Technical Editing OF
Synergy Territory Planner User's Guide

Recommendations for Improving the Synergy Technical Documentation

Prepared for:

Paresh Hirapara, CEO Synergy

Prepared by:

Caylin Hirapara, Technical Editor

With support from:

Dr. Tharon Howard

April 14, 2019

Introduction

The Synergy Transportation Suite Territory Planner User's Guide is a technical communication document intended to provide assistance to users in working with the Territory Planner software. To successfully accomplish this goal, the Territory Planner User guide must satisfy the needs of several types of users with diverse desires and expectations of the system. In the current state, the User Guide has created a gap between the user and the developer in the type of information a user may be searching for. The purpose of a user guide is to offer solutions to common problems users may be having using the system. To successfully accomplish this goal, the Territory Planner User's Guide can be improved in reassessing how different types of users will perform specific, goal-directed tasks.

In creating a more user-friendly experience, the recommendations listed in this report will attempt to solve the gap between user and developer for use in future versions of the User's Guide. This report is a part of a collaborative study between Dr. Tharon Howard's UX Approach to Technical Editing directed independent study and Caylin Hirapara, the student. This was pursued because these two individuals strongly believe that technical editing can:

(1) Enhance the end users' experience within the software usability
(2) Increase acceptance of the software
(3) Reduce the time for system support in both the immediate and distant future.

Executive Summary

This study was designed to uncover the major usability and technical problems that are contained within the Territory Planner User's guide. In the process of this project, a style guide was created and approved by Synergy to be implemented in the course of editing. Issues mentioned in the style guide are listed as recommendations in the document itself with the corresponding rule listed in the style guide cited as evidence of the problem. Below is a list of recommendations that will potentially increase the usability of the Territory Planner users' guide as well as correct mistakes in the document to bring them to the standard of current technical editing guidelines.

- **Restructuring of Navigation to general toward specific**
- **Restructure the manual toward a task-based guide based on common user errors**
- **Use sentence-style capitalization throughout**
- **Change all mention of the user to lowercase "user"**
- **Change all verb tenses to present**

- **Shorten all processes with arrows to denote where on the page to click.**
- **Use more concise, simple language**
- **Change focus from overview to user task completion**

Recommendations

The following recommendations constitute large organizational or changes which will require substantial change to the document in multiple sections. These recommendations come in addition to in-line comments and corrections made on the document itself. In some cases, these changes overlap.

1. **Restructuring of Navigation**

In the current state, the document lacks the structure that will give selective readers who have practical reasons for consulting the document to find the information they are looking for. In terms of structure, the readers' ability to gain access to information increases the document's comprehensibility. Carolyn Rude, the author of *Technical Editing,* recommended that the structure of navigation in technical writing is from general to specific. The current structure looks at the software from the top of the navigation to the bottom. I would propose the structure to look more like the following in following the General to Specific methodology.

1. Understanding the territory planning process
    - 1.1. Overview
        - 1.1.1. New terminology
    - 1.2. Creating a new plan
2. Territory Plans
    1. Territory Planner
    2. Plans
        - 2.1. Plan Types
            - 2.1.1. Zip
            - 2.1.2. Static
    3. Working with plans
    4. Map Functions
        - 4.1. Display
        - 4.2. Territory
3. Navigating the user interface
    1. Using the grid interface
    2. The ribbon bar
    3. Navigation pane

4. Using maps
5. Keyboard shortcuts
6. Closing the application

2. Focus on processes and instructional guides rather than overviews of the software.

One of the main purposes of a technical document is to give readers information in order to act. In the current state, the document lacks format that will give selective readers quick and easy information in a concise manner. This would include a user who is struggling with some portion of the system. Bullet points and numbered instructions are lacking in the document. The purpose of user and instruction manuals is to assist the customer in some process. The readers' ability to gain access to information increases the document's comprehensibility and overall experience. I recommend a restructuring of the document's prose to change the focus from an overview of software structure toward a more task-based instructional user guide.

1. Shorten all processes with arrows to denote where on the page to click.
    a. example: To generate a plan click Dynamic Generation > Zip Code Plan > Generate (Page 23)

3. **Capitalization**

In terms of capitalization, the user guide should use sentence-style capitalization throughout the document as per the style guide. This is the convention used by high-level software companies. When referring to clickable buttons, make them bold and use title capitalization. When referring to specific areas on a page, capitalize them as they are in the system.

3. Naming the User

I would suggest changing the name of the user, which currently seems to change based on which step of the process they are in (e.g. Planner, Reviewer) should be changed to lowercase "user". At times the user is referred to as "you" in an attempt to create a more consistent document, change these also to lowercase "the user"

4. **Tense**

The tenses of verbs refer to the time when the action takes place. To create more consistency within manuals, most writing is in the present tense. Currently, the tenses change often and without explanation. Unnecessary shifts in tense can disorient readers. Without no clear reason to the contrary, Generally, change verb tenses to present "can" to denote a user making a choice. To avoid harsh language, use the modal verb, "can" or it's future tense, "can be" to describe the capability of the user

within the software. One example of this is outlined in the in-line comments on page 19 of the document.

5. Conciseness
In creating a more user-friendly document, it is absolutely essential to avoid each and every phrase in our writing that generally doesn't have, a specific meaning. Most of these instances have been marked in the in-line edits, but in creating a new version of the document it is worth considering changing prose processes in the software to numbered instructions. Problem statements and even strategic repetition also promote structural clarity. Graphs and tables, effectively worded headings guide readers and help keep the large picture in focus.

6. Visuals
In technical communication, the reasons to use visuals parallel the reasons for making any other choice about a document. Readers seek information, read selectively and read in order to act. While visuals can help readers effectively use the software, no more than 2 visuals should be used for a particular task. In the current version, there are at times up to 20 visuals in a chapter. While these can help readers find their place and complete the action, changing these to visual processes denoted with arrows (>) will create a more concise document which is easier to search through. If there is a need for greater visual aid, video instructions for tasks may be something to consider in web-based help pages.

7. Adoption of Style Guide
For the purposes of this project, research was performed into common styles related to the technology and software industries. In this research, a new style guide was created specifically for Synergy, which can be found here. The style guide follows closely the rules presented in the Microsoft Style Guide, as well as the IBM Style Guide with reference to Google's Style Guide as well. In discussion with you, we determined that the more formal style used by Microsoft and IBM would best match the tone of the company. For this reason, these style guides were used as templates. As a general rule, I would recommend the adoption of this newly created style guide for all documentation of the company.

Methodology and Findings

Carolyn Rude, in her book on Technical Editing, outlines the main functions of technical editors as the readers who prepare documents for publication and make documents effective for readers. In following these principles, this technical editing project had the goal of making the information of primary importance first and place key concepts in prominent places to ensure the document will be appropriate for the community. This included checking the information for accuracy, completeness, and conciseness as well as removing visual or verbal noise which can distract readers, making information more difficult to comprehend. This project included phases of editing involving research and close reading. The steps moved as follows:

1) **Creation of Style Guide**
   After determining the document was very technical, the editor became aware of the implications of changing small grammar things such as symbols or capitalization. There are usually style guides available for this sort of editing, and with the lack of an existing company style guide, one was created for the company with research into existing style guides and careful examination of every principle.
2) **Copy Editing and Proofreading**
   Copyediting prepares text for printing while proofreading is done to verify that a text has been printed correctly. Proofreaders do not change choices but verify that they have been incorporated. Proofreaders only change text when a copyeditor has overlooked errors. Proofreaders much reviews alignment, spacing, and clarity of letters to ensure print quality. Both proofreading and copy editing was completed on the document. The proofed document can be found here.
3) **Substantive Editing**
   Usefulness depends on a document's concept that matches the needs of the readers. Substantive editing is the process of evaluating a document's concept. The substantive editor will suggest ways to improve the document has a whole. While copy editing with increase the credibility, substantive editing looks beyond words, making the document more functional and appropriate for readers. In analyzing the Territory Planner User's Guide it was necessary to analyze the text in terms of audience needs. This required analysis of audience and a determination that the document was not meeting the needs of the audience who will tend to come to the document when errors arise.
4) **Organizational Editing**
   Technical documents must organize information in order to ensure readers remember it. Templates help readers learn information including major and subordinate components. These components should be developed early to helps readers locate the appropriately stored schema in memory. The beginning of the

document should presents concept by identifying the topic and placing it in context. In analyzing the Synergy Territory Planner User's Guide, the recommendation made in terms of the organization was to move from general to specific and restructure the navigation to reflect the change.

5) Visuals

Visuals require copyediting and substantive editing to check for accuracy, correctness, consistency, and completeness. Visuals need to be in line with readers expectations, and often readers expect information in visuals. It was determined in editing the visuals of the Synergy Territory Planner were too numerous and were not each adding essential information to the User's Guide. Such visuals were marked to be removed in the proofed version of the guide.

Conclusion

Overall in creating a more user-friendly user guide, the Synergy Territory Planner User's Guide must meet the needs of readers who have come to the guide when errors arise in their use of the software. In the current version, reading of the user guide is closely tied to the development of the software itself in order and style. Since action usually immediately follows the reading, and may even intertwine, the user guide must provide easy access to go from the text to the software and back without delays or distractions. In creating a better version of this user guide, understanding this audience is the most important recommendation I can make. In creating a more consistent, concise, and reader-friendly user guide, the opportunity for distraction will be minimized. Information will enable users to act and more effectively use the product.