

Tools and techniques for working with subject matter experts to create plain language manuals

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Summary

This paper discusses tools and techniques for editors and writers who need to work with subject matter experts (i.e., engineers, programmers, accountants, etc.) to create plain language manuals.

Background

Many manuals are created from drafts or other documents written by professionals with extensive experience in their fields. These people know their subject matter inside out and sometimes have trouble communicating clearly to those with little or no knowledge or experience. Paradoxically, it's the people without this knowledge or experience who most need to read and understand the manuals written by experts.

It usually falls to you, the editor or writer, to close this large communication gap and proceed with the creation of manuals that people can actually understand. Through a collaborative effort, you can successfully work with subject matter experts to create manuals that are accurate, well-organized and written so that novice users can understand them.

As you know, this collaboration is sometimes simple and straightforward, but other times, difficult and contentious. If the process is arduous, the resulting manual can be less effective because of the wrestling match with the subject matter expert.

A good collaboration with the subject matter expert typically results in a clearly-written, well-organized, accurate plain language manual, while a poor collaboration usually produces just the opposite. The secret to achieving a positive collaboration lies in developing a good working relationship, and the cornerstone of this is, of course, good communication. The remainder of this paper discusses tools and techniques that can facilitate and even enhance communication between the people involved in crafting plain language manuals.

Technical tools

The technical tools that most effectively support this communication are the commenting features, offered in many software packages. The commenting features allow writers and reviewers to enter comments either within the margins, directly within the text, at the bottom of pages, or on separate commenting pages. Comments are automatically displayed in balloon shapes or sticky note shapes that point to the text in question. Additionally, most of these tools allow the comment recipient to "answer back" the comment's author in different colored text for the follow-up review cycle.

The commenting features discussed here are found in the Windows versions of Microsoft Word® and Adobe Acrobat®.

Microsoft Word's commenting feature

It's easy to insert comments into a Word document - here's how:

- In Word 2003, select the Insert menu and then Comment.
- In Word 2007, select the Review menu and then New Comment.

One caveat to keep in mind, however, is that to see comments on screen, you must be sure of the following:

- In Word 2003, on the View menu, Markup is selected.
- In Word 2007, on the Review menu/Show Markup/Comments is selected.

Word automatically displays comments made by different authors in different colors, which is nice for distinguishing who said what. Additionally, each comment author can change his or her identifying characteristics (e.g., color of text, etc.).

To have comments appear in the printed version of your Word document, they must appear on the screen before you start printing (see the "caveat instruction" above). Then, on the Print dialog, in the "Print what:" drop-down box, don't just select "Document"—make sure you select "Document showing markup."

There are many other options in Word's commenting feature, so to learn more, click on the Help menu and search for "comments."

Adobe Acrobat's commenting feature

Adobe Acrobat has all the commenting features of Word - and then some.

To insert a comment in Acrobat 8 Professional, click on the Review & Comment menu, and select Add Sticky Note. One nice feature about the sticky notes is that you can place them exactly where you want them on the page (i.e., right next to the text in question).

In older versions of Adobe Acrobat, you could only use the commenting feature if you were using the "full" version of the software - this feature was not included in the free Acrobat Reader version. However, Adobe has recently had a semi change-of-heart regarding commenting. Now users can enter comments into a pdf even if they are using the free version of Acrobat Reader. But there's the hitch, of course - the pdf document must be originally created with its "usage rights enabled" - and this can only be done with the full versions of Adobe Acrobat 7 or 8 Professional. Nevertheless, this is still an enhancement because now people who have Acrobat Reader can enter comments into the pdf (as long as it's been "usage rights enabled").

And as with Word, there are a few caveats regarding printing:

- To print pdf documents in Acrobat 8 Professional, select Print and then Summarize Comments. You will then have to choose from a dizzying list of options. The most useful option (in my opinion) is the second one, which prints the comments on the same page as the text.
- In Acrobat Reader, as of this writing, there is no simple way to print comments.

There are numerous other sophisticated commenting features in Adobe Acrobat, so as with Word, your best bet is to look through the Help file to thoroughly investigate all of your options.

Techniques

Technical tools are great - but they only go so far in facilitating the necessary communication between the editor/writer and the subject matter expert. The technique component of communication is equally or perhaps more important than the technical tools. Technique often boils down to two things: old fashioned courtesy and common sense. Here are a few communication techniques that typically enhance communication and thus contribute to the development of clear, easy-to-understand, plain language manuals:

- It's not what you say, but how you say it. Remember - everyone does take it personally. Always be courteous when commenting on someone else's work.
- Adopt a courteous tone in your comments and phrase them as questions. For example, instead of saying "CONFUSING!" you might say something like, "Don't you think this would be clearer if you did X, Y, and Z?" The courtesy element is particularly important when writing an e-mail. Words seem to sting more in e-mails than anywhere else. So the bottom line is—re-read and think before you push Send.
- Give your subject matter expert reasons why it makes more sense to do it your way. Most people will listen to reason, so give a "friendly" explanation. For example, you might say something like, "Studies have shown that it's easier to understand information if it's chunked into smaller paragraphs." If you really want to be underhanded, you can always interject the rules of grammar, which most people really don't understand but are too embarrassed to admit.
- Encourage your subject matter expert to provide lots of concrete examples. Real-life examples are the subject matter expert's greatest contribution to the development of the manual. Some of these examples can be used in text or graphics but even if they are not explicitly included in the manual, they will undoubtedly inform your writing and editing.

The bottom line here is this: creating a plain language manual is a collaborative effort. Anything you can do to improve the communication between you and your subject matter expert will inevitably contribute to the quality and usability of the end product.