

About Technical Writing

What's involved in technical writing? What skills are needed? How do you go about it?

Essentially technical writing is writing non-fiction documents. Each document has an audience and a purpose which are usually related to work.

There are different **types of documents**:

- plan
- procedure
- proposal
- reference
- specification

Begin a project by determining the **scope of work**:

- clarify the audience and purpose
- clarify the type of document you are to write
- inventory all existing documents that are relevant
- identify any relevant standards
- identify resources
- clarify how the document will be published
- clarify the need for written instructions to be used to maintain the document
- size the document by number of pages and diagrams
- decide what software will be used to write the document
- identify who has review and approval authority
- clarify review and approval processes
- plan your work: what you are going to do, how you are going to do it, and in what sequence
- estimate the amount of time your work will take (I avoid this step as much as I can)

Writing skills needed:

- spelling
- grammar
- punctuation
- typography
- organization
- analysis
- research
- graphic design—creates an appearance that draws attention, compels reading, and clarifies issues
- communication—to facilitate research and secure the cooperation, assistance, and support of others
- creativity

Technical skills needed (assuming the work is done with a computer):

- basic computer operations
- Microsoft Word and/or Adobe Framemaker
- Adobe Acrobat
- HTML and CSS
- Visio
- Robohelp (used to create help files, but HTML is superior)

Early **tasks** include:

1. Document your scope of work. Publish it to your reviewers and approvers.

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2. Design the overall structure of the document based on its size. Is it to be one file or a number of files? I find that large reference manuals easily lend themselves to having each chapter be a separate file.
3. Determine how chapters and pages are to be numbered.
4. Determine the use of table(s) of content and indices. How will page numbers be reflected in them?
5. Design the appearance of the document, write this up as a style sheet (a document in itself), and create one or more document templates that will provide the predefined styles to each document file. This includes specifying fonts, layout, and colors and must reflect what is available at the location where the document will be published. Styling a document typically involves presentation of prototypes to whomever has approval authority.

I prefer to use a mix of font faces, serif and sans-serif, to provide visual variety. I indent third-level headings and use color for the same reason. I especially like to color bullets and to have the letter/number of a numbered list be in a sans-serif font.
6. Develop a method of keeping track of and securing your files. This typically includes acquiring space on a file server that is dedicated to your project, designing an organizational directory scheme, and devising a way to list (inventory) all files easily.
7. For any project, maintain a document of special techniques that you rely on. This is your own work reference document. I have one for each of the software programs-languages I use: Word, Framemaker, HTML, CSS, Access, Visual Basic, Javascript.
8. For large projects, document your work process. This can be helpful both when you forget how to do something and for sharing the work.

Guidelines:

- a. Headings (and sub-headings) are an invaluable way to facilitate the reader's understanding of the scope of the document as well as finding the details they need.
- b. Phrase headings to facilitate their usefulness in a table of contents. Often this means reflecting their context.
- c. When a document exceeds one page it needs headings.
- d. When a document exceeds two pages it needs a table of contents.
- e. Multi-chapter documents need a consolidated table of contents. This is created as a separate file.
- f. Limit paragraph size to maybe 10 lines.
- g. Use lists—bulleted and numbered—to clarify choices and make the document easier to read.
- h. Use a bulleted list style for a small list where it is easy for a reader to locate a particular item.
- i. Use a numbered list style where the numbers are lower-case letters for a longer list and where the letters can help readers locate a particular item.
- j. Use a numbered list style when list items are a series of steps and their order is meaningful.
- k. Alphabetize list items when that improves readability.
- l. Long lists of multi-line list items are often more readable if there is some whitespace between each list item.

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- m. Avoid endless paragraphs that are indistinguishable from each other. This visual monotony puts readers off.
- n. Tense: most of the time present tense is best; even if you're writing about something that is in the future, it will be the present when the completed document is read by its intended audience. Avoid future tense except in proposals. Limit past tense to histories. Be consistent.
- o. Sometimes a project dictionary (defining terms specific to the topic of the project) may be useful; it can be its own chapter.
- p. Being consistent in your own terminology is always helpful, especially for large documents. I type a list of the terms I choose to use when I find myself wondering which word is best, a or b; I include dictionary definitions and anything else that will help me make the best choice. This list becomes one of my own reference documents.