



# MITWA NEWS

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## Contributions

Contributions are welcome at MITWA News.

It will be our constant endeavor to maintain high standards by inviting contributions from technical writers, indexers, subject matter experts, domain experts and others related to the field of technical writing by way of articles, technical papers, and updates on technology.

Please send us your contributions and we will get them published in MITWA News.

The articles should be up to 500 — 1000 words. You may include graphics in either of the following formats: JPEGs or GIFs.

Send your article or contributions to [aiyyangar@gmail.com](mailto:aiyyangar@gmail.com) along with your brief profile.

## Meet the MITWA NEWS Team

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## ABOUT MITWA

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Dear Friends,

Welcome to **MITWA (Mentors, Indexers, Technical Writers & Associates)** - By the community, for the community. Thank you for your interest in this group. We are a friendly, energetic and supportive group.

We welcome technical writers and all others whose work is related to technical communication.

Whether you are an aspiring technical writer, or just starting out, or have been in the technical writing game for a while, we are here to give you the support and encouragement you may need from time-to-time.

The objective of MITWA is to:

- ☞ find other technical writers
- ☞ organize informal meets
- ☞ learn, teach, and share things
- ☞ make friends and have fun
- ☞ rise up, stand up, unite, and make a difference to the TW community.



*"WE should  
all COME  
TOGETHER  
and develop  
this commu-  
nity for the  
community"*

Our meetings include: discussions, informal chats, learning sessions, support, and opportunity to network. We are an informal group that is constantly growing and trying to meet the needs of all of its members. We really look forward to meeting you and wish you great success with all of your technical writing goals.

All the best.

Ramesh Aiyangar

MITWA — Group Owner & Moderator

## AN INTERVIEW WITH SMEETA BEHERA

*“I FEEL THAT ONE SHOULD BE ADAPTABLE TO THE CHANGES IN THE TECHNOLOGY AND PROCESS.”*

### Could you please tell us about yourself?

I am working as a senior technical writer with a top Indian company in Hyderabad. I graduated in Computer Science and Engineering (B.Tech from Utkal University in the year 2001). I started my career as a lecturer because I was interested in teaching. I started technical writing with a product development firm in 2002. Some of the subjects that interest me are operating systems, data communication, graphic designing, and system architecture.

### How long have you been working in the field of technical writing? Tell us how it all started.

I have been in the field of technical writing for 5 years. As I was already into teaching and communication, technical writing proved to be a natural extension for me since it involves communicating effectively with the end-user. I joined a product development company and was involved in the analysis, design, documentation, and testing of an ERP product. Later on, I moved to my current organization, which gave me the freedom to learn and explore various aspects related to technical writing and project management.

### What are your current roles and responsibilities?

Initially, I was recruited as a writer in the documentation team. Today, I am a lead tester, quality analyst, and technical writer. As I don multiple hats, my roles and responsibilities are varied. Currently, I am leading a team of 12 testers in a project for a prestigious client. As the lead documentation resource, I am responsible for all the document deliverables. I plan the project, deliverables, and define the milestone along with the writers.

Also, I am an active participant in the organization's CMMI initiatives.

### What experience do you need to get into the technical writing field?

I feel that one should be adaptable to the changes in the technology and process. Good reasoning ability, an eye for the details, and inquisitiveness topped by good communication skills give a good opportunity to the new entrants.

### What makes a technical writer? Can you name the qualities and skills that you think are important for a technical writer?

Good communication skills (written and spoken), an eye for the details, and a willingness to learn are some crucial skills that make a technical writer.

### The technical writing scenario in India is on an upward scale. How does it feel about working here in India?

It feels good to be part of a profession that is pacing up so fast.



SMEETA BEHERA

*Smeeta Behera has 5 years of Technical Writing experience, and she is currently working with ValueLabs as the Documentation Lead.*

*In addition she is also the Test Lead for a couple of projects. She is an avid dancer with interests in choreography and music. She finds relaxation in meditation.*

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**How does a typical day look like for you?**

My typical day in office is quite fast and demanding as I need to collaborate with many teams to work towards my project deliverables.

**So, who are your typical clients and what do you write for them?**

We have worked with clients across varied domains – from healthcare to travel and from mobile technology to e-Commerce. We produce user documentation for the developers and the end-users.

**How do you get the value of documentation appreciated by clients?**

Many clients have reported a reduction in the support calls after the documentation was delivered. The fact that our documentation brought down the costs was appreciated by the client and senior management.

Recently, our documents were showcased at a National User's Conference held in the US that received appreciation.

**What are the main challenges to get a Technical Communication Team to interact with other departments?**

The challenge is to prove that documentation is an important and vital exercise to help and educate the end-users of the product.

**What do you think is the balance needed between understanding authoring tools and having writing skills?**

Ideally, a writer's skills in tools and writing should be in a proportion of 30:70 respectively. I feel that understanding the product, domain, technology, and writing for it constitutes the important portion of a writer's life in the company.

**What do you like about technical communication?**

I feel good about the ability to educate and communicate with the end-user of the product through online helps and user manuals.

**As a technical writer, how do you promote technical writing?**

I conduct seminars and open discussions to educate the teams like development and testing about the work that we do.

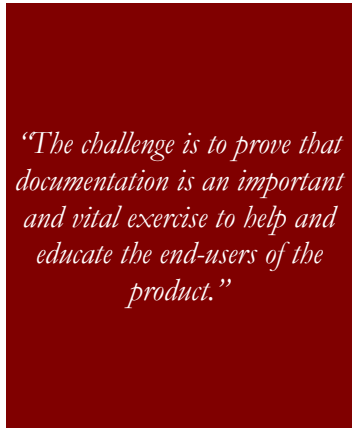
**Tell us about your family.**

My family is comprised of my husband, my parents, in-laws, brother, and sister. They are very supportive and encourage me in my endeavors.

**What interests do you have outside of work?**

I constantly keep learning new technologies, stay abreast with the latest in the field, learn various processes, and utilize them for improving the deliverables.

Presently, I am concentrating on my project management and people management skills to fulfill my aspirations of becoming a good Project Manager.



*“The challenge is to prove that documentation is an important and vital exercise to help and educate the end-users of the product.”*

## ESTIMATING PROJECT TIMES AND COSTS WITHOUT LOSING YOUR SHIRT—OR YOUR SANITY

BY GEOFF HART

*Previously published as: Hart, G. 2006. Estimating project times and costs without losing your shirt—or your sanity. Intercom April 2006:6–10.*

**D**etermining how long it takes to complete a job is essential for planning and for budgeting your time, whether you're a wage slave or a freelancer. In this article, I'll focus on the needs of the freelancer, but the same approach will work equally well for managers of teams of technical communicators and even for lone writers, for whom the "client" is a fellow employee such as the software development manager.

As a freelancer, it's natural to want to charge your clients by the hour. Those times we end up with a particularly hideous job, this approach provides the comfort of knowing that we'll at least be fairly compensated for our time. Clients, on the other hand, prefer fixed-price estimates for a job so *they* won't be the ones with an unpleasant surprise, and that's doubly true for new clients who haven't yet learned to trust our professionalism.

When the client won't accept an open-ended estimate, how can you estimate the cost of a job without losing either the client or your shirt? On the one hand, you need to protect yourself against the truly appalling jobs that will take years off your life span. On the other hand, you need to be able to bid low enough that the sticker shock won't kill the client before you can collect your pay cheque.

There's good news and bad news. The bad news is that there's no way to estimate a job's cost perfectly every time—clients and life are both unpredictable, and the less mature and controlled the client's planning process, the less predictable the work. If you're an editor or translator, you can ask to see the whole mess before you have to quote a price, and that lets you look for the trouble spots and inflate your quoted price accordingly. If you're a writer, the task is considerably more difficult. But there's also good news. With a little ongoing effort, you can gradually develop a good feeling for your own productivity and use that knowledge to estimate reasonably accurate costs. The key is to track your productivity for each of the different types of task you do as part of your work.

### Tracking *my* productivity

Over the years, I've acquired a good idea of my range of productivities for various types of work. I work primarily as an editor and translator, and for each job I've done, I've recorded the number of words and the time it took me to do the work. As a result, I have many years of productivity data (words per hour) for most of my clients. This data gives me two key things I need to know before I predict how long a job will take and how much it will cost:

- ☞ My long-term average productivity lets me predict, all else being equal, how many jobs I can complete in a given week.
- ☞ My "worst case" values tell me the longest times and lowest productivities for the nightmare jobs I'll never forget.



GEOFF HART

*Geoff Hart is an associate fellow of the Society for Technical Communication (STC), and works as a writer, editor, translator, and information designer specializing in the sciences.*

*With nearly 20 years of experience in scientific communication, he is a frequent contributor to *techwr-l* (technical writing) and *copyediting-l* (editing), Internet discussion groups, and to several STC newsletters.*

*Visit Geoff online at his Web site: [www.geoff-hart.com](http://www.geoff-hart.com).*

This data makes it possible to provide highly accurate estimates of the total cost of an editing or translation job for specific authors or corporate clients, even without seeing the manuscript. (I still ask to see the manuscript, but unfortunately, this often isn't possible.) If a new client asks me to bid on a job, sight unseen, I can offer them my worst-case price, thereby protecting myself, then point out I can almost certainly do better than that price. If I have a large multi-author job, such as a few books that I've recently edited, my long-term average productivity for (literally!) hundreds of authors provides a reasonable estimate for any other group of authors. Where more precision is necessary, I can examine a subset of data based on the native language of the client (e.g., for my Japanese, Chinese, French, and Turkish authors, among others) and for the type of project (e.g., Web page vs. journal article) to see whether that type of work has traditionally posed unusual problems.

To estimate the cost of a job, I need only divide the actual length of the job (in words) by whichever productivity value seems most appropriate for the situation. That tells me how long the job should take. If I lack confidence in this estimate for whatever reason, I can inflate the time by a percentage that represents my level of discomfort: the less comfortable I am, the more I'll inflate the time. I can now multiply this time by my standard hourly rate to come up with a base price. We'll return to that base price later in this article.

### Tracking your productivity

The benefits of my approach are clear: it provides a reliable method for generating reasonably accurate initial estimates. If you haven't been tracking *your* productivity, start now. Over time, you'll develop similar confidence in your ability to predict time requirements, and thus, costs. It's crucial to note that "industry benchmarks" for productivity are useful if you have no data whatsoever, but the only truly reliable data are for your own personal productivity.

I'm a firm believer in simplicity, so I track my editing and translation work using only word counts and completion times. I maintain this information in a simple word processor file using Word's table feature; now that I'm working full-time as a freelancer, I'm planning to migrate this data into a spreadsheet so I can automate the process of calculating productivities for each category of job or client. If you do the same kind of work that I do, either approach may meet your needs.

If you do different work, such as technical writing, you'll need different data to be able to plan and budget effectively. You can still do a reasonably good job with a simple approach, but that simple approach must reflect the actual nature of the work. For example, let's say you're creating an online help file. Here are some typical tasks you should track:

- ☞ creating a list of the contents (if one isn't provided)
- ☞ creating an overall hierarchy
- ☞ describing a field
- ☞ describing an icon
- ☞ obtaining and editing a screen capture
- ☞ creating keywords
- ☞ compiling the help file
- ☞ troubleshooting (e.g., fixing incorrect links, editing the index)
- ☞ Reviews

*"I'm a firm believer in simplicity, so I track my editing and translation work using only word counts and completion times."*

There are clearly many other tasks, but this is a good starting point. Once you have this information, you can begin developing a good idea of the time it takes to perform each of these tasks: simply look at the clock when you start a task, and again when you end. That's how long that particular task took you to complete. Now you need to determine how many tasks there will be, because multiplying the number of individual tasks by the time to perform those tasks gives you the total time. Thus, your next step is to identify the number of items you'll have to deal with.

Count up the number of menu choices, dialog boxes (and fields, checkboxes, icons, tabs, and other components for each dialog box), icons, fields, overview topics, tutorial topics, and reference topics. There are others, but that's a good start. The client may provide this checklist of the work you'll be required to do, or you may have to generate that list yourself. In either case, this list becomes the basis for your planning: you will document everything on the list within the time you have quoted and for the specified price, and everything else will be billed at an additional cost.

Unfortunately, some items will be substantially more complex or difficult to document than others. For example, a dialog box that will be undergoing continuous revision until the product ships will clearly take far more time to document than a feature that has been frozen for months and will not be revised again. The next step is to account for this additional difficulty by increasing your estimated time sufficiently to account for such difficulties.

I call this a *weighting* factor because you're using it to increase the weight (difficulty) of the job and thus, to increase your estimate of how much time it will take. There are several ways to calculate a weight, but again, you can start simply and develop a more sophisticated approach as time permits or as your needs require. If the problem you'll face is that each topic will have a different and unknown number of subtopics, come up with an educated guess at how many subtopics there will be; add that to your estimate, with a note that additional subtopics will require more time and money to complete. If the problem is that the interface isn't stable, estimate the number of revisions you're prepared to endure, then use that as the basis for your estimate; each revision counts as a separate documentation task, and any additional revisions will also take longer and cost extra. If the problem is that you expect to have difficulty reaching the subject-matter experts (SMEs) who will provide key explanations of how things work, add an hour—or three—to account for this wasted time.

### **But wait, there's more!**

Are we done yet? Not if you want to truly account for all the likely difficulties. Any dialog box with 15 fields will have interactions among the fields and possibly interactions with other product features. For example, the Page Setup dialog box for desktop publishing software has two different page orientations (portrait and landscape), and these will combine with the page's two dimensions (height and width) and four margins (top, bottom, left, and right) and number of columns (plus one "gutter" per pair of columns). Clearly, you must explain how changing the orientation affects the dimensions, and how this in turn affects the margins, columns, and gutters. Plus, there may be idiosyncrasies of the software that must be documented; for example, some desktop publishing software won't automatically reflow text if you change any of the abovementioned parameters of the page.

*"Count up the number of menu choices, dialog boxes (and fields, checkboxes, icons, tabs, and other components for each dialog box), icons, fields, overview topics, tutorial topics, and reference topics. There are others, but that's a good start."*

Complicated, huh? Yup. The basic idea is simple to state, but far more difficult to implement: Your goal is to learn how to break up a higher-level task into its most basic ("atomic") components because each of those components will typically take you around the same amount of time to document. Begin tracking the time it takes you to perform each of these lowest-level tasks. This tracking will increase the time it takes you to complete a job, and under deadline pressure, you won't have time to record a fine level of detail for every task. In that case, try to at least track times for the higher-level tasks. Obviously, this will provide less precise estimates, but the good news is that you don't have to track the times for every single task that you're tracking. Larger amounts of data provide a better idea of your long-term average, so you should certainly keep collecting this data for many different projects, but even a sample of as few as ten or twenty tasks will let you generate a reasonable average.

### Protect yourself with a contract

You'd think it's obvious that a "contractor" would work under contract, but over the past 20 years, I've seen an unending stream of problems that resulted from fellow contractors working purely on the basis of verbal agreements or a loosely worded contract. If you're going to all the trouble to track your productivities, it's foolish to throw out all that work. Instead, use it to protect yourself by including that information in a formal written contract. Hire a lawyer to create a standard contract for large or complicated jobs and review any modifications required to adapt that contract to a specific job. For smaller jobs or for work with a reliable, long-term client, a clearly written, simple, and precise description of the scope of the work may suffice.

As I noted earlier, you must create a clear list of all the tasks that you propose to perform for the client. All that information on dialog boxes, menu choices, and the like that I suggested you record now becomes your blueprint for the work you'll be doing. This list becomes the specifications for the job, and should be added as an appendix to the contract, accompanied by sentences similar to the following: "This contract applies exclusively to the work described in Appendix 1. Any added features to be documented must be added to this contract in an additional Appendix that has been dated and signed by both the client and the contractor. Any work not specified in Appendix 1 will be billed separately at a rate of..." Make sure that the client reviews and signs off on the list in Appendix 1 so they can't blame you for forgetting anything. If the scope of the project expands, create an Appendix 2 (and 3, and 4...) that defines the new tasks. Create as many of these additions as necessary.

Since the review process represents a major source of lost time, explicitly define how many reviews you're prepared to endure. My standard contract specifies that I will include one review and revision cycle in the initial cost of the contract. (That is, I will submit the job, receive a review document containing a list of changes, incorporate those changes, then return the revised document and go on with my life.) Each additional review and revision cycle will be billed separately. This encourages the client to do their reviews right the first time, since sloppy reviews that require additional rework will clearly increase their cost.

Don't forget potentially expensive details, such as "shipping and handling". Nowadays, most work can be done electronically and "shipped" by e-mail. But you may still have to cover shipping costs for the product, particularly if that product is hardware, and some clients insist on on-paper reviews that must be exchanged by courier. However, even software can become expensive; for example, you probably don't want to download a weekly 600 megabyte installation CD containing the latest build of the software, even if you have a high-speed Internet connection. If you'll have to travel several times to meet the client or their SMEs, send dozens of faxes when e-mail won't do (e.g., for signatures), or (like me) spend a lot of the time on the phone or in e-mail conversations to resolve difficulties that require a conversation, plan for those costs too.

*"Each additional review and revision cycle will be billed separately. This encourages the client to do their reviews right the first time, since sloppy reviews that require additional rework will clearly increase their cost."*

(Sometimes you can hold your conversations using instant messaging software. Sometimes you can't.) All these things take time and money, and you'll need to specify in the contract who pays for that time and those costs.

### **Next, pad your estimate**

If you collect the kind of information I've described for each job, you'll develop an increasingly sound, objective basis for estimating jobs accurately—or at least as accurately is possible given that your clients will sometimes be Dilbert's pointy-haired manager. Earlier, I mentioned the concept of a base price. If you plan and bid on jobs based solely on this base price, you'll rarely finish when you predicted or earn your desired hourly rate, because Murphy's law inevitably affects even the most carefully planned project. More factors than I can possibly describe can foul up your schedule beyond belief. These things include the necessity to hunt down elusive or reluctant SMEs, programmers, or engineers who are responsible for producing the product you're documenting. If you need them to explain obscure product features or review your documentation, their absence will cost you. Find out when they plan to go on vacation, and whether any of them have announced an intention to leave to work for another company. Plan for lost time when these people simply take a disliking to you and learn to avoid you, possibly because they're already highly stressed trying to meet an insane deadline and they don't have time for your repeated inquiries, no matter how reasonable and considerate those inquiries may be.

Then there's "feature creep". As we all know, a product interface can change dozens of times before a product ships, even when the same basic features are preserved, and the situation is worse if the project "managers" (to misuse a term) add features daily as the work progresses. The specifications checklist I mentioned earlier is your only protection against feature creep, but even with a clear list of specifications, someone must take responsibility for finding out what new features have been added so that the new features can be documented. Well-managed development teams can provide this information, but many times you'll simply have to budget time to explore the interface to find out what changed since the last build. Fail to do this, and you'll deliver incomplete documentation when the product is ready to ship, and that can lead to considerable unpleasantness. You'll also discover that some clients are very high-maintenance—they require lots of handholding, endless conversations to reassure them, and countless nag notes sent by e-mail or voicemail to remind them to answer your questions or return documents sent for review. Time is money, and if you don't account for this ongoing maintenance, you'll lose that money on each project. Plan for a certain amount of this time based on your initial impressions when you discuss the project with the client, and the more hesitant, vague, or unprepared the client, the more time you should add.

### **Embrace uncertainty**

Over time, you begin to develop a sixth sense for which projects are going to cause problems and how much these problems will delay you. Based on that feeling, you'll be able to come up with an educated guess—and never forget that this is only a *guess*—of how long a project is likely to take. If you get the feeling that a client is disorganized, and will require endless handholding, pad your estimate accordingly to account for this extra time and effort.

How much should you pad your estimate? There's no easy way to know. If you add too high a safety margin, you'll inflate the price enough to intimidate the client. You may even lose the job if others are bidding against you and working with less of a safety margin. If your existing clients have been satisfied with your work, they're more likely to accept an inflated price, particularly since it's human nature to willingly pay a bit more for the peace of mind that comes with confidence. For new clients and in competitive bidding situations, you may need to cut your safety margin to the bone to earn that critical first job. You won't earn as much per hour as you expected, but doing a great job for a bargain price may earn you the right to be their sole supplier, and based on the data you accumulated during that first job, you can come up with a better estimate next time.

If you can accept that planning and bidding on jobs will always be somewhat uncertain, you can use the techniques described in this article to minimize the unexpected, can learn to embrace that uncertainty, and can perhaps even come to enjoy it. But even if you can't, you'll sleep easier knowing that you've done your best to protect yourself.

*“There is no such thing as absolute value in this world. You can only estimate what a thing is worth to you.”*

*- Charles Dudley Warner*

## SCRIBE TRANSCRIBE COMMON PROVERBS & SAYINGS ... REHASHED!

BY SHIRLEY THOMAS

1. *A bird in the hand is worth two in the bush.*  
*A resource on a project is worth two on the bench.*
2. *A friend in need is a friend indeed.*  
*An SME in need is a friend indeed.*
3. *A man is known by the company he keeps.*  
*A document is known by the accuracy it holds.*
4. *A rolling stone gathers no moss.*  
*An updated document gathers no review comments.*
5. *A stitch in time saves nine.*  
*A note in place saves calls to customer support.*
6. *A woman's work is never done.*  
*A TW's work is never fully appreciated.*
7. *Absence makes the heart grow fonder.*  
*Redundancy makes the document grow longer.*
8. *April showers bring May flowers.*  
*April fixes bring May bugs.*
9. *As you sow, so shall you reap.*  
*As you write, so shall you earn.*
10. *Ask no questions and hear no lies.*  
*Ask many questions and hear no "I don't have the time" excuses.*
11. *Blood is thicker than water.*  
*E-mail is better than verbal communication.*
12. *Charity begins at home.*  
*Research begins with the Functional Specifications.*
13. *Christmas comes but once a year.*  
*Appraisal comes but once a year.*



SHIRLEY THOMAS

*Shirley Thomas has 6 yrs of Technical Writing experience, and she is currently working with PTC as a Senior Technical Writer.*

*She loves the keyboard over the mouse, and loves her profession, music, dance, reading (mostly non-fiction), crafts and food (especially Keralite, Maharashtra, and Mughlai cuisines). In addition to this, she loves playing with her newly born 14-month old son.*

*She can be reached at [shirleymvarghese@yahoo.co.in](mailto:shirleymvarghese@yahoo.co.in)*

14. *Don't go near the water until you learn how to swim.*  
*Don't go to the SME until you have done the basic research.*
15. *Don't put all your eggs in one basket.*  
*Don't store all your work in your local computer.*
16. *Faith will move mountains.*  
*Spell-check will remove typos.*
17. *Live and let live.*  
*Write and let review.*
18. *Old soldiers never die, they simply fade away.*  
*Old documents are never deleted, they are simply archived.*
19. *One good turn deserves another.*  
*One file checkout deserves a check-in.*
20. *Spare the rod and spoil the child.*  
*Spare the style guide and spoil the document.*
21. *The female of the species is more deadly than the male.*  
*The client call is more deadly than the team meeting.*
22. *The love of money is the root of all evil.*  
*The love of chatting is the root of all distraction.*
23. *The more you get, the more you want.*  
*The more you write, the more you localize.*
24. *.Two heads are better than one.*  
*Two formats are better than one.*
25. *Where there's a will there's a way.*  
*Where there's a search there's a result.*

## GETTING TECHNICAL REVIEW DONE

BY MEGHASHRI DALVI

Technical review is one of the major phases in the document lifecycle. Typically, the Subject Matter Experts (SMEs) or senior developers review the documents to ensure that the content is technically accurate and consistent. However, most of us find that getting technical reviews done is one of the toughest tasks. Why?

I tried to look at the top two reasons from fellow technical writers:

1. **SMEs don't have time.**
2. **There is no SME assigned to do the technical review.**

If at all the SMEs review the document, their review comments are very general, incomplete, and in bits and pieces.

To get the complete picture, I discussed this matter with some SMEs. Of course they did not have time – but I still managed to put together some of their routine reasons.

1. **No time.**
2. **Technical review of documentation is not an assigned task.**
3. **No details about what is required in the technical review.**

If you look carefully, both sides are talking exactly the same things! This is the key to getting technical review done. Let us get down to the specific challenges and how to manage them.

### Lack of time

We all are pressed for time towards the release date – so it would be a good idea to start review early. But again, to get the review done early, we need to develop the content early. How can we develop the content early if we get in the team towards the end of the project?

The solution is to make sure that the technical writer is part of the team from an early stage. As the features and functions are developed, start creating the document framework, and get it reviewed. Put placeholders where you don't have details. Note what is missing and what will be added at a later stage.

In the early phase, documenting helps in clarifying the functional details for the developers. You can convince the project manager about your early involvement in the team and start acting from the beginning of the project.

Since lack of time is a real concern, you can also give smaller chunks for review. Reviewing a 100-page document is a daunting task for the SME. If you can manage to provide ten pages at a time for review, the task seems easier. In fact, not all the content needs a technical review. Make a judgment and send only those sections that require a technical review. You can also mark the sections in a guide that need the SME's attention.



MEGHASHRI DALVI

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Acknowledge often that the time is insufficient – for both of you. Suggest that you need the review comments by a particular date so that you deliver the document on time. Specifying these dates helps the SMEs to prioritize and track their tasks.

### Missing ownership

In some projects, technical review is not recognized as a task, and no time is budgeted for it. Also, no one in particular is identified to do the review and thus, a very genuine task simply remains in limbo. Untangling this issue of missing ownership requires efforts, which begin with overhauling the project plan.

You need to convince the project manager about the requirement of a technical review and value that it adds. You also need to formally include technical review in the list of tasks of SMEs and make them accountable for it. For all practical purposes, make the technical documentation deliverables a joint ownership – one writer and one SME / reviewer.

In your report, mention the technical review as a task and mark its status – highlight if it is due or overdue. In the project meetings, bring up the review activity and get it included in the action items. Track this activity regularly and it will gradually become a part of the system.

As you get more familiar with the team, you can also identify who can do a good review and who cannot. Or, who will do a review and who will not. Start approaching those who understand and appreciate the worth of technical review. Work with them, and build a good relationship – soon, you will have a number of enthusiastic SMEs willing doing the technical review.

OK – that was overly optimistic – but you get the point.

### No guidelines

This is a very valid issue from the SME's side. Review is a vague term and each individual tries to interpret it in his own way. Some try to look at spelling and grammar, while some focus on the structure. Many SMEs ignore all this and simply check if technical information is included or not.

And let us be honest - quite often, even the technical writers are unsure about what they want in the review!

A systematic approach to this problem is to state clearly what you want from the SMEs.

First make sure you tell them the following details about the content:

- ☞ Delivery format of the document – printed guide, online guide, online help, case study, FAQ, PowerPoint presentation
- ☞ Intended audience – users, administrators, developers, managers
- ☞ Intended use of the document – installation, standard use, advanced use, reporting, training.

Then explain what you are looking for. For example:

- ☞ If the structure is suitable (this can be done at a very early phase of the project).

*“As you get more familiar with the team, you can also identify who can do a good review and who cannot. Or who will do a review and who will not. Start approaching those who understand and appreciate the worth of technical review.”*

- ☞ If all the technical details are covered for the defined format, audience, and use.
- ☞ If all the steps, screens, and cases are included.
- ☞ If the technical details are correct. You can add notes / comments where you have doubts to help them to focus.
- ☞ If you have seen any inconsistencies, mention them clearly, and ask for clarification
- ☞ If any point is ambiguous, request for an explanation.

If you can also explain upfront what you are “not” looking for in the review, it helps. Explain that spelling, grammar, and pagination will be taken care in the release checklist. If you do a regular peer review, explain what it covers. That way, SMEs are relieved of some tasks. As the technical review becomes a regular assigned task – you can slowly cut down on these instructions or include them in process documentation.

In addition to the review comments, ask SMEs for general feedback. For example - if more examples should be included, or if a descriptive section should be converted to a diagram, or if the delivery format of a particular guide should be changed. When such suggestions come from SMEs, your case becomes stronger.

Finally, just the way you want to be part of the project team, make SMEs feel that they are a part of the doc team. It works.

*“As the technical review becomes a regular assigned task – you can slowly cut down on these instructions. Or include them in process documentation.”*

## BOXES AND ARROWS: A WEB SITE REVIEW

BY MEGHASHRI DALVI

Previously published in the April 2007 issue of the IEEEPCS Newsletter.

([http://www.ieeepcs.org/newsletter/pcsnews\\_apr2007\\_reviews.php](http://www.ieeepcs.org/newsletter/pcsnews_apr2007_reviews.php))

Information Architecture (IA) is a very tricky subject. On one hand, it is a multi-layered field by itself, and on the other hand – it is one of the layers of information presentation. Its serious sounding name does baffle people, not knowing how to associate architecture with something not solid or static.

When you leave these issues aside, Information Architecture and its basic concepts give a very unusual perspective to “information”. The insight and analysis of how we want to communicate the information, and how we can best deliver it is a total delight.

And providing this delight regularly to me is the wonderful site Boxes and Arrows (<http://www.boxesandarrows.com>).

### Innovative Content

The team behind Boxes and Arrows attempts to define what the content covers (<http://www.boxesandarrows.com/about>). In the true IA spirit, they also clearly mention their reader profile. But let us not get distracted by that. The main attraction, the real treasure, is their stories (<http://www.boxesandarrows.com/story>).

Communicating Complex Ideas ([http://www.boxesandarrows.com/view/communicating\\_c](http://www.boxesandarrows.com/view/communicating_c)), a highly-rated story analyzes how complex ideas can be structured to communicate them easily. The Information Architecture of Email ([http://www.boxesandarrows.com/view/the\\_information\\_architecture\\_of\\_email](http://www.boxesandarrows.com/view/the_information_architecture_of_email)) takes on an everyday tool and thinks aloud about its IA aspect. Another good story, Using Adoption Metaphors ([http://www.boxesandarrows.com/view/using\\_adoption](http://www.boxesandarrows.com/view/using_adoption)) to Increase Customer Acceptance is further enriched by readers sharing their experiences and ideas. Unusual stories like Ranganathan for IAs ([http://www.boxesandarrows.com/view/ranganathan\\_for\\_ias](http://www.boxesandarrows.com/view/ranganathan_for_ias)) make very exciting reading.

The Case Studies (<http://www.boxesandarrows.com/story/index/date/1>) are thorough and comprehensive. Particularly, The ABCs of the BBC ([http://www.boxesandarrows.com/view/the\\_abcs\\_of\\_the\\_bbc\\_a\\_case\\_study\\_and\\_checklist](http://www.boxesandarrows.com/view/the_abcs_of_the_bbc_a_case_study_and_checklist)) makes a very good design analysis leading to overhauling the typical alphabetized index.

The novel concept of floating ideas (<http://www.boxesandarrows.com/idea>) inviting reader comments, and volunteering to turn them into stories takes interactivity to a whole new level.

Some of the articles discuss career issues like Transitioning from User Experience to Product Management (<http://www.boxesandarrows.com/view/transitioning-from>). This makes the site a more complete stop for IA / UX /design professionals.

### Helpful Links for Technical Writers

Learn how your work as a technical communicator can impact the marketing communication and corporate communication departments of your company.

[http://www.stc.org/intercom/PDFs/2006/20069-10\\_10-13.pdf](http://www.stc.org/intercom/PDFs/2006/20069-10_10-13.pdf)

The Beginner's Guide to Freelance Writing by: Jenna Glatzer

[http://www.klariti.com/technical-writing/The-Beginner's-Guide-to-Freelance-Writing\\_SHTML](http://www.klariti.com/technical-writing/The-Beginner's-Guide-to-Freelance-Writing_SHTML)

### Flowchart Tutorial

<http://www.klariti.com/technical-writing/Flowchart-Tutorial.shtml>

On the flip side, the alphabetically sorted left navigation links leave me baffled – I would rather have them arranged more meaningfully.

### Technical Communication

What does Boxes and Arrows offer specifically for technical communicators?

The focused topics range from basic tips ([http://www.boxesandarrows.com/view/six\\_tips\\_for\\_improving\\_your\\_design\\_documentation](http://www.boxesandarrows.com/view/six_tips_for_improving_your_design_documentation)), content management system ([http://www.boxesandarrows.com/view/managing\\_the\\_complexity\\_of\\_content\\_management](http://www.boxesandarrows.com/view/managing_the_complexity_of_content_management)) to user analysis and use of persona ([http://www.boxesandarrows.com/view/extending\\_a\\_technique\\_group\\_personas](http://www.boxesandarrows.com/view/extending_a_technique_group_personas)). User Assistance and User Experience also get widely discussed. Besides, several design and IA articles subtly help towards effective communication. Overall, Boxes and Arrows makes a good supplementary reference site for technical communicators.

### Why the Name

Well, out of curiosity, I asked them. Christina Wodtke, the founder, explained that it's a light-hearted reference to IA, playfully indicating planning and drawing diagrams.

The name certainly does that and also stands out in the clutter of IA-related sites. And as you refer it more and more, you realize that that the people (<http://www.boxesandarrows.com/people>) behind this quality content place a very high premium on excellence. And that makes it very inviting.

Go ahead and visit it often. It is worth it.

*“On the flip side, the alphabetically sorted left navigation links leave me baffled – I would rather have them arranged more meaningfully.”*