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Quick Reference Card

Summary

This quick reference card was prepared for the Technical Writing I class at Algonquin College. I created a guide that can be referenced while creating a documentation plan and throughout the documentation process. The guide focuses on creating manuals, tutorials, and other instructional materials.

Audience

This document was created for other technical writers and other professionals involved in the documentation process. It is ideal for newer technical writers and technical writing students. It is assumed that the reader has a basic understanding of technical writing terms and principles.

Context

This quick reference card will be available as a PDF file on the user's computer. Some writers will print a double-sided copy and laminate it.

Purpose

Technical writers can refer to this guide throughout the documentation process to ensure that they are on track to complete a comprehensive project.

The Documentation Process

Technical writers are part of an information development team that exists within an organization.

Getting Started

Perform research to prepare for the documentation plan.

- Find and collect information about the product (check white papers, specifications, etc.)
- Meet with a subject matter expert (SME) to learn what the reader will need to know in order to meet their needs (remember to plan the interview in advance, respect the SME's time, ask open-ended questions, take notes, and send a thank you email)
- Analyze the research to gain an understanding of the technology, the product, and the users

The Rhetorical Situation

Writers must perform a task analysis and examine the audience, purpose, and context to maximize the effectiveness of the document.

- Understand the purpose, context, and main goals of the user; understand why, when, where, and how the document will be used
- Conduct an audience analysis – consider demographics, roles and responsibilities, background knowledge, previous experience, bias, and expectations
- Perform a task analysis to ensure that the document uses a task-oriented approach (emphasize the procedures that the user must follow to meet a specific goal)
- Use this information to outline objectives for the project

Planning

The next step is to complete a documentation plan and receive approval to go ahead with the project.

- Create a documentation plan based on the project's objectives
- Receive approval to go ahead with the project
- Create detailed outlines, templates, and if needed, storyboards and illustration placeholders
- Create a checklist for editing and reviewing

Writing

Most of the documentation process will be spent writing.

- Begin the first draft by filling in the sections based on the objectives outlined in the content plan
- Ensure the table of contents is complete and has three levels: sections, topics, and procedures
- Write procedures following the *Introduction – Procedure – Summary* format
- Use the active voice, second person, and present tense
- Avoid multiple actions per step; do not overwhelm the reader with too many choices
- Use clear and concise sentences that are appropriate for the audience
- Keep references (e.g., tables, lists, charts) separate from procedures
- When creating the index, consider how the reader will look for information on a subject (terms, topics, abbreviations, synonyms, and other variations); use alphabetical order in singular form

Editing and Reviewing

Once writing is completed, the document must be edited and reviewed.

- **Substantive editing**: looks at the overall structure of the document; identifies any gaps
- Conduct **research** and meet with SME to fill in the gaps
- **Copyediting**: ensures that the document has proper grammar, spelling, punctuation, mechanics, and style; make sure that the text consistently and accurately adheres to the relevant style guide
- Continue to improve documentation following suggestions from experts, editors, and reviewers
- **Test** the documentation using the test plan established in the original plan
- **Proofreading**: checks errors such as typos, formatting mishaps, broken links, etc. (final review)

Language and Style

- Be consistent in applying grammar rules, using terminology, naming conventions, etc.
- Write short and simple simple sentences using reader-centred language
    - Sentences in paragraphs should be less than twenty words
    - Sentences in procedures should be less than twelve words
- Ensure that each sentence or phrase has a subject (what or whom) and a predicate (a verb or something about the subject)

Design Principles

Parallelism (consistent patterns at various levels throughout the document) is used to show that ideas have the same level of importance. Following a parallel structure creates flow and consistency, making the document easier for the user to read.

Layering is used to accommodate a variety of users by presenting information in more than one way.

Varied **Sentence Structure** is used to keep readers interested and engaged. The most important information should be at the beginning of the sentence.

White Space is used as a visual cue to direct the reader's attention. Using bulleted lists, graphs, illustrations, and charts is an excellent way to convey information without overwhelming the reader. Avoid dead sections, widows, and orphans.

Using Visual Aids

Use graphics to design an effective, useful, and readable document.

- Use running headers and footers to help the reader navigate the document
- Use icons, symbols, rules, fonts, styles, and in-text emphasis to make information memorable
- Use tables, charts, diagrams, graphs, and bulleted lists to help the reader understand and retain complex information and relate it to the big picture
- Use illustrations and screenshots to provide examples and demonstrate what something should look like, thus preventing the reader from feeling lost