality assurance team members, and managers of all these teams. Hence, it is very important to keep your communication clear and regular with all the stakeholders to ensure smooth functioning of your assignments.*

## *Tools*

*The typewriter paved the way to the personal computer. And, then the Internet revolutionized the way users access information. Addressing the needs of the evolving users, the industry has always witnessed the emergence of cutting edge tools that make the life of both the technical writer and the end user easy. Though it is important to master most of the tools to perform better, it is important to understand that a proper understanding of the tool and its functionalities is sufficient to begin with. Writers need to be well-equipped with emerging methodologies before they try to learn and master a tool.*

## *Skills*

*The times have changed and people from various backgrounds are trying their luck in the field of technical documentation. Note that the basic skills - passion for writing and a curiosity to learn new facets of technology - continue to dominate the skillset for any technical writer. Your passion for writing should reflect in your writing skills. Along with these skills, every writer should be well-informed about best practices and developments in the industry and try to inculcate these in the documentation process to enhance the experience of the end user.*

*Once you understand the importance of these environmental factors, you can try to learn the process and become adept at it to prove yourself as a successful technical writer.*

# Preparation

*Gather all the requirements and available resources during this stage of the life cycle. Identifying the requirements include establishing the primary purpose of the documentation exercise, analyzing the audience of the documentation, and defining the context and scope of the documentation. You must also identify the right medium of communication to the end user.*



## Conducting audience analysis

Audience analysis is the process of arriving at the characteristics of the audience using formal and informal methods so as to direct all the documentation efforts towards the target audience.

Whether to inform an audience or explain to an audience, analyzing them helps you to pick up the right words, tone, approach, style, and delivery while preparing a document for them. You can classify the audience for your documents on the basis of these parameters: knowledge level of the audience, demographics, environment, and their needs and expectations.

## Defining context and scope

Context refers to a combination of these two environments:

- The environment within which the writers understand the system and document about it.
- The environment within which the readers understand and interpret the information about the system.

Scope refers to the extent of details that you provide in your documentation. It specifies boundaries within which you present your information to the audience.

## Creating the documentation plan

A Documentation Plan is a broad technical writing project plan covering all the execution, schedule, and personnel details.

It consists of the following parts - introduction to the project, list of deliverables, audience, requirements, schedules, content scope, resource allocation, and stakeholders.

It is a working document and must be continuously updated during the different stages of the assignment.

# Research

*This stage primarily involves reading the source documents such as the design document, the system specifications and the functional specifications. Subject matter experts also play a significant role during this stage and you must gather information from them using various modes of communication such as interviews and emails. Analyze the information received from different sources such as source documents and SMEs during this stage in the context of the audience analysis that you performed during the earlier preparation phase.*



## Reading source documents

Source documents include functional specifications, system requirements specifications, technical design specifications, architecture documents, troubleshooting documents, and other design documents.

These documents act as the basic plan for the developer to build the application. Hence, these are a good starting point from the documentation point of view as well.

You need to read such information and analyze the impact on the end user. Hence, the basic tasks you must perform include:

- Studying and discerning the available information
- Identifying gaps and problem areas
- Making notes and establishing relationships
- Listing down questions for the subject matter experts

## Gathering information from SMEs

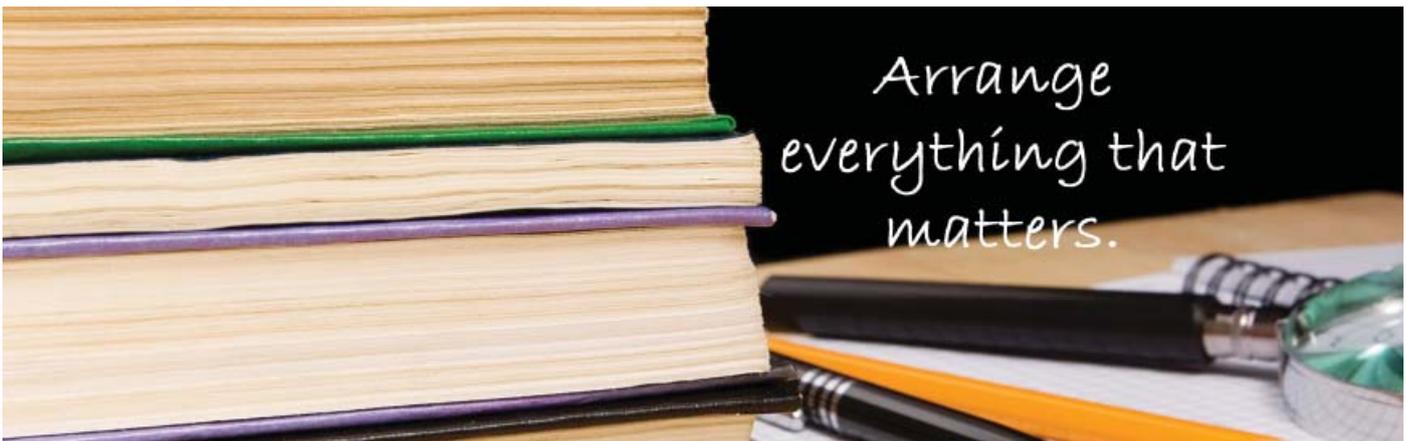
Subject matter experts, typically, include software developers and other members of the software project development team such as testing engineers. SMEs must ideally provide all the information regarding the application and answer all your questions. However, SMEs come in various sizes and shapes. While some presume that technical writers hardly know anything, some SMEs have no time to help the documentation team.

You also need to perform secondary research activities - brainstorming, mind mapping, and information mapping – to assimilate the information that you gathered using the source documents and from the subject matter experts.

You must be able to define an outline of the document after involving in primary and secondary research. Such an outline lays the foundation of a technically accurate user-friendly document.

# Organizing

*Every formal document needs to be organized to suit to the end user needs. You must organize your document on the basis of the type of the document - proposals, marketing collaterals, white papers, articles, manuals, or online help. You must also focus on visual organization - layout and design, and typography.*



## Classifying documents and outlining

List the various documents that can be delivered to the end user. Classify the information that must go into these documents. A simple classification of documents can include installation manuals, administration manuals, and online help manuals.

Frame the outline on the basis of the information collected so far. It presents the material in a logical form and shows the connections of ideas in your writing. Alongside constructing an ordered overview of your writing, it also defines boundaries and groups.

## Organizing visuals

Make use of illustrations, screen captures, tables, lists, warnings, and notes to arrange information using visual aids for better comprehension. Define the visual layout and hierarchy at this stage.

Decide if you want to include a glossary and index. Depending on the accessibility and information availability environment of the end user, you might also have to include additional information in the form of appendix chapters after all the chapters.

## Structured authoring

Technical documentation teams across the globe are embracing the structured authoring or topic-based authoring for their projects. Using this approach, you can focus on the content and not on formatting. You can also collaborate better with your colleagues across the globe.

With this approach, a topic is the basic unit of content. Each topic caters to a single subject. Such topics are grouped together to form information sets, that can be delivered to the end user. Structured authoring also allows content reuse as the same topic can be used in different information sets depending on the user requirements.

Plan your information types and determine your information sets. Thus, you can establish a hierarchy of information flow for each document effectively using structured authoring principles.

# Writing

*The quality of the document depends on the writing style and the flow of the content. Use all the information and resources gathered during the previous phases to write accurately. The two major aspects of writing that you must consider include perspective and usage and process. You must choose the right perspective while presenting the information. You need to also consider various aspects such as the usage of American and British English, Style Guides, and the appropriate method of development.*



## Authoring topics

Using the outline and hierarchy of topics identified earlier and begin documenting the topics. Focus on individual topics such as tasks to begin with. Once you document all the tasks, you will be better equipped to write the introduction and define other concepts. Refer to the outline regularly to avoid stepping out of the scope.

Darwin Information Typing Architecture (DITA) advocates three core topic types – concept, task, and reference. Using these information types, write your content for each topic. While writing a task, try to approach it from the end user’s perspective and list all the steps that the end user must perform to complete the task.

## Updating existing topics

Before you begin making changes to existing content, spend some time going through the document to understand the logical flow. Adapt to the document’s style nuances.

Typically, in addition to source documents such as functional specifications, bug reports, and other issue tracking systems provide information that you can use to update existing content.

While updating existing topics, writers can also track issues relating to the document, or usability of the application. Thus, writers can be a part of the product development process while fine tuning their documentation.

## Style Guide

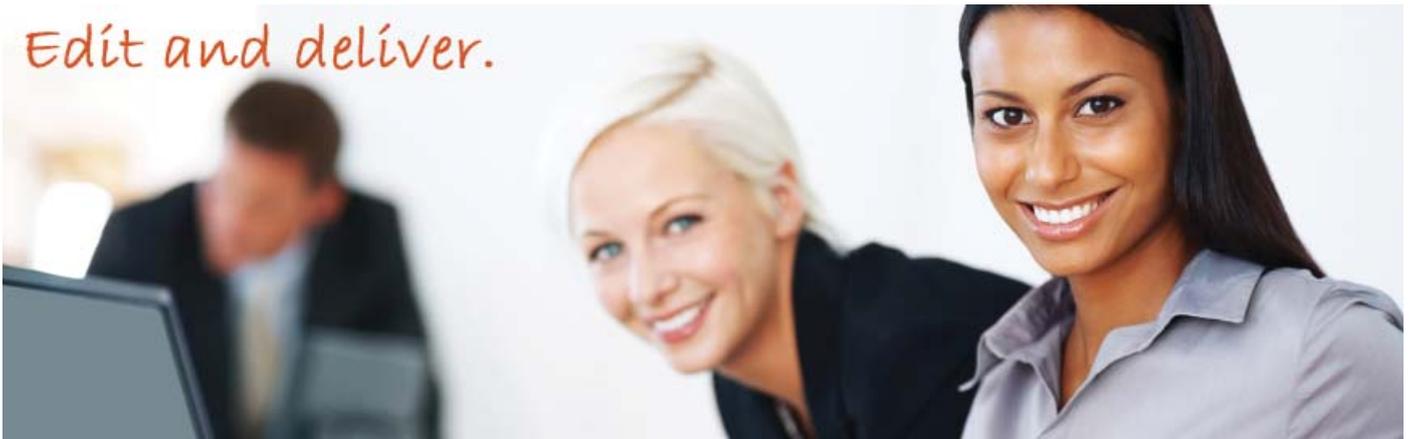
It is the starting point of your writing process. Go through your style guide and understand the nuances of writing within your technical documentation teams. Style Guides ensure consistency and are prepared after considerable amount of research.

Style Guides usually contain the following topics: Grammar, Usage, Presentation Style, and other caveats. Where company-specific style guides are not available, you can refer to The Chicago Manual of Style or Microsoft Style for Technical Publications.

# Review and Publishing

*You begin the review stage by reviewing and revising your own draft. You must check your draft for completeness, accuracy, and consistency during this stage along with a check for the Grammar guidelines and usage principles. You must send your document for a peer review. Editing is a formal process defined with set goals to improve the overall quality of the document and ensure that the document is technically accurate.*

Edit and deliver.



## Revising your own draft

List the various documents that can be delivered to the end user. Classify the information that must go into these documents. A simple classification of documents can include installation manuals, administration manuals, and online help manuals.

Frame the outline on the basis of the information collected so far. It presents the material in a logical form and shows the connections of ideas in your writing. Alongside constructing an ordered overview of your writing, it also defines boundaries and groups.

## Conducting peer review

Make use of illustrations, screen captures, tables, lists, warnings, and notes to arrange information using visual aids for better comprehension. Define the visual layout and hierarchy at this stage.

Decide if you want to include a glossary and index. Depending on the accessibility and information availability environment of the end user, you might also have to include additional information in the form of appendix chapters after all the chapters.

## Editorial reviews and publishing

To ensure that the document adheres to the required standards, you must send the document for editorial review – copy edit and production edit. An editor provides inputs about content changes during copy edit phase. The editor can rephrase sentences and provide alternative usage examples to improve the readability of the content. During production edit, the formatting, layout, and information presentation are thoroughly checked. Other editorial reviews such as substantial editing can also be done depending on the user requirements.

In the publishing stage, you finally deliver the documents and get them ready for the end user. Typically, writers need to make sure that all the required additional information about the documents is provided to the publishing team. If it is an Online Help or Context-Sensitive Help, writers need to map their topics to the software and its screens.



***About the Author:***

***Chakravarthy Srinivas Tenneti is a technical writer with more than eight years of experience. Tenneti also likes composing music and often indulges in web design and graphic design.***