STEPs & SPECS

Working Effectively with Manufacturing Engineers to Create Usable Procedures Documentation

by Linda Reitman

As any technical writer who has worked with engineers likely knows, it can be a challenge to work with them effectively in three areas: design, writing and teamwork. Fortunately, the challenges can be overcome, as I did in a manufacturing engineering environment while working as an independent contractor providing ISO 9000 documentation for a company that was seeking initial certification.

My liaison at the company was the quality assurance manager. This person reported to the company's vice presidents. The vice presidents and my liaison also comprised the committee that reviewed the documentation. One of those vice presidents was an engineer.

Design and Writing

After reading sample documents prepared in the format the engineering department had created, it was clear to me that some design changes were needed. The client was using Microsoft Word 7.0 in Windows 95. As any user of this program knows, the default right and left margins are set at 1.5 inches rather than the standard 1 inch. Also, the default type size is 10 points rather than 12 points.

So what was my problem? Actually it was twofold: First, billionaire Bill Gates chose to deviate from standard one-inch margins and select a smaller type size that for some can be difficult to read. The second problem (and perhaps even more disheartening) is that many companies accept these defaults because either they don't want to take the time to change them or they don't know they can.

Working effectively with engineers can be a challenge in the areas of documentation design, writing and teamwork.

Changing to one-inch margins eliminated the wasted space caused by the default margins. To compensate for the longer lines of type, I planned to recommend using the more accepted 12-point type instead.

As for content, some of the procedures needed to be converted into playscript procedure format. Playscript is the preferred method of documenting procedures that require more than one person to complete a single task. It uses a two-column format with headers such as "actor" and "action" or "person responsible" and "steps."

SIG Submits Proposal on Electronic P&Ps for STC Annual Conference

by Jerri Houdayer

In the fast-paced white-water adventure of on-line documentation, policies and procedures have tended to mill in the obscure backwaters of company interests. Long after the product information has been digitized, converted, scanned, mind-mapped and shrink-wrapped, someone may think to provide employees with more accessible procedures documentation.

The waters may be calming, however, as more and more companies apply to internal company materials (such as policies and procedures) the productivity gains and cost savings realized from product documentation on line.

In a proposed panel discussion for the 1998 STC Annual Conference, I and three other speakers will talk about our experiences with companies that have pursued electronic policies and procedures not as a fashion statement but as a real attempt

Inside . . .

Playscript procedure writing appeared to be a foreign concept to all concerned, even the engineering department's technical writer. I could see that I had a rather daunting task ahead of me.

> *The playscript format seemed to be a foreign concept for all concerned.*

My goal was to convince the engineer vice president to accept the playscript format whenever it was appropriate. While I had my liaison's blessing to do so, he was skeptical that I could convince the engineer. His skepticism, however, merely added to the challenge.

The Art of Persuasion

My solution was to scour my bookshelves for texts to support my recommendation for design and writing style changes. I found what I needed in several publications:

- *Xerox Publishing Standards: A Manual of Style and Design* (Xerox Corporation)
- *Procedure Writing Principles and Practices* (Batelle Press)
- *Science and Technical Writing: A Manual of Style* (Henry Holt)
- *The New Playscript Procedure* (Office Publications)

I then proceeded to produce a brief, easy-to-read memorandum that I could present at a meeting with the quality assurance manager, the vice president engineer and his department's technical writer, and myself.

Armed with a one and one-half page memorandum with an abundance of white space and appropriate highlighting, I went into the meeting with confidence, sitting at the head of the conference table, with the vice president engineer sitting to one side.

Never forgetting that I was the expert, and knowing that engineers are logical, analytical, detail-oriented people, I presented my supporting material to the engineer.

We discussed various points, and I held my ground. Finally he acquiesced, saying that he had never heard an expert's opinion on this subject. I thanked him and commended his good judgment in hiring an outsider to document the company's procedures.

The approach I used was effective because the engineer was able to acknowledge without embarrassment that the expert opinion made sense and was, therefore, logical. He was confident that I would pay attention to the details that were important to him and his technical writer in relation to the template they had carefully created and that hiring me and accepting my recommendations were good ideas.

How did I accomplished my objective? I'll talk about that in the December issue of *Steps & Specs.* Stay tuned.

Linda Reitman is director and head writer of The Writers' Bloc, a Cost Mesa, California, company that produces operations manuals and ISO 9000 documentation, and a member of the Orange County chapter of STC.

Clarification . . .

The author of the article "Using Checklists to Get a Focus on the Editing Process for P & P Documents" (*Steps & Specs*, June 1997), **Betty R. Turpin, Ph.D.,** is a member of the Department of Languages and Literature. The department name was misidentified in the author's biographical sketch. *Steps & Specs* apologizes for the error.

SIG PR Team Creates Information Sheets

by Nancy Ford Demeter

The P&P SIG is in the process of creating information sheets on a variety of P&P topics. If you would like to write an information sheet or have topic suggestions, contact **Nancy Ford Demeter** at 517/789-9007 or ar822@detroit.freenet.org.

Nancy Ford Demeter is P&P SIG Public Relations team leader and a member of the Southeastern Michigan chapter of STC.

Steps & Specs *Newsletter Makes Debut on Web*

by Kris Henige

The P&P SIG newsletter is now available on SIG's Web site:

http://stc.org/pics/ppsig/www

Each issue was converted to a PDF (portable document format) file that can be viewed in Adobe Acrobat under a Windows, DOS, Macintosh or UNIX platform.

The electronic versions of the newsletter can be viewed and printed (with format and graphics intact) independent of the application in which the original document was created.

Creating the PDF files is easy. A PostScript file of each issue is given to a Web designer who converts the PostScript file to PDF using Acrobat 3.0. The PDF file is then linked to the SIG's Web page, which I created in Microsoft FrontPage 97.

Kris Henige is the P&P SIG Web Page coordinator and a member of the Northeast Ohio chapter of STC.

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to promote the consistent implementation of processes while complying with business requirements.

The panelists represent an array of business operations, ranging from banking to manufacturing to consulting.

Don Kirtland, senior technical writer at Fleetwood Enterprises, a manufacturer of recreational vehicles and heavy-truck assemblies, will discuss how the implementation of a thoughtfully designed mainframe-based electronic documentation system has helped to reduce manufacturing errors and decrease the time that employees are away from their stations looking for appropriate P&Ps.

Michelle Anderson, the sole technical writer at Downey Savings Bank, will talk about organizing policies and procedures within a local area network that enables traveling employees to download P&P documents to their laptop computers.

Duncan Kent, principal at Kent and Associates, will relate his experience as a consultant developing Web-based P&P systems that solve more than the problem of document access.

Jerri Houdayer will discuss the lessons learned from moving P&P documents from three-ring binders to electronic client-served documents and the process of providing the rudiments of an electronic performance support system.

The tide of electronic publishing is flowing swiftly down the river, with some gunning their speedboats, some cautiously paddling rafts and others clinging stubbornly to the boulders on the water's edge. The annual conference provides a grand opportunity to see the river's future path.

Jerri L. Houdayer is the P&P SIG Programs and Projects team leader and a member of the Orange County chapter of STC.

SIG Membership Reaches 350 in July

by Jerry Laing

Twenty persons have joined the P&P SIG in June and July, bringing the group's total membership to 352. Welcome to the following new members:

- **Charles Ahern** (CA)
- **Darran Bogen** (Canada)
- **Heather Currier Clark** (WI)
- **Eileen Foran** (TX)
- **Cheryl Forest** (Canada)
- **Luanne Guthart** (MN)
- **Richard Harding** (MN)
- **Andrea Johnson** (MN)
- **Jennifer Lease** (NV)
- **Janet Lewis** (IA)
- **Lynn Lord** (MN)
- **Jackie Luttrell** (MN)
- **Julie McHam** (CA)
- **Diana Meyers** (CA)
- **Laurie Moffatt** (MN)
- **Cheryl Powers** (MN)
- **Jody Roes** (WI)
- **Mary Morello Shafer** (MD)
- **Kim Van Rooy** (Canada)
- **David Wilson** (Canada)
- **Laura Young** (MN)

Jerrold A. Laing is the P&P SIG Membership team leader and a member of the San Gabriel (CA) chapter of STC.

P&P SIG in Gear for New Year

by Raymond E. Urgo

The P&P SIG is in full gear for STC's new fiscal year, which began July 1997. All subgroup leader positions are filled, and the leaders have set their goals for the year.

Of special interest is the development of the SIG's first listserv, which will be coordinated by **Audrey Cielinski Kessler.** Persons who join the listserv (a group of e-mails bonded together by a single subject) can post questions and information to everyone on the list.

The SIG's first Web page, developed by **Kris Henige,** should be available in early fall.

Nancy Ford Demeter, Public Relations team leader, is coordinating ad hoc teams of SIG members to develop public relations information sheets that will answer many of the questions the SIG often receives.

Jerri Houdayer, the SIG's Programs and Projects team leader has organized and submitted proposals for speakers and topics for the 1998 STC Annual Conference.

Jerry Laing, Membership team leader, is considering ways for enhancing our welcome packets for new members.

If you would like to contribute as little as a few hours to the SIG, contact any subgroup leader or me, the SIG manager.

The subgroup coordinators and I look forward to leading you through the new fiscal year. ⌐

Raymond E. Urgo is principal of Urgo & Associates, a member of the Los Angeles chapter of STC and manager of the Policies and Procedures PIC.