CitiusTech

Technical Documentation

February 2015

Agenda

- **Overview of the Training**

- Creating a Technical Document

  - Requirement Analysis

  - Structure/TOC Creation

  - Template Selection/Creation

  - Development

  - Review

- Guidelines to Follow

- CitiusTech Template

- What We Offer ?

- Q & A

Introductory Video

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Overview of the Training

The objective of this presentation is to –

- Recognize and understand key aspects of technical documentation

- How Technical Documentation team can help you improve your project's documentation

Overview of the Training

- Objective of this training is to improve the quality of, and reduce the effort expended on, project documentation – for all future projects.

- Intent is not to strictly prescribe a template, style, format or method, as these elements of a document may change depending on project dynamics and client desires.

- Subject matter in this training was determined from lessons learned after reviewing documentation on projects and other sources.

- Participation in this training is expected and encouraged in order for concepts to be understood by everyone.

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Creating a Technical Document

Like SDLC which is used for software development, Document Development Life Cycle (DDLC) needs to be followed while creating a technical document.

The DDLC consists of the following stages –
- Requirement Analysis
- Structure/TOC Creation
- Template Creation/Selection
- Development
- Review

Creating a Technical Document

Requirement Analysis

This is the first phase of DDLC in which you analyze the project requirement, audience level, and stakeholders for the project.

The project requirements tell you about the type and use of the technical document. The audience level informs you about the reader level that is who will be the reader of the document. On the basis of the reader level complexity of the document is decided. Stakeholders are the reviewers of your document.

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Creating a Technical Document

Requirement Analysis

Key Pointers for this phase -

- Interview the Client/SME
- Look for any sample documents
- Identify the stakeholders
- Identify the reviewers
- Researching on the Topic
- Brainstorming Sessions

Creating a Technical Document

Structure/TOC Creation

In this phase, outline of the document is prepared, which contains overall plan/structure of the document. Outlining is skeletal format of the document, and gives an idea of placing the elements.

This skeletal information contains, introduction, table of contents, chapter/section information, and index. Outline gives clear view of complete document at a glance.

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Creating a Technical Document

Structure/TOC Creation

Key Pointers for this phase -

- Identify headings and sub-headings for your document
- Identify which sections will require tables and images
- Get the Structure/TOC approved by the Client/SME before you start your documentation

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Creating a Technical Document

Template Selection/Creation

- This phase involves selecting the right template for your document. Many a times the Client may provide you with a template.

- Following a template is key to get Consistency, Form, Completeness, and Efficiency to your document.

CitiusTech Technical Document Templates are the perfect solution for you.

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Creating a Technical Document

Template Selection/Creation

Key Pointers for this phase -

- Identify the correct template (if not provided by the Client)
- Follow the template to the core
- Keep manual formatting to the minimum
- Use Navigation Pane to check unnecessary spacing before or after headings and sub-headings

Creating a Technical Document

Development

In this phase, actual development of the technical document is done. The Author explains all the contents that are collected and planned in the outlining phase.

The required illustrations and graphics are also prepared and inserted in the document.

Development phase requires some extra time as complete drafting is done under this phase.

Creating a Technical Document

Development

Key Pointers for this phase -

- Introduction/Overview is one of the most important part of any document and needs to be concise and to the point
- Every heading should be followed by text describing the heading
- Entire document must follow a single tense and a single narrative point of view
- *Guidelines section* of this presentation gives a brief on what needs to be followed while creating a technical document

Creating a Technical Document

Review

In this phase, the document needs to be sent for review to the assigned reviewers.

Remember, the author is ultimately responsible for the quality of the document which means the author must review his / her document before submitting it to the reviewers.

Creating a Technical Document
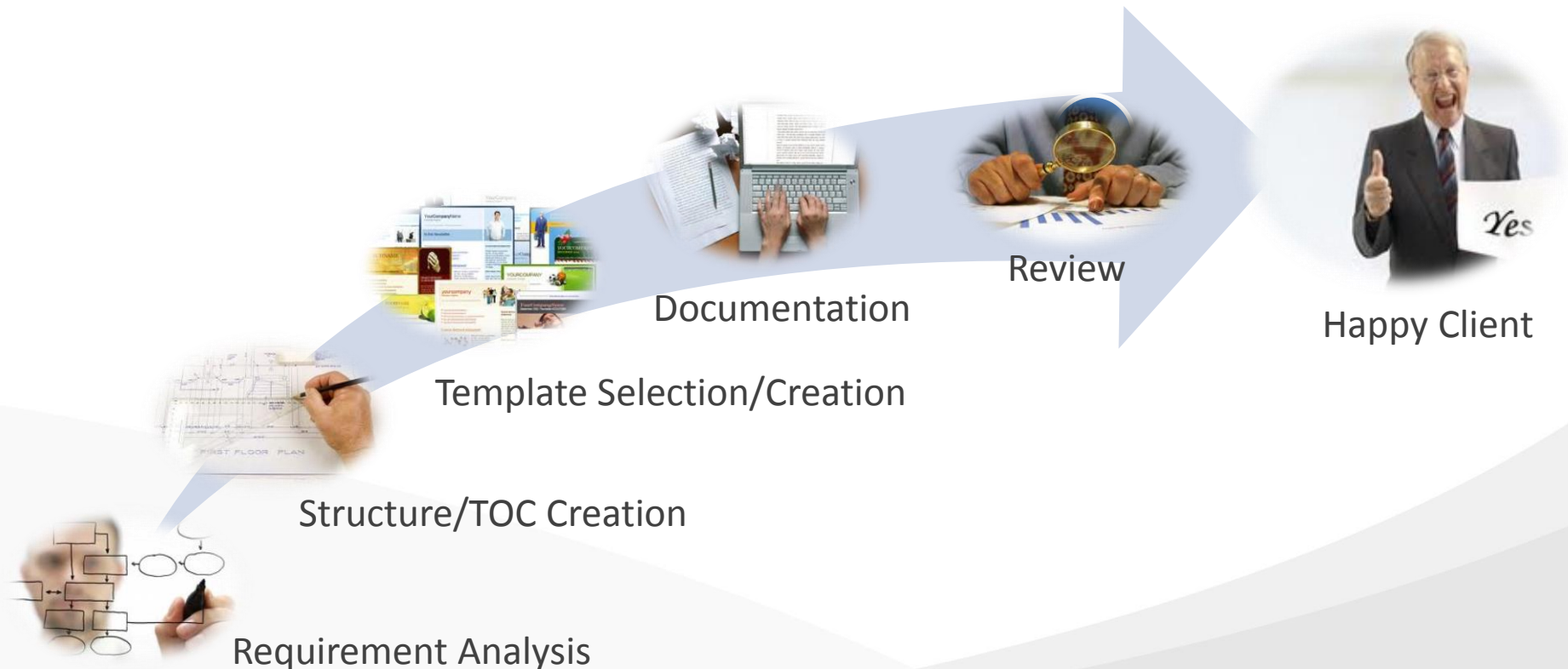

Review

Key Pointers for this phase -

- Content is the KING, check whether all the required content is documented
- Check the document for
  - Spelling
  - Grammar
  - Overall document guidelines
  - Formatting consistency
- Provide reviewers sufficient time to review the document
- Collate review comments from all reviewers and discuss the same before altering the document to avoid rework

Creating a Technical Document

Follow the Documentation Development Life Cycle (DDLC) to achieve a perfect document and a very happy Client.

Review

Documentation

Happy Client

Template Selection/Creation

Structure/TOC Creation

Requirement Analysis

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- **Guidelines to Follow**

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- What We Offer ?
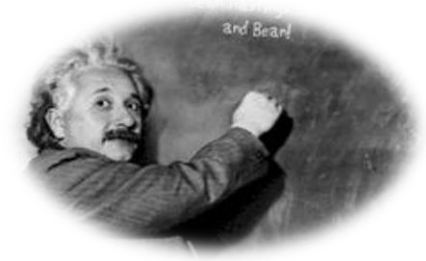
- Q & A

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Guidelines to Follow

- Every heading (except procedure headings) should have text between it and the next heading. The intervening text should normally help the reader decide if what follows will be of interest.

  For example, a description of a user problem that the content will help solve can save the time of readers who have a different problem. However, avoid inserting "filler" text just to adhere to this rule.

Guidelines to Follow

- Use active voice throughout; Passive can be used if absolutely necessary

Passive
Your technical document can be divided into as many sections as you want.

Many multimedia features are included in Internet Explorer 9.

Active
You can divide your technical document into as many sections as you want.

Internet Explorer 9 includes many multimedia features.

VIDEO

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Guidelines to Follow

- Use Present tense throughout the document

Incorrect
Although the Microsoft Mail system has proven to be reliable, you should periodically back up important messages.
The next section will describe how to write an object-oriented program.

Correct
Although the Microsoft Mail system is reliable, you should periodically back up important messages.
The next section describes how to write an object-oriented program.
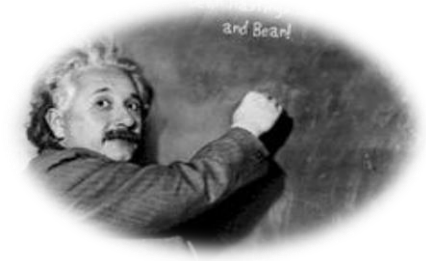
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Guidelines to Follow

Paragraphs and Lists (Procedures and Steps)

- Paragraph focuses on a single topic at once. Place the introduction of a topic at a beginning and then describe a topic and add concluding last sentence
- List displays a number of connected items or names written in a bulleted or numbered format
  - Bulleted list is used to describe a series of concepts, items, or options
  - Numbered list is used for procedures or other sequential lists

Use paragraph to describe a product. Use bulleted list to describe its features. Use numbered list to describe how to use a product.

Guidelines to Follow

- Procedures/Steps should be numbered, whereas pointers can be bulleted

Procedures/Steps
1. On the Tools menu, click Options.
2. Click the Edit tab.

Pointers
- Use complete sentences
- Use parallel construction
- Capitalize the first word in each step

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Guidelines to Follow

- Do not use a period following a bulleted step

- Spell-check the document before you send it for a review

Guidelines to Follow

- Abbreviations need to be expanded the first time you use it in the document

"The **Food and Drug Administration (FDA) Amendments Act (FDAAA)** of 2007 gave the **FDA** the authority to require a **Risk Evaluation and Mitigation Strategy (REMS)** from manufacturers to ensure that the benefits of a drug or biological product outweigh its risks.

It is a process by which the **FDA** requires establishment of effective post-marketing surveillance of all adverse events, drug-drug interactions, and side effects etc., related to a drug.

A **REMS** Program falls into one or more of following three categories:
- Assessment **REMS**
- Communication Plan
- **Elements to Assure Safe Use (ETASUs)**"

Guidelines to Follow

- Long Words vs. Short Words

Long Words	Short Words
Storage Device	Disk
Occupation	Job
Location	Place
Demonstrating	Showing
Utilization	Use
Expeditious	Fast
Facilitate	Help
Numerous	Many
Purchase	Buy
In a timely manner	promptly

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Guidelines to Follow

- Using Short Paragraphs make information concise and clear.

Long Paragraph

I found out how to sort my messages, something you were wondering about last week, and I thought you might like to know. I noticed that at the top of the message list there are words like New, and From, and Date, and Subject, and so on, and if I click one of those, the whole list gets reorganized that way. You know what I mean?
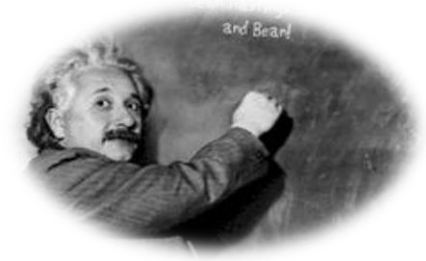
66 words

Short Paragraph

To reorganize the message list, click a column title such as New, From, Date, Subject, or Size.

24 words

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Guidelines to Follow

Gender Neutrality

- Gender Neutrality is a linguistic prescriptivism with prime importance in documentation
- Usage of gender-neutral language
- Eliminates the usage of gender-biased terms used to describe people
- Avoids the discrimination arising from the impression that one gender is more suited than the other for social roles
- CitiusTech Technical Documentation team promotes the use of gender-neutral language in all the documentation.

Guidelines to Follow

Gender Neutrality

Don't Use	Use
Chairman, Chairwoman	Chairperson
Manpower	Workforce, Staff, Personnel
Man-made	Synthetic, manufactured
Foreman	Supervisor
Headmaster, Headmistress	Director, Principal
Salesman	Sales Representative
Policeman, policewomen	Police Officer

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Guidelines to Follow

Gender Neutrality

> **Incorrect**
> A user can change his default settings.
> If a student studies hard, he will succeed.

> **Correct**
> A user can change the default settings.
> Students who study hard will succeed.

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Guidelines to Follow

Using Action Verbs

- Action verb is a verb that describes a specific action in one word instead of a phrase.

Phrase	Action Verb
Carry out	Execute
Find out	Discover
Start out	Begin
Talk about	Discuss
Leave out	Exclude
Go with	Accompany
Assign priority	Prioritize

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Guidelines to Follow

- All images and tables need to move with text

2.2.2 Forgot your Password

To retrieve your password, use the following steps:

1. On the **Log In** page, click **Forgot your password**.
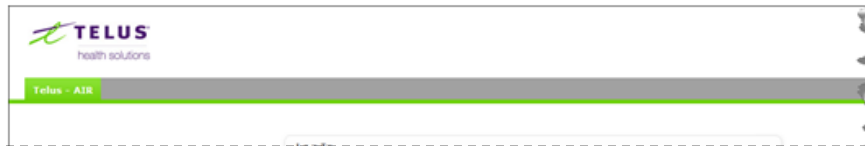
3. THS BI Portal Home

The THS BI portal home page displays once you have successfully logged on to the application and accepted the terms and conditions.

The THS BI portal home page is organized in Tabs. The Tabs provide one-click access to different sets of information and control tools over the THS BI portal.
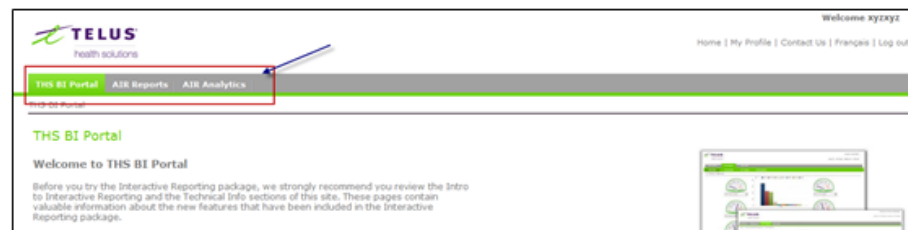
Guidelines to Follow

- Use a portion of the screenshot if you need to display a particular section of a screenshot

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CitiusTech Template

Contact Technical Documentation Team for the perfect template for your document.

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CitiusTech Template

Template Types and Usage

- CT Technical Documentation Template (Portrait Layout) – Use this template to create documents.

- CT Technical Documentation Template (Landscape Layout) – Use this template if you need to document gargantuan tables and images in the document.

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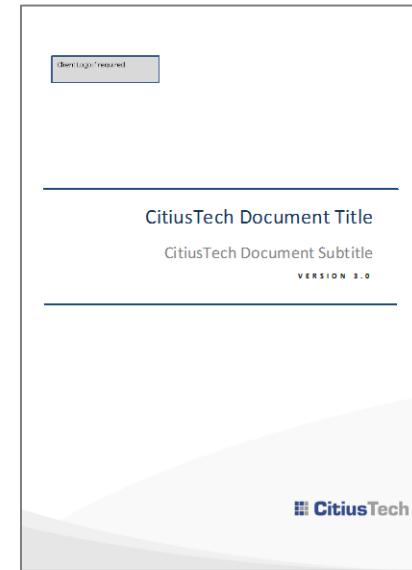
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How can we HELP you ?

Technical Documentation Team
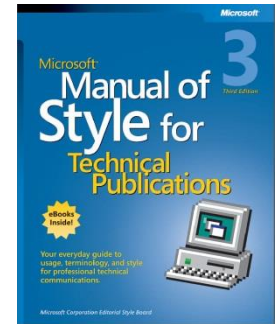
Creating Documents –

- User Guides
- Online Help
- Training Manuals
- Software Simulation (Help Videos)
- Process Flow Diagrams
- Case Studies
- How to Documents
- Release Notes

- Installation Guides
- Context-sensitive Help
- Troubleshooting Guides
- Quick Reference Guides
- Documentation Templates
- White Papers
- FAQs
- Support Documentation

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How can we HELP you ?

Technical Documentation Team

What else we do –

- Proof Reading

- Conformance of documents with **Microsoft Style Guide for Technical Publications (MSTP)**

- Reviewing technical documents for-
  - Language Clarity, Conciseness, Readability, and Coherence
  - Formatting Consistency
  - Compliance with CitiusTech Template
  - Style and Flow of Document
  - Visual effectiveness– page/screen design, graphics

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Thank You

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