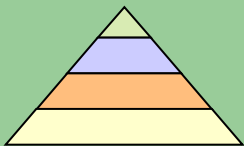


Documentation Tips and Techniques



Presented by:

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Documentation Manager

Agenda

- **Introduction**
- **Part 1 – High Level Documentation Issues**
- **Part 2 – The Big “C”**
- **Part 3 – Miscellaneous Tips**

Introduction

Time is at a premium ...

- **The nature of our work is multi-varied, and (almost) always a race against time**
- **There are tried-and-true techniques, but there is also a lot of inspiration and perspiration involved**

Adopt and Adapt

- **Opening screen showed 4 objects:**
 - **Pencil and paper (classic, often best tools)**
 - **Pyramid (hierarchy, structure, order, interdependence)**
 - **Light bulb (improvisation, inspiration)**
 - **Person working at all hours of day/night**

Rules and Rulers

- **Arm yourselves with:**
 - **Style Guide**
 - **Templates**
 - **Rules**
 - **Milestones, best practices, etc.**
(things to aim for and measure against)

Part 1 –

High Level Documentation Issues

- 1. Documentation ID**
- 2. Documentation Workflow**
- 3. Meeting, Beating, Cheating Deadlines**

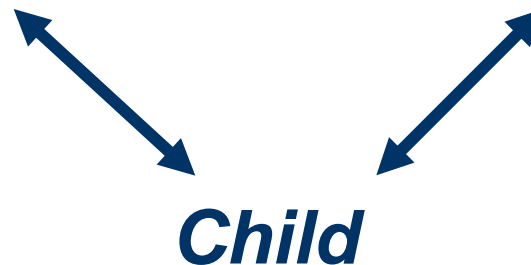
Documentation ID

- Concept or requirement
 - ❑ Request, recommendation
 - ❑ May start from scratch, or copy of existing document(s)
- Finished product/contents
 - ❑ One-time document (press-release) vs. ongoing (manual)
 - ❑ Single or multiple formats (print, Web, Help)
- Target Audience
 - ❑ Internal – may be rough
 - ❑ External – must be highly polished (even draft)

Documentation ID

Roles and Responsibilities

- Documentation is a living/dynamic entity
- Assignment of who is responsible for what
- Analogy: *Parent* ↔ *Teacher*



Documentation ID

Documentation Lifecycle

- Implementation processes (phases)
 - ❑ Interview, research (as required), copy of existing doc(s)
 - ❑ First and subsequent drafts
 - ❑ Review (peer-review, internal, external)
 - ❑ Editing (light, thorough)
 - ❑ QA (thorough content review, test document)
 - ❑ Approval (authorized person signs-off – record this!)
 - ❑ Release (delivery)
 - ❑ Storage and retrieval (read / write privileges, copying / cloning)
 - ❑ Follow-up, feedback and debriefing

Documentation Workflow

- Documentation request or requirement
- Documentation loop (pre-release)
- Documentation loop (release)
- Storage and delivery
- Follow-up, feedback, debriefing (post-release)

Request Turnaround Time Estimation

- Request to locate document
 - ❑ Relatively quick response time
 - ❑ Search, locate and deliver existing document
 - ❑ Search, respond that no document exists
- Request to create/modify document
 - ❑ Variable response time dependant on many factors
 - ❑ Minor vs. major effort
- Request to edit/translate/format document
 - ❑ Variable response time dependant on many factors
 - ❑ Light vs. thorough

Documentation Workflow

Request Protocols and Utilities

- Who may request, how, and when, is an important requirement in protocol rules that should be set as a company or department policy, ahead of time.

Documentation Workflow

Request Protocols and Utilities (cont'd)

For example, a request to:

- Locate a document (**non-destructive**)
 - ❑ Any department personnel may make such a request (repository)
- Translate or create a document (**constructive**)
 - ❑ Authorized person from any department may make such a request
 - ❑ Request via utility/mechanism for assigning and tracking tasks
- Modify (edit/format) a document (**potentially destructive**)
 - ❑ Authorized by the department the document belongs to
 - ❑ Request via utility/mechanism for assigning and tracking tasks
 - ❑ Requires versioning (revisioning) mechanism to track changes

Documentation Workflow

Request Protocols and Utilities (cont'd)

- Except for a simple search to locate a document, all work that is to be performed on documentation requires opening a task in a utility that assists in assigning and tracking tasks.
- Person opening a task must include all relevant telephone numbers, and make sure to notify all resource persons, and the approver to be available for questions and reviewing.

Documentation Workflow

Request Information

- All of the following information is required in the company's task assignment and tracking utility:
 - ❑ Document name (complete and exact)
 - ❑ Person responsible to provide contents or answer questions (key resource person) – provide telephone #(s)
 - ❑ Person responsible to give approval – provide telephone #(s)
 - ❑ Due date and time for internal review and approval (first draft) (- time factor/scheduling issues)
 - ❑ Due date and time for final, delivered product
 - ❑ Reporting (billing) code
 - ❑ Hours allocated to the current task (- time/scheduling)
 - ❑ Estimated number of pages (to create/modify)
 - ❑ Miscellaneous – list relevant source documents, resource persons, potential problems (unavailability at certain times)

Documentation Workflow

Search Request Result

- If no document found, it may need to be created – this is a new request.
- Is there a ‘version’ requirement? Pinpointing the exact version (from “descriptions”, as opposed to specific data like version #, or date and time) can take time
- If document is found, is it for delivery (PDF), view only (PDF), or editing (Word)?

Note: If PDF does not exist, it will take time to create, verify, and lock it.

Documentation Workflow

Create/Modify Request

- Creation (almost the same as modification)
 - If starting from scratch – make sure to use the correct template (Ask documentation department)
 - If copying another document as a basis, make sure it is the most up-to-date, and has most up-to-date template (Ask documentation department)
- Modification
 - Specify all sections that need to be updated
- Take care not to generate Clones !!!

Documentation Workflow

Edit/Translate/Format Request

- The processes of editing, translating and formatting are all under the assumption that the document's contents are fairly stable.
- Based on the assumption, the document is either in an initial or interim stage (e.g. before review), or it is at or near a final stage (e.g. before delivery).
- If the first case, then “Light” work is more than likely enough to sustain it in its continuing development.
- A “Thorough” job is necessary only for the final stage, and for release.
- The difference between “Light” and “Thorough” will determine the delivery time as well.

Documentation Workflow

Document Editing with Tracking

- Editing (Word):
 - Activate **Track Changes** (from the MS-Word menu bar, select **Tools → Track Changes**) so that all modifications are recorded.
 - Include a brief description of the modifications, and any important related information, such as who requested, or why (e.g. new functionality) in **Document Release Notes** section.
- Take care not to generate Clones !!!

Documentation Workflow

Document Release Notes

- A brief description of the changes made to the document must be recorded in the specific section for this, titled “**Document Release Notes**” (or: “**Document Revision Notes**”).
- For example:

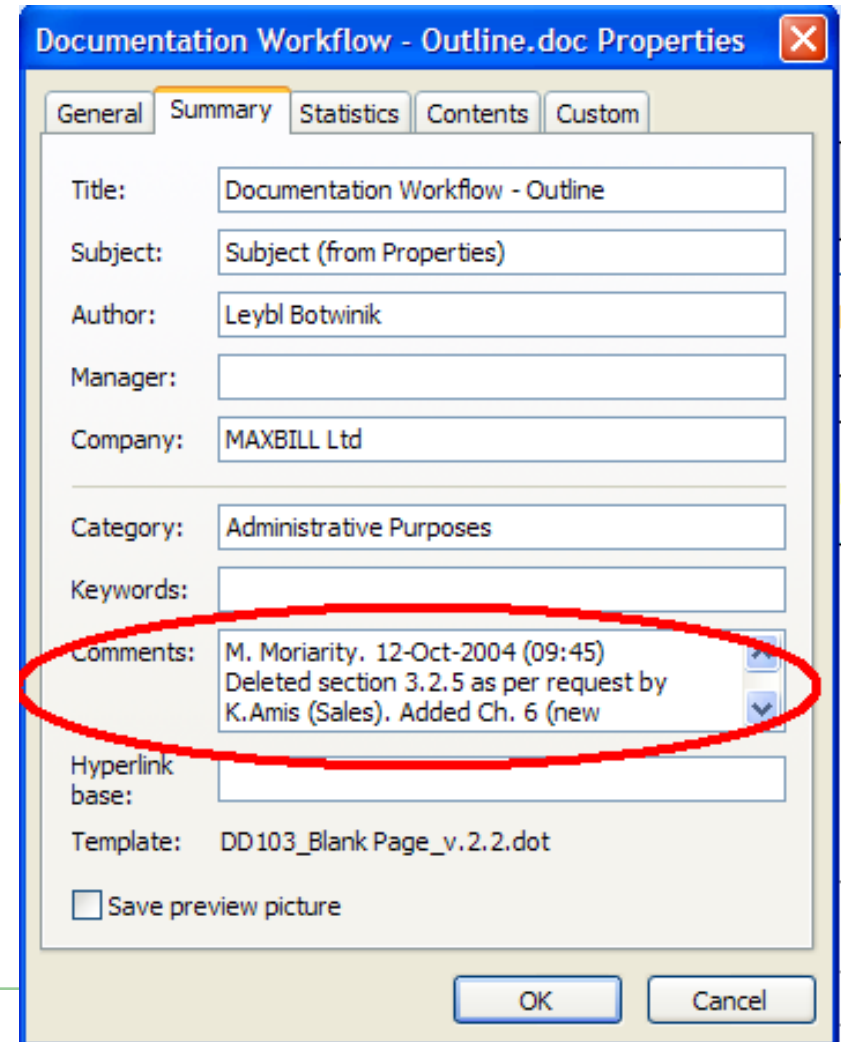
Document Release Notes

Date	Revised by	Approved By	Description	Document Revision
12-Oct-2004	M. Moriarty	S. Holmes	Deleted section 3.2.5 as per request by <u>K. Amis</u> (Sales). Added Ch. 6 (new functionality).	01

Documentation Workflow

Document Properties Comments

- If there is no **Document Release Notes** the same brief description of the changes made to the document must be recorded somewhere else, e.g. in the “Comments” field of the Properties window.
- For example ----->



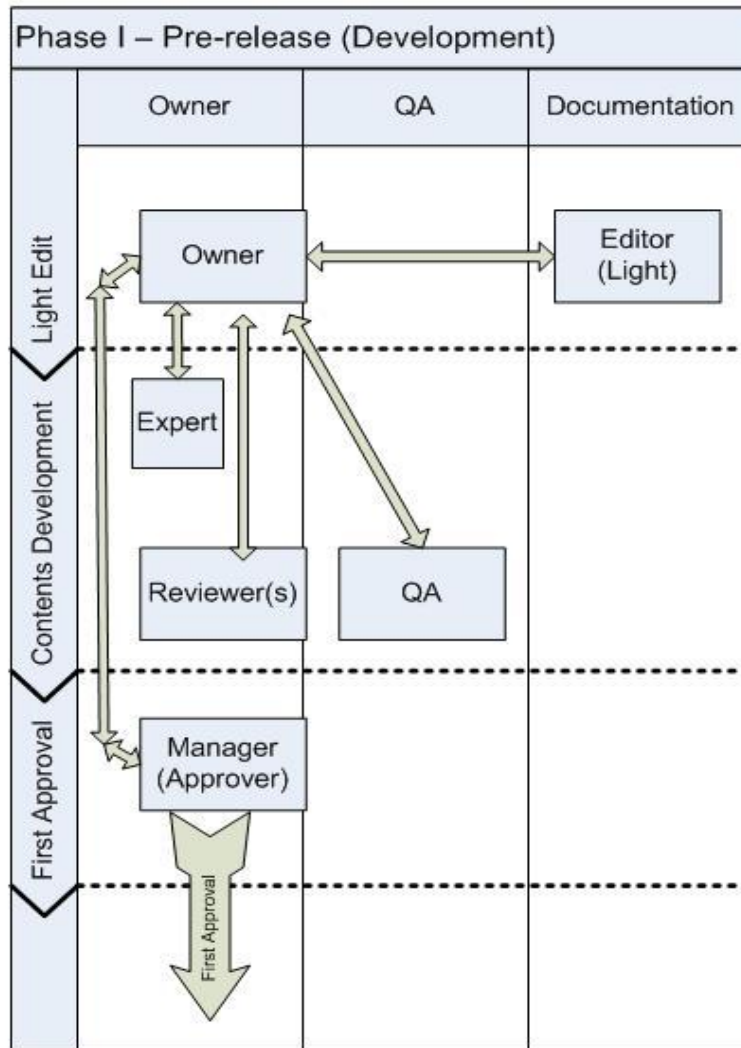
The screenshot shows a dialog box titled "Documentation Workflow - Outline.doc Properties" with a close button (X) in the top right corner. The dialog has five tabs: "General", "Summary", "Statistics", "Contents", and "Custom". The "Summary" tab is selected. The fields are as follows:

- Title: Documentation Workflow - Outline
- Subject: Subject (from Properties)
- Author: Leybl Botwinik
- Manager: (empty)
- Company: MAXBILL Ltd
- Category: Administrative Purposes
- Keywords: (empty)
- Comments: M. Moriarity. 12-Oct-2004 (09:45)
Deleted section 3.2.5 as per request by
K.Amis (Sales). Added Ch. 6 (new)
- Hyperlink base: (empty)
- Template: DD103_Blank Page_v.2.2.dot
- Save preview picture

The "Comments" field is circled in red. At the bottom of the dialog are "OK" and "Cancel" buttons.

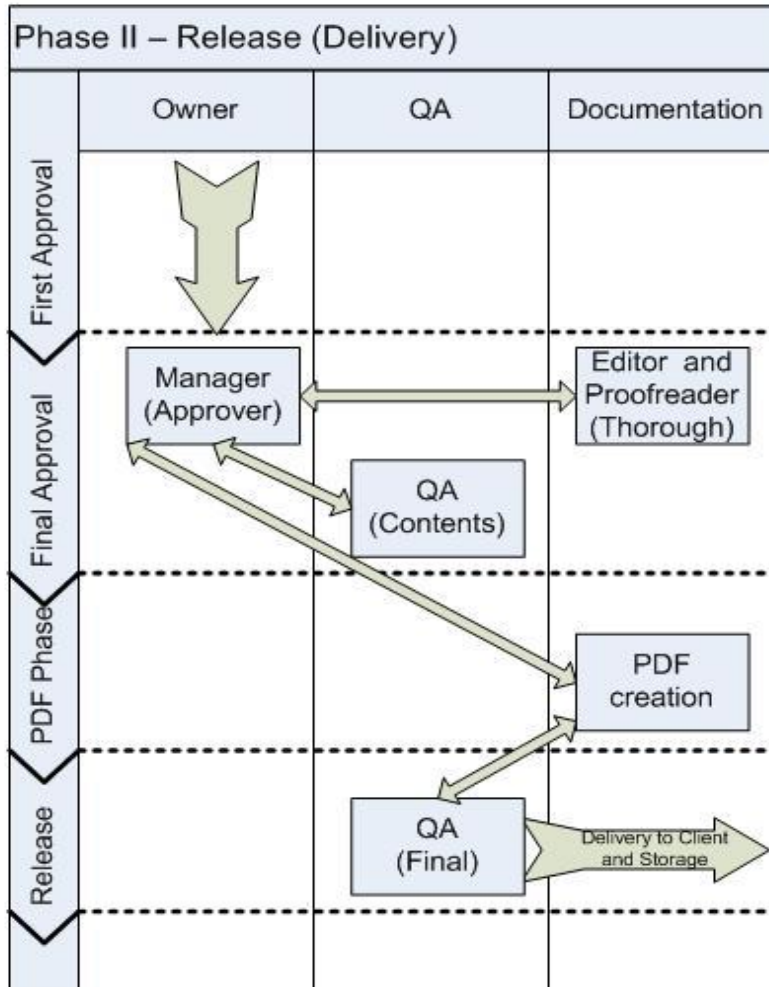
Documentation Workflow

Documentation Pre-release



Documentation Workflow

Documentation Release



Meeting, Beating, Cheating Deadlines

- **Light vs. thorough edit**
- **One-pass vs. multi-pass**
- **Ping-pong segments as completed**
- **Last resort: Disclaimers and TBDs**
- **Assistance by peers (and others)**
 - **Short segments – cut and paste**
 - **Major segments – may require collation editor**

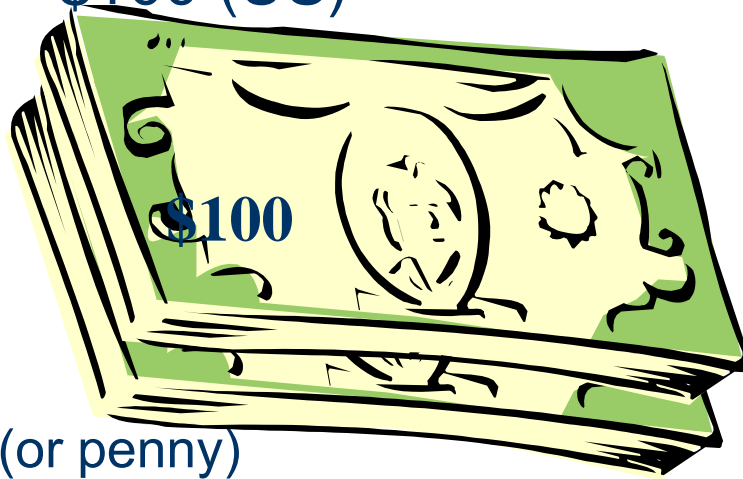
Problem Escalation

- **Problems meeting the deadline? Escalate!**
- **Urgent notification to superiors and “customer” of potential problems meeting deadline (or special requests of taxis, meals, lap-tops)**
- **Offer “Options” and “Recommendations”**
- **Request immediate feedback, decision on how to proceed**

Part 2 – The Big “C”

Big “C” vs. Little “¢”

- Understanding Dollars and Sense (of proportion and of priority)
- C-note = \$100 (US)

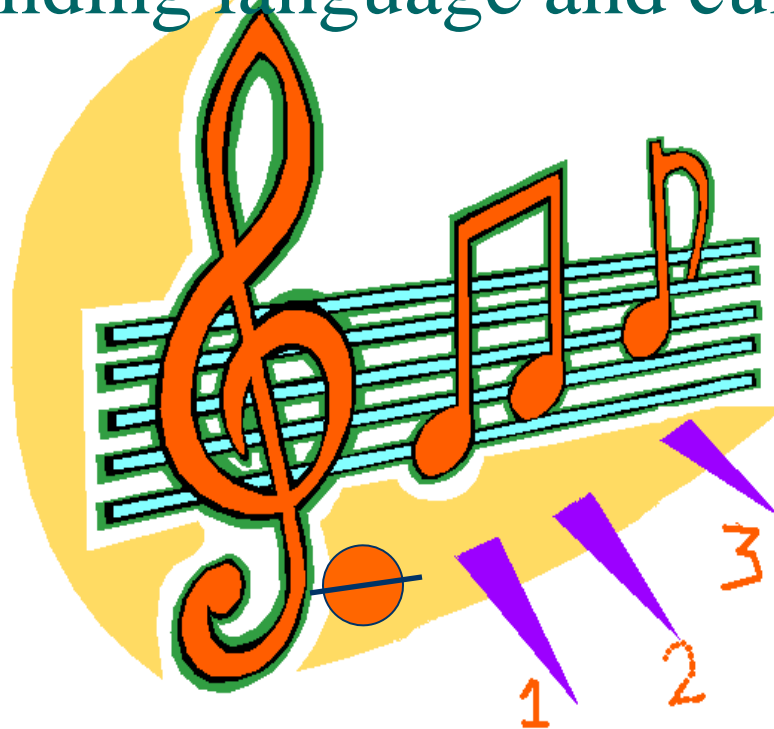


- ¢ = cent (or penny)



Big “C” vs. Big “Si”

Understanding language and cultural differences



“C” Note (“Do”) vs “Si” Note (“B”)

The Big “C”: Some Simple Rules

- C_{orrect}
 - C_{lear}
 - C_{oncise}
 - C_{onsistent}
- ❖ C_{hecked}

The Big “Correct”

- Documentation should be correct (content-wise first, language-wise second) due to legal/contractual obligations and requirements
- You may not be the expert, but you are responsible... until someone signs off on your doc

The Big “Clear”

- Understandable – also for non-native speakers
 - Note, that although most marketing documents contain a lot of gibberish (nature of the game), they don't need to 😊
 - Avoid abbreviations
- Correct use of punctuation
- Clear flow of concepts and documentation structure (use the Table of Contents to ‘test’)
- Avoid 4th level headings

The Big “Concise”

- Short and to the point

The Big “Consistent”

- Better the same mistake consistently throughout the **dok**, rather than correct in only some places in the **dok**
- There is more chance of picking up on the mistake
- Less confusing for the reader

The Big “Checked”

Candidate for a Pullet Surprise

I have a spelling checker,
It came with my pea see.
It plane lee marks four my revue
Miss steaks aye kin knot sea.
Eye halve ran this poem threw it,
Yore sure reel glad two no.
Its vary polished in it's weigh.
My checker tolled me sew.

Etc.

--Jerrold H. Zar

The Big “See”: GUI and Visuals

Graphics:

- ❑ Large icons (magnify)
- ❑ Visible graphs and screenshots
- ❑ Circle, or arrows pointing to crucial part of image
- ❑ Snip to zoom in to crucial part of image
- ❑ Describe screenshots and other figures (captions)

The Big “See”: GUI and Visuals (cont’d)

Presentations:

- Use a “calm/quiet” background color in slides
- Minimize:
 - “noise” – too much text per slide (small lettering)
 - “psychedelics” – colors, clips, FX (special effects)
 - “animation” – often slows things down due to multiple-clicks to get at some material
- The more effects you put in, the longer it takes to prepare, test, troubleshoot, and modify

The Big “Sea”

- Sink or swim:

These simple rules will “C” you through safely !



Part 3 – Miscellaneous Tips

Printouts

- **As editing tool (hardcopy backup, red-marks are also something to show the ‘boss’ why it’s taking so long... easy to flip through)**
- **Before delivery**
 - **Word doc may have hidden problems**
 - **Excel sheets should be print-tested!**

Starting Point / Cover Page

- **Word – Always first sheet**
- **PowerPoint – Always first screen**
- **Excel – Not automatically first sheet, or first cell, rather where last saved**

Headers, Footers, Dates, etc.

- **Word – Careful of segments, odd/even pgs**
- **Excel – Not always obvious; lots of work**
- **PowerPoint – Set up Master slide**
- **Make sure to include at least:**
 - **Company name and proprietary notice**
 - **Month and year (use 3-letter month)**
[8/12/2005: 12-Aug-2005 or 8-Dec-2005?]

Importance Of Correct Punctuation

- Dear John:
I want a man who knows what love is all about. You are generous, kind, thoughtful. People who are not like you admit to being useless and inferior.
You have ruined me for other men. I yearn for you. I have no feelings whatsoever when we're apart. I can be forever happy - will you let me be yours?
Gloria
- Dear John:
I want a man who knows what love is. All about you are generous, kind, thoughtful people, who are not like you. Admit to being useless and inferior.
You have ruined me. For other men, I yearn. For you, I have no feelings whatsoever. When we're apart, I can be forever happy.
Will you let me be?
Yours, Gloria

[From Games Magazine (1984)]

Spell Checker

- Eye halve a spelling checker
It came with my pea sea
It plainly marks four my revue
Miss steaks eye kin knot sea.
Eye strike a key and type a word
And weight four it two say
Weather eye am wrong oar write
It shows me strait a weigh.
As soon as a mist ache is maid
It nose bee fore two long
And eye can put the error rite
It's rare lea ever wrong.
Eye halve run this poem threw it
I am shore your pleased two no
Its letter perfect awl the weigh
My checker tolled me sew.

[Based on an e-mail forwarded by Pauline Sinclair, January 2002]

Thank you for your attention
and participation !

For comments
and feedback:

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