

DOCUMENTAL



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Documentation should embody elegance.

Katherine Hepburn is elegance. Jaguar cars are elegance. Having three examples in a sequence is elegance.

Elegance is subtle. Elegance is the opposite of “in your face.” It is mature, confident, able to do difficult jobs without getting bent out of shape. It has the right blend of substance and sophistication, refined and with great attention to detail.

Elegance is not always fully functional: It is about form at least as much as about function. But it also knows that there is a function to form if you’re perceptive enough to see it.

At first glance, you may think it puzzling to ascribe elegance to documentation. However, our programmer colleagues know the importance of elegance. Coders know that you can write the same module of an application fifteen effective ways, but when you probe more deeply into those options, one outshines. Elegant code is simple. It works with maximum efficiency. It executes quickly, in files of small size. It interacts smoothly with other modules and never, ever crashes.

What Makes a Document Elegant?

Document elegance requires 1) the right content, 2) the right appearance, and 3) the right construction “under the hood.” The first two qualities are more familiar; I’ll touch on them briefly, but I’ll focus on the third.

Give Users What They Need

Not what they want. You might try to document every conceivable use of a

product, every imaginable click on every control that users see. Such a document is likely to be so large as to be unusable, unruly, falling off your lap each time you cross your legs.

Rather, give users the information they’re most likely to need; they can figure out the rest. Elegant documents don’t explain why every product design decision was made. If the same drop-down list appears on seven different forms and offers the same six choices each time, writing it once (with cross-references, perhaps) is probably enough. Elegant documents are direct and to the point. They don’t waste words.

Clean Appearance

Our powerful document production tools allow us to adorn our documents with headers, footers, infinitely variable headlines in thousands of fonts, shaded sidebars, and marginal notes with eight kinds of eye-catching icons and multiple accent colors (or even full color). Unfortunately, it’s easy to overdo these features. Too often, documentation appearance is best described by the Yiddish word *oomgepatched*, which means “overdone, too much, more than tasteful.”

Consistency is important. Outside of the generic Arial and Times New Roman, three fonts per company are plenty. Consistent use of a few formatting features achieves an elegant look.

White space is important. It pulls the reader in, makes the document pleasant to the eye, and says, “Don’t be intimi-

dated. You will find what you seek here. You will enjoy the experience.”

As architect Ludwig Mies van der Rohe said, “Less is more.”

Under the Hood

Consistent Styles and Templates

Most people still use Microsoft *Word* or *WordPerfect* as if they were typewriters. If they want an extra line space between paragraphs, they simply press <enter> twice. If they want to indent a paragraph, they press <tab> a few times. But elegant documents make almost all formatting changes using the style feature. If you want an extra line space between paragraphs, go into the style properties dialog and specify six points between paragraphs for the normal or body style, and press <enter> once.

Contemporary documents make ample use of headings, which help readers find the material they need quickly. Headings help the author organize thoughts, making the document clear and easy to follow. You can select the text of your heading and pick a font and size, but the elegant way is to click on the text and then apply the style for heading 2.

Use Your Computer

I’d guess that three-quarters of the tables of contents I’ve seen in document files were typed manually. Someone took the time to collect all the headings in the document, retype each one into a list, type a row of periods after each item (okay, maybe he or she used a tab with a dot-leader), and type the page numbers.

Every documentation creation tool you’re likely to use has a table of contents generating feature. They are not the easiest, most intuitive features you’ll

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find on the product. You have to learn a few tricks to get them to work (most notably, “always use the style feature”). Once you get the hang of it, a couple of clicks will complete your entire table of contents, formatted exactly as you’d like: proper fonts, proper dot leaders, proper page numeration. And what’s more, when you make changes in the document, a couple of clicks can update the table of contents perfectly. A generated table of contents is elegant, as are generated page numbers, cross-references, figure lists, indexes, footnotes, endnotes, and glossaries.

The Need for Workarounds

We all need workarounds from time to time. Occasionally our tools won’t do what they’re supposed to do. There comes a point when you have to throw in the towel and move to plan B.

On a recent project, the document I was creating had to be converted to PDF. One table refused to behave. It looked perfect on my screen and printed fine on my printer. When I sent it to my client, it looked fine on his screen, too. Unfortunately, his printer printed the entries in the right-hand column in a serpentine configuration that jumped back and forth. When he sent it to his client, it looked terrible there, too. I spent two hours trying to tweak the table so it would print correctly. Finally, I removed the whole column from the table and created a second, independent table, which I could place next to the original. I zoomed to 400 percent and lined them up perfectly. Now when I convert the table, it prints beautifully on everyone’s printers.

Workarounds are necessary because our applications don’t behave elegantly.

File Size

Files can get big. The bigger they get, the more likely they are to cause problems. Has your e-mail client ever choked because someone sent you a fourteen-meg *Word* document attachment with six screen shots? Elegant documents are appropriately sized.

The most likely cause of unwieldy documents is sloppy screen shot use. Screen shots rarely need more than sixteen colors (or four bits). When you create them, most likely you’re using high color (five bit) or true color (six bit). Use a graphics program to reduce the color or your documents will expand to inelegant (and troublesome) proportions.

When you have to crop a screen shot, crop it in a graphics application, rather than using the crop tool on your documentation application. If you don’t, your documentation application keeps the full graphic in your document when you need only, say, 25 percent of it.

Why Should You Care?

The manner in which a document was created is not always apparent to even the most astute observer. Most people will never see the “under the hood” aspects of your documents. So why should you bother about elegance?

Consistent Appearance with Minimum Fuss

Your company wants all of its letters to clients to look the same. You want the company’s letters to be attractive and distinctive. Solution: Design a letter template, set all the styles in the template the way you want them, and then (the hard part) get everyone who writes letters to clients to use that template.

Easy Conversion

Document conversion from DOC to HTML to PDF is more the rule than the exception. Conversion processes often require consistent use of styles, particularly for tables of contents and other generated material.

Easy Revision

Not long ago, I had a client decide, midway through the documentation cycle, that he didn’t want the Bodoni font on his headlines after all: He’d rather stick with the classic Times New Roman.

I’m not such a nice guy that I didn’t let him apologize profusely, but because I had used styles consistently, making the change throughout the forty-page document took me less than a dozen clicks.

Size Matters

Today’s 800-MHz processors with 128 megs of RAM make large documents less of a problem than they used to be. But fill a few dozen pages with graphics, spreadsheets, and flow charts, and suddenly small is good once more. Circulate a twenty-meg document beyond the confines of your LAN, and they’ll be muttering your name under their breath.

Efficiency

The first table of contents you generate, as opposed to typing, may take three times as long. The second one you generate will take about the same time as doing it manually. The third one will save you hours. Elegant document creation rewards the effort it takes.

Mark of Quality

Even if no one but other writers recognizes “under the hood” elegance, it is there. It is a mark of the quality of your work. Even if you are the only writer in the company, you might not work there forever. I once had to revise a manual my predecessor wrote and convert it to PDF. The revision went pretty smoothly, although I wondered why the source document had over 300 different styles in it. Converting to PDF, however, was a nightmare. Ultimately, I had to reformat all 500 pages manually before I could produce a usable PDF version.

Jaguar Documentation

Elegance has fallen on hard times. Modern actors just can’t embody elegance the way Katherine always has. Ever-faster product cycles are not conducive to elegant documentation, either. But no one ever said elegance was easy to achieve. The quest for the Grail is irresistible because of—not in spite of—its subtlety and its difficulty. **❶**

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