

LEARNING MADE EASY



2nd Edition

# Technical Writing

for  
**dummies**<sup>®</sup>  
A Wiley Brand



Master the worlds of  
Clouds, AI, and Collaboration

—  
Create awesome user manuals,  
e-docs, and simulations

—  
Grasp what your learners  
need to know

**Sheryl Lindsell-Roberts, MA**  
Author, Writing Workshop Facilitator



# Technical Writing

for  
**dummies**<sup>®</sup>  
A Wiley Brand





# Technical Writing

2nd Edition

**by Sheryl Lindsell-Roberts, MA**

for  
**dummies**<sup>®</sup>  
A Wiley Brand

# Technical Writing For Dummies®, 2nd Edition

Published by

**Wiley Publishing, Inc.**

111 River St.

Hoboken, NJ 07030-5774

[www.wiley.com](http://www.wiley.com)

Copyright © 2023 by John Wiley & Sons, Inc., Hoboken, NJ

Media and software compilation copyright © 2023 by John Wiley & Sons, Inc. All rights reserved.

Published simultaneously in Canada

No part of this publication may be reproduced, stored in a retrieval system or transmitted in any form or by any means, electronic, mechanical, photocopying, recording, scanning or otherwise, except as permitted under Sections 107 or 108 of the 1976 United States Copyright Act, without the prior written permission of the Publisher. Requests to the Publisher for permission should be addressed to the Permissions Department, John Wiley & Sons, Inc., 111 River Street, Hoboken, NJ 07030, (201) 748-6011, fax (201) 748-6008, or online at <http://www.wiley.com/go/permissions>.

**Trademarks:** Wiley, For Dummies, the Dummies Man logo, Dummies.com, Making Everything Easier, and related trade dress are trademarks or registered trademarks of John Wiley & Sons, Inc. and may not be used without written permission. All other trademarks are the property of their respective owners. John Wiley & Sons, Inc. is not associated with any product or vendor mentioned in this book.

LIMIT OF LIABILITY/DISCLAIMER OF WARRANTY: WHILE THE PUBLISHER AND AUTHORS HAVE USED THEIR BEST EFFORTS IN PREPARING THIS WORK, THEY MAKE NO REPRESENTATIONS OR WARRANTIES WITH RESPECT TO THE ACCURACY OR COMPLETENESS OF THE CONTENTS OF THIS WORK AND SPECIFICALLY DISCLAIM ALL WARRANTIES, INCLUDING WITHOUT LIMITATION ANY IMPLIED WARRANTIES OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE. NO WARRANTY MAY BE CREATED OR EXTENDED BY SALES REPRESENTATIVES, WRITTEN SALES MATERIALS OR PROMOTIONAL STATEMENTS FOR THIS WORK. THE FACT THAT AN ORGANIZATION, WEBSITE, OR PRODUCT IS REFERRED TO IN THIS WORK AS A CITATION AND/OR POTENTIAL SOURCE OF FURTHER INFORMATION DOES NOT MEAN THAT THE PUBLISHER AND AUTHORS ENDORSE THE INFORMATION OR SERVICES THE ORGANIZATION, WEBSITE, OR PRODUCT MAY PROVIDE OR RECOMMENDATIONS IT MAY MAKE. THIS WORK IS SOLD WITH THE UNDERSTANDING THAT THE PUBLISHER IS NOT ENGAGED IN RENDERING PROFESSIONAL SERVICES. THE ADVICE AND STRATEGIES CONTAINED HEREIN MAY NOT BE SUITABLE FOR YOUR SITUATION. YOU SHOULD CONSULT WITH A SPECIALIST WHERE APPROPRIATE. FURTHER, READERS SHOULD BE AWARE THAT WEBSITES LISTED IN THIS WORK MAY HAVE CHANGED OR DISAPPEARED BETWEEN WHEN THIS WORK WAS WRITTEN AND WHEN IT IS READ. NEITHER THE PUBLISHER NOR AUTHORS SHALL BE LIABLE FOR ANY LOSS OF PROFIT OR ANY OTHER COMMERCIAL DAMAGES, INCLUDING BUT NOT LIMITED TO SPECIAL, INCIDENTAL, CONSEQUENTIAL, OR OTHER DAMAGES.

For general information on our other products and services, please contact our Customer Care Department within the U.S. at 877-762-2974, outside the U.S. at 317-572-3993, or fax 317-572-4002. For technical support, please visit <https://hub.wiley.com/community/support/dummies>.

Wiley publishes in a variety of print and electronic formats and by print-on-demand. Some material included with standard print versions of this book may not be included in e-books or in print-on-demand. If this book refers to media such as a CD or DVD that is not included in the version you purchased, you may download this material at <http://booksupport.wiley.com>. For more information about Wiley products, visit [www.wiley.com](http://www.wiley.com).

Library of Congress Control Number: 2023937438

ISBN 978-1-394-17675-5 (pbk); ISBN 978-1-394-17676-2 (ebk); ISBN 978-1-394-17677-9 (ebk)

# Contents at a Glance

<b>Introduction</b> .....	1
<b>Part 1: What It Takes to Write Technical Docs</b> .....	5
CHAPTER 1: Working as a Technical Writer .....	7
CHAPTER 2: Putting Together a Team and a Plan .....	25
<b>Part 2: The Write Stuff</b> .....	37
CHAPTER 3: Completing a Technical Writing Brief .....	39
CHAPTER 4: Crafting a Draft .....	51
CHAPTER 5: Designing Documents to Enhance the User Experience .....	57
CHAPTER 6: Honing the Tone .....	85
CHAPTER 7: Fine-Tuning toward the Ideal .....	97
<b>Part 3: Frequently Written Docs</b> .....	107
CHAPTER 8: Writing User Manuals and More .....	109
CHAPTER 9: Preparing Abstracts .....	127
CHAPTER 10: Creating Spec Sheets .....	133
CHAPTER 11: Generating Questionnaires .....	141
CHAPTER 12: Preparing for Technical Presentations .....	149
CHAPTER 13: Abridging for Executive Summaries .....	159
<b>Part 4: Tech Tools</b> .....	167
CHAPTER 14: Collaborating with Others .....	169
CHAPTER 15: Videoconferencing .....	183
CHAPTER 16: Offering eLearning .....	195
CHAPTER 17: Surfing the Net .....	211
CHAPTER 18: Protecting Intellectual Property .....	221
<b>Part 5: The Part of Tens</b> .....	233
CHAPTER 19: Ten Tips for Writing a Whitepaper .....	235
CHAPTER 20: Ten Tips for Publishing in a Technical Journal .....	241
CHAPTER 21: Ten Frustrations of Technical Writers .....	247

<b>Appendix A: Punctuation Made Easy</b> .....	253
<b>Appendix B: Grammar’s Not Grueling</b> .....	265
<b>Appendix C: Abbreviations and Metric Equivalents</b> .....	275
<b>Appendix D: Tech Talk: Glossary of Terms</b> .....	285
<b>Appendix E: Technical Writing Brief</b> .....	289
<b>Index</b> .....	293



# Table of Contents

<b>INTRODUCTION</b> .....	1
About This Book .....	1
Foolish Assumptions .....	2
Icons Used in This Book .....	3
Beyond the Book .....	4
Where to Go from Here .....	4
<b>PART 1: WHAT IT TAKES TO WRITE TECHNICAL DOCS</b> .....	5
<b>CHAPTER 1: Working as a Technical Writer</b> .....	7
Technical Writers Spring from All Walks of Life .....	8
Documentation Is Part of Our Everyday Lives .....	9
Technical Writing Differs from Business Writing .....	10
Documents of the business kind .....	10
Documents of the technical kind .....	11
Assigning Responsibility for Technical Documents .....	11
It's About Strategy, Not Software .....	12
What You Need to Succeed .....	12
Seeing Is Believing .....	14
Case 1 .....	14
Case 2 .....	16
Case 3 .....	16
Beyond the Writing .....	17
Create a dynamic portfolio .....	17
Create a LinkedIn profile .....	19
Present your business card .....	19
Tech Writing Career Trajectories .....	20
Translate technical documents .....	21
Become a UX writer .....	21
Soar into the cloud .....	22
Become a scrum master .....	22
<b>CHAPTER 2: Putting Together a Team and a Plan</b> .....	25
Benefiting from the Team Experience .....	26
Know who's on first .....	26
Turn stumbling blocks into stepping stones .....	27
Choosing the Right Type of Delivery .....	28
Completing a Production Schedule .....	29
Make the production schedule a "must" .....	29
Timing is everything .....	29
The Power of Brainstorming .....	30

Generating an Outline . . . . .	32
Write a traditional outline . . . . .	32
Use a decimal numbering system . . . . .	33
Create an annotated table of contents . . . . .	33
Getting Your Arms around the Document . . . . .	33
Conduct internal research . . . . .	34
Conduct external research . . . . .	35
<b>PART 2: THE WRITE STUFF . . . . .</b>	<b>37</b>
<b>CHAPTER 3: Completing a Technical Writing Brief . . . . .</b>	<b>39</b>
How to Feed a Martian . . . . .	39
Will Zeb go hungry? . . . . .	40
Fill Zeb's empty stomach . . . . .	41
Getting Jump-Started with the Technical Writing Brief . . . . .	42
Slicing and Dicing the Technical Writing Brief . . . . .	43
About the document . . . . .	43
Learner profile . . . . .	45
Key issues . . . . .	47
Budget . . . . .	48
Project team . . . . .	48
Milestones . . . . .	48
Approval cycle . . . . .	48
<b>CHAPTER 4: Crafting a Draft . . . . .</b>	<b>51</b>
Psyching Yourself Up . . . . .	51
Getting Down to Business . . . . .	52
Integrating the Editing Process . . . . .	53
The wallpaper edit . . . . .	53
Hold on to your ego . . . . .	54
Revising Your Work . . . . .	55
<b>CHAPTER 5: Designing Documents to Enhance the User Experience . . . . .</b>	<b>57</b>
Grabbing Your Learners' Attention . . . . .	58
Using Whitespace . . . . .	58
Giving Learners a Break . . . . .	59
Limit sentences to 20 syllables . . . . .	59
Limit paragraphs to eight lines . . . . .	60
Harnessing the Power of Headlines . . . . .	61
Understand the business value of headlines . . . . .	62
Know the value of SEO in headlines . . . . .	62
Putting It on the List . . . . .	63
Use bulleted lists . . . . .	63
Use numbered lists . . . . .	63

Use parallel structure . . . . .	65
Punctuate lists . . . . .	66
Avoid laundry lists . . . . .	66
Keeping It Short and Simple (KISS) . . . . .	68
Presenting the Natural Order of Things . . . . .	69
Put the bottom line up front . . . . .	69
Put the bottom line at the end . . . . .	69
A Picture (Pixel) Is Worth a Thousand Words . . . . .	70
Include pie charts . . . . .	71
Include line charts . . . . .	71
Include bar charts . . . . .	74
Include scatter charts . . . . .	75
Include flowcharts . . . . .	75
Tabling That Thought . . . . .	78
Create a formal table . . . . .	79
Create an informal table . . . . .	79
Adding More Value to Your Visuals . . . . .	80
Scale for size . . . . .	81
Location, location, location . . . . .	83
What's your visual preference? . . . . .	83
<b>CHAPTER 6: Honing the Tone . . . . .</b>	<b>85</b>
Giving 'Em a Little KISS . . . . .	86
KISS your technical documents . . . . .	86
Cut to the quick . . . . .	87
Accentuating the Positive . . . . .	87
Fill the glass half full . . . . .	88
Empty the glass . . . . .	89
Loving the Active Voice . . . . .	89
Bring documents to life with active voice . . . . .	89
Use passive voice strategically . . . . .	90
Looking Through Lens of Social Justice . . . . .	91
Show respect for all . . . . .	91
Consider gender-neutral pronouns . . . . .	92
Consider a sentence reword . . . . .	93
Being Clear and Consistent . . . . .	93
Define terms and acronyms . . . . .	94
Who's laughing? . . . . .	95
When to be a jargon junkie . . . . .	95
<b>CHAPTER 7: Fine-Tuning toward the Ideal . . . . .</b>	<b>97</b>
Crossing Your T's and Dotting Your I's . . . . .	98
Editing versus proofreading . . . . .	100
Test your proofreading skills . . . . .	100

Editing for Clarity and Flow . . . . .	100
Track changes . . . . .	101
Use an editing checklist . . . . .	101
Determining the Readability of Your Documents. . . . .	103
Don't save the best for last. . . . .	103
Try readability testing. . . . .	104
Ramp up your readability. . . . .	105
Use online readability assessments . . . . .	105
<b>PART 4: FREQUENTLY WRITTEN DOCS . . . . .</b>	<b>107</b>
<b>CHAPTER 8: Writing User Manuals and More . . . . .</b>	<b>109</b>
Understanding the Value of a Well-Written Manual. . . . .	110
Provide a good customer experience. . . . .	110
Avoid legal issues. . . . .	110
Know what to include . . . . .	110
Know your audience . . . . .	112
Getting Up and Running. . . . .	112
Determining Style and Format . . . . .	114
Taking Each Step, Then Acting on It . . . . .	116
The devil is in the details . . . . .	117
Check out the contents of the box . . . . .	117
Writing for Between the Covers . . . . .	118
Prepare a table of contents . . . . .	118
Append appendixes . . . . .	118
Generate a glossary . . . . .	118
Itemize an index . . . . .	119
Testing, Testing, 1-2-3. . . . .	120
Determining Frequently Asked Questions (FAQs) . . . . .	120
Preparing an Instructional Video for Streaming . . . . .	121
Start with a script. . . . .	122
Choose a video host . . . . .	123
Creating a Simulated Learning Experience (SLE) . . . . .	123
Apply SLE to simulations . . . . .	124
Imagine what's next: The metaverse . . . . .	125
Join-the-Dots Brain Teaser. . . . .	126
<b>CHAPTER 9: Preparing Abstracts . . . . .</b>	<b>127</b>
Types of Abstracts . . . . .	128
Preparing an Informative Abstract . . . . .	128
What to include . . . . .	129
What to omit. . . . .	129
Using Abstracts Effectively. . . . .	131

<b>CHAPTER 10: Creating Spec Sheets</b> .....	133
Knowing What to Include .....	134
Following the Natural Order of Things .....	134
Phase 1: Requirement specs .....	135
Phase 2: Functional specs .....	135
Phase 3: Design specs .....	136
Phase 4: Test specs .....	136
Phase 5: End-user specs .....	137
Considering Some Examples .....	137
<b>CHAPTER 11: Generating Questionnaires</b> .....	141
Differentiating between Questionnaires and Surveys .....	142
Ask unbiased questions .....	142
Avoid double-barreled questions .....	143
Using Distribution Channels .....	143
Designing the Form .....	144
Posing the Questions .....	146
Include closed-ended questions .....	146
Select open-ended questions .....	147
Learning from the Results .....	148
<b>CHAPTER 12: Preparing for Technical Presentations</b> .....	149
Getting to Know Your Audience .....	150
Getting Ready for Prime Time .....	151
Timing is everything .....	151
Get comfortable with your environment .....	152
Conveying Your Message with Confidence and Competence .....	152
Use repetition strategically .....	153
Leave these phrases at the door .....	153
Organizing for High Impact .....	154
Presenting Visuals .....	155
Giving Them Something to Remember You By .....	156
Give handouts before your presentation .....	156
Give handouts after your presentation .....	156
Checking Out Before Checking In .....	157
<b>CHAPTER 13: Abridging for Executive Summaries</b> .....	159
An Executive Summary Is Critical .....	159
Summing It Up .....	161
Include graphics .....	162
Use an appropriate tone .....	162
Learn from a success story .....	163
Delving into the Executive Summary for a Business Plan .....	166

<b>PART 4: TECH TOOLS</b> .....	167
<b>CHAPTER 14: Collaborating with Others</b> .....	169
Collaboration Is about People .....	170
Build trust .....	170
Give constructive feedback .....	171
Find solutions to challenges .....	171
Collaborative Team Etiquette: Etta Kitt Says .....	173
Get started .....	173
Communicate effectively .....	174
Using Collaboration Tools .....	174
Allow team members time to train .....	175
Consider these prolific providers .....	175
Get what you pay for .....	176
Know what you need .....	176
Perform an accessibility check .....	177
An ounce of prevention .....	177
Storing Data in the Cloud .....	178
Understand governance .....	180
Prevent security breaches .....	180
<b>CHAPTER 15: Videoconferencing</b> .....	183
Using the Goldilocks Theory for Selecting .....	184
Find the best platform for your needs .....	185
Identify additional equipment needs .....	186
Creating a Culture of Inclusivity .....	186
Know the accessibility of an app .....	187
Videoconferencing Pros and Woes .....	187
Pros .....	188
Woes .....	188
Are You Ready for Your Close-Up? .....	189
Fostering Cohesive Hybrid Teams .....	190
Suffering Burnout or Videoconferencing Fatigue? .....	190
Recognize the signs .....	191
Determine other options .....	191
Planning for Success .....	192
Onscreen Netiquette: Etta Kitt Says .....	193
Dos .....	193
Taboos .....	193
<b>CHAPTER 16: Offering eLearning</b> .....	195
Understanding the Forms of eLearning .....	196
Preparing the Learning Objectives .....	196
Delivering eLearning .....	197
Use an LMS .....	197

Use an SCORM . . . . .	198
Use xAPI . . . . .	198
Elements of eLearning . . . . .	198
Choosing Your Software . . . . .	200
Buy it . . . . .	200
Construct it . . . . .	200
Outsource it . . . . .	201
Creating Learning Modules . . . . .	201
Chunk information . . . . .	203
Check for readability . . . . .	204
Meet expectations . . . . .	204
Solving Business Problems . . . . .	204
Designing a Process . . . . .	205
Set your sights . . . . .	205
Plan for the learner’s experience . . . . .	205
Design the training experience . . . . .	206
Make a prototype . . . . .	206
Create a storyboard . . . . .	207
Testing, Testing, 1-2-3 . . . . .	208
Fix bugs and glitches . . . . .	208
Evaluate training . . . . .	208
<b>CHAPTER 17: Surfing the Net . . . . .</b>	<b>211</b>
Avoiding the Internet Sharks . . . . .	213
Dodging Other Internet Pitfalls . . . . .	214
Decoding Error Messages . . . . .	215
Searching for the Holy Grail . . . . .	216
Boolean searches . . . . .	216
Other syntax searches . . . . .	216
Speed surfing . . . . .	217
Boosting Search Engine Optimization (SEO) . . . . .	217
Understand pay-per-click (PPC) . . . . .	218
Go organic (non-paid results) . . . . .	218
Avoid keyword stuffing . . . . .	218
Turn SEO over to the experts . . . . .	219
<b>CHAPTER 18: Protecting Intellectual Property . . . . .</b>	<b>221</b>
Applying for a Patent . . . . .	222
Know the types of patents . . . . .	223
Do your homework . . . . .	225
Submit your idea . . . . .	225
Know who owns the patent . . . . .	226
Establishing a Copyright . . . . .	228
Know what to include . . . . .	229
Get your works copyrighted . . . . .	229

Registering a Trademark . . . . .	230
Use unregistered trademarks and service marks . . . . .	230
Apply for a registered trademark . . . . .	231
<b>PART 5: THE PART OF TENS . . . . .</b>	<b>233</b>
<b>CHAPTER 19: Ten Tips for Writing a Whitepaper . . . . .</b>	<b>235</b>
Consider Your Audience . . . . .	236
Find Credible Sources . . . . .	236
Include Facts and Figures . . . . .	236
Follow a Simple Format . . . . .	237
Create an Eye-Catching Cover . . . . .	237
Pique Interest . . . . .	238
Proofread and Edit Carefully . . . . .	238
Conclude with a Call to Action . . . . .	238
Maximize Mileage . . . . .	238
Measure the Impact . . . . .	239
<b>CHAPTER 20: Ten Tips for Publishing in a Technical Journal . . . . .</b>	<b>241</b>
Don't Procrastinate; Just Do It! . . . . .	242
Hook Up with the Right Publication . . . . .	243
Decipher the Masthead . . . . .	243
Understand the Lingo . . . . .	243
Write a Query Letter . . . . .	244
Follow Up after Submitting Your Manuscript . . . . .	245
Try Simultaneous Submissions . . . . .	245
Don't Stress about Confidentiality . . . . .	245
Don't Take No for an Answer . . . . .	246
Take the Next Steps: When Your Article Is Accepted . . . . .	246
<b>CHAPTER 21: Ten Frustrations of Technical Writers . . . . .</b>	<b>247</b>
Work Overload and Time Pressures . . . . .	248
Last-Minute Changes . . . . .	248
Issues with Subject Matter Experts (SMEs) . . . . .	248
Problems with Micromanagers . . . . .	248
Challenges with New Products . . . . .	249
Hardware and Software Challenges . . . . .	249
Poorly Defined and Managed Projects . . . . .	249
Poor Workspace Environments . . . . .	250
Little or No Job Security . . . . .	250
Burnout . . . . .	250



<b>APPENDIX A: PUNCTUATION MADE EASY .....</b>	<b>253</b>
<b>APPENDIX B: GRAMMAR'S NOT GRUELING .....</b>	<b>265</b>
<b>APPENDIX C: ABBREVIATIONS AND METRIC EQUIVALENTS .....</b>	<b>275</b>
<b>APPENDIX D: TECH TALK: GLOSSARY OF TERMS .....</b>	<b>285</b>
<b>APPENDIX E: TECHNICAL WRITING BRIEF .....</b>	<b>289</b>
<b>INDEX .....</b>	<b>293</b>



# Introduction

*As a technical communicator, I am an enabler of information.*

—SUYOG KETKAR, CERTIFIED TECHNICAL WRITER

**W**elcome to the second edition of *Technical Writing For Dummies*, which will propel you into the exciting worlds of eLearning, collaboration tools, videoconferencing, streaming, simulations, surfing, artificial intelligence (AI), virtual reality (VR), search engine optimization (SEO), user experience (UX) writing, a zoom into the metaverse, and much more!

## About This Book

To make the content easy to find and read, I divided it into six parts:

- » **Part 1: What It Takes to Write Technical Docs.** This part takes you through the gratification of being a technical writer and discusses putting together a team.
- » **Part 2: The Write Stuff.** This part introduces you to the Technical Writing Brief to find out all you can about your learners. Following that, you discover how to write a draft, design for visual impact, hone the tone, and proofread and edit. This is the meat of the book, so you'll get the most out of it by reading these chapters in sequential order.
- » **Part 3: Frequently Written Docs.** Here, you find guidelines for writing whiz-bang user manuals (and more), plus scripting for streaming and simulations, abstracts, spec sheets, questionnaires, technical presentations, and executive summaries.
- » **Part 4: Tech Tools.** No technical writing book would be complete without focusing on the power of people, the computer, and the Internet. This part goes into details about team collaboration, videoconferencing, eLearning, doing advanced online searches, and protecting intellectual property.
- » **Part 5: The Part of Tens.** This part is a *Dummies* classic. It includes a potpourri of tips on writing whitepapers and journal articles, as well as some frustrations of technical writers.
- » **Appendixes.** The appendixes round out this book with sections on punctuation, grammar, abbreviations and metrics, tech terms, and a blank copy of the Technical Writing Brief.

Beyond the words on the pages, I practice what I preach and teach. I wrote this book in conversational language, much like I'd talk to you. I hope you'll learn by example and write your technical documents as if you're talking to your learners. This will make you and your writing relatable. Throughout this book, you see the following to emulate:

- » Informative headlines and subheads
- » Bulleted and numbered lists
- » Straightforward, conversational language
- » Short paragraphs
- » Graphic elements (when they "speak" louder than words)

## Foolish Assumptions

Before I began writing this book, I made some assumptions about you — the reader. (I don't normally make assumptions because we all know what happens when we ass-u-me.) However, I've thrown caution to the wind and guessed that you likely fit into one of these categories:

- » You're an engineer, scientist, computer programmer, or IT specialist
- » You work in some other technical or medical field
- » You're a newbie writer or a seasoned technical writer
- » You're a college student who's entering a technical field or becoming a tech writer
- » You shake and grunt like an unbalanced clothes dryer when you're asked to write a technical document

Technical writers come from all walks of life: teachers, musicians, tradespeople, journalists, financial analysts, attorneys, scientists, researchers, and more. Technical writing services are sought worldwide and are in hot demand. So whether you're a technical person who finds that technical writing is something you must do to advance your career or you're a professional technical writer looking to fine-tune your skills, this book is invaluable to your professional growth and survival.

And that's a *sensible* assumption!

## NOTE ABOUT GENDERS

The language of genders has evolved over time. Many of us have become accustomed to using she/her/hers for females and he/his/him for males. As gender vocabulary continues to evolve, it's proper to address a singular person as they, them, ze, or hir. Many people now put their gender preferences in the signature blocks of their emails. Inclusive language offers respect, safety, and belonging to all people. This book uses this inclusive approach.

Having said that, *The Chicago Manual of Style* (a staple reference for writers and editors since 1906) is watching the generic use of inclusive language, stating: "They and their have become common in informal usage, but neither is considered fully acceptable in formal writing." As you go through your technical writing projects, use good judgment and always consider your audience.

## Icons Used in This Book

Scattered throughout this book are icons in the margins. They highlight valuable information that call for your attention.



SHERYL  
SAYS

Benefit from my experiences — the blissful, the painful, and everything in between.



TECHNICAL  
WRITING BRIEF

Don your Sherlock Holmes hat, scrutinize the Technical Writing Brief, and gather all the clues you can about your readers.



TIP

Find nifty tips for writing it so they'll read it. These may be time savers, frustration savers, lifesavers, or just about anything else.



REMEMBER

This is just what you'd expect. What else? — tidbits to remember.



WARNING

Ouch! Avoid these pitfalls to save yourself headaches, heartburn, embarrassments, or worse.



CROSS  
REFERENCE

Check out another section of the book for related content.

## Beyond the Book

In addition to the material in the print or e-book you're reading right now, this product also comes with some goodies you can access on the web. Check out the free access-anywhere Cheat Sheet that includes tips and advice. To get this Cheat Sheet, simply go to [www.dummies.com](http://www.dummies.com) and type **Technical Writing For Dummies Cheat Sheet** in the Search box.

The cheat sheet is a blank Technical Writing Brief, which you can use to jump-start all writing projects. (A copy also appears in Chapter 3 with an in-depth explanation, as well as a blank paper copy in Appendix E.) Share the brief with your team and keep a copy on your computer, tablet, and smartphone for handy reference.

## Where to Go from Here

I realize you won't read this book like a suspenseful mystery novel from cover to cover — but I strongly suggest that you read Part 2 (Chapters 3–7) sequentially. Good technical writing is a process of understanding your learners, writing the draft, designing for visual impact, honing the tone, and proofreading and editing. These chapters offer the foundation for a wide variety of technical documents, many of which appear in this book. After that, feel free to jump around to whatever topic interests you or applies to the writing challenges you face.

# 1 What It Takes to Write Technical Docs

## **IN THIS PART . . .**

Develop a strategic approach to technical writing, produce impactful documents, learn how to create a portfolio, and discover tech writing career trajectories.

Put together the best team, develop your plan, choose the delivery method, and complete a production schedule and outline.



## IN THIS CHAPTER

- » Discovering who writes technical documents
- » Understanding how business and technical documents differ
- » Creating a portfolio and business cards
- » Learning about different career trajectories

# Chapter **1**

# Working as a Technical Writer

*I didn't go to film school. My grandpa always says just watch a lot of movies. He didn't go to film school; he went to theatre school. It's interesting to learn about the technical side of it, but I think it's more important to learn about writing and working with actors.*

—*Gia Coppola, Granddaughter of Francis Ford Coppola*

**A**lthough formal training in technical writing may be helpful, you don't need it any more than Francis Ford Coppola needed film school to become one of the most successful figures of Hollywood filmmaking. What you need is

- » A love of learning
- » An attention to detail
- » A good command of the English language

- » An understanding of how people use and process information
- » The ability to manage tasks and work well as part of a team

If you arranged your alphabet soup into acronyms when you were a kid, you constantly asked “why” when people told you to stop asking questions, or you sent Santa lists with headings and subheadings, you’re a natural-born technical writer.

## Technical Writers Spring from All Walks of Life

People who write technical documents come from all walks of life — and most aren’t technical writers per se. Here are some actual situations of people who were called upon to write technical documents in the course of their professions:

- » **Computer programmer:** Octavia graduated with a degree in computer science and was hired as a software developer for a company. Several months later, the company felt a financial pinch and laid off the technical writers. Octavia had a big deliverable due in a few months, and her supervisor told her that she had to write a user manual. Sophomore English (which Octavia struggled through and loathed) didn’t prepare her for this type of assignment. After all, Shakespeare wasn’t a technical sort of guy. Poor Octavia had to muddle through writing the user manual and got gray hair prematurely.
- » **Manufacturing specialist:** Bill worked for a manufacturing company for many years and developed a piece of equipment that was expected to revolutionize the industry. The equipment made its debut in Germany at the industry’s largest conference. Bill’s supervisor asked him to deliver a paper (the industry term for a making technical presentation) at the conference. The audience would consist of more than 200 high-level industry professionals. Not only did Bill fear the podium more than the dentist’s drill, he didn’t know how to prepare or deliver a technical paper — especially in a foreign country for an audience of this caliber.
- » **Biotech scientist:** While working at a pharmaceutical company, Abdul had a major breakthrough on a treatment that promised to prevent baldness. The company president asked him to write an article for a major medical journal. Although Abdul was flattered by the president’s request, he didn’t know the first thing about writing or submitting a technical article.

## BRIGHT AND EXCITING FUTURES FOR TECH WRITERS

The Bureau of Labor Statistics released its annual Occupational Handbook for Technical Writers. It predicts that job growth in this field is expected to outpace the national average for all other occupations. This is due in part to the growing high-tech and electronics industries that are embracing the value of superior-quality technical communications — paving the way to solve problems more quickly and easily by intersecting the human experience with the digital world.

» **Sales representative:** Lynette was a sales representative for a worldwide computer distributor. She'd often be away from home for weeks at a time. After 15 years as a road warrior, Lynette suffered from burnout. (She used to leave her picture on the fireplace mantle so that her family wouldn't forget what she looked like.) Lynette had been reading about the burgeoning field of tech writing. She called a local college, got all the literature, and decided to pursue a degree in technical writing.



Although I changed the names to protect the innocent, scenarios such as these are typical. Technical people who aren't trained writers are constantly asked to write technical documents. Their education and work experience rarely prepare them for this type of challenge. This book can help bridge the gap!

## Documentation Is Part of Our Everyday Lives

Whether you realize it or not, documentation is part of our everyday lives — both personal and business. When you buy a new piece of electronics, it comes with instructions. When you buy a DIY (do-it-yourself) furniture kit, it comes with assembly instructions. When you get a prescription for medication, it comes with a leaflet on how often to take the medication and what the side effects may be. Documents are written for all of us, not just for computer geeks who assemble rockets or plasma generators. And it's not just the computer geeks who write technical documents — all technical people do at some point in their careers.

## THE HUMBLE BEGINNINGS OF TECH WRITING

Technical writing as we know it today took root in World War II when the U.S. military persuaded “those who served” to write manuals to aid the war effort. The military needed to teach soldiers about weapons, transport vehicles, and other hardware. These “technical writers” had little or no training. They just sat down at their manual typewriters and banged out whatever made sense to them. I don’t know whether it made sense to the poor soldiers trying to decipher their writing. But we did win the war!

Technical writing means different things to different people. It covers the fields of electronics, aircraft, computer manufacturing and software development, chemical, biotech, pharmaceuticals, health, and much more. It spans the public and private sectors as well as government and academic institutions.

## Technical Writing Differs from Business Writing

Many people ask the difference between business writing and technical writing. The difference is analogous to apples and watermelon. For example, at the very core (pardon the pun), apples and watermelons are fruits. And at the very core, documents are words and graphics. Beyond the core, business and technical documents are different species.

### Documents of the business kind

Emails are the crux of business writing and account for as much as 90 percent of all business communication. Other type of business writing include letters, reports, blog posts, articles, and more. One major difference between business and technical documents is that business documents are generally written by one person, often for a single learner or small, select group of learners. Following are some commonly written business documents:

- » Agendas
- » Emails
- » Letters

- » Meeting minutes
- » Proposals

## Documents of the technical kind

People in specialized fields write documents that relate to technical or complex subjects. Unlike business documents, technical documents are often a collaborative effort between a technical writer, UX writer, subject matter expert (SME), editor, and others. Technical documents are generally intended for a vast number of learners. Following are some commonly written technical documents. You find chapters about the specifics of writing each of these documents later in this book.

- » Abstracts
- » Articles for publication
- » eLearning
- » Executive summaries
- » Functional and detail specifications
- » Online help
- » Questionnaires
- » Reports
- » User manuals

## Assigning Responsibility for Technical Documents

The responsibility for writing technical documents depends on a company's structure and resources. Following are several ways that companies typically generate technical documents:

- » **Technical gurus (engineers, software developers, and others) write their own documents.** Some of these people may have taken writing courses, but most have no training in writing a cohesive document. These “technical writers” often overlook steps in the process. They write what's obvious to them. And they often haven't identified the needs of their learners.

- » **These same gurus may draft documents and then turn the drafts over to technical writers to edit, format, and polish.** Unless the technical writer has an opportunity to learn the subject matter intimately, many of the steps that may have been overlooked by the gurus aren't identified by the writer or editor. This process does, however, produce a document that may be more pleasing to the eye.
- » **A technical writer is called in from the onset of a project.** The writer works with the developer who's the subject matter expert (SME). They work as a collaborative team, each adding their expertise to the project. This approach is the best of all possible worlds.

## It's About Strategy, Not Software

Anyone who writes technical documents must understand how critical it is to take a strategic approach. For example, if you design a custom home, do you first call someone to wield a hammer? Of course not. A hammer is merely a tool. To design a custom home, you call an architect — a trained professional who designs layout; renders plans for the plumbing, electrical, and heating systems; and provides the structure. Then you call someone with a hammer.

The same holds true in technical writing. Effective technical documents require an information architect — *a technical writer*. Whether this person is a professional technical writer or an engineer or software developer who writes technical documents, this person must plan, design, and provide logical structure. Anyone can learn to use the software to create the document. Much like the hammer, software is merely a tool. The key to writing a great document is *strategy*, not software.



SHERYL  
SAYS

Someone once told me that they wouldn't make a good technical writer because they can't even use jumper cables to rev up an ailing car battery. Remember that technical writing isn't about jumper cables or about understanding every aspect of the technical and scientific communities. And it isn't about knowing every nuance of the latest software application. Very few people have that broad a knowledge base. Technical writing is about using *strategy and resources* to write clear, accurate, and logical documents. If you apply a logical strategy and avail yourself of resources, you can write just about anything — from using your instant pot to assembling a jet engine.

## What You Need to Succeed

Following is a snapshot of what it takes to write clear and understandable technical documents: