

# THE DOCUMENTATION PROCESS

## Developing professional documents in a timely manner

There are many ways to share information in a work setting. Regardless of the means, the message must be accurate and communicated professionally so that it casts a positive light on the employee and company providing the information. Just think about how long it takes to write a professional email to a supervisor or a cover memo to a co-worker. Even though these are forms of written communication that most people complete on a daily basis, the writing process involved usually consumes much more time than most would prefer, requiring developing content and reviewing for typos and other mistakes, as well as making sure that the point is clear and that there is a coherent subject line, just to name a few tasks needed to communicate effectively and professionally.

Now think about how much time it can take to create more complex documentation: performance and accountability reports, annual reports, budget plans and proposals. These are just some of the documents that professionals may be asked to assist with, especially when working for a professional agency. Like emails and memos, these documents are time sensitive, requiring the attention of their intended readers by a designated date. Furthermore, these types of documents contain valuable information that contribute to the development and continued success of an agency. They provide research, analysis, and textual and visual presentations on issues or projects that decision-makers must comprehend to determine the best course of action in a given situation. To ensure that a production team working on such documentation creates a publication that meets readers' expectations and that is received in a timely manner, the team needs a standardized documentation process and schedule to ensure that the project is successful while also allowing team members to fulfill their regular office obligations and responsibilities.

This paper discusses the usefulness of developing a process for completing documentation projects in a timely manner; it includes the following discussion points:

1. Understanding the importance of a standard documentation process.
2. Adopting a process that is appropriate for an agency.
3. Evaluating the effectiveness of the documentation process.
4. Implementing the proper tools and techniques for the documentation process.

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Plan.

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## UNDERSTANDING THE IMPORTANCE OF A STANDARD DOCUMENTATION PROCESS

It is important that all team members on a documentation project have a clear understanding of the product and responsibilities involved with a project before actually starting it. However, even professional writers and designers are sometimes prone to jump into a project without proper planning, and yes, even they are susceptible to the frustrations and loss of time associated with ill planning. With this in mind, why not find the means to avoid the headaches and frustrations all together?

Patrick Harvey, a professional writer of 10 years, writes, "...I have participated in several document design projects...usually you are part of a group of writers, all of whom will have to use the result. I have seen group design projects go wrong. But I have also seen them go very right when approached with planning and leadership skills and willingness to compromise."<sup>1</sup>

To avoid frustrations during a project, team members on a documentation project can create a production schedule based on the documentation process. To develop such a schedule, it is important to have a clear understanding of the documentation process. Based on literature from experts in the technical communication and professional writing fields, the documentation process, as referred to in this paper, involves the steps, including planning, writing, designing, editing, and printing, and tasks for each that allow a document to be produced in a timely manner while also maintaining a specific level of quality and meeting reader expectations.

### STEPS OF THE DOCUMENTATION PROCESS

The tasks involved in each step of the documentation process may fluctuate based on the parameters of a specific documentation process; it is up to team members to define these steps when planning a project (the first step of the documentation process). However, the general steps implemented for documentation projects should be standard for all such projects. Team members can adopt the general steps of the documentation process, as described below.

#### Step 1: Planning the production schedule

*Creating a schedule that considers all team members' work responsibilities, as well as the project's resources, limitations, expectations, and deadline.*

Team members should consider the following points when developing the production schedule, especially if the team's agency has no precedence for creating or implementing a production schedule:<sup>2</sup>

- Define the scope and complexity of the project.

<sup>1</sup> Harvey, Patrick. "Managing and Surviving a Design Project." *Intercom* December (2001): 6–9.

<sup>2</sup> Hackos, JoAnn. *Managing Your Documentation Projects*. New York: John Wiley & Sons, Inc., 1994.

- ❑ Identify the deadline and budget.
- ❑ Examine the people involved with project and identify their strengths and weaknesses pertaining to the project.
- ❑ Clarify expectations and limitations of the final product.
- ❑ Create the milestones, as well as a timeline based on those milestones and the available resources.

## Step 2: Gathering and drafting the content

*Collecting and/or composing the content needed for the documentation.*

More than likely it will be up to team members to collect and/or develop the content for the project. The best approach to help this step of the process go smoothly is to be patient. It may take time to create content that addresses all necessary points for the project. Team members should make sure that the points are accurate and up to date. Although team members do not have to obtain final versions of text at this step in the documentation process, it is helpful if team members can finalize as much of the text as possible to help save time and energy in other steps.

Team members may also consider creating a style sheet. This style sheet records the standard forms for spelling and use of particular words or phrases for the document. This sheet will not only be helpful during the editing stage of this project, but it will also be helpful during future documentation projects, providing consistency across agency documentation. (For more information on creating style sheets, refer to the Resources section at the end of this paper.)

## Step 3: Designing a professional document

*Designing a document that looks professional and appropriately represents the agency, as well as the content and tone of the document.*

Team members should refer to previous agency documentation to assist with the design of the document design. A document's design needs to be appropriate for the tone and content of the content. Furthermore, it needs to look professional and serve as a positive representation of an agency's work.

Even without formal training in design, anyone capable of viewing a document has an opinion about the visual appeal of a document and how it portrays a professional institution. With this in mind, team members should collect samples of "good" documentation to emulate for the documentation project. In addition, the following lists four basic design principles that can be used to evaluate a design:<sup>3</sup>

- ❑ **Contrast** is created when there are at least two different elements on a page. They need to be VERY different so that the differences look intentional and help emphasize an element on the page.

<sup>3</sup>Williams, Robin. *The Non-Designer's Design Book*. Berkeley, CA: PeachPit Press, 1994.

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- ❑ **Proximity** dictates that related items on a page be placed close together, or at least closer together than elements that are not related.
- ❑ **Repetition** means that elements that appear throughout the document appear the same way to build consistency.
- ❑ **Alignment** states that nothing should be placed on a page without a specific reason for being placed in that position. Even when there are many elements on a page, they should all have visual connections with each other to create cohesion.

Once a person can identify these principles, he or she will have a better understanding of why elements are arranged on a page and will be able to form critical opinions of many types of documentation.

#### Step 4: Revising drafts of documentation

*Editing the content and design to create a consistent, organized, and professional document for the agency.*

Team members should take advantage of the editing stage. This is the time to go through the document and find any errors, for example with the design, format, or grammar. Ideally, most of the content was finalized in step 2; however, some changes cannot be prevented, so if there are substantial changes to the content, team members should incorporate them as early as possible in this step so that additional drafts can be populated. Limiting the number of major changes helps reduce the number of additional drafts outside of those already allotted in the production schedule. (Yes, there should be multiple drafts and revisions built into the production schedule.)

Also, team members should be aware of how much time it will take to make such changes. If there are numerous revisions or additions, team members will have to find the time, energy, and resources to include them, thereby delaying the remaining steps and milestones on the production schedule. The end goal is to deliver a finished product that is on time, as well as professional looking and accurate.

To help stay on task during the drafting stage, team members can create an editing rubric that describes the types of changes or edits to approach for certain drafts. (For more information on creating an editing rubric, refer to the Resources section at the end of this paper.) It is hard to catch everything at once, so if changes can be broken into different levels, everyone's time and energy can be used more efficiently. There are two types of edits to identify in the editing rubric:<sup>4</sup>

1. Comprehensive edits: revising to the logic and organization of the text; editing the sentence structure and organization to improve the meaning and coherency of a sentence or paragraph. Changes that improve the overall meaning of the text.

<sup>4</sup>Farmer, Delores and Sherry Southard. "Editing: What?..." Revised September 2001. East Carolina University English Department. 9 February 2007 <<http://core.ecu.edu/southards/5770/ledit.htm>>.

2. Copy editing: checking the grammar, usage, capitalization, spelling and consistency of the text; making sure tables and graphics are labeled and referenced in text; checking for page numbers and headers. Changes that improve the presentation of the text and visuals in the document.

Also, team members should refer to the style sheet created during step 2. This sheet and the editing rubric will support individual team members' efforts to revise the document consistently. Furthermore, such tools can be helpful in future documentation projects, building consistency across agency documentation.

### Step 5: Printing the documentation

*Arranging for the final version of the document to be printed and distributed.*

The team should be pleased with the final draft; all members should approve of the text and the design before the necessary files are submitted for printing. If any team member has changes, this is the time to incorporate them into a final draft copy.

The final stage of the documentation process varies based on the medium and distribution of the documentation. If the document is to be printed, team members should arrange to submit the necessary files to a printing company. If the agency does not have a regular printing company, team members should find a company that they feel comfortable working with and ask the printing company what information and files are required for printing. Also, the team members should specify a deadline for printing and inquire about delivery. For other scenarios of production and distribution of the documentation project, team members should inquire involved parties about the appropriate actions.

## IMPORTANCE OF A STANDARD DOCUMENTATION PROCESS

Again, the steps of the documentation process may be broken into tasks based on the specific documentation project. The point of describing them in this paper is to provide a basic understanding of the documentation process. Furthermore, it is necessary to understand the process before acknowledging the benefits of a standard documentation process. The documentation process helps ensures that

- ❑ employees can participate in the creation of agency documentation, regardless of their experience with previous documentation projects;
- ❑ employees contribute to documentation projects while fulfilling their other obligations and responsibilities for the agency;
- ❑ documentation project team members produce documentation projects in a timely manner;
- ❑ agencies publish documentation in a timely manner;
- ❑ agencies maintain consistent, professional documentation that serves as a positive representation of their abilities; and
- ❑ documentation project team members produce documents that meet the expectations of agency supervisors and intended readers.

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## ADOPTING A PROCESS THAT IS APPROPRIATE TO AN AGENCY

The first step toward adopting a standard documentation process is to acknowledge that there is, in fact, a documentation process. Once team members are aware of the process, such as the one described in this paper, they can begin specifying the tasks within the general steps that will allow them to complete their specific documentation project successfully. To define these steps, team members need to choose new and existing standards to integrate into the documentation process.

If agency standards for the documentation process are established, team members can use these as a foundation for their project. Furthermore, even if an agency does not maintain a standard documentation process, more than likely it has standards for specific aspects of documents that can affect the steps of the documentation process. For example, agency logos and other identifiers may affect the design (step 3) while an agency style sheet or acronyms list must be included in the writing and editing (steps 1 and 4). Team members need to integrate such standards into the documentation process, recording their actions to help maintain the standard process for future projects.

In addition to agency standards, team members can look to other agencies in similar fields or sectors when developing a standard documentation process. Although team members more than likely will not witness the documentation process for other agencies, they can at least evaluate the final product and determine what tasks to integrate into the documentation process to render specific aspects of that product. Alternatively, if team members wish to avoid creating a final product similar to other agencies, they may discuss preventative actions to take in specific steps of the process. Overall, it is helpful for documentation project team members to compare their expectations and projects to the final products of similar agencies to help confirm tasks for a standard documentation process.

Once team members determine which standards to apply to the documentation process, they can use the process to assist with an actual documentation project. Overall, a standard documentation process will help guide the development of a documentation project. It will help ensure that team members stay on task and meet milestones, allowing them to produce a final product in a timely manner. However, in addition to the standard process, team members will probably have to set project-specific styles and standards. It is important that team members coordinate such styles and standards with the documentation process and make note of them for future projects.

## EVALUATING THE EFFECTIVENESS OF THE DOCUMENTATION PROCESS

Although modifications to the documentation process can be made throughout a project, team members should include time for evaluation at the end of the project. This evaluation occurs after the final step of the documentation process, and it allows team members to determine what tasks require modifications to prove beneficial for future documentation projects. In addition to speaking with each other, team members may ask supervisors or readers for feedback and suggestions for improvement on the final product. Knowing reactions to the document can help team members determine which tasks of the documentation process did not meet goals or expectations.

In addition, team members should make note of such modifications to the process so that team members on future projects can refer to it—the standard documentation process. Future documentation teams will probably modify the documentation process after their projects as well, but as long as such changes are recorded, the process will continue to serve as a foundation for the next project, thereby promoting agency documentation to improve as projects progress while also ensuring that consistency and professionalism is maintained.

## IMPLEMENTING THE PROPER TOOLS AND TECHNIQUES FOR THE DOCUMENTATION PROCESS

In addition to having a standard process, an agency needs documentation project team members with standard skill sets. Otherwise, team members cannot ensure that they can meet the goals and expectations of the documentation process. For example, if team A has a team member familiar in a desktop-publishing software, but team B does not, then neither team can ensure that they will produce documentation of consistent quality. Furthermore, team members may have different levels of experience with writing and editing, thereby questioning the consistency of the writing itself. Although style guides and editing rubrics help prevent some inconsistency in writing and editing, they cannot prevent differences in team members' writing and editing training.

## TRAINING FOR DOCUMENTATION PROJECT TEAM MEMBERS

To help reduce the differences in documentation training among documentation project team members, agencies may supply training materials and specific programs or techniques to be used for documentation projects. This option ensures that team members for all documentation projects have a similar skill set, which they can use to develop consistent agency documentation.

## USE OF A CONSULTANT IN THE DOCUMENTATION PROCESS

Alternatively, an effective production schedule developed and followed by a suitable consultant can optimize the production of documentation, saving time and energy for those involved. Furthermore, an effective consultant uses his or her training in writing, editing, and design to guarantee that the document presents clear, logical, organized information using proper grammar and usage in a professional design. If hired for multiple documentation projects, a consultant can produce consistent quality across agency documentation in the writing, editing, and design.

## HIRING MACROSYS RESEARCH AND TECHNOLOGY FOR DOCUMENTATION PROJECTS

MacroSys has always emphasized a commitment to client satisfaction, persistent hard work, and positive attitudes in all its employees, resulting in the MacroSys team performing all past projects on time, within budget, and to the satisfaction of its customers.

MacroSys Research and Technology is a minority-owned, 8(a)-certified small business. Since its inception in 1997, MacroSys has evolved from a two-person team to a group

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of over 50 professionals. The MacroSys team consists of highly trained and educated professional, over half of whom hold an advanced degree in economics, statistics, regional science, geography, urban planning, public policy, computer science, applied mathematics, communications, or professional writing.

The MacroSys team provides a rich set of technical skills and a large pool of specialized knowledge. The MacroSys publications production team has provided services in technical writing, editing, and layout and graphic design that are professional and well received by clients and readers. The publications team applies its skills in technical writing, editing, design and layout, as well as publication management to oversee the draft development and production of print and online publications for clients.

### TECHNICAL WRITING AND EDITING

MacroSys's professional writers and technical editors ensure that client's publications communicate organized, accurate information in a professional manner by integrating the documentation process, style guides, grammatical rules, and levels of edit into all publication projects.

### DESIGN AND LAYOUT

MacroSys documentation specialists have a mastery of desktop-publishing and graphics software that they use to apply design principles and techniques to ensure that clients receive publications with designs that are not only professional and consistent but also sophisticated and unique.

### PUBLICATION MANAGEMENT

The MacroSys publication production staff develops and implements publication project plans, monitors project progress, provides editorial and design guidance, advises other team members and clients involved with the project, and ensures the smoothest publication production schedule permissible. All team members are encouraged to anticipate customer needs and become technically better prepared to satisfy such needs upon request.

### CONCLUSION

Recognizing and adopting a standard documentation process is beneficial to agencies seeking effective documentation. Regardless of the intended readers of such documentation, it is important that agencies present documentation that is accurate and professional. A documentation project team can develop a standard documentation process to help ensure that all agency documentation consistently meets the readers' expectations as they relate to content and design.

An effective documentation process should include steps that account for planning, writing, designing, editing, and printing a document. However, each document can have project-specific tasks that fall within these steps. It is the responsibility of documentation project team members to identify such tasks and coordinate them with the documentation process. Furthermore, team members must recognize when other standards are applicable

to a project and integrate them appropriately. After documentation project team members apply the documentation process, they should evaluate the process and provide modifications so that future project teams have a stronger, more effective foundation from which to produce documentation projects.

This paper has described the documentation process, as well as its importance and the means for applying it so that readers can recognize that it is beneficial during documentation projects. Regardless of the specific tasks involved, the documentation process can help uphold specific expectations of agencies and their employees, including:

- ❑ employees participating in the creation of agency documentation, regardless of their experience with previous documentation projects;
- ❑ employees contributing to documentation projects while fulfilling their other obligations and responsibilities for the agency;
- ❑ documentation project team members producing documentation projects in a timely manner;
- ❑ agencies publishing documentation in a timely manner;
- ❑ agencies maintaining consistent, professional documentation that serves as a positive representation of their abilities; and
- ❑ documentation project team members producing documents that meet the expectations of agency supervisors and intended readers.

## RESOURCES

Refer to these and other resources to better understand and develop a standard documentation process.

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