Quick Reference Guides:
The Function of Minimalism in Technical Documentation

Prepared for
Antonio Ceraso
Instructor
WRD301

Prepared by
Aaron Samardzich
Student
WRD301

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Executive Summary

This report analyzes the brevity of quick reference guides (QRGs) and how their brevity relates to the function of minimalism in technical documentation.

Researching QRGs

To conduct my analysis, I gathered three QRG samples, blog discussions about the genre's purpose and design, and journal articles about the function of minimalism in technical instruction manuals. I conducted stylistic analyses in selected sections of the three samples, looking at sentence length, the types of sentences, and the use of the imperative voice. I also examined the definition of minimalism in the context of technical documentation and how it relates to the brevity of QRGs.

Research Findings

After analyzing the samples and relating the function of minimalism in instruction manuals to the brevity in QRGs, I found that because technical writing chiefly serves to satisfy users' needs, the skill level of QRG users must be considered in the documents' production. QRGs also have a variety of purposes and contexts in which they can be used depending on user group and type of product.

I found that minimalism, in relation to technical documentation, can be viewed in terms of the length of the text (minimalist text) and how users learn to use a product (minimalist learning strategies). The two main types of learning strategies discussed in my secondary research were direct instruction and user exploration. I found that minimalist manuals give the user more freedom to explore, instead of using strictly direct instructions, when learning about a product. However, the scholars in the journal articles believe that this freedom is geared towards novice users who are learning the basic concepts of a product and have time to make mistakes. Because minimalism targets these novice users, it does not successfully meet the needs of expert users who have more specific goals beyond a product's basic concepts.

After conducting my stylistics analyses, I found that each of my samples contained the short, simple sentences and brief explanations found in minimalism. Additionally, I found that, like the minimalist manuals, two of the three QRG samples target novice users by concentrating on the basic features of a computer program, while one sample targets more-advanced users by concentrating on completing a specific task using a computer program.

Research Conclusion

Even though QRGs are designed to be brief, their multiple uses do not make them a strictly minimalist genre because QRGs can describe complicated tasks and be directed towards more advanced users. Because QRGs can explain the basic elements and specific tasks of a product, technical writers must ensure that each QRG is directed towards the appropriate audience and clearly expresses the purpose of the document.

Introduction

I believe that people tend to perceive technical writing as a minimalist genre of writing in that technical documents should be basic, concise and straightforward. That is, technical documents should avoid the complexity and eloquence typically found genres like literary analysis and should only employ a basic writing style that addresses the audience's needs. Because quick reference guides (QRGs) fall within the larger genre of technical writing and serve to quickly teach users about a product through instructions and explanations, minimalism would seem to be an even more important factor in the documents' production. How does this supposed, minimalist quality relate to the purpose and use of QRGs? Are QRGs primarily geared towards novice users, or can they satisfy the needs of more advanced users?

Although QRGs are designed to be simple, brief and quick answers to the intended audience's needs, these documents are not strictly geared towards novice users. The concept of minimalism, in relation to technical writing, extends beyond the issue of length and complexity; minimalism also refers to how a document is designed to teach users how to accomplish a task. QRGs can be used in multiple contexts and have multiple purposes, which weakens the association between minimalism and the brevity in QRGs.

This document will contain definitions of key terms and concepts of my analysis, my methodology of collecting sample QRGs and secondary resources for my analysis, my analysis of these samples and secondary resources and how they relate to my overall arguments and thesis, and a conclusion.

Methodology of My Analysis

To conduct my analysis, I chose three QRG samples via a Google search:

1. "Outlook 2007: Merging Mailboxes"
2. "Oxford English Dictionary Online Quick Reference Guide"
3. "Elluminate Live! Version 7.0 Participant Quick Reference Guide"

The three samples I found are all two-pages in length. "Outlook 2007 Merging Mailboxes" (Outlook sample) provides a list of instructions and graphics to merge mailboxes in the Microsoft Outlook 2007 program. "Oxford English Dictionary Online Quick Reference Guide" (OEDO sample) describes the basic features of Oxford English Dictionary Online's simple and advanced search engines. "Elluminate Live! Version 7.0 Participant Quick Reference Guide" (Elluminate Live! sample) describes the programs features as an interactive, online environment, listing tips for participating in an Elluminiate Live! session and naming the features of the program window.

To better understand the qualities of QRGs and how these qualities relate to their purpose, I analyzed the sentence length, types of sentences, and the use of the imperative mood (i.e., giving instructions/orders) in my three samples. Because my samples mostly contain numbered lists, bullet points and callouts (i.e., short blocks of texts that are placed next to and describe an image), I chose stretches of text that contain roughly five sentences. I then compared these stylistic features to the features of minimalist documentation to examine how the brevity of QRGs relates to the features of minimalism. I chose these three areas because they include features of minimalism that are discussed in my secondary resources. I wanted to see if QRGs share these stylistic features with minimalism and if these features affect how QRGs are used. These samples and stylistic analyses can be found in the Appendices section.

I found my secondary, online sources through Google searches and the ACM Digital Library Database. These secondary resources are comprised of blogs about the purpose and design of QRGs, and journal articles about how minimalism functions in technical documentation. The journal articles' focus on minimalism will supplement the blogs' discussion of brevity in QRGs, allowing me to examine how minimalism relates to the purpose and length of QRGs.

The Qualities and Functions of User-Centered Genres

Technical Writing

To understand how brevity functions in QRGs, we must first analyze the qualities and functions of technical writing and how these two genres relate. University of Michigan English professor W. Earl Britton argues that technical writing involves technical subject matter, specialized vocabulary, sequential thought, and functional writing. Furthermore, he defines the primary characteristic of technical writing as the author's goal "to convey one meaning and only one meaning in what [he or she] says" (Britton 114). Most technical writing is produced by technical professional (e.g., engineers, accountants), who write documents like "emails, letters, proposals, and reports," and technical writers, who "create manuals, proposals, reports, sales literature, Web sites, letters, journal articles, and speeches" (Markel 4).

All genres of writing have an audience that the writer must acknowledge when creating a document. However, technical writing, with its abundance of subgenres, has a practical use and specific purpose that makes audience analysis a far more critical priority. In evaluating the effectiveness of technical papers and reports, marketing scientist, A.S.C. Ehrenberg, proposes five rules that he believes will improve technical writing—"(1) Start at the end; (2) Be prepared to revise; (3) Cut down on long words; (4) Be brief; (5) Think of the reader" (Ehrenberg 326). Ehrenberg's final rule, "think of the reader," is one of the most important aspects of technical writing that encompasses his four previous rules. By starting at the end of the document, cutting down on long words and being brief, the writer makes the document much easier and less stressful to read. However, in addition to the increasing documents readability, Ehrenberg argues that the writer must keep in mind the reader's intended use of the document and the purpose for which the document is written (Ehrenberg 329). Because of the many subgenres within the field, I would define technical writing even more broadly as any type of writing that tries to clearly and concisely communicate information in an appropriate tone to a specific audience.

Quick Reference Guides

Just like technical writing, grounding a single definition of a quick reference guide can also be difficult. Although QRGs have many intended uses, they are typically shorter forms of longer documents that contain specific information based on the type of product and the phase in which that product is being used. In contrast with, quick *start* guides, QRGs are used during the operating process of a product, whereas quick start guides are used during the setup process of a product. Despite this difference, the names of the two genres are sometimes used interchangeably.

Senior Technical Writer Tom Johnson discusses the purposes of QRGs and the contexts in which they are most appropriate. QRGs are ideal when:

- "the product requires a **one-time setup process**...[to] provide the user with the basics to get up and running"
- the document has **limited functionality** for "a product with a small set of tasks"

- the document highlights several basic, **core tasks** that are frequently performed with a product
- there are multiple **user roles** (i.e., duties that a user must perform in order to use a product) that contain important tasks. A quick reference guide could be used for each user role.
- "a new (especially complex) product replaces an old one," easing the **transition from legacy systems** (i.e., old or outdated computer systems) to more current computer systems
- there is a **large documentation set** that users are discouraged to read due to its length
- there are **busy users** who do not have time to read long documentation ("Quick Reference Guides: Short and Sweet Documentation")

Each of these purposes and contexts revolve around a single issue: brevity. QRGs "take something that's robust and complex, and distill it down to its essence, but distill it in a way that brings perfect clarity to users" ("Quick Reference Guides: The Poetry of Technical Writing). Brevity is important because people simply do not want to read long documentation. For example, if users have the option to choose between a 75-page manual that describes how to operate a forklift and a 2-page QRG that adequately describes the same task, users would most likely choose the QRG. Because QRGs serve to teach users about a product through instructions and explanations, the document must contain the core tasks and information to accomplish this goal not only to uphold the purpose of its genre, but to meet the goal of all technical documentation: to satisfy users' needs.

Minimalist Documentation

Because QRGs emphasize brevity, and people tend to associate brevity with minimalism, I want to see how scholars associate minimalism with technical writing and then compare their discussions with the purpose and qualities of QRGs.

Eric Lodor's article "The Proven and Potential Promises of Minimalism for Technical Communicators" discusses the advantages and disadvantages of using minimalism to create computer documentation and the viewpoints of several scholars on minimalist documentation. Lodor defines minimalism as "a methodology and a philosophy of design and instruction that is based on the notion that users need useful, but non comprehensive information to learn how to use computers" (Lodor 49). Author and technical writer John Carroll, who many scholars and technical writers would call the pioneer of minimalist documentation, designed his minimalist approach to emphasize working "on realistic tasks from the start and throughout training: learning by doing rather than learning by reading" (Lodor 49). Therefore, minimalism refers to both the length of the text (minimalist text) and how users learn to use a product (minimalist learning strategies).

By encouraging a hands-off approach to computer training, minimalist advocates believe that users will learn faster by having the freedom to explore the program and better overcome making errors. The more concrete features of minimalist documentation include:

- brief and not overly explicit explanations
- short, simple sentences

- short chapters that provide closure so users can stop and move between chapters more easily
- error information after a combination of steps to help users catch their mistakes when they are making them.
  (Van der Meij 8)

Even though the minimalist approach to computer documentation may seem like perfect philosophy and practice, many technical writers and scholars believe that it only serves novice users because it is so focused on the basic concepts and multiple aspects of a program or task. This focus is more appropriate for users who have general goals and limited knowledge about the program. But what about more advanced users and the more complicated tasks they undertake? Skeptics of minimalism believe that minimalism "does not take into account the social dimension of work that makes working with technological systems truly complex and calls for cognitive flexibility on the part of the user" (Lodor 51). Because advanced users have more developed knowledge of the program, their tasks are often too complex for minimalist documentation, as minimalist texts are geared towards tasks and logic defined by the program, rather than the environment in which these advanced users work.

To address this disparity between user groups, my secondary research proposes better audience analysis and understanding of the needs and learning strategies of advanced users. For all technical documentation, and especially minimalist documentation, focuses on the users' needs. Lodor argues that minimalist documentation "needs to take into account the ecology of both the institution/organization and the user" (53). By taking this environmental approach, technical writers can use minimalist learning strategies to help users of all skill levels accomplish their tasks.

Taking a Closer Look at QRGs: Stylistic Analyses

In conducting my stylistic analyses, I found that: the average length of a sentence in my samples was 14 words; 70% were simple sentences; and 65% of the sentences were in the imperative mood. These features closely match the short, simple sentences and brief explanations found in minimalism. Also, because minimalism instructs users how to use a product, the imperative mood is also a shared feature.

Even though the Elluminate Live! excerpt contains two complex sentences that are 18 and 27 words long, and the OEDO excerpt contains a 31 word-long sentence, they are introductory sentences at the beginning of the guides and are not in the imperative mood. Also, these sentences are not in a bulleted or numbered list, which reveals that they serve to provide background information about the programs, rather than instruction about how to use specific features. These features reveal that, like minimalism, the samples target novice users who do not have much prior knowledge of the programs they are learning about.

The second page of the Elluminate Live! sample contains one large image of the program window with callouts pointing to the window's features. These callouts are between one and six words, which also resemble the exploration concept of minimalism. Because these callouts do not contain descriptions about their function, the users are given more freedom to interact with the program and discover the functions of these features themselves.

Examining the purposes of these samples provides contrasting evidence about how they relate to minimalism. Although these samples share many of the same stylistic features, the Outlook sample actually provides instruction for a specific task: merging mailboxes. Because this sample does not provide a general description and instructions for Microsoft Outlook 2007, the user group for this sample is more advanced. For the sample does not explain what the merging of mailboxes means, which is information that a novice user, who would know very little about Microsoft Outlook 2007, would probably fail to fully understand. However, because the Outlook sample describes a specific task, it provides closure and acts as a chapter of a multiple QRGs. This feature relates to the short chapters found in minimalist documentation that allow the user to move conveniently between sections of the document.

My stylistic analyses reveal that although QRGs are designed to be brief and explain the core tasks of a product, this brevity does not necessarily coincide with the concept of minimalism as defined by my secondary resources. QRGs share many stylistic features with minimalism, but the fact that the Outlook sample describes a specific task geared towards more-advanced users reveals that QRGs are not completely minimalist.

Conclusion

Although QRGs are classified by their brevity, this analysis has revealed that they contain many qualities that affect how, when and by whom they are used. Technical writing and all of its subgenres focus on the audience and satisfying the audience's needs. Because the audience of QRGs seeks to obtain the core concepts of a product in a fast manner, the documentation must be written in a particular way to satisfy their needs. Short and simple sentences and brief explanations satisfy the speed requirement of this need, but the choice of content is what really determines the efficacy of the document. Because QRGs can be written in numerous contexts, it is essential the technical writer matches the content with the correct user group. By describing a specific task rather than the basic concepts of an entire product or program, the technical writer targets more advanced users. Because this advanced user group has more-developed knowledge of the product, the technical writer does not have to include general information that novice users would value, thus allowing more space to describe the specific task.

Because users of all skill levels can use QRGs, brevity is not the only factor that determines the guide's effectiveness. There is often the misconception that minimalism strictly pertains to the length or complexity of the document, but this analysis has revealed that QRGs are minimalist in terms of brevity, but not necessarily in terms of the targeted user group. If technical writers want to direct minimalism at more-advanced user groups, they need to analyze how this hands-off approach will help users complete specific and increasingly difficult tasks. Similarly, in order for QRGs to target users of all skill levels, the appropriate content must be paired with the minimalist text that makes QRGs so appealing to the overwhelming majority who dread reading long, technical documentation.

Please review this genre analysis and assign me a final grade. If you have any questions, please feel free to contact by email at asamardz@students.depaul.edu.

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