

What does a Technical Author do?

That's a question I'm often asked whenever I have to enter my occupation on a form. More importantly, clients and agencies often ask this question in one way or other. This document is for you, if you are likely to recruit a technical author, or to commission work from one.

A technical author produces information on technical subjects. This information can be many different kinds of things, for example:

- *Business procedures for internal company instructions or to comply with ISO standards*
- *User instructions for such things as computer software, computer hardware, telecommunications equipment, scientific instruments or consumer electronics*
- *Technical documentation for software or hardware engineers*

The output may be in various forms:

- *Paper*
- *Electronic (for example, help screens)*
- *Multimedia*

It may be for:

- *Users (book, manual, handbook, training course, script for an audio-visual program)*
- *Developers or engineers (technical documentation, specifications or test scripts)*
- *Customers (marketing documents, white papers)*
- *Others*

I am using the term "technical author" in a wide sense, so some people who come under this description may have different job titles.

The important thing, which I hope to bring out in this document, is that the actual production of the deliverable copy is usually only a small, though essential, part of a technical author's work.

This is a personal view, so not all my colleagues will see everything the way I describe it here. I am writing from the point of view of a contract technical author, so writers of books for a mass audience and employees in large or small documentation departments may have different ideas on some points.

The work of a technical author

A technical author produces deliverable documentation of some kind. This may be a book, manual, set of specifications, web page, script or whatever, with or without illustrations or multimedia enhancements. What is common to all these is that something technical is explained in words. It is the technical author's skill in explaining something simply and clearly that produces the final result.

However, before the documentation is delivered, very much more has to happen. The technical author's work can be broken down into four main tasks.

- *Assessing the audience for the documentation, and the nature of the documentation required*
- *Collecting and sifting the information required*
- *Organising the information to meet the requirements of the audience*
- *Creating the physical documentation*

These do not necessarily happen one after the other, of course. Each task is composed of many smaller steps. One task may be begun while others are in progress.

Assessing the documentation requirements

A technical author first finds out as much as possible about the intended readership: the readers' work, knowledge and background, and the depth and breadth of the information they require. Once this is done, it is possible to decide what kinds of documents are required, and how they are to be presented to the readers.

Collecting the information

This is usually the most difficult and time-consuming part of a technical author's work. The information may be in fragments of documentation already existing (on paper or on disk), in computer code, in people's heads or in other forms.

I prefer to collect as much information as possible from such written sources as documents and code before conducting interviews. This means that I can draw up a list of specific questions to ask, and avoid taking up more than necessary of the time of busy people.

Collecting information is much like scientific research - extracting the hard-to-find, relevant information from much that is irrelevant - which is why I find my scientific research background so useful.

Organising the information

This is an essential step, because documentation that is not organised according to the reader's needs is almost useless. The reader must be able to find what he or she needs without having to hunt for it. Organisation is generally what makes a good manual rather than a bad one.

Creating the deliverable

If the earlier steps have been done correctly, this is usually the easiest, and sometimes the quickest, part of the process. The technical author presents the information in a clear way using the language most appropriate to the intended readers - non-technical and jargon-free for non-technical readers, and using appropriate technical terms for technical readers.

As part of producing the physical documentation, the technical author may also create templates and house styles.

Much research has been done over the last few decades into how people read and understand written language, and how to enable them to get the most out of a document with the least effort. A good technical author will make use of this. For some information about this, see Joseph M. Williams, *Style: Toward Clarity and Grace*, University of Chicago Press 1990.

The most important person: the reader

The very first thing to do when starting documentation is to determine who the readers will be, and in what circumstances they will use the documentation.

From this the technical author determines, in consultation with the client or other interested parties:

- *What information is to be provided*
- *What level of technical detail is required*
- *What type of documentation is required (it could be one document or more than one)*
- *How the documents are to be organised for ease of use*
- *How changes to the documents are to be controlled, to avoid multiple versions in circulation*
- *Who is to receive handover of the documentation after it is finished*

Documentation should be planned around the reader's needs. Manuals, for example, are generally best organised to reflect the tasks that the user must carry out. Other forms of organisation (for example, by menu option) are very useful in appendices or as additional reference manuals, but are usually not suitable for the main user guide.

Remember that user documentation represents your product or service to the user. Many people wish to see it before deciding on a major purchase.

Also, think of your technical author as representing your users to you. The technical author will have a good idea of what the users will expect of your product and how they will react to its user interface. So, involve the technical author fully in design, debugging and user interface testing.

What should you look for in a technical author?

In my personal opinion, the four most important attributes of a technical author should be:

- *An ability to collect information from diverse sources, and to collaborate with people in technical fields who possess the necessary information*
- *An ability to sift through masses of information, pick out relevant items and organise them*
- *A clear, straightforward and reasonably concise style in writing technical documents. The author should pay attention to detail, including spelling and grammar*
- *Understanding of the requirements of the users of the documentation*

Assessing these attributes may be difficult, but samples of the author's previous work should be inspected. You can ask the technical author about the sources of information used in the previous assignments, and the techniques used to analyse them for the documentation. Ask also how the documentation meets the requirements of the intended users.

In the case of the last item, it is very helpful if the technical author gets to meet users of the documentation, for example, through user-group meetings or by involvement in training.

Expertise in the technology that is the subject of the documentation may be important, particularly if the documentation is very technical. On the other hand, using a technical author who is new to the technology may in some cases be an advantage, for example, when creating a user manual for non-technical users.

One of the least important things is the technical author's experience with the writing tools (Word, for example). Most technical authors will have used a number of word processors and/or publishing systems, and it does not take long to pick up speed with a new one. There is certainly no point in insisting on (say) two years of experience with a particular word processor.

When should you call in the technical author?

The answer is: as early as possible.

If the technical author is writing user documentation, in particular, he or she can give valuable feedback on the user interface. Consider retaining the technical author on a part-time basis from the earliest stages of a project, and involve him or her in the planning and specification of a product or service.

In fact, it may be a good idea to write the user manual before doing anything else! Once you are happy with the product that is described in the user manual, then you can enter the specification, design and implementation phases.

Why do you need a technical author?

A technical author uses many skills, in finding, collecting, assessing, selecting and organising information, and finally communicating it to the reader in a clear and concise form to meet the reader's needs.

Some of this is science, some is art. Some is learned by study, some by practice. Like any other work, this is done with best results if an expert is called in to do it. The technical author achieves the result by co-operating with those who have the specialist knowledge in the systems or technology.

In producing a readable and understandable document, one of the most important things is being concise, but not too brief. A technical author can express the information in the right number of words.

A good technical author can often rewrite a document by a technical, sales or marketing person to reduce the size of the document (in words) by around one quarter or one third. This is without changing the meaning, but making the meaning much clearer. (The actual size of a paper document will not necessarily decrease by as much, because the technical author will use white space better to improve readability.)

How long does it take?

This is impossible to answer without having some information about a specific documentation requirement. The collection and the organisation of information usually take the most time.

At one extreme, collecting the information to be displayed in a table occupying one or two pages may take days.

At the other extreme, a procedures manual for a well-designed application is usually easy and straightforward to write, and a technical author may manage 2,000 or 2,500 words a day on this.

Remember to allow time for creating templates, formatting, creating illustrations, indexing and any other specific requirements.

Also remember to allocate staff time for reviewing the document. This is often forgotten, and is a common cause of delays in creating a document.

What does a technical author need?

This section may not concern you if your technical author is providing all the resources.

However, if you require the work to be done on your site, please bear in mind that what the technical author requires to do the job properly may be very different from what a software developer needs, and is often more demanding on computer processing power.

Here are some things that I may use on a typical project:

- *The prototype application*
- *The software tools that the developers are using (for example, Visual Basic or Visual C++)*
- *Access to the client's network*
- *The word-processor and/or publishing program specified for the deliverable*
- *A text-editing program*
- *A selection of graphics programs for creating and editing illustrations for the documentation*
- *Programs for searching for text strings in a set of documents*
- *A web browser (in many cases): the World-Wide Web is an invaluable resource for instant information and software*
- *Other software for specific requirements*

I may be using a selection of these at one time. In my own office, I work on two computers, usually one for editing and one for the application software being documented. These computers are connected by a network, for easy exchange of data.

Please also bear in mind that a technical author spends more time talking to a computer than talking to people. A quiet environment is essential for productivity.

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