

Are you maintaining your documentation correctly?

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By Mike Hayden

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As I've said in many eZines, you must write stuff down.

The other day, an interviewer asked,

"How many pages you written?"

"Somewhere around 30,000 pages delivered, not including thousands of draft pages."

"You must love writing!"

"Not really."

"Then what...?"

"I don't love writing per se. I love the applications. I love the results. In writing, you can create, let's say, the first level of reality. By writing, you can begin to give intangible ideas form in the physical universe.

"Can you imagine how many people discovered the secret of fire and didn't write it down? The news had to spread by 'tribal knowledge!'

Are you maintaining your documentation correctly?

"How many times did the secret vanish because some fire–novice asphyxiated himself and family? How many times do think some do–gooder banned fire due to its dangers?"

"It probably took eons to discover that secret – over and over!"

"Eventually, I suppose, someone wrote the secret on a cave wall or cocktail napkin..."

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"Planning to write is not writing. Outlining... researching... talking to people about what you're doing, none of that is writing. Writing is writing."

-- E.L. Doctorow

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Anyway, when you write stuff down, you'll eventually need to update it. (I'll talk here about large, important documents – Operations Manuals, Technical Manuals, User Manuals, or maybe the secret of fire and how to control it.)

"Mike, what have you learned over the years about maintaining documentation?"

Well, large documentation projects have their own "life cycle." This cycle extends from conception to obsolescence.

When you develop large–scale documents, you'll typically iterate through the following:

1. Requirements.

Includes definition, statement of goals, preliminary analysis, functional specifications, and design constraints.

2. Design.

Includes outline definition, format definition, etc.

3. Implementation.

Requires writing, editing, integration of various

Are you maintaining your documentation correctly?

components, and proofing.

4. Testing.

Includes verification and evaluation against the requirements.

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But wait! There's another phase I call Documentation Maintenance! It begins after you deliver your documentation to your user.

You can divide Documentation Maintenance into the following steps:

- Determine need for change
- Submit Change Request
- Review Proposed Changes

- Analyze requirements
- Approve/Reject Change Request
- Schedule task(s)
- Review and Analyze Design
- Write and Edit
- Test
- Verify against Standards
- User Acceptance

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In these steps, I outline the maintenance process, which begins when someone needs a change and ends when your user accepts your changes.

As you can imagine, changing documentation is frequently complex and may involve many people.

For example, imagine the task of updating documentation for applications in complex electronics, aerospace, law, medical, insurance, etc. Or, how about updating flight-prep manual for a commercial airliner?

The maintenance process above appears linear. But again, you'll undergo many steps and iterative loops.

For example,

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You may need to clarify the Change Request.
You may require more analysis of the Design Reviews.
You may need to rewrite your Standards Audit.
Your users may fail to accept the results, etc.

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Someone, the "Maintainer(s)" must do the work.

This Maintainer must make changes within the context of the existing documentation. Maintenance people often find this the most challenging problem.

The older the documentation, the more challenging and time-consuming the maintenance effort. But normally, maintenance takes you less time than development.

Your development effort may span several months. You may schedule PERFECTIVE maintenance in cycles of one to six months. But, you may require CORRECTIVE maintenance within hours.

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Functionally, you can divide documentation maintenance activities into three categories:

PERFECTIVE,
ADAPTIVE, and
CORRECTIVE.

Let me explain...

~~~~~ PERFECTIVE MAINTENANCE

"Perfective maintenance" is when you make changes, insertions, deletions, modifications, extensions, and enhancements to improve understandability or maintainability.

You generally do Perfective maintenance because you have new or changing requirements, or you may need to fine-tune the documentation.

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Fine-tuning is an excellent way to introduce a new writer to your documentation. This will reduce your chance of serious errors later.

Both failures and successes of your documentation require Perfective maintenance. If your documentation works well, users want more features; if your documentation works poorly, you must fix it.

When you perform Perfective maintenance on poorly written documentation, you can dramatically reduce resource requirements by making your documentation more maintainable.

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### ADAPTIVE MAINTENANCE

"Adaptive Maintenance" is when you adapt the documentation to changes in the user environment. Environmental changes are normally beyond control of the writer and consist mainly of changes to:

Rules, laws, and regulations that affect the documentation. Typically you must quickly make

these changes to meet dates established by the rules and regulations.

Equipment configurations, such as, new computers, new terminals, local printers, etc. Usually, you want to take advantage of improved features and/or pricing. You normally perform this maintenance on a scheduled basis.

Data formats, file structures, etc. You may require extensive maintenance if these items were not properly designed and implemented. If you can isolate changes to specific modules, the maintenance may have less impact. If not, the effort can be both lengthy and costly.

System software, operating systems, compilers, utilities, etc. In these cases, you usually perform maintenance on a schedule.

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CORRECTIVE MAINTENANCE

"Corrective Maintenance" is when you must fix errors
– sometimes immediately.

Generally, you'll find three types of errors:

Design errors.

These errors include incomplete or faulty design because of incorrect, incomplete, or unclear descriptions, or when the writer does not fully understand the user's needs.

Logic errors.

Often, logic errors occur when user instructions and/or unusual data combinations are not tested during development or maintenance. These errors, usually attributable to the designer or previous maintainer, include invalid assumptions, tests, instructions, or conclusions, or faulty logic flow, and incorrect implementation.

Writing Errors.

The writer causes these errors. These errors

include incorrect implementation or design logic, or incorrect use of special terms. While these errors may be the result of negligence or carelessness, they are usually the easiest to fix.

NOTE: Many managers consider maintenance to include changing specifications or adding new capabilities.

Fascinating stuff, eh?

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5. Call to Action
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As I've said before, I'm a fanatic about documenting

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business processes.

Find out for yourself! You have nothing to lose.

Together, let's document what you want, how you want it, and when you want it. We will discuss various creative approaches before the project begins.

Mike Hayden
Principal/Consultant
Your partner in streamlining business.

Mike Hayden is Founder/CEO of Senior Management Services and the Documentation Express in Silicon Valley, California. Mr Hayden is the author of "7 Easy Steps to your Raise and Promotion in 30–60 Days! The book that smart bosses want their employees to read." ISBN 0–9723725–1–2. More articles at <http://www.SeniorManagementServices.com/pvt-information.html>

What Are The Benefits Of Outsourcing Your Technical Writing To India?

By James Marriot

You know that you need the help of a technical writing service when you don't have employees with technical documentation experience, when your in-house technical publications group is overloaded and understaffed and you don't have the time to hire and train new technical writers, and when your engineers don't have the time to write customer-focused end user documentation in addition to creating your products. In such a situation, it's only inevitable, not to mention sensible to hire the services of a technical writing service.

And since your documentation is the first thing that visitors to your organization will scrutinize, you need technical documentation that reflects the organization's quality and compliance activities. And unlike other pieces of writing, in technical writing of any documentation the use of words play have an important role. Technical writing is not the same as creative writing where use of action verbs and colorful adjectives and imagistic metaphors are encouraged. So, you need a good technical writing service to help you out of the tight spot. And, now you have the option of outsourcing technical writing services to India.

And there are many benefits to outsourcing technical writing services to India. Technical Writers in India are trained for clarity of presentation and materials, thus making the information more easily understood and processed. Also, if you get many people to write your technical documents for you, there's bound to be inconsistency. Some technical writers will be better than the others and so different documentation will show different levels of quality. But, a technical writer in India can prepare or edit documentation to ensure consistency among the processes.

Also, a paper trail of documented events allows you to monitor and improve your processes, products, and services. And, technical writing in India includes the preparation of forms and other documents

Are you maintaining your documentation correctly?

related to the completion of work. And finally when you employ a technical writer to prepare or edit your documents, you will have more time to spend on your job or with your clients.

However, if you're not sure whether to trust a technical writing service with your valuable documentation or not, then you can just hire the technical writing service for a small project and see how it works out for both of you. And if you've a large project, you can first ask the writer to write on some small topics for your software for free, as a part of the proposal.

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