

Writing OIT Technical Documentation

This document contains guidelines for technical writers/content coordinators responsible for creating print and online documentation for OIT services.

HOW to USE

- Use this document to find out how to create technical documentation the OIT way. Learn more about what it takes to write OIT documentation, including our preferences for headings, instructions and naming conventions.
- This document covers only issues related to creating technical documentation. For more in-depth information related to style or grammar, please see the table below.

What

OIT Proper Names (conventions)

OIT style & conventions

Style, grammar, naming in technical documentation

Grammar

Where

Talking About OIT

OIT Style Guide

Microsoft Manual of Style

Chicago Manual of Style

Strunk and White's Elements of Style

- All documents associated with this guide are also available online at <http://www.oit.umass.edu/about/site/index.html>

The documentation production cycle has three stages: **Explore, Develop & Review**

EXPLORE

Become the user. For starters, become familiar with the application you will document. Understand how it works, what it can do and what it can't. Install it on your computer and play around. Take notes. What are some aspects that someone using this product for the first time should know?

Set an overarching goal. Ask yourself the following questions:

- **What is the primary purpose** of this document? To educate? To raise awareness? To guide users through a procedure? Z
- **What type of document** are you writing? Is it a configuration guide? A troubleshooting guide? An information sheet?
- **Who is your target audience?** Is your audience external (e.g., the campus community) or internal (e.g., OIT staff)

Based on your answers, **develop a goal** for your document (e.g., By reading this document, students will know how to install and configure anti-virus software). As you're writing, keep this goal in mind.

Set a deadline. What is a realistic date by which you can complete the documentation? Before setting the deadline, please assess the time for the initial write-up and the time for revisions and feedback.

DEVELOP

Start drafting your document:

Headings

A few rules for OIT headings:

- Use active voice
- Avoid gerunds
- Use ampersand (&)
- Capitalize verbs & nouns

Correct:

Install & Configure SFTP Software

Incorrect:

Installing and Configuring SFTP Software
Get SFTP Software Installed

Step-by-step Instructions

- **Document every single step.** Do not assume that users will know how to move from one step to another (e.g., from one screen to another). The most common mistake technical writers make is omitting steps that seem easy or intuitive. When reviewing a user guide, ask yourself: have I documented every single step? Does my reader know how to get from step A to step Z?
- **Follow the sequence: where** (situate the user) + **what** (tell him/her what needs to be done) + **what consequence** (what will happen after the action/command is completed). For example, *In the General window, click Accounts (upper left corner). The Accounts window will open.*
- **Situate the user.** In some instances users may have a hard time locating a command name or action prompt in a window/screen (especially when these are verbose and complex). In these case, make sure you provide more specific directions. For instance, *On the Preferences page, under Web Browser (left-hand side), select Advanced.*
- **Document every action.** If several actions need to be taken on the same window/screen, document every single one in bulleted sub-steps. For instance,

4. Under Server Information:

- *Select **IMAP** as the type of incoming server.*
- *In the Incoming Server field, enter **mail-?.oit.umass.edu** where ? is the first letter of your NetID (OIT Account user name).*
- **Use > for long sequences**, especially in the beginning of a procedure to track navigation. For example, *Go to Menu > Course Guides > Search Schedule of Classes*

Language

- **Present information in a simple, concise manner**, consistent throughout the entire document. Eliminate "nice to know" information or information that is not strictly necessary to the user. Ask yourself: what does the user need to know? If there is nothing to say, don't say anything.
- **Make sure you don't clutter the page** with text; leave enough white space for users to quickly see the text.
- **Use brief, yet complete sentences.** Avoid meaningless words. Search your writing for useless or empty words and delete them.
- **Use the active voice** rather than the passive voice. The passive voice is characterized by some form of the verb "to be." For example:
 - Two instructions convert the data.* (Active voice, 5 words) (Note the direct action flow from the noun "instructions" to the verb "convert.")
 - The conversion can be done by two instructions.* (Passive voice, 9 words)

- **Use more verbs and fewer nouns.** Avoid changing verbs into nouns by addition, such as *-tion, -ment, -ance*, etc.
- **Use the present tense, second person** (implied 'you') when possible.
Go to Window > Mail & Newsgroups.
- **Identify and avoid all jargon**, i.e., technical words that seem obvious to you and other technical staff, but not the user.

Fonts

Fonts for Web pages

The names of inactive agents in an application, such as a window, screen, field, table, icon, etc. are written in Courier (window or FieldData tags in XML), using the same font size as the surrounding text.

In the *Pharos Remote* window, the print jobs are listed by the customer's NetID in the Owner column.

Active agents, things that one clicks, or text that one enters into fields, are written in **Courier Bold** (ClickIt tag in XML), using the same font size as the surrounding text.

Click the **Photos** icon to open your library of images.
Go to **Start > Programs > Internet Explorer**.

Example of both instances in one sentence:

In the *Viewer* window, click **Accept**; the *Timeline* window will open.

Fonts for handouts/print documentation

The names of inactive agents in an application, such as a window, screen, field, table, icon, etc. are written in *Italics* using the same font and font size as the surrounding text.

In the *Pharos Remote* window, the print jobs are listed by the customer's *NetID* in the *Owner* column.

Active agents, things that one clicks, or text that one enters into fields, are written in **Bold** using the same font and font size as the surrounding text.

Click the **Photos** icon to open your library of images.
Go to **Start > Programs > Internet Explorer**.

Example of both instances in one sentence:

In the *Viewer* window, click **Accept**; the *Timeline* window will open.

Links

There is a wealth of information about creating usable, intuitive links out there. Just a few pointers:

- a. **Avoid 'click here'**. Links should be descriptive enough to give users an idea of what content is included in the hyperlinked page. Neither 'click' nor 'here' contain any information, and according to most Web designers, should not be used. In addition, only mouse-clicking visitors do in fact click, while others, including disabled users and users with touch screens do not.
- b. The sentence surrounding the link should provide additional information about the hyperlinked page. Compare:
 - *For background information on heart disease, [click here](#).*
The BBC Web site provides background information on [heart disease](#).
- c. **Links should be short** (not exceed 4 to 5 words). Long links, that include more information than necessary can be confusing. Similarly, too many links on a page/ in a block of text can also confuse the user. Ask yourself: are my links necessary? Are they comprehensive, yet brief enough? Do I have too many links on this page?

Naming Conventions

Depending on what type of documentation you are writing, follow the guidelines below for naming your document. These apply mostly for configuration and troubleshooting guides intended for the OIT Web site, but could also be used for print documentation. See the OIT Web site URLs for specific examples.

Operating System directory names

- *mac9, macx*
- *winxp, win2000, winme, win98*

Application names

- *operating system_applicationname*
- *win_winscp*
- *mac_jellyfish*

Paths

- *service/function/directory*
- *dialup/configuring/winxp*
- *Ethernet/troubleshooting/win2000*

Software names

Three rules of thumb:

- Use the full name (Manufacturer + Name + Version Number, e.g., Macromedia Dreamweaver MX 2004) in the beginning of any document. In subsequent instances, use the name only (e.g., Dreamweaver)
- Remember to use the version number of a given program especially if OIT supports multiple versions.
- For common Microsoft products, you can drop the manufacturer name (e.g., Internet Explorer rather than Microsoft Internet Explorer).

One other rule for naming URLs: **Avoid spaces, unnecessary numbers or characters.** An intuitive URL is easy to remember, pass over the phone and, in general, keeps the structure of any Web site clean and neat. See the difference:

- *http://www.oit.umass.edu/spire/for_staff/add_permissions.pdf vs. http://www.oit.umass.edu/spire/for_staff/add_permissions02.pdf*
- *<http://www-ims.oit.umass.edu/directory/dirnotes6.html> vs. <http://www-ims.oit.umass.edu/directory/update.html>*

Screenshots

We tend **NOT** to use screenshots for two reasons:

- They take up a lot of space, making the documentation longer (both online and in print)
- Users may have different versions of the same program or operating system: while the instructions may be correct, they may not see the same screenshots. As software is updated, screenshots may change from one version to another.

DO use screenshots when a procedure is very complex, and the image helps sort out the step one needs to take to complete it. Also, if an application contains specific icons, but no name (such as the service indicator icons in SPIRE), decide on a name for the icon and use its screenshot when writing up documentation.

If you need screenshots, use .jpeg and .gif files only. Find a descriptive name for your .jpeg file. If the documentation is published online, then always use alt tags.

Need More Help?

- See the **OIT Style Guide for Technical Documentation** (http://www.oit.umass.edu/about/style/web_guide.pdf) for stylistic issues: word choices, spelling and punctuation conventions specific to OIT documentation.
- Check the **Talking About OIT** document (<http://www.oit.umass.edu/about/style/names.html>) for OIT-specific names.

REVIEW

Distribute your draft to:

- **Your 'tech' guys for technical accuracy;** they will spot any technical inconsistencies your documentation may have.
- **Your colleagues for clarity and consistency;** let them know you need their feedback primarily on these two issues.
- **At least one user for user-friendliness & everything else;** ask him/her to test the documentation on a computer and write down comments. Collect their feedback and decide the extent to which your document will change. Make the changes, and you are all done.