

Planning Topic-based Authoring

Working in a Use Case or Scenario-based Environment

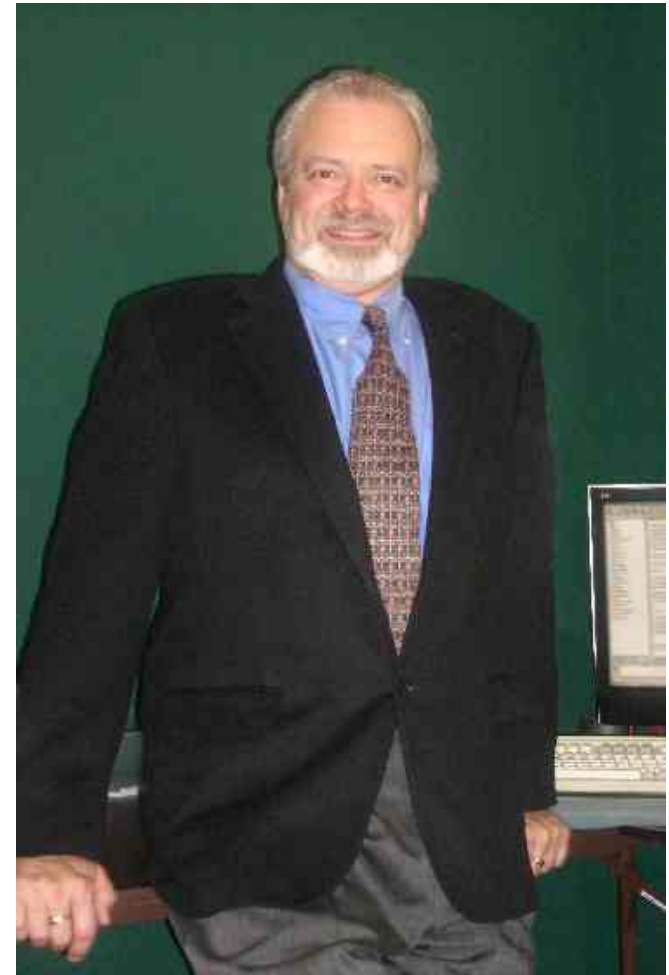


A presentation by John Hedtke
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Speaker Background

John Hedtke has worked in high tech for over 30 years and has written documentation and books for many leading software products. John owns and operates *JVH Communications*, a company that provides writing, consulting, and training services to private and government clients in all fields. A list of clients, projects, and other information can be found at his web site, www.hedtke.com.

When not otherwise occupied, John lives in Eugene, OR, where he writes magazine articles, plays the banjo, and sings Renaissance and jazz music with several choirs. John is a Fellow of the STC and served on the STC's Board.



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What this presentation covers

- A brief overview of topic-based documentation concepts
- How to plan for topic-based documentation
- How to look at a use case and figure out how many topics you need
- How to estimate time for topics using metrics



What this presentation *doesn't* cover

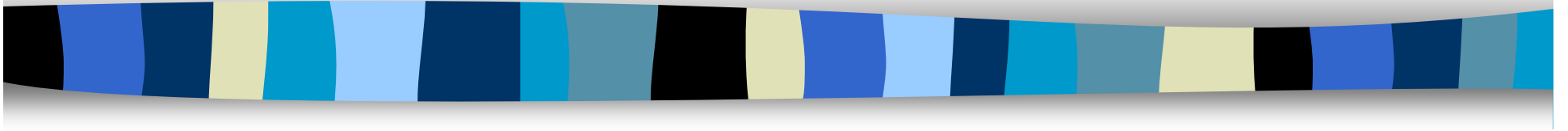
- Reasons for moving to topic-based documentation
- XML/DITA conversion
- CMSes
- Anything about how to use a specific tool
- A specific timetable for implementing topic-based documentation at your company



Warning!

- This presentation is just an overview.
- The issues of creating topic-based documentation are large, complex, and depend strongly on your selected goals.
- You cannot learn everything you need to know about topic-based documentation in a single presentation or even a dozen.
- This is Big Stuff. It isn't simple.

Section 1: Concepts





Where are we now?

Most documentation is feature-based.

Feature-based documentation focuses on:

- Features in the software
- What they're used for
- How to use them

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What topic-based documentation is

Topic-based documentation is documenting in a way that helps the **users** achieve their goals, instead of cataloguing all of the product's features. Topic-based documentation:

- Focuses on why a user wants to do a task
- Is written in second-person
- Takes its structure directly from the use cases



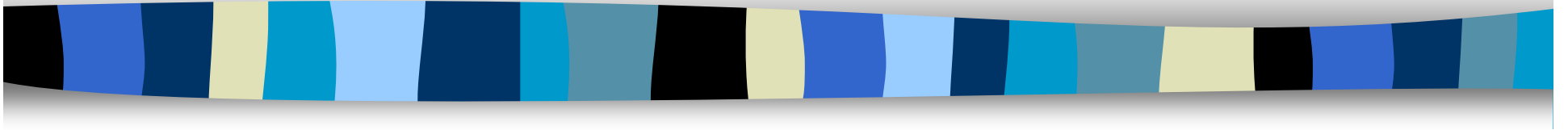
Assumptions and terminology

- You're in a development environment that uses use cases and scenarios.
- A **use case** is a complete function or operation that the product does, such as "Configuring a Chart in a Spreadsheet," "Starting the Car," or "Running a Washload."
- A **scenario** is a more detailed part of the use case, such as "Changing the Gridlines in a Chart," "Starting the Car in Cold Weather," or "Running a Load of Whites."
- (Your terminology may differ.)

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Section 2: Prerequisites





Who are you writing for?

- You have to determine who you're writing for before you can write effectively for them.
- Magid's Law: "It doesn't matter how you get there if you don't know where you're going."



Determining your audience

The Squidlips User's Guide is read by:

- »»» Squidlips users
- »»» System administrators who are installing and configuring Squidlips but will not be using it
- »»» OEMs/VARs
- »»» System configurators/developers
- »»» Potential new customers
- »»» Customers new to the Squidlips product

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Personas

- Personas are user archetypes. They are a composite of the users' commonest traits.
- Personas give you a target for your documentation. You can identify the behaviors for that user and what they're looking to get out of the product.
- Personas are not the same as "actors" in standard engineering use cases.



Persona traits (partial list)

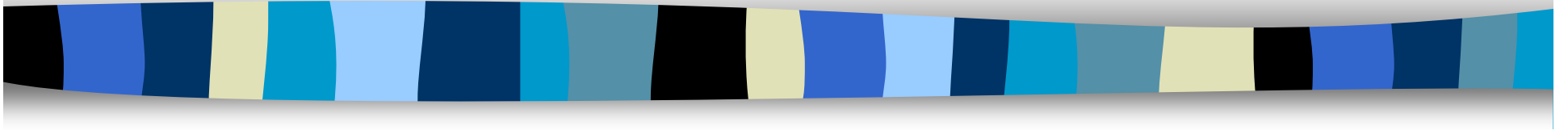
- ▶ reading/comprehension level
- ▶ educational background
- ▶ type of learner (visual, auditory, or kinesthetic)
- ▶ goals
- ▶ hopes
- ▶ dreams
- ▶ background
- ▶ primary relationship
- ▶ family life
- ▶ problems they're solving at work and at home
- ▶ relationship with boss and peers
- ▶ work environment (such as dynamic, stable, or high-pressure)
- ▶ personality traits
- ▶ age
- ▶ physical description
- ▶ disabilities
- ▶ ethnic background
- ▶ languages
- ▶ how often they use/interact with products (occasionally, frequently, or daily)
- ▶ boss's management style and expectations



Creating personas

- More than just traits and characteristics.
- More than just a job description.
- Personas are a narrative pattern of behavior.
- Traits provide information about what the personas want and how they'll react.
- You may need some specialized personas, too.
- Personas are for internal use **only!**

Section 3: Identifying your topics





Look at the use cases and scenarios

- If the use cases aren't finished yet, you can ask the architects/developers what they want to develop.
- It's not a 1-to-1 ratio for the scenarios and topics. It depends on things like:
 - the focus of the document you're writing
 - the knowledge and background of your users
 - the material itself



Budget an initial topic for every scenario

- Add a "zeroth" topic to every scenario in your initial plan.
- This covers exposition of concepts and background information.
- It also adds a reasonable amount of grease to your schedule. You probably won't need it, but better to have it....



How big should topics be?

- A topic is usually 2-4 pages.
- If your topics look like they're >4 pages, chances are you need to break them down some more. (There are exceptions.)
- Use the “Dr. Seuss” method of topic planning.



Some scenarios don't need topics

- Overlapping tasks
- Internal tasks
- Some process tasks, such as data transmission, compiling, or localizing



Other scenarios require multiple topics

Changing Chart Appearance

Changing Chart Colors

- Changing Background Color

- Changing Chart Border Color

- Changing Plot Area Background Color

- Changing Pen Colors

- Changing Grid Color

Changing Grid Visibility and Granularity

Changing Number of X- and Y-Axis Cursors

Changing Chart Orientation

Changing Default Duration of the Chart

Changing Axis Labels

- Changing the X-Axis Labels

- Changing the Y-Axis Labels

Changing Chart Fills

- Changing Fill Direction

- Adding Background Graphics

Showing and Hiding the Y Axis Cursors

Smoothing Curves

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Sample topics from a use case

2.5B-141	Adding the Inertial Damper	Chapter: Configuring the Inertial Damper
	Scenario 0: Concepts and background	Concepts and background
	Scenario 1: Add governor module to Inertial Damper	Adding governor module to the Inertial Damper
		** Adding an internal governor module to the Inertial Damper
		** Adding an external governor module to the Inertial Damper
		** Adding a remote-control governor module to the Inertial Damper
	Scenario 2: Remove governor module from Inertial Damper	Removing modules from the Inertial Damper
	Scenario 3: Change Inertial Damper options	Changing Inertial Damper options
		** Changing Housing
		**** Changing from External to Internal Housing
		**** Changing from Internal to External Housing
		**** Changing Mounting Rails
		**** Enabling/Disabling SATA Connectivity
		** Changing Remote Control Access
		** Changing Error and Alarm Display Options
		**** Changing Error and Alarm Sounds
		**** Changing Error and Alarm Light Codes
		** Changing Self-Repair Mode
	Scenario 4: Configure connection(s) to the system	Connecting to the Motherboard
		** Connecting to the Motherboard using PCI
		** Connecting to the Motherboard using SATA
		Connecting through a USB Port

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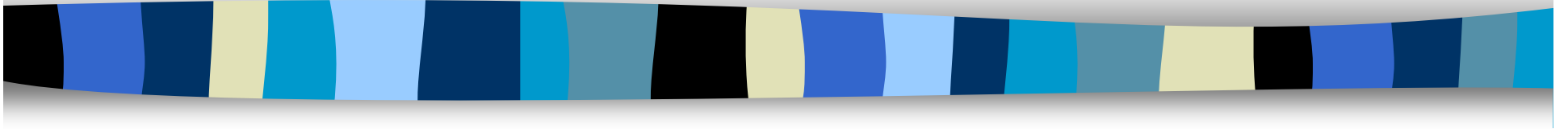
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Tips

- The initial use cases from Engineering are usually high-level and not very detailed.
- As the use cases firm up, you can refine your estimates.

Section 4: Putting it all together





Generating your estimates

- With your spreadsheet of topics, you're ready to assign time estimates.
- Writing time per topic is typically 1.75 days. Some technical topics may take longer...
- ...but no topic should be estimated at less than 1.75 days.
- Most topics will have the default time.



If you're converting existing text....

- Calculate the number of pages from the existing text that will go into the topic. (I use a spreadsheet for this, too.)
- The process is very similar to how you estimate levels of changes to a manual.

Sample spreadsheet with estimates

UC #	UC Name and Scenario	Suggested Documentation Mapping	Est'd time (days)	Comments
2.5B-141	Adding the Inertial Damper	Chapter: Configuring the Inertial Damper		
	Scenario 0: Concepts and background	Concepts and background	1.75	
	Scenario 1: Add governor module to Inertial Damper	Adding governor module to the Inertial Damper	1.75	
		** Adding an internal governor module to the Inertial Damper	2.5	Need photo showing internal governor module being installed
		** Adding an external governor module to the Inertial Damper	2.5	Need photo showing external governor module being installed
		** Adding a remote-control governor module to the Inertial Damper	2.5	Need photo showing remote-control governor module being installed
	Scenario 2: Remove governor module from Inertial Damper	Removing modules from the Inertial Damper	3.5	Need photos showing removal of modules.
	Scenario 3: Change Inertial Damper options	Changing Inertial Damper options	1.75	Add annotations to photos.
		** Changing Housing	1.75	
		**** Changing from External to Internal Housing	1.75	
		**** Changing from Internal to External Housing	1.75	
		**** Changing Mounting Rails	1.75	
		**** Enabling/Disabling SATA Connectivity	1.75	
		** Changing Remote Control Access	1.75	
		** Changing Error and Alarm Display Options	1.75	
		**** Changing Error and Alarm Sounds	1.75	
		**** Changing Error and Alarm Light Codes	1.75	
		** Changing Self-Repair Mode	1.75	
	Scenario 4: Configure connection(s) to the system	Connecting to the Motherboard	1.75	
		** Connecting to the Motherboard using PCI	2.5	Need photo showing installation in motherboard in PCI slot
		** Connecting to the Motherboard using SATA	1.75	No photo needed for this one.
		Connecting through a USB Port	1.75	

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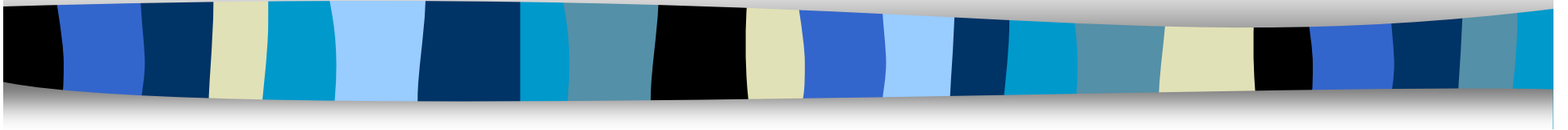
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Polish your estimates

- You'll probably need to work with the engineers, product manager, and product designer to refine your topic estimates.

Section 5: Wrapping up





This is **hard!**

- Topic-based documentation requires lots of planning.
- It requires hard work and cooperation on everyone's part.
- It isn't going to happen overnight, or even tomorrow.
- There are **no shortcuts!**



Bibliography

Dr. Joann Hackos, **Information Development: Managing Your Documentation Projects, Portfolio, and People**, Wiley, 2006

Dr. Hackos is widely regarded as the industry spokesperson for document design and topic-based documentation.

Alan Cooper, **The Inmates Are Running the Asylum**, Sams – Pearson, 2004

An exceptional book on user and product design that embodies many of the concepts in topic-based documentation.

Donald A. Norman, **The Design of Everyday Things**, Basic Books, 2002

This book is considered a standard for user-based design in products.

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Resources

- The reading list and a downloadable copy of the spreadsheet can be found at:

<http://www.hedtke.com/clouds.htm>

Thank you!

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if you have questions.
(Please use the name of
this seminar as the subject
so I can get to it quickly.)

