

User Interfaces to User Manuals

Technical Editing in the Software Industry

Who am I?

- Patrick X. Gray, Technical Writer at Argo AI
- B.S. in Biology from Case Western Reserve University (2002-2007)
- M.S in Technical Communication from Northeastern University (2013-2015)
- Live and work in Pittsburgh, PA

What do I do?

- 5 years as a full time technical communicator in the software industry
 - Argo AI
 - ANSYS Inc.
 - Ribose Inc.
 - SpinSci Technologies
 - Universal Electric Corp
- Responsibilities
 - Planning strategy
 - Writing
 - Editing
 - Building documentation systems

What does Argo AI do?

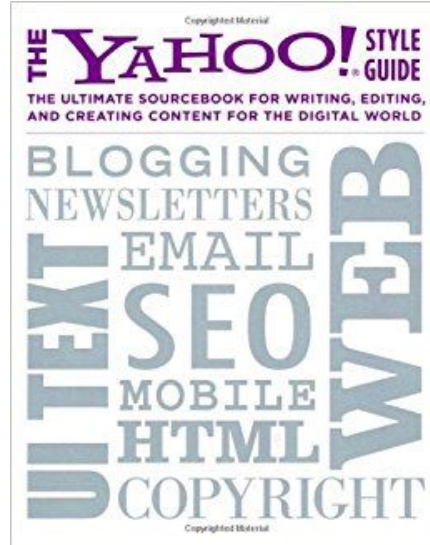
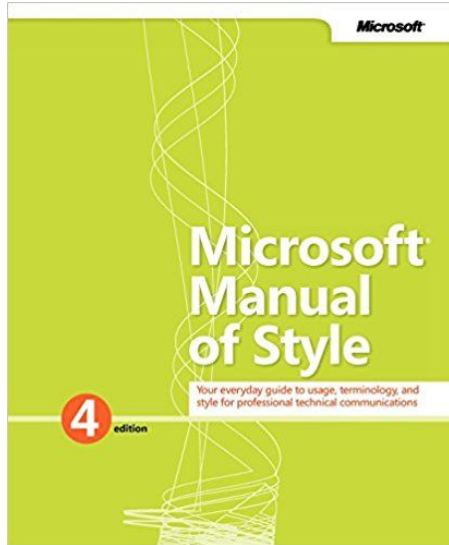
- Developing self driving system for Ford
 - Hardware design
 - On-car software system (self-driving software)
 - Map building and development for use on car



What is a technical editor?

- Most experienced technical communicator on a technical communications team
- Sometimes, another technical communicator providing review for a colleague
- Responsible for editing technical documents for content, style, and tone
- Responsible for reviewing UI elements (strings, tooltips, other text) for consistency and accuracy
- Responsible for implementing and enforcing a unified style guide

Style in the software industry



Apple Style Guide

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Google Developer Documentation Style Guide

What do technical editors do?

- In general
 - Review written content for language and consistency
 - Review written content for appropriateness for the intended audience
 - Review content for publishing
 - Review technical content for consistency and accuracy
- In the software industry
 - Review written content from developers and technical writers
 - Review user interfaces, videos, and other non-written content
 - Plan and execute documentation in parallel with software development
 - Edit and maintain corporate wikis or blogs
 - Provide feedback through retrospectives or lookbacks

Who needs a technical editor?

- Organizations publishing material to communication product function to end users
- Organizations with internal tools that are used across departments
- Organizations with tightly controlled procedures and training
- Anyone publishing technical content that is used for production, training, or operations

Responsibilities of a Technical Editor

Planning documentation

- Meeting with development teams to understand needs and features to be developed
- Providing accurate estimates of amount of writing and editing necessary to support development
- Managing epics, user stories, feature requests, and bugs in a project tracking tool
- Planning workload over the course of a sprint to provide complete documentation for features as they are developed

Editing written documentation

- Editing written documentation for language and style
- Editing written documentation for technical content accuracy
- Working directly with subject-matter experts (SMEs) to ensure that documentation is accurate
- Reviewing content in the final publishing format

Editing corporate wikis

- Reviewing content for consumption by other departments within the company
- Maintaining accuracy of technical information in corporate wikis and intranets
- Editing articles produced by other technical communicators, developers, and managers
- Editing entire wiki for consistent style and tone
- Providing feedback to wiki authors to help them improve their writing

Editing user interfaces

- Reviewing the interface of an application for communication of function
- Editing all in-interface text for spelling, capitalization, and language
- Editing all in-interface text for consistency of voice
- Reviewing icons and symbols for accuracy of communication
- Reviewing interface for consistency of style with other applications produced by the company
- Providing feedback to developers on required interface changes

Editing videos

- Editing video scripts for language and tone
- Assisting in video production by providing information about the audience of the video
- Providing feedback on video and voice-over content for videos
- Closed caption editing

Attending retrospectives/lookbacks

- Providing feedback to development teams on the state of documentation after a sprint
- Reviewing feature plans and helping development teams plan time for documentation work during sprints
- Advocating for the technical communication department in development meetings
- Providing point-of-contact for development needs in technical communication department

Skills of a Technical Editor

Understanding audience

- Understanding the expected end-user of the software product
- Communicating user expectations to development, technical communication, and management teams
- Writing user stories
 - Describe what a user wants and why
 - Outline expectations for satisfying user needs

Planning documentation strategy

- Identifying documentation delivery systems
- Working with development and build teams to deliver a consistent documentation product across multiple delivery mediums
- Planning for unique challenges of individual delivery mediums

Planning sprints

- Planning documentation effort during development sprints
- Planning time for SME review
- Planning time for structural and content edits
- Outlining conditions for successful delivery of documentation
- Understanding development timelines that drive documentation timelines

Working with technical writers

- Assigning user stories, tasks, and subtasks to individual team members
- Assisting with in-process edits as technical writers encounter challenges in writing documentation
- Being available to answer questions on style, structure, and content
- Providing feedback on early iterations of work to keep documentation on track
- Monitoring progress on documentation effort as it relates to development effort

Working with developers/SMEs

- Being aware of the state of development effort for the sprint
- Maintaining a conversation with developers and development managers on expectations for documentation
- Seeking guidance on how features that are in development will work when they are development complete
- Reviewing design documents to understand how user interface will change
- Provide iterative feedback on in-process feature development

Working with a documentation build team

- Understanding the challenges of delivering content in several different mediums
- Working with the limitations of various documentation build systems
- Helping build engineers understand the needs of the documentation team
- Helping technical writers work within the bounds of the build system
- Communicating scheduling to the build team

Extraordinary skills

- Writing documentation build code
- Website development and layout
- Integrating documentation into software
- Providing bridge between development and production users
- Serving as alpha and beta tester for in-development software

Editing as a Full Time Job

Fitting in with a development team

- Documentation is a service to developers to enhance the overall product
- Learning the development workflow and what developers expect from the end-user documentation
- Attending development meetings and being an advocate for good documentation and good interfaces
- Applying pressure where needed to improve interface design

Documentation strategy

- Attending planning meetings and representing technical communications team
- Advocating for good documentation
- Understanding the audience for documentation
- Working with development and management to make sure that the technical communication team has necessary resources
- Working with recruiting to hire skilled communicators

Separating content from delivery method

- Working with build team to find a content editing format that works for the build system and for technical communicators
- Building a workflow that allows for easy contribution to documentation
- Working in source control (Git, SVN)
- Participating in pull request (PR) process as part of editing

Common formats for software documentation

- XML (Docbook, DITA)
- reStructuredText (Sphinx)
- Markdown (Gatsby, MkDocs, Docsify.js)
- Word processors (Google Docs, Word)

Common delivery formats

- Static website (HTML)
- In-interface help (native help-viewer, tooltips, context sensitive help)
- Wiki
- Single-file delivery (PDF)
- Printed documentation

Freelance Technical Editing

What to expect when freelancing

- Documentation may not be produced by a professional technical communicator
- Clients may wish you to edit more than technical documents
- Clients may not fully understand their editing needs
- Clients underestimate the amount of editing work they have
- Clients may have non-standard formats or quirky documentation systems

Where to find freelance technical editing work

- Upwork
- Reddit (r/forhire)
- LinkedIn
- Technology councils and other local groups
- Professional networking

Resources for Technical Editors

Style guides

- Microsoft Manual of Style
- Yahoo Guide to Style
- Apple Style Guide
- Google Developers Guide to Style

Documentation Systems

- Sphinx
- MkDocs
- Gatsby
- Read the Docs
- Jekyll
- Docsify.js

Professional organizations

- Society for Technical Communications (STC)
- Write the Docs

Certifications

- Certified Professional Technical Communicator (CPTC)
 - Offered by STC, can be achieved in a variety of ways
- Masters of Science in Technical Communication (MSTC)
 - Offered by many professional colleges and universities

Blogs and other online resources

- [Technical Editing SIG](#) - Society for Technical Communication
- [Write the Docs](#)
 - Write the Docs Slack - slack.writethedocs.org
- [Nine Steps to Improve Technical Editing Skills](#) - Francis Bao, STC Chicago
- [Technical Editors Eyrie](#) - Jean Weber
- [Foundations: The Role of a Technical Editor](#) - Peter Winninger