Guidelines For Producing Effective Documentation

This article is intended for subject matter experts (engineers, researchers, product managers and project managers) who need to work on documentation projects with a technical or marketing writer. The following guidelines are intended to help both you and the writer assigned to the project in producing clear and easy to read documentation.

Rule 1 Never consider the time you invest in writing or planning documentation as wasted time

Like any well-designed project, the production of good documentation requires clear planning and a considerable investment of time and resources. This may seem like a pain to you, especially when you are overloaded with other work. Rather than viewing documentation and the lengthy meetings with the "non-specialised" technical writer who needs to be explained step by step the simplest things, as a necessary evil, you should see it as a tool for helping you clarify your product to yourself as well as to others.

One of the problems of design is that when you become bogged down in the gritty details and mechanics you may loose site of the forest, for all the trees. Documentation not only provides you with a roadmap of the forest, it also presents an overall perspective, an opportunity to step out of the logger's mindset and see the larger plan or goal. Where are you going? Are you missing anything? Have you included everything that needs to be included?

Your discussions with your writers may help identify problems that you were not aware. The documentation process helps you to place what you are doing in perspective and keep in focus the ultimate purpose or use of the product being designed.

Preferably an outline should be produced that covers the major sections of the documentation. The outline is designed to lead the reader in a logical manner through the task, procedure or description being described.

Make sure your time allotment for a project takes into consideration time devoted to documentation.

Rule 2. Don't take what you say or write for granted

What may seem clear and obvious to you may not appear so to someone from outside the company, who is not familiar with the concepts and jargon that you use daily.

When a writer asks you what you mean by something, the answer may seem obvious, but it may not be. Language needs to be taken apart, examined for its basic concepts and then reassembled. Often, drafts need to be rewritten several times, to clarify the meaning and focus the text to fit the reader's needs.

Information that has been assembled from a technical or development perspective needs to be presented in a form suitable for the purpose of the document and the intended reader. Readers of manuals or brochures will probably not need to know any technical details, other than on a broad, conceptual level. This requires removing information not relevant to the reader.

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Rule 3. Provide plenty of feedback and input

The basic formula for documentation is:

Quality of input = quality and clarity of output

Remember this formula the next time you give feedback. Writers depend on receiving good quality information. You are responsible for ensuring that the information you provide is comprehensive and accurate.

Feedback should be concise and to the point. It should:

- Refer to specific items
- Provide clear guidelines for what needs to be changed
- Preferably be presented as a list of to do items or as text to be edited/changed in the document

You may not be sure of the precise problem with the documentation. Something may feel wrong or be missing, or a description of a concept or procedure may feel incomplete. Trust your gut feeling and explore this further. You know the product. Ask yourself or the writer “What do you mean by this?” Try rephrasing unclear sections in a way that communicates the way that you see the product.

Use diagrams and examples to explain what you mean.

Finally, if a writer requests information or feedback, don’t procrastinate and delay. This holds up the entire documentation process, since the writer cannot proceed until your feedback or information has been received.

Rule 4. Be prepared for several drafts

Clear documentation, like any other activity, requires constant rethinking and reshaping. Concepts, terminology and processes need to be identified, written about, clarified, rewritten about, discussed and honed. Writing is a cyclical process. Each round of feedback produces a document that is clearer to read, more comprehensive and accurate. The more input received from different perspectives and different readers, the more reliable and accurate will be the nature of the information you produce.

Unfortunately, the myth of dashing off a draft in one sitting, which contains everything that needs to be said in a clear way, is unpractical. It would be similar to asking a software engineer to produce a program in one draft.

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Rule 5. Be on friendly terms with your writer

The writer assigned to your project is there to help you. He/she is not an added nuisance that is a drain on your resources and time. The writer's purpose is to take the problems and considerations that go with documentation off your hands.

The task of documenting a project is both lengthy and time-consuming – technical writers are employed to take over responsibility, allowing you to devote your energies where they are most needed.

Don't cut short or avoid your writer, for fear of wasting your time. Your patience will pay off.

Rule 6. Make sure all stages of design are well-documented

It pays to invest time and energy at the start of a project in clarifying the concepts of your design, through white papers, product proposals, presentations, diagrams and system specification documents. The more complete the documentation, the more information will be available at a later stage for user-orientated manuals and other external documents.

Rule 7. Involve your writer in all stages of the product design

Your writer is a valuable resource. Don't involve him/her at the last stage, in the final rush to complete the project.

The writer should be involved in all stages of a project. An experienced writer will be able to provide a bird's eye view of the entire project and its components. Such a writer can integrate and synthesise information from different sources, written over different time periods. A writer who has been involved in all stages of documentation will be able to fill in gaps and make critical decisions about the contents of a manual, with the minimum of investment from the product manager and engineers.

Rule 8. Writing is team work

The final documentation product should be the result of the combined input and feedback from the entire team: engineers, product managers, writers and quality assurance staff. Each professional member of the team can add something from his or her own perspective that can contribute to the value of the documentation and the project. Remember this when you are asked to offer feedback or if it is your task to coordinate and ensure that other members of the team contribute their feedback.

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Rule 9. Be Flexible in your expectations and demands

Be prepared to be flexible in your expectations and demands. You may have to share a writer with several other product managers, each with their own deadlines. A busy writer, with several projects on hand, may not be in a position to drop everything else and devote all their time to your project. It is therefore important that you plan your documentation needs in advance, together with the writer. This will enable him/her to schedule time for you.