

Cooking the Books: A Practical Guide to Documentation Design

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Why “A Practical Guide...”?

- Because theory is great for technical communicators, but of little use to our customers and readers.
- Because there is not a lot of broad-based practical knowledge available for technical writers.
- Because we need a common vocabulary to enable us to work with our customers.

How “A Practical Guide...”?

- Emerged from my own experience as a writer, editor, and STC competition judge of many types of documents
- Also emerged from a documentation survey performed for Thermo Electron
- What I surveyed:
 - Documents that enable customers to install, use, and service products
 - 77 documents from 14 Thermo business units
 - 12 documents from Agilent Technologies

How “A Practical Guide...”?

- Documents in survey:
 - Quick Start guides (small page, short document)
 - Installation guides (site preparation, hardware installation)
 - User guides (variously called operations manual, instruction manual, user guide, administration guide, configuration guide)

How “A Practical Guide...”?

- Documents in survey:
 - Reference manuals (usually for programmers, details a language or a programming interface)
 - Service manuals (sometimes combined with a user manual, not normally intended for end-users)
 - Information and application manuals (provides context or additional information, not absolutely required to use a product)

How “A Practical Guide...”?

- Developing the common vocabulary:
 - Product managers know products, not documents.
 - Documentation managers know documents, not products.
 - Required a simple product taxonomy, meaningful to both groups, that classified products by the types of information users required.

About the 6 Product Classes

Type	Size	User Interface
Hardware	Small	Simple
	Large	Rich
Software		Simple
		Rich

About the 6 Product Classes

- Definitions:
 - “Hardware” refers to any physical product, not just equipment.
 - “Hardware” includes embedded software.
 - “Software” refers to a non-physical product, one that does not require any user documentation of hardware.

About the 6 Product Classes

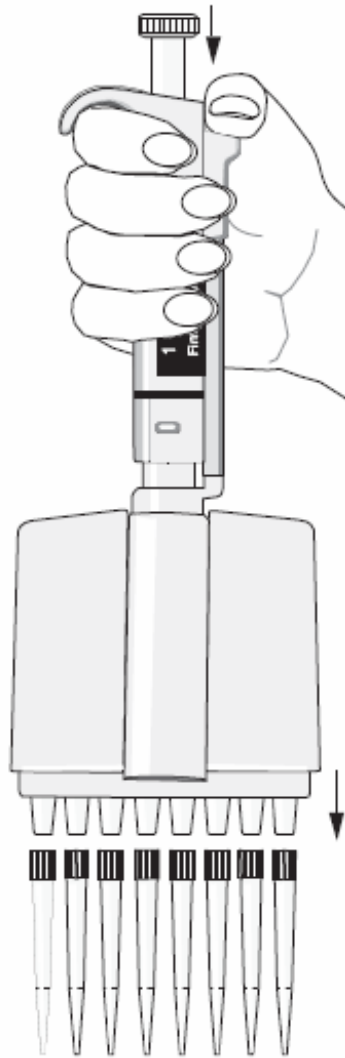
- Definitions:
 - “Large hardware” is any hardware product requiring special site preparation.
 - “Simple user interface” is any interface that a novice can learn to use in one hour.
 - “Rich user interface” includes programming interfaces.

About the 6 Product Classes

- A note:
 - A product that has different types of users may be a member of more than one product class.
 - Combine the classification of the product with a classification of the product's users.

About the 6 Product Classes

- Examples of small hardware with a simple user interface:
 - Sample container
 - Manual pipettor
 - Debit card terminal
 - Consumer digital camera
 - RapidStak instrument loader



About the 6 Product Classes

- Examples of large hardware with a simple user interface
 - BioBank
 - Airport kiosks



About the 6 Product Classes

- Examples of small hardware with a rich user interface
 - Point-of-sale terminal for restaurants
 - RapidStak controlled by another device

About the 6 Product Classes

- Examples of large hardware with a rich user interface:
 - Commercial aircraft
 - POLARA lab systems



About the 6 Product Classes

- Examples of software with a simple user interface:
 - Wizards
 - Browsers
 - Simple programmatic interfaces
 - Media players

Add Printer Wizard

Local or Network Printer

The wizard needs to know which type of printer to set up.



Select the option that describes the printer you want to use:

- Local printer attached to this computer
 - Automatically detect and install my Plug and Play printer
- A network printer, or a printer attached to another computer



To set up a network printer that is not attached to a print server, use the "Local printer" option.

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Cancel

About the 6 Product Classes

- Examples of software with a rich user interface:
 - emacs
 - Office productivity applications
 - Integrated development environments
 - Database administration tools
 - Et cetera, ad infinitum

Microsoft PowerPoint - [Cooking the Books.ppt]

File Edit View Insert Format Tools Slide Show Window Help Adobe PDF

Type a question for help

03%

Times New Roman - 24

Design New Slide

Outline Slides

- Sample container
- Manual getter
- Debit card terminal
- Consumer digital camera
- RepeatStk

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13 **About the 6 Product Classes**

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 - Browsers
 - Plug-ins
 - Simple programmatic interfaces
 - Media players

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20 **About the 6 Product Classes**

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 - emacs
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 - Et cetera, ad infinitum

Click to add notes

Slide Layout

Apply slide layout:

Text Layouts

Content Layouts

Text and Content Layouts

Show when inserting new slides

Slide 20 of 42

Default Design

Documents for the 6 Product Classes

- Required information:
 - Installation
 - Usage
 - Maintenance (hardware only)
 - Safety
 - Legal

Documents for the 6 Product Classes

- Required information, but not necessarily the responsibility of technical writers:
 - Service
 - Manufacturing

Documents for the 6 Product Classes

- Optional information, not necessarily the responsibility of technical writers:
 - Training
 - Marketing Communications

Documents for the 6 Product Classes

- How the required information is distributed across the document set depends on several factors:
 - Audience types
 - Printing, distribution, and maintenance costs
 - Customer relationship type

Documents for the 6 Product Classes

- Small hardware with a simple user interface:
 - Unpacking guide: on package or in a “Read Me First” document
 - What is in the package?
 - How do I unpack it?
 - Who do I contact if there is something missing or broken?
 - What do I do with the packing materials?

Documents for the 6 Product Classes

- Small hardware with a simple user interface:
 - Installation guide
 - Where does it go?
 - What connections or supplies does it need?
 - How do I know it works?
 - Who do I contact if it's not working?

Documents for the 6 Product Classes

- Small hardware with a simple user interface:
 - User guide
 - What does it do and why should I care?
 - What safety issues should I know about?
 - How do I use the user interface?
 - What are the main tasks I perform with this product and how do I perform them?
 - Who do I contact if it's not working?
 - Optional:
 - How does it work?
 - How do I troubleshoot?

Documents for the 6 Product Classes

- Small hardware with a simple user interface:
 - User guide
 - What does it do and why should I care?
 - What safety issues should I know about?
 - How do I use the user interface?
 - What are the main tasks I perform with this product and how do I perform them?
 - Who do I contact if it's not working?
 - Optional:
 - How does it work?
 - How do I troubleshoot?

Documents for the 6 Product Classes

- Small hardware with a simple user interface:
 - Service guide:
 - What do I need to know to service this product?
 - What are this product's main components and how do they work together?
 - What safety issues should I know about?
 - What are the serviceable components?
 - How do I identify the problem component(s)?
 - How do I swap the problem component with a new component?
 - What are the main maintenance tasks and how do I perform them?
 - Who do I contact if I can't identify or fix the problem component, or if I need more components or supplies?

Documents for the 6 Product Classes

- Large hardware with a simple user interface:
 - Site preparation guide:
 - Where does it go and how much space does it need?
 - What supporting infrastructure and human resources are required?
 - Are there any safety issues I need to know about?

Documents for the 6 Product Classes

- Large hardware with a simple user interface:
 - Unpacking guide:
 - Same as for small hardware
 - Installation guide:
 - How do I move it?
 - Other topics same as for small hardware with simple user interface.

Documents for the 6 Product Classes

- Large hardware with a simple user interface:
 - User and Service Guides:
 - Same topics as for small hardware with simple user interface

Documents for the 6 Product Classes

- Small hardware with a rich user interface:
 - Unpacking guide:
 - Same topics as for small hardware with simple user interface.
 - Installation guide:
 - What do I need to know to install this product?
 - How do I configure this product?
 - Other topics same as for small hardware with simple user interface

Documents for the 6 Product Classes

- Small hardware with a rich user interface:
 - User guide:
 - What do I need to know to use this product?
 - What are this product's main user interfaces and how do they work together?
 - Other topics same as for small hardware with simple user interface
 - Service guide:
 - Same topics as for small hardware with simple user interface

Documents for the 6 Product Classes

- Large hardware with a rich user interface
 - Site preparation guide:
 - Same topics as for large hardware with simple user interface
 - Unpacking guide:
 - Same topics as for other hardware products.
 - Installation guide:
 - What do I need to know to install this product?
 - How do I configure it?
 - Other topics same as for large hardware with simple user interface

Documents for the 6 Product Classes

- Large hardware with a rich user interface
 - User guide:
 - Same topics as for software with rich user interface
 - Same topics as for large hardware with simple user interface
 - Service guide:
 - Same topics as for small hardware with simple user interface

Documents for the 6 Product Classes

- Software with a simple user interface
 - Installation guide (standalone software only):
 - What are the system requirements?
 - How do I install the product?
 - How do I know it's working?
 - Who do I contact if there is a problem?

Documents for the 6 Product Classes

- Software with a simple user interface
 - User guide:
 - None! The user interface itself should tell the user how to use the product.
 - Put help in the user interface: e.g., labels, tool tips.
 - Provide one link to more information.

Documents for the 6 Product Classes

- Software with a simple user interface
 - User guide:
 - If you must... same topics as for small hardware with a simple user interface, except probably for safety issues

Documents for the 6 Product Classes

- Software with a rich user interface
 - Installation planning guide:
 - The software equivalent to large hardware product's site preparation guide
 - What other systems must this product work with?
 - What resources will I need: licences, processors, memory, storage, peripherals, operators, administrators, etc.?

Documents for the 6 Product Classes

- Software with a rich user interface
 - Installation guide:
 - Same topics as for hardware with a rich user interface, often with a special emphasis on configuration

Documents for the 6 Product Classes

- Software with a rich user interface
 - User guide(s):
 - Same topics as for hardware with a rich user interface
 - Often need more than one, one for each type of user: administrator, user, developer, etc.
 - Reminder: user guides for rich user interfaces include those describing how to use programming interfaces.

Documents for the 6 Product Classes

	Unpacking Guide	Site Preparation Guide	Installation Planning Guide	Installation Guide	User Guide	Service Guide
Small hardware, simple UI	Yes			Yes	Yes	Maybe
Large hardware simple UI	Yes	Yes		Yes	Yes	Maybe
Small hardware, rich UI	Yes			Yes	Yes	Maybe
Large hardware, rich UI	Yes	Yes		Yes	Yes	Maybe
Software only, simple UI				Yes	Maybe	
Software only, rich UI			Maybe	Yes	Yes	