



## Philip Tory's Professional Technical Writing Course Training Manual

I originally created this workbook for delegates who attended my Technical Writing Course, which I fine-tuned over the years. I have delivered this course to several hundred satisfied individuals, across 11 countries, since 2002.

It assumes that you are a fairly competent user of MS Word, that you are reasonably computer literate, and that you have a good grasp of written and spoken English.

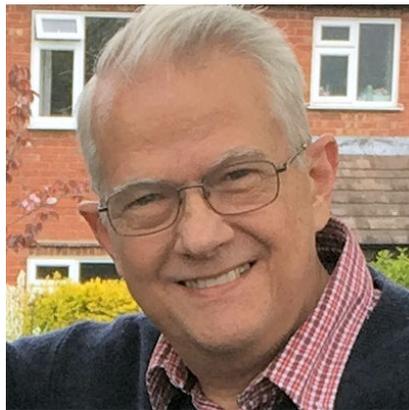
You also need to be Technical! You can't explain a subject properly to the target users unless you know enough about that subject area, or can learn it quickly and well enough.

I retired in 2017, so I am now passing on this Training Resource free of charge, so that you – and your colleagues – can be competent and professional Technical Authors too.

**This manual must NOT be sold in any form, nor may it be used for running training sessions / courses for which money is charged. This is a FREE resource for sharing.**

I hope you enjoy it and benefit from it!

God bless you.



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See [http://www.technical-author.org.uk/subject\\_areas.html](http://www.technical-author.org.uk/subject_areas.html)

You can read more on my Training web site [www.technicalwritingcourse.co.uk](http://www.technicalwritingcourse.co.uk),

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# MODULE 1

## MODULE 1 – Technical Writing in Plain English

This **Training Workbook** contains my Professional Technical Writing Course, which I have successfully used to train hundreds of people across 11 countries. It teaches you the essentials of good writing practice for technical publications.

I have tried to present it in a user-friendly style, to make it readable and easy to understand.

**Work through it, study every page, highlight things that seem important to you, and write your comments on the pages.**

**Do the Exercises. This is a WORKBOOK! So WORK at it!**

**Read it again from time to time, and Develop New Habits! Happy Writing! 😊**

*Philip Tory* BSc (Hons), Dip.M., Technical Writer and International Trainer, Gloucester UK

If you can, work through the course in twos or in a small group. Organise time together to do this.

Test your technical communication skills, and test your understanding!

### What makes Good Documentation?

What are the characteristics? What do we need to think about when writing good documentation?

**Write your thoughts here:**

Is it easy to write good documentation? \_\_\_\_\_

## Good documentation –

- Targets the audience
- Is task-oriented
- Uses step-by-step instructions
- Uses shorter words, sentences and paragraphs.

## What do writers find difficult?

- Where do I start?
- What do I include/exclude?
- How much detail do I need?
- What is the right Structure?
- How do I target / write for the user?
- What about the writing style & layout?
- How do I make it readable / clear / appealing?

## What makes Bad Documentation?

From replies to our pre-course questionnaire, delegates often mentioned the following points:

- Bad structure
- Poor spelling and grammar
- Cannot find the answer
- Dry and long-winded / dull and boring
- Out of date
- Insufficient illustrations / diagrams
- Index poor / non-existent
- They ASSUME you already know = **ASS | U | ME**

– When you ASSUME something, it makes an **ASS** of **U** and an **ASS** of **ME** !

## What is Technical Writing?

Technical Writing is a conversation between the writer and the user. An effective technical writer predicts the questions a user would ask about the subject, and answers them clearly and concisely.

“Technical writing is communication. The primary aim is to convey specific information to a target reader group for a particular purpose. Essentially, it explains scientific, technical and instructional subjects.”<sup>1</sup>

Stated another way, Technical Writing is –

**Translating technical ideas into words that a target audience will understand.**

This Training Course focuses on the essential elements of how to write effective technical / instructional documentation.

## What is – or isn’t – ‘Plain English’?

Plain English is essential for good, user-friendly documentation. Here are some definitions:

Plain English focuses on being a flexible and efficient writing style that readers can understand in one reading. It uses only as many words as are necessary. It combines clear, concise expression; an effective structure; and good design. It tries to avoid obscurity, inflated vocabulary, and convoluted sentences. Plain English lets readers concentrate on the message instead of complicated language.<sup>2</sup>

“Plain English is a writing style that is clear, concise, and easy to understand. It is not bureaucratic or convoluted. Plain English involves writing the way you talk (sometimes called ‘natural writing’), using active voice, using personal pronouns, being concrete and concise, and organizing your documents in a logical and readable form.”<sup>3</sup>

“Plain English is clear, straightforward expression, using only as many words as are necessary. It is language that avoids obscurity, inflated vocabulary and convoluted sentence construction. It is not baby talk, nor is it a simplified version of the English language ... It makes sure that the audience understands the message easily.”<sup>4</sup>

### Note:

- Most effective people at work use plain English by habit. Their colleagues, staff and customers appreciate it.
- Plain English uses the right wording for the target audience.
- It is clearer to a wider range of readers.
- It removes clutter, and minimises details that add little or no value.
- Plain English is a skill you can learn and a habit you can develop.

**“If you can’t explain it simply, you don’t understand it well enough” – Albert Einstein**

<sup>1</sup> Wikipedia

<sup>2</sup> Wikipedia.

<sup>3</sup> Society of Technical Communicators.

<sup>4</sup> Professor Robert Eagleson.



## What if you were to translate it the other way?

What they actually said	A Gobbledygook version by a stuffy bureaucrat ...
“England expects every man to do his duty.” – Lord Nelson.	“England anticipates that, as regards the current emergency, personnel will face up to the issues and exercise appropriately the functions allocated to their respective occupational groups.” <sup>9</sup>
“Mrs Smith didn’t want the job.”	“Verbal contact with Mrs Smith regarding the attached notification of promotion has elicited the attached representation intimating that she prefers to decline the assignment.” <sup>10</sup>
“I see one third of a nation ill-housed, ill-clad, ill-nourished.” – Franklin Roosevelt.	“It is evident that a substantial number of people within the Continental Boundaries of the United States have inadequate financial resources with which to purchase the products of agricultural communities and industrial establishments. It would appear that for a considerable segment of the population, possible as much as 33.33% of the total, there are inadequate housing facilities, and an equally significant proportion is deprived of the proper types of clothing and nutriment.” <sup>11</sup>

## Doesn’t everyone use plain English?

Unfortunately they don’t. Some people find it hard to communicate in simple, everyday language. A few of them speak complicated language all the time. Here is an example from a film:

### From the film ‘i, ROBOT’

Det. Spooner:

“So, Dr Calvin, what actually do you do around here?”

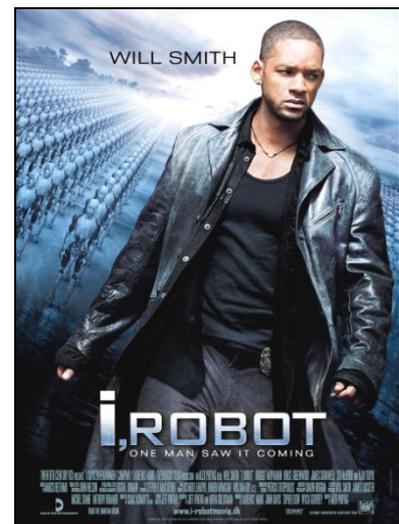
Dr. Calvin: “My general fields are Advanced Robotics and Psychiatry, although I specialise in hardware-to-wetware interfaces, in an effort to advance the USR Robotics Anthropomorphisation Program.”

Spooner: (pause) “So, what actually do you do around here?”

Dr. Calvin: “I make the robots seem more human.”

Spooner: “Now, wasn’t that easier to say?”

Dr. Calvin: “Not really ... no.”



She’s right. To the specialist, no, it’s not easier! They spend their lives using that level of language.

(And in case you were wondering, **anthropomorphisation** means, “applying human or animal qualities to inanimate objects”.)

<sup>9</sup> Alan Herbert, Oxford MP

<sup>10</sup> Stuart Chase, “Gobbledegook”

<sup>11</sup> Stuart Chase, “The Tyranny of Words”

## Some authors instinctively write Good English

**Agatha Christie** is one of the top ten, best-selling, English fiction authors of the last hundred years, with worldwide sales topping **two billion**. (Hercule Poirot, Miss Marple, etc.)

**Dr Pernilla Danielsson** is from the **Department of English** at the **University of Birmingham**. She used textual analysis to discover the type of words that Christie used in her detective novels. The purpose was to investigate the differences between the writing style of Agatha Christie, and other English authors. Dr Danielsson noted that Agatha “**used conversational language throughout her writing ... Christie’s books score highly in readability because she used short words, short sentences and a limited vocabulary.**”<sup>12</sup>

“Agatha doesn’t challenge you with her vocabulary, therefore you can concentrate on the clues and the plot.”

So that’s what we need to aim for in the way we write: to help the reader to “concentrate on the story”.

## Your Aim

Your aim is –

- To communicate
- To help people to **learn**
- To help people to **understand**
- NOT to show off or to impress people how clever you are!

Plain English often uses a conversational style. Don’t be afraid of it – readers like it!

## Benefits of Plain English

Plain English is using the correct language for the subject matter and the target audience.

Benefits:

- People read it quicker, understand it better, and remember longer.
- Procedures are more efficient.
- Productivity is higher.
- Complaints and Support Calls are fewer.
- It improves customer understanding and satisfaction, product credibility and company image.
- It increases sales, cash flow, and profits. Referrals from happy customers are the best and cheapest form of advertising.

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<sup>12</sup> [Source: ‘The Agatha Christie Code’, first broadcast on ITV1, 26 December 2005.]

## Plain English saves Time and Money

All over the English-speaking world, governments, corporations, professional services organisations, and businesses large and small are using plain English. It saves time and money, improving profits and credibility.

- Plain English has saved the **British Government** about **£500 million** in the last 20 years.<sup>13</sup>
- In 1983, the UK **Home Office** produced a new plain English application for British Citizenship that takes people 15 minutes less to complete than the old one. This saved the public 20,000 hours a year.<sup>14</sup>
- The **Department of Health and Social Security** introduced plain language application forms for legal aid in 1984. It cost the Department about £25,000 to develop and test the forms, but they saved £1,500,000 in staff time per year.\*
- At **GEC**, a new manual in plain English saved 125 support calls a month from just one customer. Applying the average cost of support calls, GEC estimates that it saves between \$22,000 and \$375,000 a year **for each business customer** who uses the new manual.<sup>15</sup>
- In Canada, the **Royal Insurance Company** unveiled its “simple English” Select Homeshield Policy for home insurance. Sales increased 38%, from \$58 million to \$79 million in the same year.\*
- The **State of Victoria**, Australia, saved \$400,000 by simplifying the wording on a summons forms so people could understand it. They were able to reassign 16 clerks and 10 police officers.\*
- In 2006, the **Arizona Department of Revenue** rewrote many of its standard letters into plain language. Phone calls went down so much in 2007 that workers were able to process about 30,000 more claims than they had in the previous year.<sup>16</sup>
- **British Telecom** reduced complaints by **25%** by using Plain English in their telephone bills.<sup>17</sup>
- **Royal Mail** saved **£500,000** in 9 months by redesigning one form in Plain English.
- In the US, **General Electric** saved **\$270,000** by rewriting manuals into plain English.
- The **US Navy** could save **\$250 to \$350 million a year** by using Plain English.
- **USA Plain Writing Act 2010**. Each call for clarification from taxpayers costs the IRS agency \$25, and it received 110 million calls in 2010 alone\*. The new law states that every federal agency must communicate to the public in “clear, concise, well-organised” language, emphasising the potential cost savings from translating legalese to lucid prose. Clear communications improve compliance with rules and reduce errors, which lower enforcement and administrative costs.<sup>18</sup>

[\* That's US\$2.75 billion – Ed.]

*(Various sources)*

<sup>13</sup> Preston City Council web site.

<sup>14</sup> The Plain Language Association International.\*

<sup>15</sup> “Technical Communication” (1995).

<sup>16</sup> “The Arizona Republic” newspaper.

<sup>17</sup> Siegel & Gale.\*\*

<sup>18</sup> Cass Sunstein, Regulatory Chief, US Inland Revenue Service 2011.

## It's quicker in Plain English!

### Study conducted by the American Institutes for Research.

In a plain language document, people find information faster, understand it more accurately, and are more satisfied with using it.

In a study comparing original and plain language regulations from the Federal Communications Commission, both inexperienced and experienced users did much better with the plain language version:

<b>They found the information faster</b> Measured in minutes per problem		
<b>Type of user</b>	<b>Original</b>	<b>Plain Language</b>
Experienced user	2.4 mins	1.5 mins
Inexperienced user	3.5 mins	1.7 mins

<b>They answered more questions correctly</b> Measured as number of questions answered correctly		
<b>Type of user</b>	<b>Original</b>	<b>Plain Language</b>
Experienced user	64% correct	82% correct
Inexperienced user	43% correct	86% correct

<b>They rated the new version EASIER TO USE</b> Measured on a scale of 1–5 (where 1 = Easy and 5 = Hard)		
<b>Type of user</b>	<b>Original</b>	<b>Plain Language</b>
Experienced user	4.2 (hard)	1.8 (easy)
Inexperienced user	4.6 (hard)	2.0 (easy)

## Who is the best equipped to translate into Plain English?

### You? Or the Reader?

Suppose 300 non-specialists will eventually read your documentation. Do you want them all to understand the same message? If it is not well written, in easy English, each reader could interpret a slightly different message.

Consider the following:

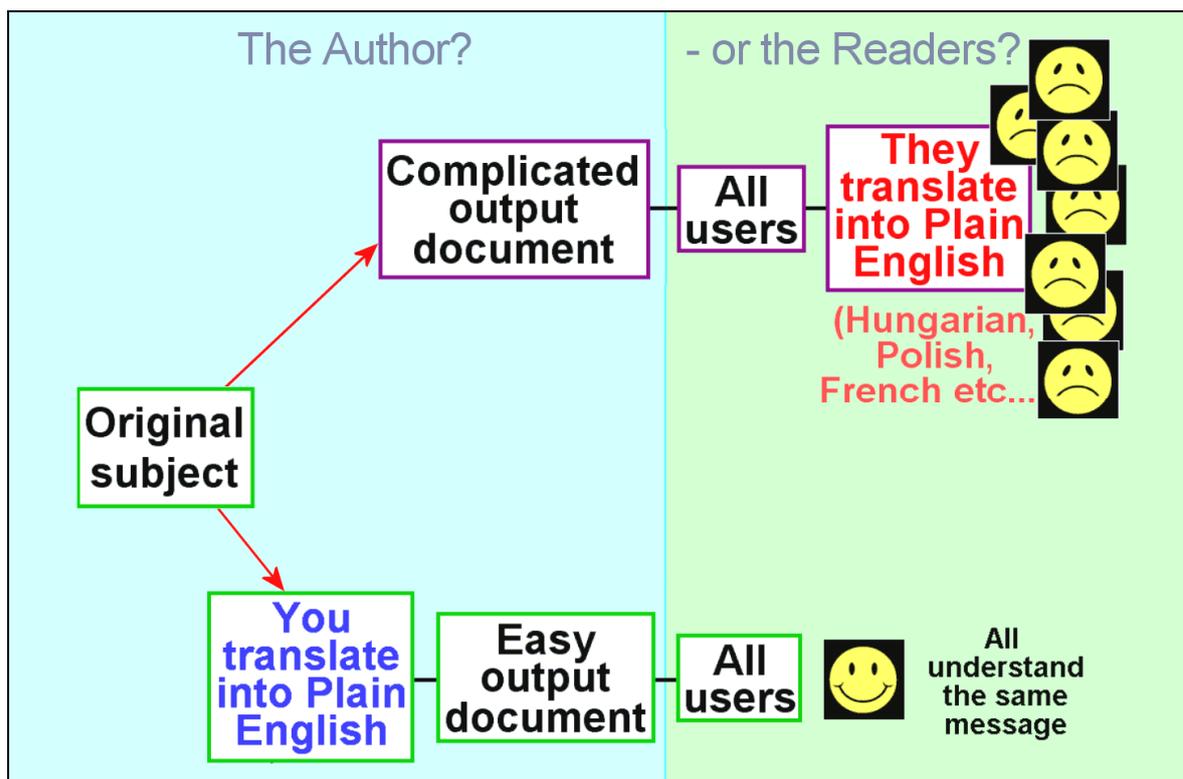
### If you write in Difficult English

If you write the original documentation in high-level, complicated language, it may make complete sense to you. You might ask, “Well, what’s wrong with it? I understand it just fine!”

However, each of the 300 readers will then unconsciously try to translate it into their personal everyday language and understanding – their own ‘Plain Language’. You might end up with 300 different versions, complete with misunderstandings, mistakes, support calls or accidents. ☹️☹️☹️

### If you write in Plain English

If you write a Plain Language document that ALL the readers can understand without effort, then ALL 300 readers will receive the same message. YOU know the subject best, so write what is best for ALL the end readers. 😊😊😊



## Write to COMMUNICATE, not to show off!

Unless you are writing a University Thesis, you win no respect for being academic, pompous or long-winded, if you leave the readers bewildered.

- **Don't** try to impress people – try to help them to **understand**.
- Keep the message **at the level of the reader**, so that they can learn from you and enjoy doing so.

## Conversational style

**Talk to your reader** in a friendly, open way. Be personal.

“I notice that these Upgrade Notes are now in layman’s terms. Please produce the next Manual in this style!”

“I like the simpler terminology - the Speaking Voice.”

– *Comments from end users of a Leisure Centre Management software system, for which I had written the documentation.*

Imagine this scenario:

- Imagine you are speaking to the reader on the telephone, and can see them by a remote television link. Suppose you have to give them step-by-step instructions about how to do a task.
- Talk them through it; explain what they need to do, and don't be afraid to be direct. They need to understand clearly what to do – they don't want to make a mistake any more than you do.
- Now use the same words in your written instructions. Remember to keep them clear, logical and step-by-step.

This is probably the best way to write your instructions and procedures.

---

## Paragraphs

A **paragraph** should be about one main idea. Don't make paragraphs too long: 4 or 5 sentences are usually enough.

## Sentences

The **sentences** in a paragraph need to support this main idea. A sentence needs one or more complete thoughts. In terms of grammar, it normally needs a **SUBJECT** (the person or thing taking the action), a **VERB** (the 'doing' word) and an **OBJECT**, (the person or thing receiving the action).

### Not too many ideas in a sentence

Readers can only absorb so much information at once. Too many ideas lead to hard work or confusion. Sentences exist to divide ideas into "bite-sized chunks" that we can easily digest.

If someone has to read something more than once, it is too long or too complex: so, simplify it!

### In brief

- Avoid long words, sentences, paragraphs, or sections. Allow the reader to absorb ideas more easily. (Would you read this training manual if it were one continuous paragraph?)
- Define special terms. Use **bold** to make them stand out on the page: it's easier to find them.
- Explain **acronyms** on their first use in a chapter, and use as few as possible. As a guideline, don't use an acronym unless you are going to use it at least three times. (Use a footnote or Glossary section for acronyms and special terms).

## Average Sentence Length? 15-20 words

Long words in long sentences in long paragraphs require a higher level of intelligence and education to understand. To reach a wide readership, write for the **lowest skill level of the target readership** – to make it **accessible** to the whole reader group.

**Long words** might make you sound pompous, pretentious or arrogant. They are also more difficult to understand and more awkward to read.

Some writers love **long sentences**: their readers usually don't! (I once took an 80-word sentence back to the writer for explanation. She couldn't understand it either, and asked me who wrote it!)

Trying to explain complex issues in one long sentence makes matters worse. Here is a 71-word example from a Guidance document produced by a leading Bank Insurance company:

"A managing agent must ensure that the documentation of the theory, assumptions, and mathematical and empirical basis underlying the internal model is thorough, sufficiently detailed and sufficiently complete enough to ensure that an independent knowledgeable third party could understand the model framework, its methodology, the underlying assumptions, and the limits of applicability of the model and in principle reproduce the model outputs if all the parameters and exposure data were available."

Researchers in English-speaking countries agree that the **average sentence length** should be around **15 to 20 words**. Vary the sentence length, to make it interesting. Sometimes difficult procedures need longer sentences; but if a sentence is 30-35 words or more, see if you can split it.

### Shorter is better

Short sentences get to the point. Use them for emphasis.

## Big Words?

Sometimes you might need to use big words for accuracy; but those times are few and far between. Use simple, familiar words instead of unfamiliar words. Use a well-known term instead of the latest bureaucratic expression. Use a short word rather than a long one, if it means the same thing. For example, use **"buy"** instead of **"purchase"**.

For many people, more syllables means it is slower to read and harder to understand.

## Punctuation - what is it for?

When we talk to somebody face to face, we use **intonation** (tone of voice) and we use **pauses** for emphasis. There are also visual signals – our facial expressions, our body language, to help the listener to understand what we are saying.

When we write, there are **no visual or verbal signals**. The only aid we have is **punctuation**. This helps the reader to reconstruct the way we would have spoken the words. They can then imagine our intonation, our pauses and our meaning – the **verbal signals**. That's why it is so important.

Wrong punctuation can change the message totally.

Here is a fun example.

### Same words + different punctuation = a totally different message!

<p>Dear John,</p> <p>I want a man who knows what love is all about. You are generous, kind, thoughtful. People who are not like you admit to being useless and inferior. You have ruined me for other men. I yearn for you. I have no feelings whatsoever when we're apart. I can be forever happy – will you let me be yours?</p> <p>Jane</p>	<p>Dear John,</p> <p>I want a man who knows what love is. All about you are generous, kind, thoughtful people, who are not like you. Admit to being useless and inferior. You have ruined me. For other men, I yearn. For you, I have no feelings whatsoever. When we're apart, I can be forever happy. Will you let me be?</p> <p>Yours, Jane</p>
--	--

## Commas

Use **commas** as an aid to understanding. Think of them as a brief pause between thoughts. For example, "If you were speaking the sentence out loud, trying to put your message very clearly, where would you put the commas?"

A comma in the wrong place can change the message.

Examples:

Our doctor said, the man is drunk. — Our doctor, said the man, is drunk.

Correct punctuation could even save someone's life:

Let's go and eat Grandma! ☹️ ... or ... Let's go and eat, Grandma! 😊

### Examples of Correct Usage:

"The bar was closed, but the customers stayed to watch the television."

"Because of a flat tyre, the salesman was late for his appointment."

"For instance, ..."

"For example, ..."

"Certainly, ..."

"In this section, fill in the reason you were absent from work."

"Monday was her day off, so she went to visit her mother."

"Unfortunately, the system was not ready for despatch on Tuesday."

"As you know, the engine works best after it has warmed up."

"Meanwhile, you can find further information at our web site."

"On the other hand, the system will work better after correct adjustment."

"However, we don't always know the reason why this component fails."

**Note:** Too many commas in one sentence can be confusing, so could you split a complex sentence into two or three separate sentences? Or is there a better way to say it?



## Apostrophes

The **apostrophe** has two main functions: to show **possession** or **omission**.

Historically, possession was indicated as in “*John Smith his book*”,  
– which became abbreviated to “*John Smith’s book*”.

### Possession: belonging to

**Singular:** When something belongs to **one** person or thing, the apostrophe goes **before** the ‘s’ to show possession:

e.g. the student’s book; the supervisor’s office; the car’s wheels.

**Plural:** In the plural form, the apostrophe goes **after** the ‘s’ to show possession:

e.g. the coal miners’ strike; the dogs’ dinners (the dinners of the dogs).

**Note also:** The children’s shoes; the companies’ accounts (the accounts of the companies).

### Omission

The apostrophe also shows when we have omitted something in a word; for example, “**She’s** been here before”; “**Don’t** do that!”

## Is it **Its** or **It’s** ?

Make sure you understand the difference between **its** and **it’s**.

**Its** can only mean one thing: the **possessive**, something that **belongs to it**.

We don’t use an apostrophe with **his** or **hers**, so we don’t use one with **it’s**.

“**its**” is the **only exception** to the rule for apostrophes and possession.  
Hence – The dog wagged **its** tail. The equipment blew **its** fuse.

**It’s** can only mean a contraction of “**it is**” or “**it has**”:

**It’s** been here for a week.

(Contraction of **it has**).

**It’s** raining.

(Contraction of **it is**).

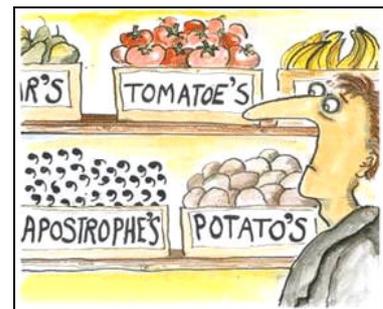
### Plurals

1. Do not use an apostrophe to indicate plurals. This classic mistake is often seen on market stalls and is sometimes called the “greengrocer’s apostrophe”.

e.g. **APPLES** not APPLE’S;  
**PEARS** not PEAR’S, etc.

2. Do not use an apostrophe to form a plural with **numbers** and **acronyms**:

e.g. **1980s**, not 1980’S      **DVDs**, not DVD’S



**No, no, no, no, no!**

### Semicolons ;

A **semicolon** tells the reader that the two clauses (parts of the sentence) are closely related. It marks a stronger pause than a comma but less final than a full stop. There is no connecting word such as **and** or **but**. Examples:

“It was the best of times; it was the worst of times.”<sup>19</sup>

“Alice worked hard for her exams; she passed with flying colours.”

“He was nervous about addressing the meeting; he asked for water several times.”

<sup>19</sup> From “A Tale of Two Cities” by Charles Dickens.

## Colons :

Use a colon between two main clauses of a sentence when the second clause explains or expands the first. Effectively, the colon focuses the reader's attention on what is to follow.

- (a) Use a colon to **introduce** or **emphasise** the words following. For example:
  - “They brought presents: gold, frankincense and oil at \$54 a barrel.”
  - “Africa is facing a terrifying problem: perpetual drought.”
  - “Note: first check that the system is isolated from the mains.”
- (b) Use a colon for **contrast**. For example:
  - “He liked the new car: his son didn't”.
- (c) Use a colon to introduce a bulleted list.

## Hyphens and dashes

Use a hyphen or a dash – for emphasis! The shortcut for an 'en-dash' is  (use the **minus key on the number pad**).

**Compound words:** Use a **hyphen** between words when their combination makes an adjective (a describing word) **before** a noun. Here are some examples:

high-level summary	long-term view	far-fetched explanation	old-fashioned design
clear-cut decision	full-time monitoring	custom-built interface	quick-thinking staff
sugar-free diet	up-to-date report	muddle-headed thinking	Carbon-neutral design

However, when using the words **without** a noun after them, don't use a hyphen. Hence; “The idea was far fetched”; “the interface was custom built”, etc.

## Simplify: If you can remove a word, then do so.

Some writers have developed the habit of adding “padding” to their sentences – extra words that carry little or no meaning. This means that the reader has to “filter out” the irrelevant words in order to find the message.

Writer George Orwell said:

**“Any words that don't contribute meaning to a passage dilute its power. Less is always better. Always.”<sup>20</sup>**

[See more of George Orwell's writing tips on page 144.]

## International Readers

More than one billion people use **English as a foreign language**. Short sentences give international readers confidence and reduce translation errors.

### Long sentences:

- Can be difficult to translate accurately.
- Have complex structures that confuse international readers.
- Can obscure the main point.
- Can cause grammar mistakes.
- Cause anxiety in people who don't read English fluently.

<sup>20</sup> From George Orwell – “Five Rules for Effective Writing”, 1946

## Exercise 1 – Sentence Length

**LONG SENTENCES:** Write a short instruction about a subject of your choice, real or imaginary. What will you write about? What information do you want to tell people?

1. Write the instruction using very long sentences. What's the longest you can do?

LONG SENTENCES	
----------------	--

2. Now, **REWRITE THE SAME INFORMATION** using short and medium sentences.

Try to keep to a maximum of 15-20 words per sentence, and **don't leave anything out!**

SHORT / MEDIUM SENTENCES	
--------------------------	--

After you finish the exercise, answer these questions:

1. How could you apply this in your writing at work? How might you use this in future?

2. What difficulties would this overcome?

3. What kinds of existing documentation would benefit?

**Exercise 2a – Convert Long Sentences to Short****REWRITE THIS LONG SENTENCE INTO SHORT AND MEDIUM SENTENCES.**

- Aim for a maximum of 20 words per sentence; fewer are better.
- Do not lose any accuracy of meaning – this is a business procedure.
- Use bullet points.
- It might help to use a highlight pen to dot the main points that have to be checked.
- Ask yourself, “What has this person got to do?” – and then answer the question.



“The Document Administrator shall check that procedures have been formatted correctly, including the Footer or for Mechanical Integrity documents, the Header (Issue No. and Date, Revision No and date, Document Number and Title, Page Numbering and review period interval etc); whether any hard copies are required and if so the distribution and copy numbers, or alternatively for electronic only masters, that no hard copies are required, but showing who needs to be communicated with if the document should change (by job title); the format should comply with the document control template.” [91 words. Reading ease = 24.5].

SHORT SENTENCES:

After you finish the exercise, answer these questions:

- 1. How could you apply this in your writing at work? How might you use this in future?**
- 2. What difficulties would this overcome?**
- 3. What kinds of existing documentation would benefit?**

(After you've finished – see the answer on p. 130)

**Exercise 2b more than Convert Long Sentences to Short****REWRITE THESE LONG SENTENCES INTO SHORT AND MEDIUM SENTENCES.**

- Aim for a maximum of 20 words per sentence; fewer are better.
- Do not lose any accuracy of meaning – this is a business procedure.
- Use bullet points.
- Ask yourself, what has this person got to do? Then write the answer to the question.

“The Clinical Team Leader or designate (CTL): Develops the Clinical Management Plan (CMP) (Operating Procedure CS.OP.CM010, Clinical Management Plan), defines the Data Query process, co-ordinates the monitoring activities of the Monitor, including development and distribution of monitoring guidelines, and review of the associated site visit report.” [45 words]

SHORT SENTENCES:

After you finish the exercise, answer these questions:

**1. How could you apply this in your writing at work? How might you use this in future?**

**2. What difficulties would this overcome?**

**3. What kinds of existing documentation would benefit?**

(After you've finished – see the answer on p. 130)

## ACTIVE or PASSIVE voice – what’s the difference?

People mostly use the “Active voice” when speaking, but use the “Passive voice” when they write. This is why readers tend to “switch off”, even though they could have absorbed the information.

<b>ACTIVE</b> (shorter; more direct). Has a feeling of <i>Action</i> about it.	<b>PASSIVE</b> (longer; less direct) Has a less active, more passive feel.
The goalkeeper kicks the ball.	The ball <b>is kicked by</b> the goalkeeper.
The car hit the tree.	The tree <b>was hit by</b> the car.
Unscrew the two nuts securing the air inlet duct.	The two nuts securing the air inlet duct <b>are unscrewed</b> . *
Disconnect the battery negative lead.	The battery negative lead <b>is to be disconnected</b> . *
The technician set up the new computer.	The new computer <b>was set up by</b> the technician.
The boy broke the window.	The window <b>got broken</b> . *
Mary crossed the road.	The road <b>was crossed by</b> Mary. (!)
Fill in the form and post it back to us in the envelope provided.	The form <b>is to be filled in and posted</b> back to us in the envelope provided.
Each morning, check that there is enough paper in the photocopier.	Each morning, the photocopier <b>is to be checked</b> to see if it has enough paper. *
Fill the kettle with water.	The kettle <b>is to be filled</b> with water. *
The doctor’s quick action saved John’s life.	John’s life <b>was saved by</b> the doctor’s quick action.
You have not paid the bill.	The bill has not <b>been</b> paid. *
The airline lost their luggage.	Their luggage <b>was lost</b> . *
The programmer will test the new software.	The new software <b>will be tested</b> . *
We have investigated your complaint.	Your complaint <b>has been</b> investigated. *

\* Omits to say by whom!

### Use the ACTIVE voice where possible

ACTIVE sentences make it clear **who has to do what**. It eliminates ambiguity about responsibilities. Not: “It must be done”. But, “You [or someone else] must do it”. Passive sentences can sometimes avoid this.

Example: Memo about cleaning the toilets:

Suppose you arrive at your desk one morning, and you find a memo addressed to you, that says:

“All toilets should be cleaned by nine o’clock every morning.”

You might agree with this completely! But beware: it’s a passive sentence.

What the manager meant to say, using an Active sentence, was:

“I want **you** to clean all the toilets by nine o’clock every morning.”

This has quite a different meaning!

## ACTIVE Style!

Many sources agree that, for instructional material, use the ACTIVE voice rather than PASSIVE. **Active** implies some **action** will take place; passive sounds as if it might not.

The **active** voice is the “normal” voice that most people use in everyday conversation. Write as you would speak to the person. This is the ‘voice’ that we use most of the time. In the active voice, the object receives the action of the verb. Hence, “Switch off the light”; “Check the safety lock before leaving the premises”.

The **passive** voice is less common in normal conversation, but is prominent in “officialise jargon” that used to come from bureaucracy, local government, large organisations, and the self-important. Example: “The light is to be switched off”; “The safety lock is to be checked before leaving the premises.”

## Identifying Passive or Active sentences

What is the difference between **passive** and **active** sentences? Grammatically, it is determined by the order of SUBJECT, VERB and OBJECT in the sentence.

### ACTIVE

In an **ACTIVE** sentence, these three “parts of speech” appear in this order:

**ACTIVE = Subject > Verb > Object**

**Active** example: “The supervisor (*subject*) will test (*verb*) the equipment (*object*).”

The **SUBJECT** is the person, or thing that performs the action.

The **VERB** is the ‘doing’ or ‘action’ word.

The **OBJECT** is that which is affected by the action.

Extra words can make the sentence longer, but the same **subject > verb > object** sequence is still in place:

“The supervisor (*subject*), who visited the factory last week to overview installation, will test (*verb*) the new equipment (*object*) on Friday, so that it will be ready for production staff to use on Monday.”

### PASSIVE

Note: ‘Passive’ is not the same as writing in the past tense.

In a **PASSIVE** sentence, the order is reversed:

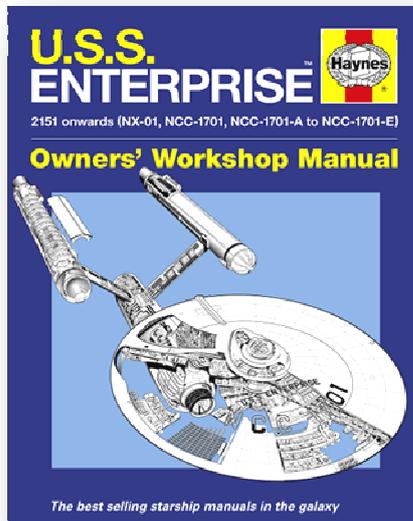
**PASSIVE: Object > Verb > Subject**

**Passive** example: The equipment (*object*) will be tested (*verb*) by the supervisor (*subject*).

Note: ‘will be tested’ is now passive, and the sentence now includes new words, ‘will be’ and ‘by’. These are **clues** to whether a sentence is active or passive. The feel of the sentence is less precise, not so crisp, and a bit clumsy.

## Haynes Workshop Manuals – ACTIVE sentences

The popular **Haynes Workshop Manuals** use **ACTIVE sentences** almost entirely, throughout, and they “talk” directly to the user. For example:



### Car Maintenance examples

“Disconnect and remove the battery.”

“Remove the air cleaner.”

“Connect the speedo drive cable.”

“Release the bellows clips and ...”

“Lubricate the sliding surfaces ...”

“Release the front mounting bracket...”

“Check that the engine mounting is...”

“Adjust the idle speed to the specified level.”

“Raise the window glass by hand and ...”

“Refit the road wheel and lower the car.”

**Clue words 1:** Because of the way the English language works, there are usually some **clue words** in the sentence. The first clue is that the verb **TO BE** (am/is/are/was/were/been/be/will be) is used with the **PAST TENSE FORM** of the main verb. Examples:

was	tested (test)
were	arranged (arrange)
will be	made (irregular form of “make”, so not always “ed” ending)
has been	discovered (discover)
am	recorded (record)
is	compiled (compile)
are	
* became	
* got	

\*Sometimes other words replace the verb “to be”, such as “got” or “became”. For example – “The window **got** broken”; “The woman **became** upset by his behaviour”, etc.

**Clue words 2:** Look for the word “**by**”. This is another strong clue. Examples:

- She was amazed **by** the response.
- The unit needed calibrating **by** the manufacturer.

The Passive voice can cause problems because it may not be clear exactly **who** must carry out the action. Or sentences can become too wordy or may sound officious.

## Writing Instructions for Aerospace

In the **Aerospace industry**, they write in a very tightly controlled manner called “**ASD<sup>21</sup> Simplified Technical English**”. You are not allowed to use a single passive sentence, and you can only use words from a defined list. **Readability** is good, especially for foreign readers, and it reduces translation costs – and misunderstandings – significantly.

The **ASD Simplified Technical English** specification restricts grammar and style usage.

For example, you need to:

- Restrict the length of “noun clusters” to no more than 3 words, e.g.  
“Mercedes engine compartment sound insulation” is a cluster of 5 nouns.  
“Core information technology servers” = 4 nouns.
- Restrict sentence length to no more than 20 words (instructions) or 25 words (descriptions);
- Restrict paragraphs to no more than 6 sentences;
- Avoid slang and jargon;
- Make instructions as specific as possible;
- Use articles such as “a / an” and “the” wherever possible;
- Use simple verb tenses (past, present, and future);
- Use active voice for all instructions;
- Not use **-ing** participles or gerunds (unless part of a technical name); i.e. avoid words that make a noun from a verb, such as tuning, installing, logging in, machining, connecting, cleaning etc. Instead, use: tune, install, log in, machine, connect, clean, etc.
- Write sequential steps as separate sentences;
- Put conditions (such as “if”, “when”, “after” etc.) **first** in warnings and cautions.

## When is it OK to use Passive?

**The guideline is to make 80 to 90% of your sentences ACTIVE: the more the better.**

But sometimes it is OK to use passive sentences.

- When it doesn’t matter who carries out the action: “Security will be improved in the next software release.” The focus is on the security of the software – it doesn’t matter who improved it.
- To make something more diplomatic. “The form was not filled in correctly” (passive) is friendlier than “You did not fill in the form correctly” (active, but sounds like an accusation).
- If you do not know who did it: “My car was stolen last night.”
- To avoid responsibility: “The document was leaked to the press” is passive and allows anonymity! If you wrote, “My department leaked the document to the press” this would be active and an admission of guilt!

This Training Manual has about 4% passive sentences, many of which come from the passive sentence examples.

<sup>21</sup> AeroSpace and Defence Industries Association of Europe (ASD) based in Brussels

**Exercise 3 – Write PASSIVE and ACTIVE Sentences**

1. **INSTRUCTIONS ARE TO BE WRITTEN** about how a cup of tea or coffee is to be made; or a similar task may be chosen. **PASSIVE SENTENCES** are to be used: **Object > Verb > Subject**.

<b>PASSIVE</b>	
----------------	--

2. **REWRITE THE INSTRUCTIONS** and use **ACTIVE SENTENCES**: **Subject > Verb > Object**. Assume the reader has to do the task, therefore use a direct instructional approach.

<b>ACTIVE</b>	
---------------	--

- Note the difference in the way the information is given. Which of the two is easiest to read and understand? Do you notice anything else?

← Your Notes: **Write PASSIVE and ACTIVE Sentences**

← After you finish the exercise opposite, answer these questions:

**1. How could you apply this in your writing at work? How might you use this in future?**

**2. What difficulties would this overcome?**

**3. What kinds of existing documentation would benefit?**

**4. Discuss your ideas with somebody else.**

## Exercise 4 – Convert PASSIVE Sentences to ACTIVE



Here is an example rich in passive sentences.

The following activities will be conducted in accordance with the Research Management Plan (RMP). Data Collection Files (DCF) may be generated by Data Management (DM) or Research staff during the data query process. DCFs may be provided to the Supervisor for resolution at the testing site as specified in the Scope of Work and the RMP. If DCFs are provided directly to the site by someone other than the Supervisor, the CTL will request that copies of the DCFs be provided to the Supervisor.

The visit timing is to be confirmed with the relevant study site staff, and a confirmation letter is to be provided detailing to the investigator what is to be accomplished at the visit, if these details were not included in the previous site visit follow-up letter.

**Rewrite the procedure using ACTIVE SENTENCES: Subject > Verb > Object**

**Before you write anything, please read these instructions:**

1. If it does not say who has to do something, assume the reader has to do the task.
2. Highlight the passive 'clue words', before you convert the sentences.
3. Ask yourself, "Who has to do what?" and then write the answer.
4. Use a direct 'you' approach. Start with the words shown below:

*Conduct the following activities ...*

- Note the difference in the way the information is given. Which of the two is easier to read and understand? Do you notice anything else? Discuss in a constructive manner.

(After you've finished – see the answer on p. 132)

← Your Notes: **Convert PASSIVE Sentences to ACTIVE**

← After you finish the exercise opposite, answer these questions:

**1. How could you apply this in your writing at work? How might you use this in future?**

**2. What difficulties would this overcome?**

**3. What kinds of existing documentation would benefit?**

**4. Discuss your ideas with somebody else.**

## Exercise 5 – Find the Passive Clauses

This extract comes from a Research Procedure. Try to find all the **passive phrases**.

1. Use a **highlight pen** to mark the **passive verbs** and any other clue words. You're not re-writing it, this is purely an exercise to find them.
2. After you have finished, mark a cross **X** in the right-hand margin beside any passive phrase that does **not** define who has to do the action. If you cannot answer the question "Who has to do it?" then mark it **X**.



### Conducting a Supervisory Visit

A Supervisor must address all activities described below over the course of the study in accordance with the Research Management Plan (RMP) or equivalent documentation and instructions. However, not all of the activities described in this section may necessarily **be performed** at each interim Supervisory visit.

- Meet with study site staff and/or Investigator to obtain an overview of study progress and any issues since the previous contact, and to identify any issues that require additional site training.
- Ensure that all new and on-going Immediately Reportable Adverse Events (IRAEs) and Unanticipated Adverse Device Effects (UADEs) have been documented, reported and followed up appropriately.
- Verify continued acceptability of study site staff and facilities and discuss any planned changes. If changes occur, check whether the appropriate RDs are updated.
- Determine the status and review the time line for completing pending and outstanding issues from previous contact(s).
- Verify compliance with the informed consent procedures and conformance with the required subject visit schedule, and confirm whether all study-specific procedures were performed after written consent was obtained.
- Review the accuracy, completeness, and legibility of the CRF entries, DCFs, source documents, and other trial-related records against each other, and ensure that any known deviations from the protocol are documented.
- Review the Investigator Site File or equivalent and determine whether the investigator or designate is maintaining the RDs, Research Study Documents (RSDs), forms, logs and other study documents appropriately.
- Check whether any changes to data on CRFs were made by authorised study site staff and were initialled and dated.
- Check that the Investigator has verified the accuracy of all DCFs, if applicable.
- Check that resolved DCFs are filed at the study site.
- Check whether the Investigator or authorised designate has reviewed all research results, including abnormal laboratory results.
- Inspect the storage conditions of laboratory kits, expiration date and adequacy of supplies.
- Document and discuss with the Investigator and/or designated staff any issues relating to the handling and documentation of IP, including storage conditions, IP records, reconciliation, expiration date and adequacy of supplies.

(No cheating! – but the answer is on page 134).

Counts	
Words	342
Characters	2026
Paragraphs	15
Sentences	16
Averages	
Sentences per Paragraph	1.1
Words per Sentence	21.1
Characters per Word	5.7
<b>Readability</b>	
Passive Sentences	43%
Flesch Reading Ease	18.4
Flesch-Kincaid Grade Level	15.9

Here are the **Readability Statistics** for this extract.

- **Passive Sentences = 43%**. This is too high. Aim for 10% – 20% maximum.
- **Reading Ease = 18.4**.

This is very bad; confusing.

The score rates text on a 100–point scale; a **higher readability** score is **easier** to understand.

For most standard documents to average readers, aim for about **60 to 70**.

← Your Notes: **Find the Passive Clauses**

← After you finish the exercise opposite, answer these questions:

1. How could you apply this in your writing at work? How might you use this in future?

2. What difficulties would this overcome?

3. What kinds of existing documentation would benefit?

**How difficult was this example to read and understand?**

Note: We cover **Readability Analysis and Statistics** later – see page 102.

## Writing Style

### First person? Second person? Third person?

#### Personal pronouns:

**First person = I, me, we, us. Second person = you. Third person = she, he, it, they.**

Personal pronouns – I, me, my, mine; we, us, our; you, your, and yours – help to achieve a conversational tone that is so important to plain English. Use of '**you**' and '**we**' involve your reader and make a connection that helps keep the reader involved. This also reduces your chances of using the passive voice.<sup>22</sup>

If you have been to University, then they probably taught you to write in the **third person** and use passive sentences:

“The temperature was raised gently to 90 °C and then the valve was closed by the technician.”

– and so on. Also, you were writing a past experience, and that's how they taught you to write a good thesis: you were intentionally showing off your knowledge.

However, out in the real world, you are trying to teach people how to do something, and some of them will know nothing about the subject. Your style must be different, a little more directive; therefore talk them through it, step by step.

- **“I”**: The **first person singular** is accepted in scientific writing, but use it sparingly. You might want to emphasise things that “you” uniquely did; e.g., “I calibrated the system before despatch.”
- **“We”**: The **first person plural** is good for both instructional and report writing.  
“We replaced the broken assembly...”;  
“We recommend that you calibrate the system once every three months.”
- **Second person: “You”**. As a Technical Writer, you will often be **writing instructions** about how to do something. The second person form, the “you”-oriented style is much better;  
e.g. - “Increase the pressure until it lifts the load off the ground.”  
- “You must log in before you can use the system.”
- **“He, she, it, they, one; the reader; the user...”**: **Third person**: This sounds stuffy and dull. Would a car instruction manual say:  
“The user should carefully remove the trim panel from under the windows”?  
– or simply:  
“Carefully remove the trim panel from under the windows.”

Which sounds stuffy? Which sounds clear and easy?

If one uses his or her brain, then he or she can succeed.	If you use your brain, then you can succeed.
The user clicks the <b>Save</b> button to save the file.	Click the <b>Save</b> button to save the file.

<sup>22</sup> Society of Technical Communicators.

## Address the reader directly as ‘You’

In instructional material, you can usually address the reader directly as ‘you’, whether you actually include the word “you” in the sentence or not. See examples in the table below.

More than any other method, using “you” draws readers into a conversation, rather than making them feel “spoken at” from a distance. They feel involved; it becomes relevant to them. This means they will understand it better – which is a prime goal of the Technical Writer.

**Haynes Workshop Manuals** are an excellent example – they use the ‘you’ approach throughout.

Examples:

Before	After
The wire should be connected to the terminal by the engineer when the switch-box assembly is completed.	After assembling the switch box, connect the wire to the terminal.
The spring and the shock absorber protective shield are to be removed.	Remove the spring and the shock absorber protective shield.
The user switches the computer on and waits for it to boot up.	Switch on the computer and wait for it to boot up.
Service Notes are available from the company.	We can provide you with Service Notes.
The System Administrator has to look after the following areas of responsibility ...	If you are the System Administrator, you are responsible for ...
The dipstick is removed and the oil level is checked.	Remove the dipstick and check the oil level.
The driver turns left at the next traffic lights and then takes the first turning right.	Turn left at the next traffic lights and then take the first turning left.

## Using ‘We’ to refer to your company

You can nearly always refer to your organisation as ‘we’. If necessary, make it clear near the beginning of the document.

For example,

“At Johnsons, we aim to...”

“We include all cables and assembly tools...”

“We will tell you when the system is ...”

This is more friendly and welcoming to your readers; you are including yourselves and your readers in a conversation, rather than “talking at them”.

It’s the way you would probably say it if you were in a meeting with them. It also makes your sentences shorter.

Look at this open, honest and friendly message from outside caterers, at a company canteen :



## NATURALLY HONEST FOOD.

WE LOVE FOOD & BELIEVE IT SHOULD NOT ONLY TASTE GOOD, BUT DO YOU GOOD! ALL OUR SANDWICHES ARE MADE FRESH IN OUR KITCHENS DAILY.

WE SUPPORT LOCAL FARMERS & PRODUCERS. FOOD THAT'S GOOD FOR YOU, OUR FARMERS & OUR PLANET!

WE USE SEASONAL LOCAL PRODUCE WHEREVER POSSIBLE.

OUR FISH COMES FROM SUSTAINABLE STOCKS & WE ONLY USE DOLPHIN FRIENDLY TUNA.

WE RECYCLE ALL CARDBOARD, TINS & CANS & USE ENVIRONMENTALLY FRIENDLY PACKAGING WHEREVER POSSIBLE. WE ARE COMMITTED TO REDUCING FOOD MILES.

## Target the Reader Groups

When you write, use **appropriate words** for the readers. Keep it simple and straightforward, and use words that they will understand.

Think about whom you are talking to. What sort of people are they? What is their age range?

**Older people** have more wisdom and experience of life in the workplace, but their IT skills may be limited. **Young people** just out of school/college tend to be highly computer-literate, but their experience in the workplace is limited.

What are their Technical skills? Education? Experience? Computer literacy? Some or all of these will determine the best way to 'talk to' your target reader groups in the way that you write.

**Example:** Suppose you have to write a Report or a Procedure that will be read by three groups of people in these categories: Chief Engineers; Commercial; Accounts.

### 1: How would you rate their technical understanding?

- **TTT** = very technical
- **TT** = reasonably technical
- **T** = not very technical

Mark your score in the table below:

How technical are they?	Score
Chief Engineers	
Commercial (sales, negotiators, etc.)	
Accounts (accountants, clerical)	

So, how would you make sure they ALL understand it? (Write your answer here)

.....

### 2: What if the Commercial and Accounts people only need to read, say, an introductory part of the document, but the Chief Engineers will read all of it?

Why not have different sections?

Document	
Part 1 – Simple Language for Non-Technical readers	<b>T</b>
Part 2 – Moderately Technical	<b>TT</b>
Part 3 – Serious Technical Talk	<b>TTT</b>

## Jargon and Acronyms

### Jargon

Jargon is the language used by people who work in a particular area or who have a common interest: lawyers, computer programmers, scientists, financial services, pharmaceuticals, etc. All have specialised terms and expressions that they use, many of which may not be comprehensible to the outsider. They may also use familiar words with different meanings as well as abbreviations, acronyms etc.<sup>23</sup>

Only use jargon if **all** the target readers will understand it. And remember to allow for the new member of staff, who may not know the jargon yet – so provide a definition nearby (See **Footnotes** below).

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### Acronyms

Beware of acronyms – these can be worse than jargon!

I once did some documentation work in the Pensions industry, where they used **86** acronyms in just one pension product. They even talked to each other like it:

“Is Mr Jones COMP or CIMP? Has he PUPPED yet?”

This can be a nightmare for a new member of staff, who can make costly mistakes if they get it wrong.

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### Footnote and Glossary

If you use jargon and acronyms, and you suspect that some readers will **not** understand, make sure you define these terms somewhere within easy reach.

You might define it in brackets just after the first occurrence of the term on the page, or add it in a footnote at the bottom of the page.

A less-accessible method is to include a Glossary of Terms. This could be either near the front, so that they read it before starting on the rest of the document, or at the back in the Appendix.

Whichever method you use, make sure the reader knows where to find it.

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<sup>23</sup> Using English, an educational web site.

**Exercise 6 – Jargon****INSTRUCTION 1 – use DIFFICULT TECHNICAL LANGUAGE with lots of JARGON.**

Write a brief Procedure about how to perform a task, or to use a product or service that your organisation provides. Make it very technical, but try to avoid acronyms for this exercise. Assume that the target reader is familiar with your field of work, has similar education and technical expertise, and is a native English speaker.

<b>JARGON / SUPER-TECHNICAL</b>	
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**INSTRUCTION 2 – REWRITE USING PLAIN ENGLISH**

Now rewrite the instruction in Plain English. Imagine the reader is a Polish employee who joined your company one month ago. She has limited knowledge of the subject, but needs to understand perfectly what you have written, and get it right first time. She learned English at school up to age 16. Her verbal English is reasonable, but she has not used written English since ten years ago.

<b>PLAIN ENGLISH</b>	
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- Note the difference in the way the information is given. Which of the two is easiest to read and understand? Do you notice anything else?

← Your Notes: **Exercise 6 – Jargon**

← After you finish the exercise opposite, answer these questions:

**1. How could you apply this in your writing at work? How might you use this in future?**

**2. What difficulties would this overcome?**

**3. What kinds of existing documentation would benefit?**

**4. Discuss your ideas with somebody else.**

## Instructions and Procedures

The reader wants to know what to do. That's why they are reading the instructions. So tell them! Yes, be polite; but people prefer to know exactly what you want them to do – they don't want to make a mistake.

Simple	Stuffy!
Please use the checklist.	It is recommended that it would be better to use the checklist.
Hush!	The audience is requested to be quiet.
Wash your face.	Children are advised that their faces should be washed.
Please be careful to ...	Users are cautioned that they should be careful to ...

## Noun or Verb?

If you want to keep the reader's interest, then use the active **verb form** rather than the **noun** derived from it, known as a “**nominalisation**”. For example:



Noun form ✗	Active Verb ✓
abbreviation	abbreviate
affirmation	affirm
attention	attend
collection	collect
confirmation	confirm
construction	construct
digression	digress
division	divide

Noun form ✗	Active Verb ✓
education	educate
explanation	explain
imitation	imitate
introduction	introduce
persuasion	persuade
production	produce
publication	publish
revision	revise

The noun form is an abstract object, instead of an **action**; it sounds dull and *inactive*.

- Are there any that you use fairly often? If so, highlight them to remind yourself to try the verb form.

Here are some example sentences. Note that the active verb form is shorter, simpler, and sounds more as if something will actually **happen**:

Active verb form ✓	Noun form ✗
We will <b>attend</b> to this immediately.	We will give this our immediate <b>attention</b> .
ABC Builders will <b>construct</b> the offices.	ABC Builders will carry out the <b>construction</b> of the offices.
The Training Officer will <b>instruct</b> the staff on safety issues.	The Training Officer will give <b>instruction</b> to the staff on safety issues.
The next step is to <b>persuade</b> the user to ...	The next step is <b>persuasion</b> of the user to ...
... which complies with...	... in compliance with ...

Imagine how they would sound if somebody spoke these words to you.

## Bullet Point lists and Punctuation

Bullet points help to make a list of items, instructions, etc., very clear to the reader.

For a simple list of **items**, write it like this, with **no punctuation** except for a full stop at the end of the last item:

Allow for ceiling fittings, such as:

- fluorescent light fittings
- down lighters
- sprinklers
- smoke detectors
- security cameras, etc.

For longer statements that are **not** separate sentences, use a **semicolon** after each point and use a lower case letter to start each line:

Before you move the machine, check that:

- you have disconnected all hoses and cables;
- you have cleared the floor of obstructions;
- you have another person with you to help.

If the bullet points are each **separate and complete sentences**, end each with a **full stop**. See below.

This is a very clear example of the difference that bullet points can make. It is a real-life example of a cluttered, long sentence, re-written using bullet points:

<p><b>BEFORE</b></p> <p>A postcode field can be linked to an external product such as “Quick Address Pro” (“Quick Address Pro” allows the entry of a postcode and will automatically complete the address fields, the house number can be selected from a list) or “Rapid” from QAS Systems (Quick address “Rapid” allows the entry of a postcode and will automatically complete the address fields) or “AFD Postcode” from Nildram Software (“AFD Postcode” allows the entry of a postcode and will also automatically complete the address fields.</p> <p style="text-align: right;">(Reading ease = 0!)</p>	<p><b>83 words!</b></p>
<p><b>AFTER</b></p> <p>A postcode field can be linked to an external product such as:</p> <ul style="list-style-type: none"> <li>• “Quick Address Pro”. This allows the entry of a postcode, and will automatically complete the address fields. The house number can be selected from a list.</li> <li>• “Rapid” from QAS Systems. This allows the entry of a postcode, and will automatically complete the address fields.</li> <li>• “AFD Postcode” from Nildram Software. This also allows the entry of a postcode, and will automatically complete the address fields.</li> </ul> <p style="text-align: right;">(Reading ease = 60)</p>	<p><b>Use bullet points to make this easier to understand.</b></p>

This simple rearrangement makes a huge difference to readability.

## Bullet Points for Instructions

Use bullet points when listing step-by-step instructions. This helps to emphasise each step.

Introduce the list with narrative text first. Use an initial capital letter, and a full stop after each sentence. Here is an example:

This topic tells you how to change paper in the photocopier:

- Pull out the paper tray at the bottom of the copier. The display indicates “No Paper”.
- Put new paper into the tray, but do not fill above the black arrow marks either side.
- Make sure the paper is settled into place, and then replace the paper tray into the copier. The display should then indicate “Ready”.

## Numbered Lists

I once edited some business instructions that went to more than 150 steps. When I reached step 117, I was starting to sag, and thought, “How long does this procedure go on for?!”

Numbered lists just give the reader’s mind extra information to process and discard. Often, it is just clutter and doesn’t need to be there. Only use numbering if there is a **business reason** to do so.

Instead, try to use **subheadings** to break the content into blocks of instructions, and within each block use a series of up to five or six bullet point instructions.

Documentation of a legal nature often needs to refer to paragraph numbers, which is therefore OK.

## Numbering to emphasise a sequence

Sometimes it helps to use numbers to emphasise when the user must do things in a certain order.

See an example of an image annotated with numbers, and the related numbered instructions, on page 120.

## Exercise 7 – Bullet Points

**Write a short technical instruction on how to do a common task.** This is an exercise in layout and making instructions easy to follow. This can be real or imaginary. Here are some ideas.

- How to lay a table for a meal.
- How to repair a puncture in a bicycle tyre.
- How to set up a piece of equipment (of your own choice) before use.
- How to change a wheel on a car.
- Anything else.

### 1: Write One Continuous Paragraph.

CONTINUOUS PARAGRAPH	
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### 2: Rewrite using bullet points to separate the steps

BULLET POINTS	
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**When you have finished, swap your work with somebody else.**

- Check each other's grammar, spelling and punctuation. Circle anything you would question.
- Note the difference in the way the information is given. Which of the two is easiest to read and understand? Do you notice anything else?
- How has your partner handled jargon and abbreviations? Would a non-technical reader understand it?
- Discuss your observations with each other, in a constructive manner.

## Changes in English Grammar

The English language has evolved since many of the rigid rules of grammar were first invented, some of them centuries ago. So let's update the situation.

### Beginning of a sentence

It's OK to start a sentence with conjunctions or prepositions such as **And**, **But**, **So** etc. Use them for **emphasis**. Some of the best writers have been ignoring this rule for years. **And** why not? **But** some people persist in prohibiting this technique. **Yet** we defy them. **Or** we simply ignore them. **Nor** do they understand our attitude, though we try to convince them, and will continue to do so. **So** there. <sup>24</sup>

**But** don't do it too much – it can be a distraction. Use the rules as a guideline, but ignore them if you need emphasis.

### End-of-sentence Prepositions

There are over 100 prepositions in the English language. Here is a selection:

aboard	about	above	across	after	against	along
among	around	at	athwart	atop	before	behind
below	beneath	beside	besides	between	beyond	but
by	down	during	except	for	from	in
inside	into	like	near	next	of	off
on	onto	opposite	out	outside	over	plus
round	since	than	through	throughout	to	toward
towards	under	underneath	unlike	until	up	upon
with	within	without				

Many people have heard of the 'rule' that says that a sentence should never end with a preposition. This public school doctrine was based on Latin grammar, so it was considered incorrect in English too. There is no justification for it these days, so you can safely ignore it. <sup>25</sup>

Put the preposition where it sounds natural. For example:

"These people have no idea what they are talking **about**."

"Have you found that report you were looking **for**?"

"What are you looking **at**?"

"The sump fixes **underneath**."

"John was good company to travel **with**."

"What country do you come **from**?"

"Am I getting my point **across**?"



Here is a much-quoted story:

About 50 years ago, an editor once rearranged one of Winston Churchill's sentences to avoid it ending with a preposition, and sent it back to him.

The Prime Minister, very proud of his style, scribbled this note in reply:

**"This is the sort of b\*\*\*\*y nonsense up with which I will not put!"** <sup>26</sup>

<sup>24</sup> [www.dailywritingtips.com](http://www.dailywritingtips.com)

<sup>25</sup> Hutchinson Encyclopaedia and many other references.

<sup>26</sup> Oxford Companion to the English Language.

## Spelling Does Matter!

Bad spelling loses business! However, the brain can do wonders with the odd mistake here and there. Look at this example:

“I cdnuolt blveiee taht I cluod acutlaly uesdnatnrd waht I was rdanieg. The phaonmneal pweor of the hmuan mnid! Aoccdrnig to a rsearh at Cmabrigde Uinervtisy, it deson’t mttar in waht oredr the ltteers in a wrod are, the olny iprmoatnt tihng is taht the frist and lsat ltteer be in the rghit pclae. The rset can be a taotl mses and you can sitll raed it wouthit a porbelm. Tihs is bcuseae the huamn mnid deos not raed ervey lteter by istlef, but the wrod as a wlohe. Amzanig huh?”

OK, that’s just for fun.

**We all make spelling mistakes at times, but it does not impress the reader...**

### SPELLING REALLY DOES MATTER!



Good grief!



Wrong!



Wrong!



Wrong!

Mistakes look **bad** and **unprofessional**. If there are too many of them, the reader might wonder if they should be dealing with a different company.



As you know, don’t rely completely on the spell checker in the word processor. If you misspell a word and it makes another valid word, then the spell checker ignore it.

## Bad English: National Opinion Poll Survey

Many businesses suffer from the style of their written output, with ideas poorly expressed, confusing to the reader, bad grammar, bad design, and so on.

A National Opinion Poll survey in 2005 concluded:

**“Bad design, poor grammar and atrocious spelling could be costing UK businesses a staggering £41 billion a year in lost sales.**

**74% of customers said they wouldn’t trust businesses that used poor spelling or grammar, whilst 30% said they wouldn’t buy any product or service from them.”**

## Using the Correct Words

### Some common misunderstandings

#### “which” or “that” ?

- **that** DEFINES or RESTRICTS – e.g.,  
“The lawn mower **that** is broken is in the shed.”  
Implies that there may be another, but **that** one in the shed is broken.



- **which** gives extra, non-essential information; e.g.,  
“The lawn mower, **which** is broken, is in the shed.”  
This implies there is only one lawn mower. It is broken, and you’ll find it in the shed.



#### Utilise or Use ?

- **Utilise** is not the same as **use**. It means, “to use something in an effective way”<sup>27</sup>, or “to make best use of”.

Example: “He utilised the space available by fitting shelves.”

#### Principal or Principle ?

These two words sound the same, but have different meanings.

- **Principle** is a noun, and it means a fundamental truth, a scientific theorem.
  - “It’s the principle that matters.”
  - “That’s a good idea, in principle.”
  - “These machines all operate on the same principle.”
  - “... the principles of democracy...”
- **Principal** (think of **a** for **a**djective, means the “main or most important”, as in – “one of the country’s principal cities”;
- **Principal** as a noun means the senior person, as in “The **principal** of the college”. (To help you remember, he’s your **pal**.)

#### -ise and -ice word endings

- Use **-ice** for **nouns** (music practice; I need some advice; also – driving licence),
- Use **-ise** for **verbs** (I practise the piano; she advised me to exercise more; he was licensed to sell alcohol).

**Exception:** “exercise” is the spelling for both the noun and the verb.

#### Login or Log in ?

- **Login** – is an adjective, a describing word; as in: “**Login** screen”.
- **Log in** – is the **verb** form: “**Log in** and open the required file.”

Hence make the button  and not .

<sup>27</sup> Cambridge Advanced Learner’s Dictionary.

## Meaningless Text

Eliminate words that do not add meaning, that are mere padding. They waste space on the page, and the reader has to filter them out before they can focus on the real message.

For example:



Instead of ...	... try ...
a number of	several
adding together	adding
adequate number of	enough
as a matter of fact	in fact (or omit)
at regular intervals of time	regularly
cancel out	cancel
conduct an investigation	investigate
despite the fact that	even though
during the course of	during
for the purpose of	for
I would appreciate it if you would...	Please...
in the majority of instances	usually
in view of the fact	given (or omit)
in view of the fact that	because
it can be seen that	(omit)
it is a fact that	(omit)
it would appear that	apparently
on a monthly basis	monthly
owing to the fact that	because
shows a preference for	prefers
sufficient number of	enough
the vast majority	most
whether or not	whether

## Word alternatives

Try using the shorter and simpler words on the right:



Use your **highlight pen** to mark those that might be useful...



Instead of ...	... try ...
additional	extra
advise	tell
are able to	can
at such time as	when
at this precise moment in time	now
by reason of	because
commence	begin / start
commencement	start / beginning
complete (the form)	fill in
concur	agree
consequently	so
do not hesitate to	please
due to the fact that	because
during such time as	while
during the course of	during
employ (meaning to use)	use
for the duration of	during
for the reason that	because
forthwith	immediately
forward	send
henceforth	in future
I am in receipt of	I have
in case	if
in excess of	more than
in order to	to
in the event of	if
instantaneously	instantly
is able to	can
is applicable	applies
is unable to	cannot
is under obligation to	must
member of the board of directors	director
on request	if you ask
owing to the situation that	because, since
particulars	details
per annum	a year
persons	people
prior to (the occasion when)	before
purchase	buy
regarding	about
should a situation arise where	if
subsequent to	after
unaware of the fact	didn't know
taking into consideration such factors as	considering
there is a reasonable expectation that	probably
with immediate effect	immediately

## Accuracy of Meaning

English is a strange language, rich in **colloquial expressions** and **ambiguous words**. Here is a trivial example to illustrate a point.

He made arrows and a bow from a bough of a tree. She brought a bow for his violin. He bowed his violin, bowed to his master and walked to the bow of the ship. With ribbon, she tied a bow in her hair.

And a few more, just for fun:

Farmers produce produce abundantly.

Is it possible to desert someone in the desert while eating a dessert?

You can tune a piano, but you can't tuna fish.

As Technical Writers, we must be **clear and unambiguous** when we write – we will not be there with the reader to correct mistakes. Some English words are imprecise and ambiguous, so we must be careful when we use them; and in some cases, avoid them completely! Only you can judge whether you really mean what you say. Lack of punctuation can change the meaning, too.

## Word Order

Look at this headline from an advertisement in the Daily Mail newspaper, in February 2006:

**FREE SUMMER FLOWERING PLANTS  
FOR EVERY READER WORTH OVER £30**

( This begs the question, “**What if the reader is worth only £10?**”... )



**What should it say? What would be the correct wording?**

## English as a Foreign Language?

**About ONE BILLION people in the world speak English as a foreign language, according to the British Council.**

Comprehension is more difficult when your readers' first language is not English.

- (a) They may only remember conversational English from secondary school, and therefore find written English much harder. You can help them if you write in a conversational style – just talk them through the procedure that you want them to do.
- (b) Some words do not translate well because of the context; they translate into different words in the other language.
- (c) Some words in English are both a Verb and a Noun. The translator may have to guess which it is, based on the context.

For example, consider the word “**Oil**”. As a verb, it means ‘**to lubricate**’; as a noun, it means ‘**lubricant**’. Therefore, try to use the correct, unambiguous word.

Another example: a sub heading in a procedure says ‘Document Visit’. Does this mean that it is a visit to look at documents? Or does it mean that you must ‘Document the Visit’? Or is it about ‘Documenting the Visit’?

### Choice of Vocabulary

Therefore, be careful to use words that have literal meaning rather than idiomatic meaning.

For example, in 1989, a China Airlines flight, flying in zero visibility, crashed into the side of a mountain shortly after take-off. On the voice recorder, the last words of the Chinese pilot to the co-pilot were, “What does ‘pull up’ mean?”<sup>28</sup>

The official term used in “control tower” talk is **climb**. However, the warning system built into the US-made planes gives an audible warning: “**Pull up! – Pull up!**” if altitude drops, or an obstruction looms ahead.

**Ambiguity** leads to **mistranslation** and **misunderstanding**, or worse.

## Idiomatic Expressions

Some phrases are unique to a language, and would not make sense if translated literally. Look at these examples of English idiomatic expressions and their French equivalents:

English phrase	French equivalent and its direct translation
I feel a little under the weather.	I don't feel in my plate. (Je ne me sens pas dans mon assiette.)
He's as cool as a cucumber.	He is of Olympic calm. (Il est d'un calme olympien.)
They are barking up the wrong tree.	They are taking the wrong road. (Ils font fausse route.)
They are pulling our leg.	They are making us walk. (Ils nous font marcher.)
Pigs might fly before that happens.	It will happen when chickens have teeth. (Ça arrivera quand les poules auront des dents.)

Some phrases do translate as written: for example, to “sweep it under the carpet” translates directly into German as “Unter dem teppich kehren” – exactly the same idiom.

<sup>28</sup> ‘Technical Communication’, A Study of Plain English Vocabulary and International Audiences: Aviation English Classes. Vol 48, Number 3, August 2001.

## Exercise 8 – Writing for non-English speakers

**Idiomatic expressions** do not translate well (if at all) into another language. This is a problem for readers for whom English is not their first language, and also a problem when translating. This exercise is to help you think about the way you write. **Rewrite some of these examples:**

Example idiomatic expression	Rewrite the <u>underlined phrases</u> in good English
1. I'm <u>not with you</u> .	To us, this means "I don't understand what you said". However, in real life, a Japanese businessman translated it literally and thought it was personal rejection: "I want nothing to do with you".
2. Engineers must not be <u>kept in the dark</u> about safety issues.	
3. The new design <u>threw the baby out with the bath water</u> .	
4. The new software was of <u>mind-boggling</u> complexity.	
5. Although they fixed the main problem, the side issues were <u>swept under the carpet</u> .	
6. You can <u>piggyback</u> this experiment with the first one.	
7. If you don't install the system correctly, it could <u>cost you an arm and a leg</u> in litigation.	
8. <u>Keep an eye</u> on the temperature gauge while you increase the engine speed.	
9. The investigation was <u>dogged by delays</u> , but we <u>went the extra mile</u> , <u>stuck to our guns</u> , and <u>cracked the problem</u> .	
10. If you want to get the best out of the new system, you've got to <u>think outside the box</u> .	
11. Check that the new installation is <u>up to scratch</u> .	
12. It was time to <u>roll out</u> the new software.	
13. We <u>put our heads together</u> and came up with a solution.	
14. We decided it was time to <u>get our act together</u> *	*

\* Expressions such as, "pull our finger out / get a move on / get our backsides in gear / pull our socks up / sort it out / get cracking, are all idiomatic expressions, so they are not valid!

### Questions

- How difficult was it to translate? Why?
- Why do people use idioms?

## Weak, Vague and Imprecise Words – Beware!

### Weak words: Should

Beware the word “should” – it can sound like an option:

“You should, really, but it doesn’t matter if you don’t”.

If you mean, “You must...”, then it’s OK to say so. Here are some variations:

“You must sign the form and post it back to us immediately.”

“Sign the form and post it back to us immediately.”

“Please sign the form and post it back to us immediately.”

These are clear and unambiguous. If you need to be extra polite, add the word ‘**please**’.

If ‘should’ means it **is** optional, then say so, and give them the information to help their decision. For example, “Optional: Enter the address if you want this to appear in the usage report.”

Look at these examples of words that require special care.

Word	Example	Comment
<b>Should</b>	“The Supervisor <i>should</i> discuss the local process with each investigator...”	It sounds optional; “You <i>should</i> , but it doesn’t really matter if you don’t.” The word has many meanings:  should (DUTY) should (WOULD) should (PROBABLE) should (ADVISE) should (POSSIBILITY) should (REASON) should (SURPRISE)  If you <i>must</i> , then say so; be firm, clear and unambiguous.  “The Supervisor must discuss the local process with each investigator...”

### How to avoid “Should”

Sometimes you can change “should” to “must”, otherwise just write it another way...

Before	After
The member should be made aware...	Tell the member...
The file and quotation should now be passed to an authorised checker.	Pass the file and quotation to an authorised checker.
This should be pointed out to the consultant.	Point this out to the consultant.
Details should be sent in writing...	Send details in writing...
You should send...	Send...
... you should still obtain an up-to-date figure	... you must still obtain an up-to-date figure
The client should be advised...	Advise the client...
The member should use the certificate...	The member must use the certificate...
The following message should appear at the bottom of the Menu screen...	(You can probably leave this as it is. The message <i>should</i> appear, but you never can tell, with software!)

## Other weak words

<b>May</b>	“Work <b>may</b> not be initiated without management approval.”	<p>“May” sounds optional, depending on context. “It may, but it doesn’t have to”. The word has different meanings:</p> <p><b>may</b> (POSSIBILITY)  <b>may</b> (PERMISSION)  <b>may</b> (WISH)</p> <p>If it <b>must</b>, or <b>must not</b>, then say so: “Work <b>must not</b> be initiated without management approval.”</p> <p>However, it is correct to say: “Management has the power to decide whether the research <b>may</b> take place or not.”</p>												
<b>Shall</b>	“The Supervisor <b>shall</b> check that the sites comply with...”	<p>In translation to another language, the distinction between the imperative (“<b>shall check</b>”) and the future tense (“<b>will check</b>”) is not clear. The sentence structure may be new to the reader unless they learned it thoroughly at school. The word has different contexts:</p> <p>shall (FUTURE)  shall (SUGGEST)  shall (CERTAINLY WILL)</p> <p>Again, if you <b>must</b> then you <b>must</b>.</p> <p>“The Supervisor <b>must</b> check that the sites comply with...”</p> <p><b>Note:</b> In contractual or legal documentation, or technical specifications, you can use “shall” for the imperative, instead of “must”.</p>												
<b>Would</b>	“... an advisor to the NHS institutions where the research <b>would</b> take place.”	<p>This word is not precise and does not translate clearly into other languages. What is its exact meaning? – the word has many contexts:</p> <table data-bbox="794 1216 1318 1397"> <tr> <td>would (FUTURE)</td> <td>would (OPINION)</td> </tr> <tr> <td>would (INTENTION)</td> <td>would (LIKELY)</td> </tr> <tr> <td>would (POSSIBLE)</td> <td>would (ADVISE)</td> </tr> <tr> <td>would (REQUEST)</td> <td>would (WILLING)</td> </tr> <tr> <td>would (WISH)</td> <td>would (REASON)</td> </tr> <tr> <td>would (OFTEN)</td> <td></td> </tr> </table> <p>If you mean the future tense, then use it: “... an advisor to the NHS institutions where the research <b>will</b> take place.”</p>	would (FUTURE)	would (OPINION)	would (INTENTION)	would (LIKELY)	would (POSSIBLE)	would (ADVISE)	would (REQUEST)	would (WILLING)	would (WISH)	would (REASON)	would (OFTEN)	
would (FUTURE)	would (OPINION)													
would (INTENTION)	would (LIKELY)													
would (POSSIBLE)	would (ADVISE)													
would (REQUEST)	would (WILLING)													
would (WISH)	would (REASON)													
would (OFTEN)														



## Gobbledegook – some examples

### The Small Print...

“All transactions effected pursuant to this instrument shall be effected for the account and risk and in the name of the undersigned; and the undersigned hereby agrees to indemnify and hold you harmless from, and to pay you promptly on demand, any and all losses arising therefrom or any debit balance due thereon.”<sup>29</sup>

[i.e. “You’ll be responsible for anything you owe on your account.”]

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### Department for Culture, Media and Sport

“Food or drink supplied on or from any premises is ‘hot’ for the purposes of this Schedule if the food or drink, or any part of it —

(a) before it is supplied, is heated on the premises or elsewhere for the purpose of enabling it to be consumed at a temperature above the ambient air temperature and, at the time of supply, is above that temperature, or

(b) after it is supplied, may be heated on the premises for the purpose of enabling it to be consumed at a temperature above the ambient air temperature.”<sup>30</sup>

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### Central Manchester and Manchester Children’s University Hospitals NHS Trust

From an Agenda for Change document:

‘Where the combined value of the above payments before actual assimilation remains greater than the combined value of the payments after assimilation, the former level of pay will be protected. These protection arrangements apply to the combined value of payments before and after assimilation, not to individual pay components, excepting the provision relating to retention of existing on-call arrangements.’<sup>31</sup>

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### From a B2B Links web site:

“Junkk.com is a brand new, commercially-oriented, Internet-based environmental awareness business venture. Its core mechanism is a web-based, interactive recycling-ideas database created by and freely accessible to the general public, with the complementary participation and support of environmentally aware blue-chip retailers and manufacturers, as well as media/marketing savvy SMEs and local authorities. If you think you can help us or you’re interested in finding out more information then check the Website out, or contact us!”

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### More Mangled English

“Reports that say something hasn’t happened are always interesting to me because, as we know, there are known knowns; there are things we know we know. We also know there are known unknowns; that is to say there are some things we do not know. But there are also unknown unknowns - the ones we don’t know we don’t know.” – US Defence Secretary, Donald Rumsfeld<sup>32</sup>

“Our enemies are innovative and resourceful and so are we. They never stop thinking about new ways to harm our country and our people, and neither do we.” – George Bush.<sup>33</sup>

“I never knew I didn’t have that much petrol” – anon.

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<sup>29</sup> BizAlert Blog

<sup>30</sup> UK Laws - Licensing Act 2003 (c.17)

<sup>31</sup> About.com, an educational site about Grammar and Composition

<sup>32</sup> The Maitland Mercury, Australia, 10 Dec 2003.

<sup>33</sup> Herald Sun, Australia, March 2010.

## “Brevity” – Churchill’s Memo to the Cabinet

Look for the business reasons behind Winston’s recommendations:

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“To do our work, we all have to read a mass of papers. Nearly all of them are far too long. This wastes time, while energy has to be spent in looking for the essential points.

I ask my colleagues and their staff to see to it that their reports are shorter.

The aim should be reports which set out the main points in a series of short, crisp paragraphs.

If a report relies on detailed analysis of some complicated factors, or on statistics, these should be set out in an appendix.

Often the occasion is best met by submitting not a full-dress report, but an aide-memoire consisting of headings only, which can be expanded orally if needed.

Let us have an end of such phrases as these:

‘It is also of importance to bear in mind the following considerations’,

or

‘Consideration should be given to the possibility of carrying into effect’.

Most of these woolly phrases are mere padding, which can be left out altogether, or replaced by a single word. Let us not shrink from using the short expressive phrase, even if it is conversational.

Reports drawn up on the lines I propose may first seem rough as compared with the flat surface of officialese jargon. But the saving in time will be great, while the discipline of setting out the real points concisely will prove an aid to clearer thinking.”<sup>34</sup>

**Winston Churchill**

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<sup>34</sup> Quoted widely by many different sources.

## Simplify!

Sometimes we write too much meaning into one sentence, and confuse the reader.

### Example 1

The following descriptions have roughly the same content and meaning:<sup>35</sup>

#### 1. The original sentence

“With the cover removed, tighten the screw using a hexagonal key while holding the nut with a spanner before replacing the cover.”

#### 2. Separate the ideas

“While the cover is not fitted, tighten the screw using a hexagonal key while holding the nut with a spanner. Refit the cover.”

#### 3. Final version with clear style

- Remove the cover.
- Use a spanner to hold the nut, and tighten the screw with a hexagonal key.
- Refit the cover.

### Example 2 – More information than necessary

“Most of the natural gas used in the United States comes from domestic gas production. The remainder comes from imports, primarily from Canada. Domestic gas production and imported gas are usually more than enough to satisfy customer needs during the summer, allowing a portion of supplies to be placed into storage facilities for withdrawal in the winter, when the additional requirements for space heating cause total demand to exceed production and import capabilities.”<sup>36</sup>

#### Simplified version

“Most of the natural gas used in the United States comes from domestic gas production. The remainder comes from imports, primarily from Canada.”

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<sup>35</sup> The new language in International Business: Simplified English, 2<sup>nd</sup> Edition. Published by Tedopres International BV.

<sup>36</sup> Energy Information Administration Brochure, Official Energy Statistics from the US Government

## Exercise 9 – SIMPLIFY!

### Write a new Safety Leaflet in Plain English

1. **FOCUS:** First, read all of it carefully. What are the **main issues** here?
2. Then, with your **highlight pen**, mark **4 or 5 key words** that are the focus of the message.

**SIMPLIFY:** Write a new version below in Plain English. **About 60% is padding**, so **simplify** it, and use bullet points.

'Certain of the components comprising our electrical appliances have inherent characteristics the effect of which, whether before or after such components have been introduced into appliances or during such introduction, make it desirable, in the interests of safety, for the introduction of spare components into, and/or the repair of, our appliances to be carried out by a competent person. The parts now supplied are done so on the clear understanding that such introduction and/or repair will not be otherwise interfered with beyond the extent of normal cleaning as recommended in the operating instructions, and that no liability attaches to ABC Electrical Appliances Limited for any damage or personal injury from such introduction and/or repair.'



(117 words, Passive sentences 100%, Reading Ease = 0)

(From a **Safety Leaflet** supplied with a spare part for household appliance; e.g. a washing machine motor. Company name changed to protect the guilty!)

**When you finish, swap your worksheet with someone else.**

- Check their translations.
- Do you agree? Did they miss any main points? Or did they invent something that was **not** in the original? Why are they not valid? Discuss.

(After you've finished – see the answer on p. 136)

## Exercise 10 – Translate into Plain English (2)

### WARD PHILOSOPHY

“To improve the quality of life in a caring, safe and secure environment with self-care encouraged and, although involving an element of risk, with as little disruption to the patient’s own daily routine as possible.

To achieve this goal a good nurse/patient relationship is encouraged with individualised care plans enabling staff to highlight specific problems and needs.

The learners should be made aware of the condition, problems and requirements specific to the speciality to enable them to assist safely in the care of patients and complete care plans with confidence.

The overall ward atmosphere should be such that patients are able to relax and be as free of anxieties as possible. The learners should be involved in the ward management within their limitations – thus forming an essential part of the ward team.

(Passive sentences 20%, Reading Ease = 41)

*Notice on a wall next to a ward reception desk, at a major General Hospital, Feb 2005.  
 (“Learners” refers to staff undergoing training – I had to ask!)*

### How would you write it?



Begin with “We aim to ...”

*We aim to ...*

**When you finish, swap your worksheet with someone else.**

- Check their translations.
- Do you agree? Did they miss any main points? Did they create anything that really was **not** in the original? Why are they not valid? Discuss

## Readability Improvement Examples – BEFORE

[Ten long sentences taken at random, from example procedures on testing products.]

1. Review the accuracy, completeness, and legibility of the CRF entries, DCFs, source documents, and other trial-related records against each other, and ensure that any known deviations from the protocol **are documented** (Work Instruction TP027, Development and Implementation of Source Data Verification Procedures, and Form TP003 Study Site Monitoring Visit Report).
2. Testing Team Leader or designate (TTL): Develops the Testing Management Plan (TMP) (Operating Procedure TP010, Testing Management Plan), defines the Data Query process, co-ordinates the monitoring activities of the Monitor, including development and distribution of monitoring guidelines, and review of the associated site visit report.
3. Document and discuss with the Investigator and/or designated staff any issues relating to the handling and documentation of IP, including storage conditions, IP records, reconciliation, expiration date and adequacy of supplies (Operating Procedure TP004, Investigational Product(s)).
4. A Contact Report (Form TP011, Contact Report) or equivalent may **be used** to document one individual telephone contact or a Telephone Report Log (Form TP017, Telephone Report Log) or equivalent may **be used** to document several telephone contacts on the one form for the same site.
5. Complete a Contact Report (Form TP011, Contact Report) rather than a Site Visit Report to document brief visits to sites for a limited purpose (for example, delivery of supplies; collection of pre-packaged shipment or outstanding document(s)).
6. Review the Investigator Site File (TP020 Investigator's Site File) or equivalent and determine whether the investigator or designate is maintaining the RDs, Testing Study Documents (TSDs), forms, logs and other study documents appropriately.
7. Confirm the visit timing with the relevant study site staff, and provide a confirmation letter detailing what is **to be accomplished** at the visit to the investigator, if these details were not included in the previous site visit follow-up letter.
8. If original CRFs have **been submitted** to data management, document new queries raised by the testing staff on a blank Testing Site Data Clarification Form (Template TP013, Testing Data Clarification Form) or equivalent approved format.
9. Complete the applicable Site Visit Report (Form TP003 Study Site Monitoring Visit Report) and submit to the TTL for review in accordance with the TMP and Work Instruction TP026, Site Visit Reports and Follow-up Letters
10. Follow up on any pending financial issues including payment to Investigator/site in accordance with the Testing Trial Agreement, if applicable (Refer to Work Instruction TP009, Preparation of Testing Trial Agreements).

<b>Analysis</b>	<p><b>Passive sentences</b> = 40% against a target of 10-20%. Too high.</p> <p><b>Reading Ease 3.8</b> = very bad, far too low. Higher is better: aim for 60-70 as a target.</p> <p>Considering the education level of the target readership (all graduates or above), this would probably be OK with native English speakers. However, what about those whose first language is not English?</p>
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## Readability Improvement Examples – AFTER

**I have rewritten these examples.** I have replaced some long words with shorter ones; split long sentences; and converted passive sentences into active. There is now more “white space”.

Readability is improved, and foreign users will translate and understand them more clearly.

1. Check the accuracy, completeness, and legibility of:

- CRF entries
- DCFs
- source documents
- other trial-related records
  - and check them against each other.

You must document all known deviations from the protocol. See:

- Work Instruction TP027, Development and Implementation of Source Data Verification Procedures;
- Form TP003, Study Site Monitoring Visit Report.

2. The Testing Team Leader (TTL) or designate:

- Develops the Testing Management Plan (TMP). (See Operating Procedure TP010, Testing Management Plan.)
- Defines the Data Query process.
- Coordinates the monitoring activities of the Monitor. This includes:
  - development and distribution of the monitoring guidelines;
  - review of the associated site visit report.

3. Document and discuss with the Investigator and/or designated staff, any issues about the handling and documentation of IP. Include:

- Storage conditions
- IP records
- Reconciliation
- Expiry date
- Adequacy of supplies.

See Operating Procedure TP004, Investigational Product(s).

4. To document a single telephone contact, use a Contact Report. Use Form TP011, Contact Report, or similar.

To document several telephone contacts for one site on one form, use a Telephone Report Log. Use Form TP017, Telephone Report Log, or similar.

5. If you make a brief visit to a site for a limited purpose, such as to:

- deliver supplies;
  - collect a pre-packaged shipment or outstanding document(s);
- then fill in a Contact Report (Form TP011, Contact Report), not a Site Visit Report.

6. Review the Investigator Site File (TP020 Investigator’s Site File) or similar. Check that the investigator or designate correctly maintains:
  - RDs
  - Testing Study Documents (TSDs)
  - Forms
  - Logs
  - Other study documents.

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7. Confirm the time of the visit with the relevant staff at the study site. If the follow-up letter from the previous site visit did not state the objectives for the next visit, then write a letter to the investigator. Confirm what he or she must do at the visit.

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8. If you have sent original CRFs to data management, then document new queries raised by the testing staff on a blank Testing Site Data Clarification Form. Use Template TP013, Testing Data Clarification Form, or similar approved format.

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9. Fill in the relevant Site Visit Report. Use Form TP003, Study Site Monitoring Visit Report. Submit it to the TTL for review according to:
  - The TMP
  - Work Instruction TP026
  - Site Visit Reports
  - Follow-up Letters.

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10. Follow up any pending payment or other financial issues to the Investigator / site, in accordance with the Testing Trial Agreement, if relevant. See Work Instruction TP009, Preparation of Testing Trial Agreements.

<b>Readability Analysis</b>	<p><b>Passive sentences now 0%</b> (was 40%) = Excellent. Aim for 10-20% max. Lower is better.</p> <p><b>Reading ease 38.4</b> (was 3.8) = a good improvement. Aim for a range of 60-70. (High is easier).*</p> <p>* It was difficult for me to improve these further without knowing the subject area, and also considering the strict testing requirements in this business sector. – Philip Tory.</p>
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## Flesch Reading Ease

One of the tests, known as the “Flesch Reading Ease” test, gives higher scores for text that is easier to read, and lower scores for harder-to-read passages.

As a rule of thumb, scores of 90-100 are considered easily understandable by an average 10-year-old. The average reader could easily understand passages with a score of 60-70, and college graduates with a good command of English can understand passages with results of 0-30.

**This test has become a U.S. government standard.** Many government agencies require documents or forms to meet specific readability levels. Most states require **insurance forms** to score 40-50 on the test. The U.S. Department of Defense uses the Reading Ease test as the standard test of readability for its documents and forms. The test is so widely used that it is bundled with the popular word processing programs Corel WordPerfect and Microsoft Word.

This Flesch Reading Ease score is a standard part of MS Word. How you run this test is covered in the MS Word module later on page 99.

Flesch tested various samples and derived the following results. The target range for most business writing is 60-70, shown in bold:

Sample	Flesch Reading Ease (A score of 0 is very hard to read and a score of 100 is very easy to read.)
Comics	92
Consumer ads in magazines	82
<b>Seventeen</b>	<b>67</b>
<b>Reader's Digest</b>	<b>65</b>
<b>Sports Illustrated</b>	<b>63</b>
<b>New York Daily News</b>	<b>60</b>
Time	52
Newsweek	50
Wall Street Journal	43
Harvard Business Review	43
New York Times	39
New York Review of Books	35
Harvard Law Review	32
Standard auto insurance policy	10
USA Internal Revenue Code	-6 (!)

Source: [http://www.ravensheadservices.com/readability\\_checker.php](http://www.ravensheadservices.com/readability_checker.php)

**90-100 = Very Easy**  
**80-89 = Easy**  
**70-79 = Fairly Easy**  
**60-69 = Standard**  
**50-59 = Fairly Difficult**  
**30-49 = Difficult**  
**0-29 = Very Confusing**

The long sentence analysis of the original examples on page 54 scores **less than 10!** Many companies have this problem.

The scores for this Training Workbook are well within target:

Passive Sentences = 4%  
 Flesch Reading Ease = 62.6

How well does **your** writing score? You can run this analysis on your own documents after the course and see what it reveals!

## Exercise 11 – Convert to Bullet Points and Plain English

This exercise is about **making instructions easier to follow**. Here is a short instruction about computer system security. The original was one continuous paragraph.

“Staff members shall not reveal personal passwords to any other person, within or outside the company. Staff members shall not permit any other person to access their computer account. If a breach of personal account security is suspected User Management and IT Support shall be notified immediately. In addition, staff members should avoid assigning passwords that might be readily discernible, such as a person’s name or birth date, or a common term (e.g., a holiday or name of a month). Staff members should not write down computer system passwords or record in other media. Failure to follow these procedures may be considered grounds for disciplinary action.”

Readability	
Passive Sentences	33%
Flesch Reading Ease	44.0
Flesch-Kincaid Grade Level	11.4

### REWRITE THIS INSTRUCTION USING BULLET POINTS

- Change all **passive** sentences to **active**.
- Replace weak words ('should' etc); change 'shall' to 'must'. (If you **must**, then say so).
- Are there any difficult words that could be made easier?
- Break it down into bullet point steps where appropriate.
- Be direct: talk to the reader. Begin with: “**As a Staff Member, you ...**”

As a Staff Member, you

Note the difference in the way the information is given. Which of the two is quickest and easiest to read and understand? Do you notice anything else?

(After you've finished – see the answer on p. 139)

← Your Notes: **Convert to Bullet Points and Plain English**

← After you finish the exercise opposite, answer these questions:

**1. How could you apply this in your writing at work? How might you use this in future?**

**2. What difficulties would this overcome?**

**3. What kinds of existing documentation would benefit?**

**4. Discuss your ideas with somebody else.**

## Consistency, Consistency, Consistency...

### Ambiguity and Consistency in Writing

If you call something a “Zone Matrix Adjuster” in one part of your documentation, then **always** call it a “Zone Matrix Adjuster” throughout the documentation, not something else. If you start to call it a “Zone Controller”, someone will think you mean a different control and will make a mistake: you can guarantee it. Consistency is VITAL when there are **several authors** of documentation! You may need to agree a list of Standard Terms that you will all use.

## Software and Software Help Guides

### Ambiguity and Consistency in Software Documentation

In the case of software documentation, consistency goes back to the software itself. You want the user to be comfortable with the product, learn it quickly, not make mistakes and not need to call the Help Desk. Each Support Call can cost your company £25–30.

Unfortunately, many so-called mistakes seem to be ‘designed in’ as a feature of the application. As a former Software Product and QA Manager, this is one of the issues I instinctively look for.

### Consistent Product

**Shortcuts:** If shortcut **Ctrl S** means ‘Save Changes’ in five screens, then make sure you use shortcut **Ctrl S** for the same function in the rest of the product, and don’t use something else. **Be consistent.**

**Buttons:** If there is a “Next” button to finish a screen before you move to the next screen, then **always** call it “Next”, not a mix of “OK”, “Continue”, etc. **Be consistent.**

**Menus and Links:** If you click a link that says ‘User Details’ but it takes you to the next screen with a heading ‘User Maintenance’, you now have two names for the same thing. This can be confusing to a new user, and could cause mistakes. ☹ This makes it difficult to document properly. **Be consistent.**

### Help Topic Command Path

Show the “Command Path” at the top of each relevant Help topic, like this:

**Menu > Tools > Options > Print tab > Update fields**

Sometimes that is all the user is looking for – “I know what I want, but where have you hidden it?!” – and it is *very* frustrating if you don’t tell them. Many a Support Call is prevented by this simple one-liner.

### Copy the best of Microsoft software operation

Whether we like it or not, MS rules the roost, and most of your users will know MS software. Therefore, where possible, mirror the common Windows and Microsoft Office commands. It helps users to become familiar with your product more easily.

### Keyboard Shortcuts

Many users use keyboard shortcuts by habit, because it is so quick to do. If something in your product resembles a Windows or Word function, then use the same keyboard shortcuts. For example, shortcut **Ctrl O** to **O**pen a file; shortcut **Ctrl S** to **S**ave details, and so on.

Conversely, make sure a common MS shortcut doesn’t do something misleading, different or catastrophic if used in your product! (It happens). (See MS Word shortcuts on page 125.)

## Appearance and Layout

If a document \*looks good\*, then people will pay attention and be more willing to read it. Why do newspapers and magazines pay so much attention to graphic design? Who would buy your own favourite magazine if there were no pictures on the cover? Black text on a white page does not sell magazines. **First Impressions Matter!**

### Cover pages in MS Word 2010 and 2007

If you are fortunate enough to have MS Word 2010, here are some examples of standard Cover Page designs. (There are cover designs in other Word versions, but I do not show examples here). You can insert a cover page and then edit the text, change pictures and colours, etc:



You can also insert these cover pages at various places throughout the document.

### Fonts and Typefaces – definitions

“**Font**” means a defined Typeface + type size. “Arial” is a typeface. “Arial 10pt” is a font.

**Sans Serif** fonts (like Arial, Helvetica, Univers, Verdana, Trebuchet, Tahoma) are easier to read, especially for on-screen use, compared with **Serif** fonts (such as Times New Roman). This is particularly true for those who do not have perfect vision, but don’t need reading glasses yet. Try not to sacrifice usability to style, unless your corporate style guide says you really must.

## Text Alignment

**Left aligned** works best. **Fully justified** is used in paperback books where the page is narrower than A4. But research shows that **Left aligned** is easier and quicker to read; people scan it better. Compare these two examples:

The configuration of the fully integrated programmable logic module enables sophisticated stabilisation elements of the system's output waveform.

The configuration of the fully integrated programmable logic module enables sophisticated stabilisation elements of the system's output waveform.

## CAPITALS and *Italics*

**CAPITAL LETTERS** or **ALL CAPS**: Don't overdo CAPITAL LETTERS for emphasis – it is more difficult to read, and LOOKS AS THOUGH YOU ARE SHOUTING AT ME.

Long sentences and paragraphs in capital letters **significantly reduce reading speed**, and use 25 to 35 percent more space, depending on the typeface.

It is better to use **bold** for emphasis - don't underline.

**ITALICS: In Print** - do not use italics too much; a few words here and there are OK, but a block of italic text is more difficult to read.

**On Screen**: avoid italics completely for normal text, as they do not reproduce well. This is because screen images are made up of small dots called **pixels**, and the slant of italic characters causes jagged edges to the letters. It's harder to read. Here are **enlarged examples** of Arial 10pt text:

Use Regular for on-screen use.

*Avoid Italic for on-screen use.*

(Enlarged screenshot example)

**Sub Headings**: Use Sub Headings to split the text into manageable blocks.

**White Space**: Don't clutter the page up. Leave sufficient white space so that the reader does not feel "drowned in text"!

**Graphics**: Use relevant graphics / screenshots / photographs to illustrate the subject. These are a great help to the readers.

**Numbered Lists**: Unless you have a particular reason, try to avoid long numbered lists.

## Layout example:

**Just one block of text.** (Do you feel like reading this?)

Changing your Password. menu > Utilities > Change Password. This topic tells you how to change your own password. To change your password, you must be the person currently logged in. If someone else is logged in, they must log out first, using menu > Log off. Then you can log in. To change your password, go to menu > Utilities > Change Password. Enter your Old Password - to confirm that it is really you using the computer at this moment. Type your New Password in the next field. It must not be longer than 8 characters. See Choosing a Password. Type the same again in Confirm New Password. Use Ctrl\_S to save changes. You must use the new password next time you log in. Forgotten Password. If you have forgotten your password, please ask your Pharmacy Manager to issue you with a new one. Safety checks. Nexphase watches carefully what you type! Do not leave the password blank. If you're going to change it, you cannot change the same password again now! You must type the same password twice, or it thinks you have made a typing mistake.

**Develop the structure:**

Changing your Password  
 menu > Utilities > Change Password  
 This topic tells you how to change your own password.  
 To change your password, you must be the person currently logged in.  
 If someone else is logged in, they must log out first, using menu > Log off. Then you can log in.  
 To change your password, go to menu > Utilities > Change Password  
 Enter your Old Password - to confirm that it is really you using the computer at this moment.  
 Type your New Password in the next field. It must not be longer than 8 characters. See Choosing a Password.  
 Type the same again in Confirm New Password.  
 Use Ctrl\_S to save changes. You must use the new password next time you log in.  
 Forgotten Password  
 If you have forgotten your password, please ask your Pharmacy Manager to issue you with a new one.  
 Safety checks  
 Nexphase watches carefully what you type!  
 Do not leave the password blank.  
 If you're going to change it, you cannot change the same password again now!  
 You must type the same password twice, or it thinks you have made a typing mistake.

**Add Headings and Colour****Changing your Password***menu > Utilities > Change Password*

This topic tells you how to change your own password.

To change your password, you must be the person currently logged in.

If someone else is logged in, they must **log out first**, using *menu > Log off*. Then you can log in.

To change your password, go to *menu > Utilities > Change Password*

Enter your **Old Password** - to confirm that it is really you using the computer at this moment.

Type your **New Password** in the next field. It must not be longer than 8 characters. See [Choosing a Password](#).

Type the same again in **Confirm New Password**.

Use Ctrl\_S to save changes. You must use the new password next time you log in.

**Forgotten Password**

If you have forgotten your password, please ask your Pharmacy Manager to issue you with a new one.

**Safety checks**

Nexphase watches carefully what you type!

Do not leave the password blank.

If you're going to change it, you cannot change the same password again now!

You must type the same password twice, or it thinks you have made a typing mistake: -

## Add Bullet Points for Instructions

### Changing your Password

*menu > Utilities > Change Password*

This topic tells you how to change your own password.

To change your password, you must be the person currently logged in.

If someone else is logged in, they must **log out first**, using *menu > Log off*. Then you can log in.

- To change your password, go to *menu > Utilities > Change Password*
- Enter your **Old Password** - to confirm that it is really you using the computer at this moment.
- Type your **New Password** in the next field. It must not be longer than 8 characters. See [Choosing a Password](#).
- Type the same again in **Confirm New Password**.
- Use Ctrl\_S to save changes. You must use the new password next time you log in.

### Forgotten Password

If you have forgotten your password, please ask your Pharmacy Manager to issue you with a new one.

### Safety checks

Nexphase watches carefully what you type!

- Do not leave the password blank.
- If you're going to change it, you cannot change the same password again now!
- You must type the same password twice, or it thinks you have made a typing mistake: -

## Add screenshot images

### Changing your Password

*menu > Utilities > Change Password*

This topic tells you how to change your own password.

To change your password, you must be the person currently logged in.

If someone else is logged in, they must **log out first**, using *menu > Log off*. Then you can log in.

- To change your password, go to *menu > Utilities > Change Password*



Example Change Password window...

- Enter your **Old Password** - to confirm that it is really you using the computer at this moment.
- Type your **New Password** in the next field. It must not be longer than 8 characters. See [Choosing a Password](#).
- Type the same again in **Confirm New Password**.

This is exactly the same text, but laid out in a much more attractive manner.

- If it looks good, people will want to read it.
- If it looks like just a block of text, the mental effort required is much greater.

## Graphics Processing for On-Screen use

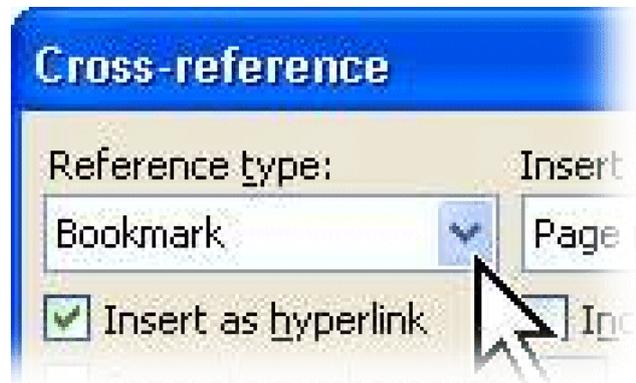
### Minimise file sizes for networks or Internet.

If you have to deliver the documentation over a network then, these days, large images are not usually a problem. But if there is a slow network or broadband connections, then you need to optimise photographs or screen images to minimise the file size for each one.

**Photographs:** use the JPG format, which is designed for best file size where there are gradual changes in shade.

This format is **not** suitable for software screen shots where you have large areas of all one colour, and then closely defined black lines that make up text.

JPG file sizes would be much larger, and the picture quality will be poorer – resulting in a **granular appearance**, particularly near sharp changes in colour, such as text. The effect is more noticeable in colour, and certainly on screen.



Note the granular appearance in this enlargement.

**Diagrams / Screen images:** use the **GIF** or **PNG** format. GIF format gives the most accurate colour rendition, whereas PNG can be fairly close on colour, but have a smaller file size than GIF.



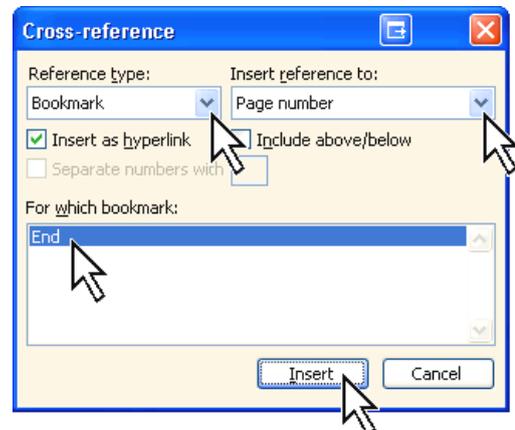
Use your favourite graphics package (I use Paint Shop Pro) and reduce the number of colours in the image to 256 or lower. When reducing, select **Nearest Colour**, not **Error Diffusion**.

### File sizes for screen shots:

The bigger the file size,  
 – the more space it takes up on your system,  
 – the slower it takes to load,  
 – the bigger (and slower) the file when you want to print.

The file size of this image is:

- **GIF** format = **8.8 Kb**
- **PNG** format = **5.5 Kb**
- **JPG** format = **22 Kb**



## Inserting Images into MS Word

**There are two ways that work.** Start by copying your image from somewhere, then:

1. Either: Paste the image into place using shortcut **Ctrl V** = **Paste** command. The print quality is good, but in Word 2007/2010 it looks blurred on screen.
2. Alternatively: use **Edit > Paste Special**, in Word 2007/2010 shortcut **Ctrl Alt V**, and select **Picture** or **Bitmap**. This gives the clearest image on screen, and the print quality is good.  
 (However, if printing to PDF, the ordinary pasted image seems clearer.)

**Experiment** for best practice for your PC and the images that you need to insert.

## Annotating Images and Diagrams

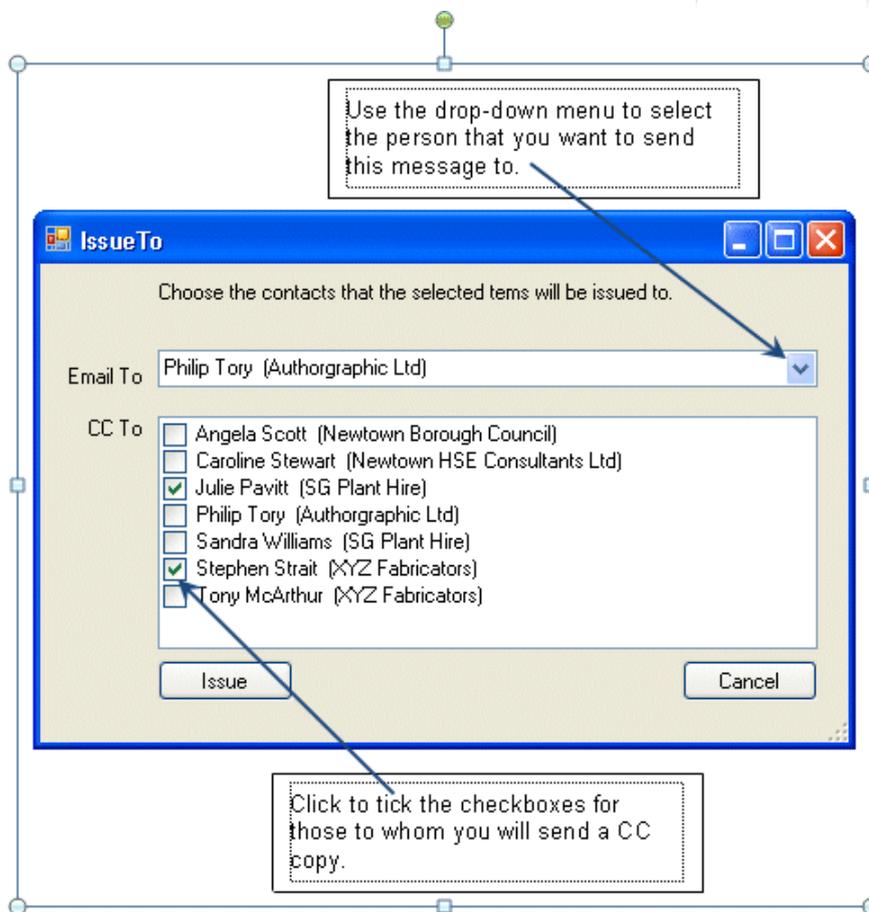
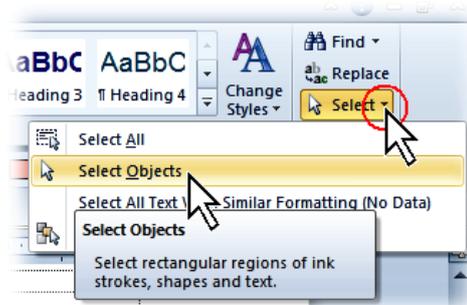
### In MS Word – unstable images / annotations

When you add image annotations in MS Word using **text boxes** and **shapes** (drawing objects) such as circles or arrows, these can be unstable, i.e. they can move out of place with subsequent editing. For example, if you add sentences above the image, the image can move down so that parts of the image / annotations hang down below the bottom margin.

### How to work round the instability

I have not yet found an easy fix for this in Word, so you will have to experiment. Sometimes it works, sometimes not.

- Insert your image; create text boxes, arrow shapes, etc.
- Select all of the objects, right-click and make a **Group**. To do this in Word 2010, select the **Home tab > Editing > Select > Select Objects**:

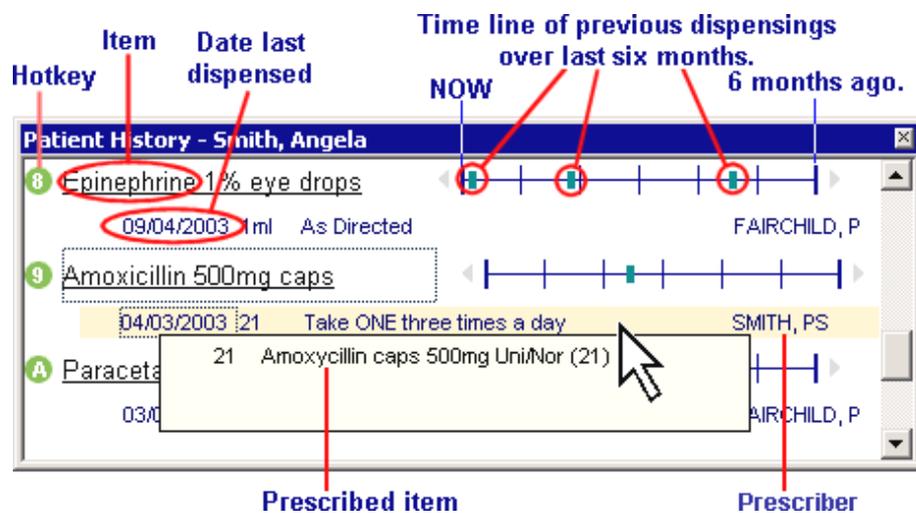


- Option 1: **Cut** the complete selected group (shortcut **Ctrl X**) and paste it back in using **Paste Special**, as an image / bitmap. However, sometimes the text within the text boxes changes format.
- Option 2: unselect the groups and take a screen shot (**Alt Print Screen**) (**Alt+PrintScreen**). Paste it back in using **Paste Special > Bitmap**, then **crop** the image to remove the unwanted bits. Resize as required.

Some users tell me they create the image / arrows / text group in PowerPoint, and then copy the completed image and paste it into Word as an image. It might be worth trying.

## Guaranteed to work: use your favourite Graphics Package

- Copy and paste your image / screen shot into your graphics package.
- **Annotate** the image / screen shot / diagram with text / arrows / lines / circles, to help explain:



Example...

Then copy and paste the finished image back into MS Word. I have always found this to be completely stable and predictable in its behaviour, and you can't "break it".

### Which graphics package?

Personally, I like **Paint Shop Pro**, and actually use an old version 7: it does all that I need. The newer versions are more complex and not as easy to use.

The same goes for **Photoshop**: If you're doing graphic design or processing lots of photographs for magazines, it's the best. But for taking a screenshot and adding a bit of annotation, it's over-powered, complex and relatively expensive.

Some people on these courses recommend **GIMP**, a freeware package from [www.gimp.org](http://www.gimp.org), and also **Paint.NET** from [www.getpaint.net](http://www.getpaint.net). I've not tried it myself, but I have heard good reports.

### Including Flow Charts

Be careful about using flow charts: most readers can only understand very simple flow charts.

Complex flow charts can be a complete mystery to your readers unless they are accustomed to using flow charts in their everyday work.

This is another reason to know your target reader groups.

## Reminder: Basic Rules of Plain English

Here are a few basic hints and tips that will make a lot of difference to the final result.

- **Plan what to write.** Use a Mind Map to help you decide what the topics to write, and the scope of what you need to cover. (See Module 2 beginning on page 83).
- **Clarity:** Be thorough, accurate, unambiguous and clear. Allow for readers whose first language isn't English: there are more and more of them working in this country.
- **Actions:** Use bullet points for actions.
- **Jargon:** Beware of jargon and abbreviations - remember, there was a time when you didn't know what they meant either! If you must use them, provide a glossary, or better still, define them when you first use a term in that section.
- **Familiar words:** use the everyday language of the target reader.
- **KISS:** Remember the **K-I-S-S** principle? **Keep It Simple and Straightforward**. More readers will understand you if you use simple words and simple ideas.
- **Imagine you are speaking to your reader.** Write personally, in a suitable conversational style, and with the correct tone of voice, perhaps as if you were having a telephone conversation.  
Talk them through the procedure, step by step.  
Use the 'You' style for example: "Do this" or "do that..."; e.g.
  - Click the button.
  - Type your name in the field.
  - Switch the power off before you remove the cover.
- **Weak words:** Remember, '**should**' is a weak word. If the reader 'must' then say so. If it is an option, say so, and indicate how important it may be.
  - "You might find it helpful to..." (weak)
  - "We recommend that..." (medium)
  - "We strongly recommend that..." (strong)
  - "You must ..." (mandatory)
 Make sure you give the reader enough information to help them to make the correct decision.
- **Use the ACTIVE rather than PASSIVE voice where possible.** For example, "Enter the password in the box", rather than "The password is entered in the box". "Release the spring clips and remove the battery..." not "The spring clips are released and the battery is removed."
- **Keep sentences short.** Aim for an average of 15-20 words, maximum 30-35 words where possible.
- **Use shorter words.** Long words do not help easy understanding.
- **Focus.** Keep the focus on the main issues.
- **Readable:** Always check your writing. Is it user-friendly? Clear? Helpful? Polite?
- **Proof Check:** It is a good idea to ask someone else to check your writing occasionally, especially for important documents. Are they "technically correct"?
- **Reader Feedback:** Get feedback from the readers from time to time. If you really want to improve, then tell them so and ask for their help.
  - And don't be afraid of a critic: value them. They will tell you things that your friends protect you from.

## How to Write

*“I KEEP six honest serving-men,  
(They taught me all I knew);  
Their names are What and Why and When,  
And How and Where and Who.”* – Rudyard Kipling

### If someone is Lost, they need ‘Signposts in the Wilderness’

If someone is using a Help Manual, it is because they are unsure or don't know what to do next. They may be confused and lost. They may not even know the questions to ask.

When you explain something, try also to answer the questions “**Why?**” or “**How?**”. This will improve the reader's overall understanding of the subject.



Ideally, give your readers enough information so they ask themselves the right questions. Then they can arrive at the right answers, and continue their work without asking someone else. This is the objective of a good Help Guide.

### Going on a Journey...

Imagine you get an unsigned memo addressed to you, that says:

“Take the third exit at the roundabout; carry on for half a mile and take the third turning on your right. Go through the traffic lights, and turn off at the next roundabout. You'll see the office about 200 yards down there on the right. Call at reception and ask for me - I'll be there ahead of you. This is important.”

And that's all it says.

- What is missing?
- What do you really need to know?
- What else might you need to know?

Write your thoughts here:

It's the same principle when you're writing documentation. Make sure you give the reader enough information so that they can follow instructions and achieve the desired result.

Read more about **Manage People's Expectations** on page 72.

## What to Write

In the previous sections, I covered “**How to Write**”. Now we look at “**What to Write**”.

## Where to begin

### Define the subject

- Review your Objectives.
- Set the boundaries.

### Scope

- How much do you include / exclude?
- Depends on audience & user groups.
- Use Mind Mapping.

### Information

- Include relevant theory – the ‘Why?’ and the ‘How’.
- Help the user to make the right decisions.

## Researching the Subject

What do you need to know before you begin?

## Your Competence

Firstly, ask yourself if you are technically competent to write about this subject? Don't be afraid to decline if it really is out of your sphere of knowledge. If you don't understand the technology, how can you explain it to somebody else? You will only produce bad documentation and a high level of support calls.

## Subject Matter Experts

Who are your Subject Matter Experts? You need quick access to those who have a thorough knowledge of the product or service that you are writing about. Whom might you ask?

- Product manager?
- The person who wrote the specification?
- Development team?
- Quality Control team?
- Sales team?
- Help Desk?
- Trainers?
- Installers?

If you cannot have quick and priority access to these people, it can double the length of time that it takes to write the documentation.

## Existing Documentation – is it still usable?

Another resource is **existing documentation**. You might find an old version of the manual, or design specifications, training notes, Help Desk notes, and so on. You might be able to update these to the latest specification product.

However! Check the quality of the old material. Sometimes it is quicker to rewrite the document from the beginning, than to try to edit something that is badly written and out-of-date. You might spend hours just trying to understand the differences between the old documentation and the latest product.

## Interviewing people

You will be talking to the people who have the knowledge, so that you can write the documentation. You will take notes; but these often cannot record the whole conversation and catch all the details. So why not record it in full, using a **Digital Voice Recorder**?

I show them the device and ask, “Do you mind if my secretary takes notes? Then I can be sure I don’t leave out anything important from the manual.” Nobody has ever refused; most say it’s a good idea.

A simple device like this one here costs about £35, and records for up to 8 hours. You download the recording to your PC later, and then play it back to headphones when you type the documentation. This makes sure you have covered everything. There are many models on the market but, above all else, make sure you buy one that is easy to use. Some models are rather small and the control buttons are tiny.



Some people like to keep information to themselves, and will tell you very little, or be unavailable when you need them. In this case, you may need to ask your manager to talk to their manager, who can in turn ask your contact to be helpful.

## Find out the Main User Tasks

1. What are the **main things that people DO** with this product / service / procedure? Remember, if someone is using the documentation, they usually want to find out **how to do something**. The main approach of an instructional manual is TASK ORIENTED wherever possible or appropriate. What does the user need to DO?
2. Map it out using **Mind Mapping**<sup>®</sup> techniques. (Next course module)
3. Arrange the topic headings into a **logical sequence**.
4. Write the topics.

## IMPORTANT – Manage People’s Expectations!

This is IMPORTANT! . . . **Think New User.**

Imagine you’ve never seen or used this product / service / activity or technology before, but you’ve got to learn how to use it from a manual.

A new user is not a 100% perfect robot, who blindly does what he/she is told, step by step. Users are intelligent people, like you and me. They try to follow instructions accurately, but this will depend on how well their upbringing, training, education and life experience prepares them for the next step in the process. Their minds will try to Predict or Expect what is likely to happen next – even if they’re wrong! They can’t help it.

Therefore, **Manage People’s Expectations**. When you tell them to do something, also tell them what will happen when they do. Then this will confirm that they’ve “done it right” and can move on with confidence to the next step.

It’s like being given Instructions for driving from your home to an address 3 miles away, when you don’t know the area. If it just said, turn left here; turn right at the traffic lights; take the third turning on the right — without giving landmarks and street names on the way, then it makes for a rather nervous experience.

Instead, it needs to say something like, “Turn left at the Bell Inn pub into Station Road; at the next traffic lights turn right into Bridge Street – you’ll see the Morrison’s store on your left; then take the third turning on the right by the telephone box into Churchill Road”. This manages your expectations along the way.

For example, in software, you might say,

- Fill in the name and address boxes, and click on the drop-down selector.
- Select the **Widget type** that you need, and click **OK**. This will take you to the Widget Settings screen.

I underlined the expectation bit, which tells them what to expect when they click OK. Therefore, if the Widget Settings screen doesn’t appear, they’ve done something wrong and can go back and check.

Remember, a computer does exactly what you tell it to do, not what you *thought* you’d told it to do!

## Software documentation: write ‘Task-Oriented’

Don't just describe what's on the menu for that 'screen'. Work out what the **main tasks** are that the User might have to perform.

Suppose you were writing an Instruction Manual on how to drive a car . . . you want a “How To Drive It” manual, not a description of what's inside the engine compartment, what's inside a gearbox, how the brakes work, etc. Focus on what the User might need to Do.

So, for software instructions, ‘talk them through’ what the various work functions or tasks they might need to perform.

Imagine you have a remote computer link to the end user, so that you can see what they are doing on the screen. Imagine how you would speak to them on the telephone, giving them instructions on how to do something. Talk them through it step by step. Write down what you would say - possibly word for word.

## Exercise 12 – Logical Sequence

If switch B is on,  
AND  
switch C is off,  
THEN you can continue... etc.

Did you hear about the Bomb Disposal Manual that didn't quite work? In chapter 3, it said:

**“Cut the red wire after you cut the blue wire”...**

### Step by Step

Each section needs an introduction to put the reader in context:

- Try to order your topics in terms of workflow, or the sequence in which things happen.
- If the reader has to do something first, then don't wait until the end to tell them.
- At each place where they have to make a decision about something, give them the information they need to make the decision. Explain the rules!

“IF this... AND that... then select Code 123 and press Enter” etc.

Example:

**“Proceed to the third house on the right after you've taken the second left after the third traffic lights, which you come to after the first exit off the roundabout at the end of the bypass.”**

Rewrite this in the correct sequence, (and, of course, in Plain English). OK, it may seem a simple example, but I want you to give me a 'polished performance'. What is the clearest way to lay this out?

Remember, something may be obvious to you, but not to the reader, otherwise they would not be reading the Help Guide!

(See the answer on page 139.)

← Your Notes: **Logical Sequence**

← After you finish the exercise opposite, answer these questions:

**1. How could you apply this in your writing at work? How might you use this in future?**

**2. What difficulties would this overcome?**

**3. What kinds of existing documentation would benefit?**

**4. Discuss your ideas with somebody else.**

## Self-Training Pages

The traditional way to teach new staff is for an experienced person to sit beside the new person and show them what to do, and how to do it. This means the 'instructor' cannot do their normal duties while coaching the newcomer – and this can be very time-consuming.

To reduce this need, you could include a Self-Training Checklist page that can be photocopied. Each step refers to a particular section in the Manual or Help Guide. The new person uses the checklist to work through the procedures, step-by-step, and ticks off each step when completed. If they need help, they can ask; but if you do it right, they can often work through several sections without needing to interrupt the 'instructor'.

One customer's Team Leader said to me, "It's great. I give new staff one module to learn, and they are moving on to the next by themselves!"

### Example Training Checklist

This example is part of training checklist from a Pharmacy Dispensing computer system. The descriptions on the left refer to section headings in the manual. For online Help Guides, you can make a clickable link that takes you direct from the item to the corresponding Help Topic.

<b>How to Dispense Medication</b>	<b>Page no.</b>	<b>Completed</b>
Dispensing to new patients		
Dispensing from patient records		
Accessing last patient		
How to add a new Doctor or Institution		
Drug quantity - various ways to set		
Drug selection with various formulae		
Warnings and Interactions – suppressing and confirming them		
Details applicable to each line		
Repeating scripts		
Altering the script using Item Edit and Abandon		
Printing blank labels		
Repeat and regular use		
Standard label on/off		
<b>About Reports</b>	<b>Page no.</b>	<b>Completed</b>
How to produce Reports		
Patient enquiry		
Product enquiry		
Quick interaction check		
<b>General Procedures</b>	<b>Page no.</b>	<b>Completed</b>
Data Backup		
Procedure to close down and start up		
Changing the label printer		
Pricing formulae		
Data provider – how to set up and use		

## Useful sections to include

### “How Do I?” section:

This would show the commonest “How do I?” tasks that people do with the system / equipment / etc.

### “Frequently Asked Questions” section:

This would list common **Questions and Answers from the Help Desk**. Ask them for a list of the commonest things that people telephone about. Then make sure these items are covered in the documentation. Or if it's already there, why can't the users find it? Or why can't they understand it?

## Including Reference Information

If you are writing an instructional guide, it is normally better to create a separate section for reference information, perhaps in an **Appendix**. This might include:

- Standard forms and letters
- Checklists
- Report examples
- Technical Support or Corporate Information
- Lookup tables or reference data.

## Model Instructions in Plain English

### FFA 90 ICE BUILD-UP BENEATH THE BOTTOM TRAY

**Symptoms:** Ice forms in the bottom of the Hotpoint FFA90 Freezer compartment, below the bottom drawer.

**Cause:** The drain hole at the back of the freezer compartment is blocked with ice and sludge.

**Tools required:**

- 7mm socket spanner
- Phillips screwdriver
- Clean damp cloth
- Electric fan heater (optional, but it makes the job much quicker)
- A length of plastic tubing approx. 3 ft (1 metre) long with 5mm bore (optional)
- A few inches of fairly stiff but flexible, insulated wire (I used a piece of earth wire flex)
- A torch or inspection lamp.

**Solution:** Follow these instructions, which take about 20 minutes to complete.

**Preparation**

- Switch off the fridge and pull out the mains plug.
- Remove all the freezer drawers. If there is food in them, wrap them in a duvet or something cosy, to reduce thawing.
- Place a shallow tray under the front of the freezer compartment to catch dripping water.

**Thaw the ice**

- Switch the fan heater on to low heat, and let it blow into the freezer compartment from a distance: NOT too close - a gentle heat is all you need. You don't want to melt the plastic!
- After a few minutes, use a blunt knife to prise the sheet of ice away from the bottom of the freezer compartment and remove it. Mop up as you go.

**Remove the inner back panel**

- Using the 7mm socket spanner, remove the 8 self-tapping, hexagonal-head screws that fix the back panel inside the freezer compartment. With all the screws removed, pull gently at the bottom of the panel and ease it out. It may stick where ice has stuck to foam rubber inside, so don't pull too fast.
- Put the panel on your draining board and allow it to thaw slowly. There will probably be ice embedded in the foam rubber backing. Don't pull the ice off by hand - you might tear the foam.

**Clear the blockage**

- At the back of the freezer compartment, below the chiller tubes, there is a drain hole about 15mm diameter, and this will probably be blocked with ice. Allow the fan heater to continue to thaw the ice in here, mopping up from time to time. Gently ease off any bits of ice with the blunt knife. As the ice thaws, the drain hole will gradually clear.
- Insert one end of the plastic tube into the drain hole, and blow gently and steadily through the other. The warmth of your breath will help to thaw the ice in the drainage tube. Keep going until you have cleared about 5cm down.
- Now use the piece of wire to poke gently down the hole and clear any further blockage. This should go down about 8-10 cm or so. Blow through the tube to clear any final blockage in the drainage pipe.

**Reassembly**

- Wait for the inner panel to thaw. Gently remove any remaining ice and mop it dry. Press the aluminium foil and foam back into place. Wipe both sides clean.
- Inside the freezer compartment, gently mop the coolant tubing dry. Mop the circular foam seal around the fan, and press it back into place.
- Replace the inner panel. DO NOT over tighten the screws, as they are self-tapping into the plastic walls of the freezer compartment, and you might strip the thread.
- Replace the freezer drawers, and switch on. Everything should now be running OK.

[Passive sentences = 2%. Readability = 79.7]

## Report Writing

This section is supplementary information if you write reports, and it discusses the layout or sections in a report.

### What are Reports for?

Reports tell the readers about something that happened in the past, so most of the English used will be in the **past tense**.

A report might be about:

- analysis of oil well data
- a medical investigation
- radio telescope survey data
- the cleanliness of a café
- the servicing of an oil-processing plant
- the implementation of a new policy
- what happened in a motor accident

– and so on.

### Style of Language in Reports

Depending on the company or situation, some reports tend to be very formal. But with the move towards a Plain English style, these old-fashioned bureaucratic styles are changing across a wide range of professionals and industries.

Use the everyday language of the target Reader Groups. You will access a wider range of readers, and they will read it quicker and understand it better.

### Rules for a Good Report

1. **THINK READER! The Reader is the most important person.**
2. To produce a good report takes effort.
3. Keep the report as short as possible. Don't waffle or pad out your sentences to make it "look more important". The resulting verbiage means that the reader has to filter out the clutter before they can understand the main message. If you can leave out a word without changing the meaning, then do so. Always.
4. Organise the report to help the READER.
5. If you use references to other pages or other documents, check that they are correct
6. Check your facts are correct.
7. Check that your diagrams, tables, graphs and images are relevant, helpful, labelled or annotated where necessary, and in the right place for the READER.
8. A summary tells the whole story, in miniature.
9. Ask someone to proof check your reports for consistency and technical accuracy. (I'm sure they will point out any typing errors.)
10. The appearance of the report should be as important as the contents.
11. **THINK READER! The Reader is the most important person.**

## Report Formats

### How should you format your reports?

Many companies have defined their own format for reports, so that everybody has to write in a common format. Naturally, these formats vary from company to company.

**But are these templates right for the job?** Many report formats were derived so long ago that nobody can remember who wrote them. Maybe the person who wrote them didn't really understand the needs of the whole reader base. Or circumstances and working practices have changed, so it's not really suitable any more.

Beware of "We've always done it this way!"

If the format does not work well for you/ some areas of your company/your customer, then ask around and see if you can work together on a better template.

I cannot tell you which is the "best" format, because every situation and company has its own needs.

However, here are some guidelines and ideas. If you use one of these as a "starting point", then I recommend that you derive your own company standard(s). Allow for the needs of the different Reader Groups. And please build in some leeway, so that it is not fixed forever, but can be adapted if and when necessary.

Recommendations allow for flexibility; rigid rules that are "cast in stone" can sometimes be counter-productive.

### Format 1: Simple Report Structure

Here is a very basic report structure for a simple investigation:

- **Aim:** What did the investigation try to establish or discover?
- **Methods:** How did you carry out the investigation? What stages did you go through? Describe them.
- **Results:** What did you discover during your investigation?
- **Conclusions:** What do you conclude from your investigation? What actions do you recommend for the future?

### Format 2: Advanced Report Structure

A more complex format might have the following sections:

- **Cover/Heading page:** For impact, make it punchy and attractive. Create your own design, or use one of the MS Word templates. MS Word 10 has some nice designs. ([Menu > Insert > Cover Page](#)).  
I suggest you finalise the design of your cover page until you have finished the report, so that the appearance can reflect the overall content.
- **Table of Contents:** Use MS Word fields to pick up the headings and page numbers automatically. ([Menu > References > Table of Contents](#)).
- **Executive Summary:** This is a real 'must' for long reports.
  - It gives a summary of all the main elements of the report – a 'snapshot' view of the contents.
  - Emphasise your main points, and use bullet points if it seems appropriate. Cover the main features, results and conclusions. An executive summary could be several pages long.
  - **Tip:** Finish the report before you write this section.

- **Introduction or Background:** Use this to put the reader in context, or to “set the scene”.
  - Explain why you did the investigation; why you put the information together; why the report was necessary.
  - What are the objectives of the report?
  - What problems may have affected the investigation?
- **Methods:** How did you carry out the investigation? What did you do? How did you collect your information? What was the process you used? Who was involved? What reference documents did you use?
- **Results:** What did you discover? Tell the facts.
  - Use tables, diagrams, graphs, embedded spreadsheets, if they help the essential meaning. Longer or more detailed information should go in the Appendix.
- **Observations:** Sometimes factual results are not enough.
  - What else influenced the investigation?
  - You can draw your own conclusions or express opinions, even if you can't support your remarks with hard evidence. It might help some readers to develop their own thoughts further.
- **Recommendations:** This is where you might recommend:
  - improvements to a design
  - changes to working practices / operating procedures / safety procedures
  - new ideas, new products and so on.
- **Conclusions:** State your overall deductions from the investigation.
  - The 'HOW' factor. If you are recommending changes or improvements, state HOW these would improve things like Reliability? Safety? Productivity? Performance? Operation? Customer care? – and so on.
  - State your assessment of the outcomes, your evaluation of the benefits.
  - “SELL” your ideas to your readers!
- **Appendices:** An appendix removes the “clutter” from the flow of the main body of the report, so that it reads more easily. This is where you put Reference / Supporting information. It could include:
  - “technical talk” for the experts who want to “dig deeper” into the investigation and evidence
  - lookup tables of data
  - forms and standard letters
  - spreadsheets
  - charts and tables
  - survey results, etc
  - **Bibliography** if you refer to other documents or reference books
  - **Acknowledgements** where you list the people who helped you.

**Note:** Depending on your situation, choose the sections you need for your situation.

Larger reports benefit from more sections, as it's a convenient way of dividing them up. However, a short report with all ten sections might look a bit “overdone”.

## Should you number the sections in your report?

Opinions differ on section numbering. The “traditional” way is to number everything in sight – just because you can ... But is it really necessary?

- If there is a **business reason** to say things like “Refer to section 2.3.17” in a certain report, then number the sections.
- If you really don't need to, then leave out numbering, and use sub-headings.
- If necessary, restrict numbering to one or two top heading levels only. **Keep It Simple.**

## Why not number everything?

Suppose the reader has to read a lengthy report that runs to over a hundred steps. A constant barrage of numbers can become a distraction and an irritation that does little more than tax the brain. If the reader has to mentally evaluate, every time: “Is this number relevant? No” – then don't number the steps. The reader's energy is wasted processing and filtering out unnecessary information.

In cases like this, you can often divide up the list into smaller sections by using subheadings. And give them meaningful descriptions. Each subheading then leads to maybe five or six steps before the next subheading, and so on.

## What about Headers and Footers in Reports?

You can give a report style and impact if you include a relevant image in the header (or footer), something that relates to the report content. Or use a company logo.

## Other Report Tips

Successful journals, magazines and newspapers pay a lot of attention to appearance and impact; to writing style and accuracy. You have put a lot of effort into this report, so take a little extra time to **Make It Look Good**, and give it **impact**. It will encourage people to want to read it.

- Remember to do an attractive cover page; headers and footers; page numbering.
- Use bullet points to emphasise particular points.
- Do a thorough spelling and grammar check before you distribute your report.
- It is difficult to be objective and thorough if you have spent several days writing something. If the report is important, ask a colleague to do a “**technical proof check**”, to make sure it makes technical sense, before you distribute it. And if you happen to have mis-typed something that the spell checker didn't find, they will point it out to you.

Some companies have proof checking in place as a standard procedure.

- In longer reports, insert an **Index-at-the-back**, to help readers to find information quickly.

## Active instead of Passive Sentences in Reports

Just as with Instructional writing, in report writing you can use active sentences instead of passive. This means you can use “we” to say what your team did, provided you make it clear at the beginning.

“Engineers in our ABC department investigated the breakdown of the central heating system.

First, **we** isolated the electrical connections... **We** checked the water pressure ... **We** tested the integrity of the pressure boiler... **We** found that... **We** accept that... **We** recommend that...” – etc.

**Talk to the reader, and tell them what you did.**

# END OF MODULE 1

# MODULE 2

## MODULE 2 – Documentation Planning Techniques

This module is about using **MIND MAPS**, which help you to plan exactly what to write, so that the documentation includes all relevant information and leaves out the rest.

### Why plan my work? Why don't I just start typing?

#### Good question!

Have you heard the saying: "Plan your work and then Work your Plan"? This is important in documentation, too. You can make the task of writing so much easier if you take a few minutes to map out what you need to write.

#### What do people find difficult when writing?

When I conduct Technical Writing Courses, I ask delegates to complete a pre-course questionnaire. This gives me some idea about who the person is, what they do at work, how much they know already, and what they need to learn.

In particular, I ask these questions. Here are problems that you can overcome by using correct planning techniques:

#### What do you find most difficult in trying to write good documentation?

- The most difficult thing for me is to figure out how to start.
- I struggle to decide what level of technical details need to be included.
- Planning the format of the document.
- Trying to decide how deep you should go in a work instruction.
- Balancing clarity and simplicity with sufficient information.
- Planning the best way to structure the information.
- The content!
- Getting all of the information required by others into the document.
- "Keeping it brief, but making sure it is comprehensive enough to be useful."

#### What particular issues would you like me to cover in a Training Course?

- Planning and structuring documentation projects and individual documents.
- Getting the right Content.
- Structure and organisation of documentation.

## Planning what to write

### What to include? What to exclude?

This is one of the biggest problems in writing any documentation. The bigger the manual, the harder it gets – it can numb the mind just trying to think about it. Some people write out a linear list, but this has significant limitations on the way you think.

### What is Mind Mapping?

Mind Mapping is a sort of one-person Brainstorming tool. It is a very powerful aid for managing almost any kind of project. It saves a huge amount of mental energy and helps your productivity.

Here is a definition derived from 'Wikipedia', the online encyclopaedia:

“A Mind Map is a diagram used to represent words and ideas linked to and arranged radially around a central key word or idea. It is used to generate, visualise, structure and classify ideas, and as an aid in study, organization, problem solving, and decision making.”

To put it simply, Mind Mapping is a visual “Thoughts Organiser”. It allows you to work out just how much to write, and it breaks the whole project down into ‘bite-sized chunks’.

### What can you use it for?

You can use it to plan ALMOST ANYTHING!

- Holidays
- Writing a 140-page manual from scratch
- Moving house
- Restructuring your company
- Planning an expedition to the South Pole
- Planning your monthly reports
- Starting a Football Club from scratch
- Research projects
- Weddings
- Starting a new company.

### How do I draw a Mind Map?

- a) The main subject of attention goes at the centre, in a circle (or ellipse).
- b) Main themes radiate from the centre on branches.
- c) Each branch holds a key word as a **node** on that line.
- d) Expand nodes with further branches as required, until you need go no further.

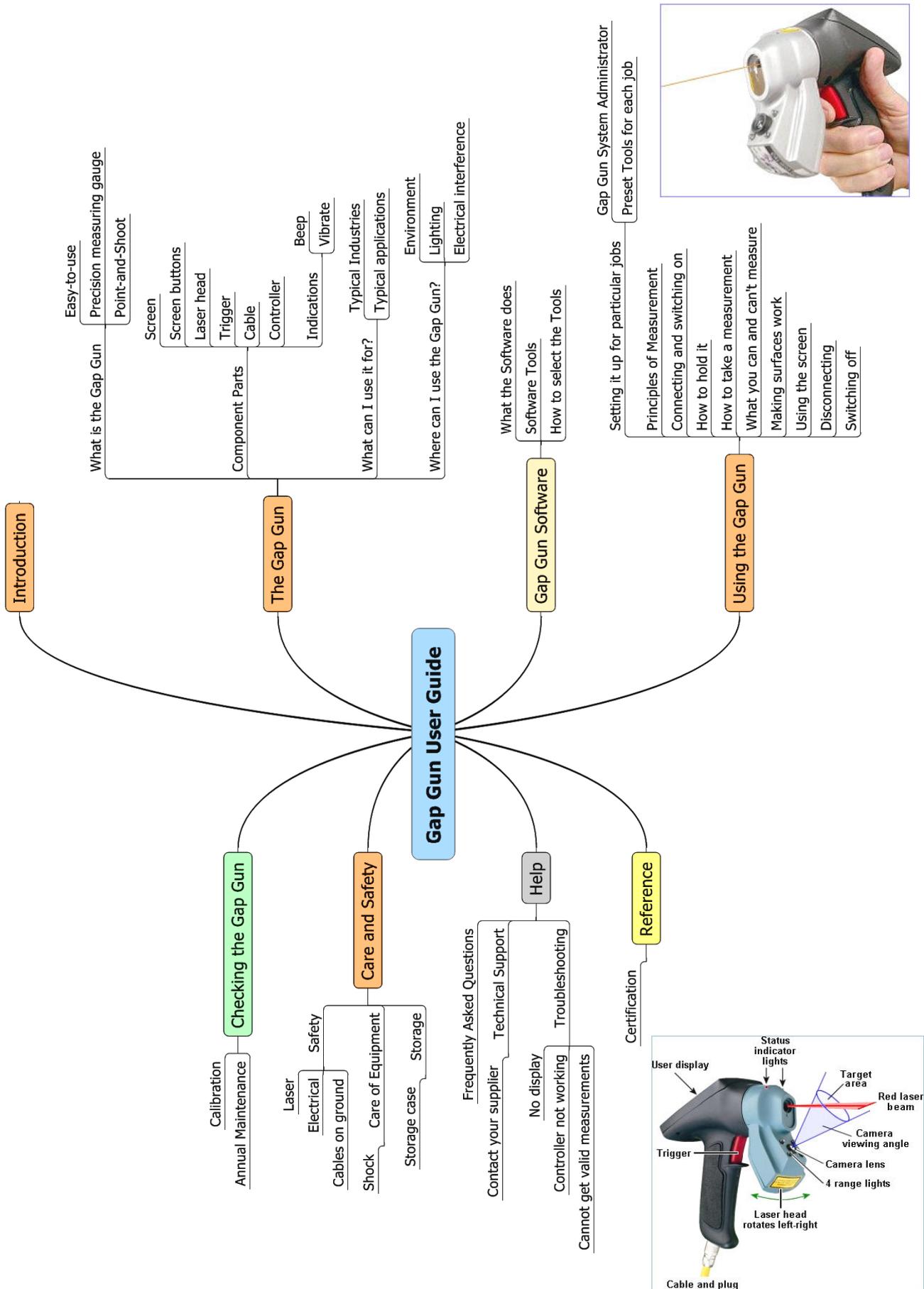
You will find a more detailed explanation about how to create a Mind Map on page 89.

But first, some examples...

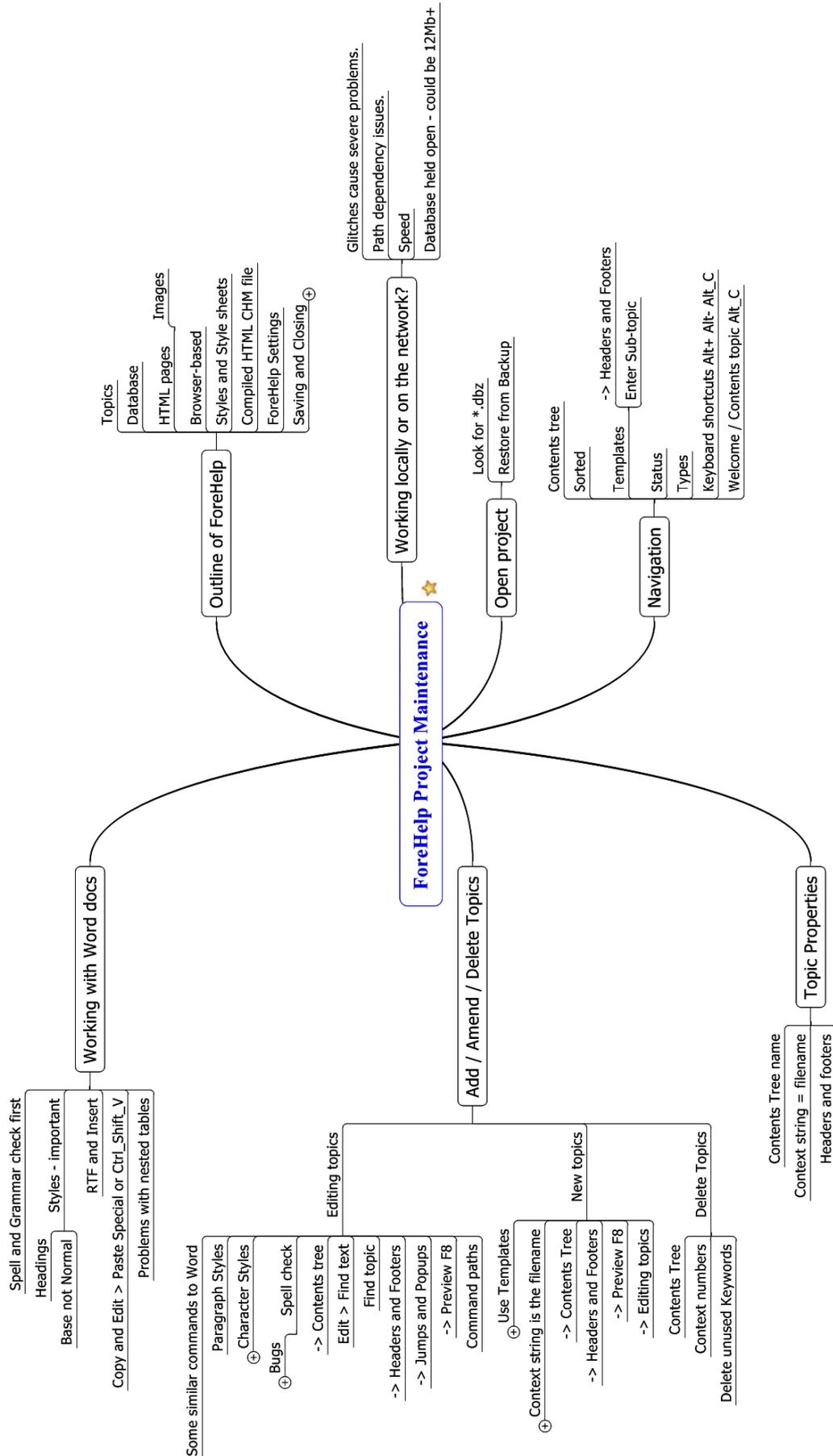
## Example Mind Map 1 – Uses of Mind Maps!



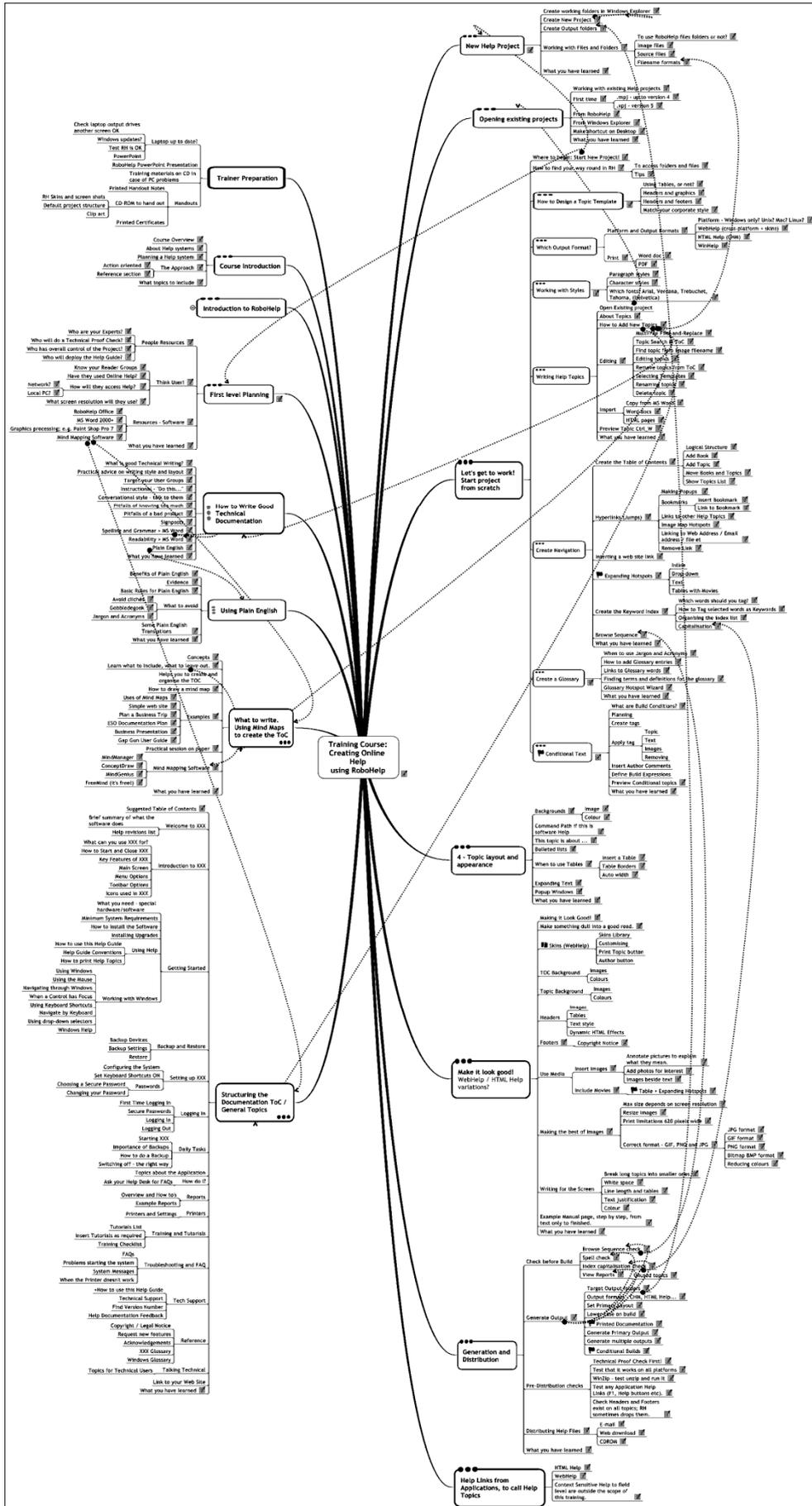
## Example Mind Map 2 – ‘Gap Gun’ User Guide



## Example Mind Map 3 – Part of a Software Training Course



# Example Mind Map 4: a 160-page Training Manual with full text & images



## How does a Mind Map help with Documentation?

Mind Maps help you to map out everything you need to write about. All relevant content has a place on the Mind Map, and irrelevant content is automatically omitted. Each node on the whole map is a sub heading for your documentation. Make Titles and Subtitles for each node into a word processor, and then you write text about each little bit of the subject. This is easier than being overwhelmed by trying to visualise the whole document in one go.

If your brain is juggling twenty thoughts at once, you are going to drop some of them. Mind Mapping allows you to write them down, one at a time, in such a way that you don't drop them, forget them or lose association.

## How to create a Mind Map

<p>1. Take a sheet of white, unlined paper. (Lined paper can restrict your thought flow.)</p>	<ul style="list-style-type: none"> <li>• Use <b>half a sheet of flip-chart paper</b> – it gives you room to think.</li> <li>• Otherwise, use <b>A3</b>. (Stick two sheets of A4 together with sticky tape and then turn it over). A4 is limited, but OK for small maps.</li> <li>• If A3 or A4, use 'landscape' orientation; this gives more room for sentences – you can spread out more.</li> </ul>
<p>2. Start in the middle with a brief, main Title.</p>	<ul style="list-style-type: none"> <li>• Thoughts start in the centre of our mental world. The Mind Map works that way too.</li> </ul>
<p>3. Put aside all pre-conceived ideas.</p>	<ul style="list-style-type: none"> <li>• Break free from the way you worked up until now (unless you use Mind Maps!)</li> <li>• Don't draw a vertical list!</li> </ul>
<p>4. Add the <b>main themes</b> around the central circle, like the chapter headings for your book. The order (sequence) doesn't matter.</p>	<ul style="list-style-type: none"> <li>• If using paper, draw a circle round each node.</li> <li>• Draw lines to connect them directly to the centre.</li> <li>• Use curved lines – they are more about flow. Straight lines can restrict your thinking.</li> <li>• If you like using colour then use colour.</li> </ul> <p>The main themes connect to the central image on the main branches, and show their relative importance. These are the core ideas for the rest of the Mind Map.</p>
<p>5. Circles help show the main nodes.</p>	<ul style="list-style-type: none"> <li>• Connect all nodes into the image, don't leave any 'floating'. The brain works by association, not by disconnected ideas.</li> </ul>
<p>6. Add more main theme branches - think of other 'Chapter Headings'.</p>	<ul style="list-style-type: none"> <li>• Then your main themes will stand out clearly, and trigger your subsequent connecting thoughts.</li> </ul>
<p>7. Start to add the next levels of thought. What themes can you add to each of the main themes?</p>	<ul style="list-style-type: none"> <li>• First level themes stimulate associations in your mind.</li> <li>• Allow your thoughts to flow freely – attach whatever word is triggered next.</li> <li>• You do not have to finish one branch before moving on. You will probably 'jump about' the Mind Map as the links and associations occur to you.</li> <li>• The connecting lines create <b>relationships</b> and a <b>structure</b>.</li> </ul>
<p>8. Add extra levels of data as required.</p>	<ul style="list-style-type: none"> <li>• Keep going until you can attach no more ideas to the map.</li> </ul>

## Next – decide the sequence of MindMap nodes for your document

For documentation purposes, the next step is to sort the nodes into a **logical sequence** for the document / manual / training course / report etc. These will be your documentation headings and sub headings.

You can use Mind Mapping software to sort these on-screen by drag-and-drop. Otherwise, type the headings into your word processor as headings and sub headings, and rearrange the sort order in Outline View (MS Word), to arrive at the right sequence for your manual.

There are some excellent **software packages** to help you create Mind Maps on your computer, and you can see more about these on page 91.

## Exercise 13 – Mind Map A - select a topic

Do a Mind Map for planning one of the following, something you have **never done before**.

- Holiday abroad
- House move
- Start an Equestrian Centre
- Banquet for 100 people
- Start a Coffee Shop business
- Wedding
- Set up a Wild-Life Park tourist attraction
- House extension
- Sponsored Charity Event
- Set up a Football Club with team and stadium, on a brown-field site
- - or anything you like, but not related to work.

Draw a detailed Mind Map for your chosen subject on a large sheet of paper, landscape format.

## Mind Map B - Plan your next documentation task

- Map out your next major documentation project / User Manual / Software Help Guide, or imagine one and map that.
- If you can't think of one, map out a work related project:
  - An office move
  - New product / product upgrade
  - New marketing campaign
  - Reorganise your department

Use a large sheet of paper, landscape format.

## Mind Mapping Software

With good Mind Mapping software, you can:

- Export your map to a text file or Word document, so you can start work in your Word Processor.
- Copy-and-Paste.
- Export graphics, etc.

Here are some of the software packages available, which I found by recent research on Internet and by practical experience. You decide which you want to use.

### Mindjet MindManager Pro

☺☺☺ MindManager is good, easy to use and produces clear, easy to read Mind Maps. It is a very powerful communication tool. MindManager caters for everyone, from individuals to large organisations. **You can even write complete documents in MindManager and then export the output into Word for final formatting / printing.** About 1.5 million users worldwide. Price is around UK £295 plus VAT.

See [www.mindjet.com](http://www.mindjet.com). Free 30-day trial download.

### ConceptDraw MINDMAP

☺☺ See [www.conceptdraw.com/en/](http://www.conceptdraw.com/en/). Free 30-day trial download for Mac or PC users.

### MindGenius Business

☺☺ See [www.mindgenius.com](http://www.mindgenius.com). Free 30-day trial download for Windows.

### FreeMind

☺ Written in Java, requires Java Runtime Environment, runs on Mac, Linux etc. Commercial products have more facilities, but, hey, it's free! See [http://freemind.sourceforge.net/wiki/index.php/Main\\_Page](http://freemind.sourceforge.net/wiki/index.php/Main_Page)

## Bad News section:

### Microsoft Visio for making Mind Maps?

☹☹ General remarks from various users in comparison tests seem to be: **“Forget it!”**

### MS Word Drawing Tools for making Mind Maps?

☹☹☹ Even worse, so **forget it twice!** Tedious, slow and inflexible.

## Structuring your Document

### User Tasks

Mind Map the **User Tasks** – what people actually have to do.

**Note!** If your project is a software user manual, **please don't** just copy the menu structure and design your Help Guide around that. It is rarely helpful.

### Table of Contents / List of Headings

Derive this from the Mind Map. If you use Mind Mapping software, you can rearrange your finished Mind Map into a vertical column of topics by drag-and-drop. When you export to MS Word, the topics will then be in the same order.

Remember to include Reference topics such as:

- Background theory
- Help Desk contact details
- Tables of data.

### Start documentation in Word Processor

- **Export the MindMap** into MS Word. This is the basis of your Table of Contents (ToC).
- Go into Word, then add, delete, rearrange the ToC – get it 90% complete.
- Set Heading Styles; make Headings and Sub-headings.
- Start writing! Section by section.

---

## Essential Software Tools

There are a few software packages that I consider essential for creating good Manuals and Online Help Guides.

- **Planning:** If you write new documentation, plan it using Mind Mapping software.
- **Writing:** You have to write the text, so you need a word processor such as MS Word.
- **Graphics processing:** If you use images, you probably need to process them. Use Paint Shop Pro or similar. (MS Paint is a bit too basic to be suitable).
- **Online Help Guides:** You will need a good software package such as RoboHelp, Madcap Flare, etc. There are several on the market. (I used RoboHelp).

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# END OF MODULE 2

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# MODULE 3

## MODULE 3 – Working Smart in MS Word

This covers MS Word versions 2010 and 2007

Welcome to the **Working Smart in MS Word** module of this training course. You may have come across some of these points before; if you have, please forgive me for reminding you.

It covers some of the vital aids for the Technical Author, and some useful extras that can enhance your work, making it better in presentation and quicker to finish.

However, from experience, many people do not know some of the quicker ways to use Word, so please use this as an opportunity to learn. These will help you to improve the look of your documents, as well as showing you how to work quicker.

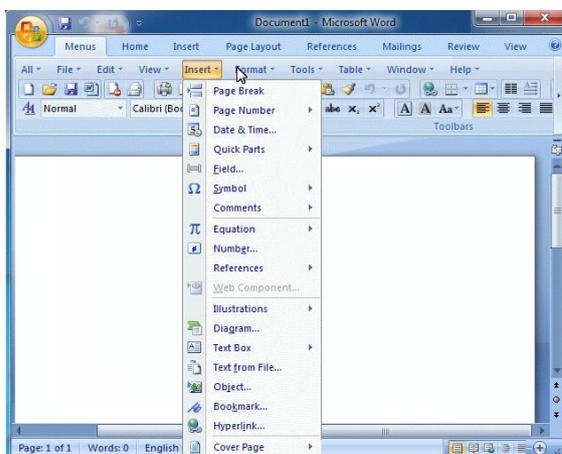


**If you wish MS Word still had the 2003 toolbars...**

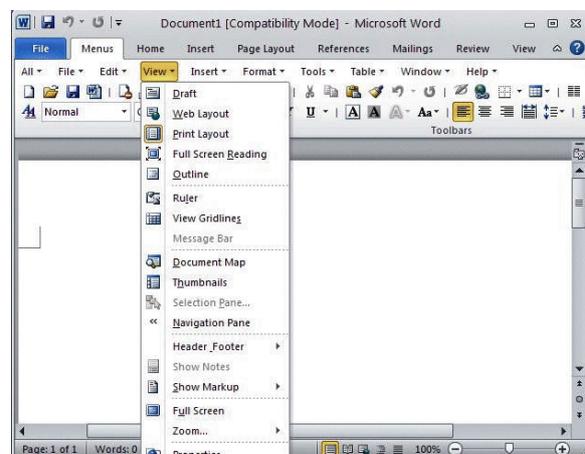
Word 2003 was great – everything was easy to find. And then along came Word 2007 and Word 2010, and bingo! — no toolbars, no menus — terrific... **Productivity worldwide dropped by a reported 25% !**

If you would like to have the old toolbars back, you can buy an add-in that gives you a set of toolbars for the complete MS Office suite, for about **£25. That could pay for itself in time savings in the first 2 days.**

**Try it:** I think there is a 15-day free trial. See [www.addintools.com](http://www.addintools.com). Here are screenshots:



Classic menus for Office 2007



Classic menus for Office 2010

**This add-in has saved me many hours' wasted time** while I learn the new, scrambled-menus-and-toolbars arrangement. (I wonder, how many hundred man-hours is your company losing?)

## Essential Settings in MS Word

Hints and Tips about getting the best out of MS Word 2010. (You'll have to adapt from your own knowledge of later version menus, which have changed.)

### Formatting the Paragraph Styles

You can customise the default settings for font (typeface and size) and colour, for the main body text and the heading styles that you use. Set the style once, and it applies to the whole document.

#### Set the Default Font in Word:



If many people will view your work on a computer screen, (e.g. as a PDF file, or online Help) then use **sans serif** fonts such as **Arial**, **Calibri**, **Tahoma**, **Trebuchet** and **Verdana**. Research shows that these are easier to read on the screen.

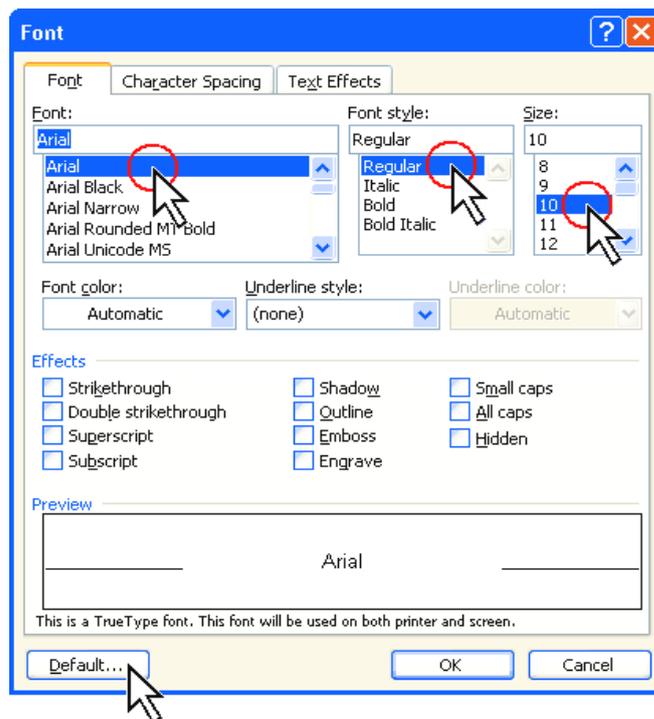
If your work is going to be printed, then you can use a variety of serif and sans serif fonts, but I recommend **Arial 10pt** or **10.5pt**.

- To set the default font for the "normal" style, start a new paragraph and use shortcut



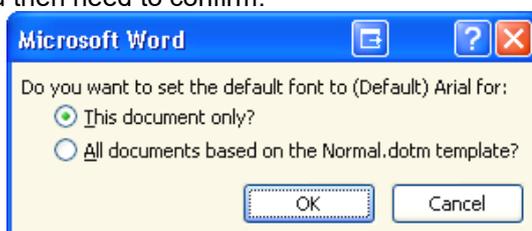
to set the 'Normal' style.

- Without moving the cursor, use shortcut to call up the **Font** screen:



Example for default Normal style = Arial Regular 10pt...

- Select the required **Font**, **Font Style** and **Size**. (You could also choose a colour and underline style, but I recommend that you leave the text colour as black (automatic).
- Check your settings and then, at the bottom, click **Default (Set As Default)**. You then need to confirm:

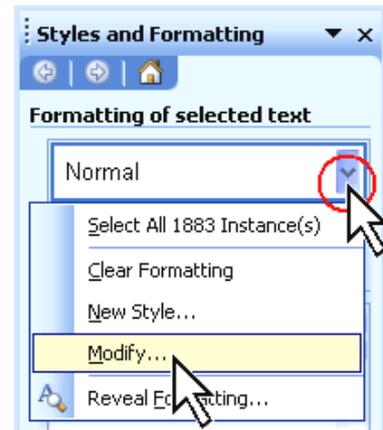


Choose your option, click **OK**.

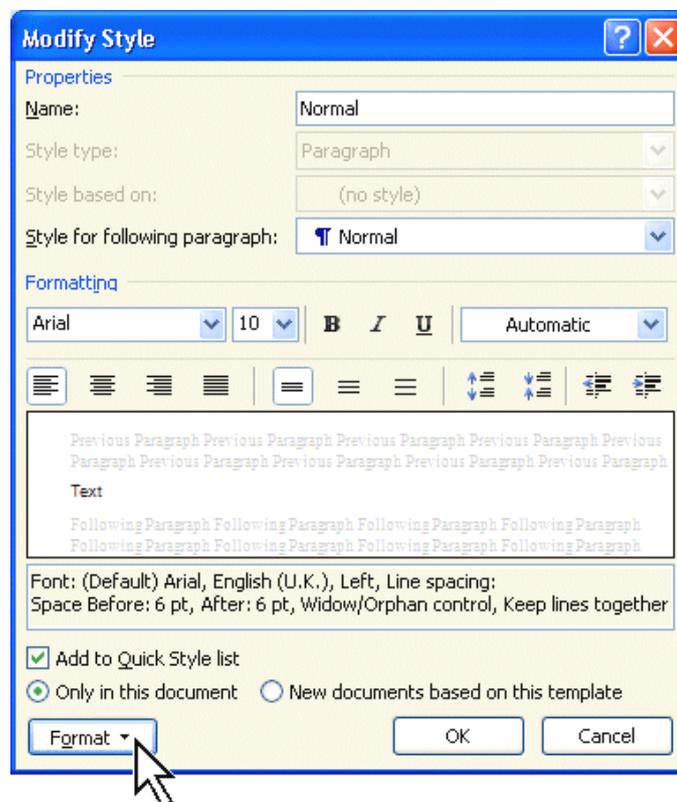
## Set default Paragraph Spacing

For the 'Normal' style, I recommend that you set a paragraph spacing of **6pt** before and after each paragraph.

- Click on a line that uses **Normal** style.
- Use shortcut **Alt O, S** (= **f**ormat **s**tyles). The **Styles** pane opens, usually on the right of the screen.
- Scroll up/down to find the required style '**Normal**'.
- Hover over the selection and click on the drop-down arrow on the right, and then click on **Modify**.



The **Modify Style** screen appears:



- **Only in this document:**  
Select  to apply changes to this document only.
- **New documents based on this template:**  
Select  to apply to all future documents based on this template.
- Stay in this screen for the next settings...

## Paragraph settings

Follow the instructions on page 95, and then:

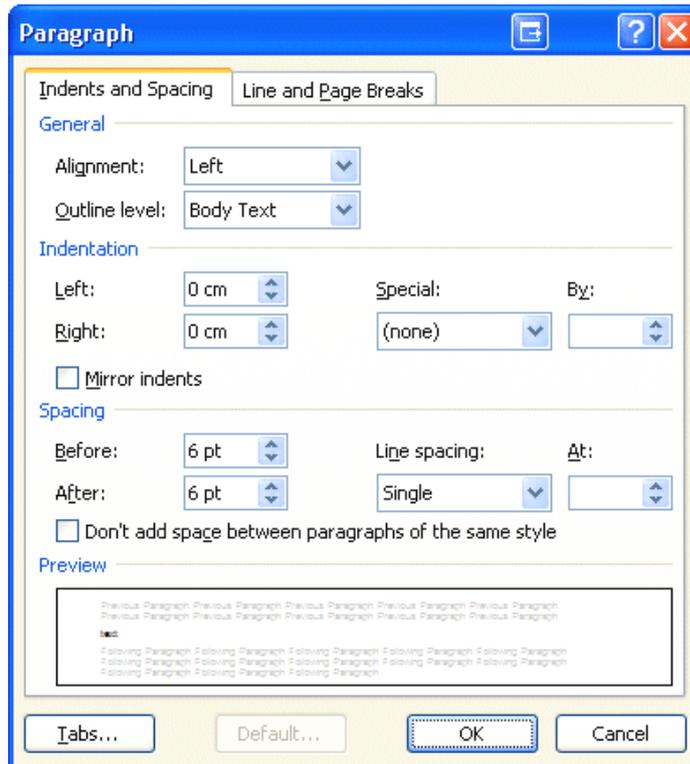
- **Format button:** Now set the paragraph spacing: click on **Format** and select **Paragraph**. (Screen shot above).

The **Paragraph** screen appears – see below.

### Alignment: set to Left aligned

Follow the instructions above, and then:

- Select the **Indents and Spacing** tab (at top left).



- **Alignment:** My research shows that **Left aligned** is recommended as best for all normal text and headings.

**[Fully justified]** might “look nice”, with a neat right-hand edge, but research shows that it makes things harder to read. Two reasons are given:

(a) The word spacing is not regular from one line to the next – some words are more widely spaced than others.

(b) Sometimes, readers do not move correctly to the next line. Have you ever read the same line again, or skipped a line by accident? This is called a ‘tracking error’. Having a “ragged right margin” helps the eye to track to the next line correctly.

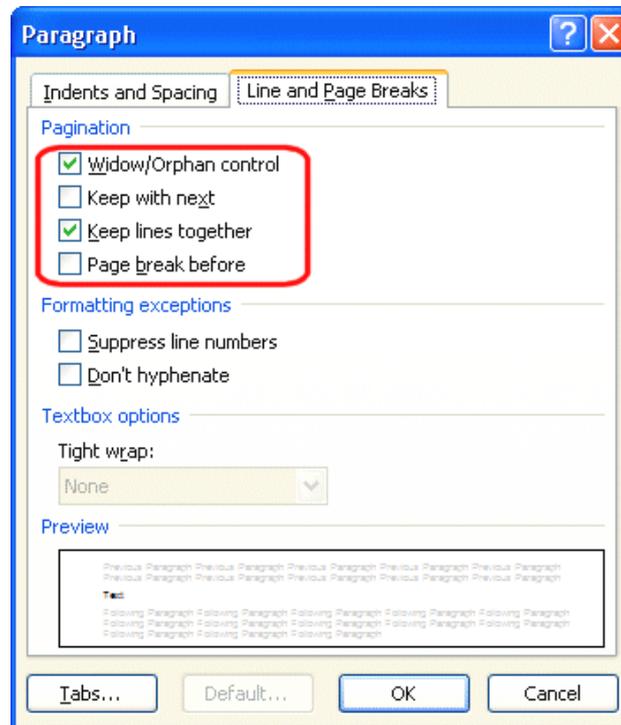
See **Text Alignment** on page 62.

- **Indentation:** Set as required – probably set both to **zero**, and alter later if needed.
- **Spacing Before/After:** Set both to **6pt**.
- Stay in this screen for the next settings...

## Set Line and Page Breaks

Follow the instructions on page 95, and then:

- Select the **Line and Page Breaks** tab:

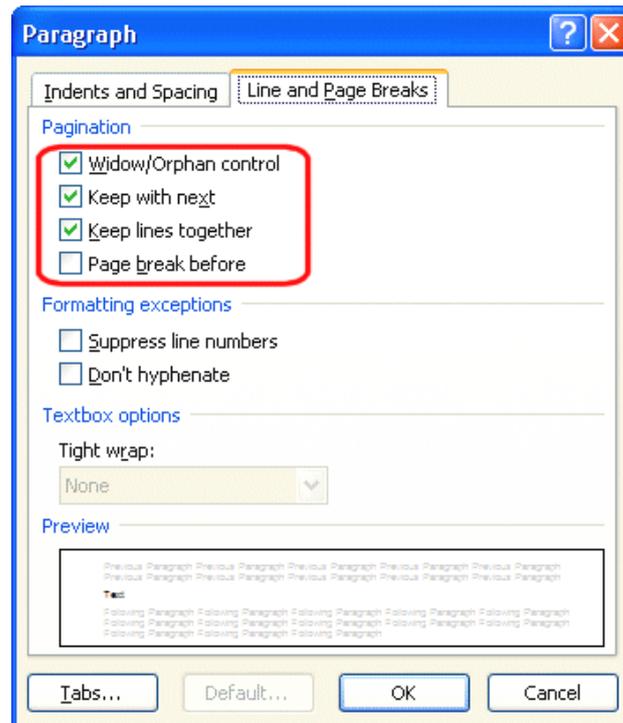


- **Widow/Orphan control:** Select this to prevent the last line of a paragraph from flowing over to the next page by itself. It will guarantee that at least two lines will flow over the page boundary.
- **Keep with next:** Clear this check box for all normal paragraph text. Use it for heading styles.
- **Keep lines together:** I recommend that you select this to prevent a whole paragraph from being split across a page boundary. This looks neater and improves readability.
- **Page break before:** Clear this checkbox for almost all paragraph styles. Useful for “Heading 1” paragraph styles if you always want to start a new section on a new page, and start it with Heading 1.
- To finish, click **OK**.

## Set Heading Styles 1, 2 and 3

Follow the instructions on page 97, and then:

- Make a new line and use **Ctrl Alt 1** to set the style to **Heading 1**.
- Repeat the **Format Style** procedure as above on page 94, but this time select **Heading 1**. You might like to try Arial 16pt Bold and colour Dark Blue, as a suggestion.
- Repeat for **Heading 2** **Ctrl Alt 2** (e.g. Arial 14pt Regular, Dark Blue)  
and **Heading 3** **Ctrl Alt 3** (e.g. Arial 12pt Bold, Dark Blue).



- **Line and Page Breaks tab:** For headings, it is useful to tick  **Keep with Next**. This makes sure that a heading keeps with the next sentence across a page boundary. It prevents a heading being left at the bottom of a page and the subsequent text separated from it on the next page.
- **Page break before:** Tick this checkbox if, for example, you always want **Heading 1** to start on a new page.
- Click **OK** and **OK** again to finish, and then close the **Styles and Formatting** pane on the right. Once set, these will stay valid for the current document.

## Spelling and Grammar Check

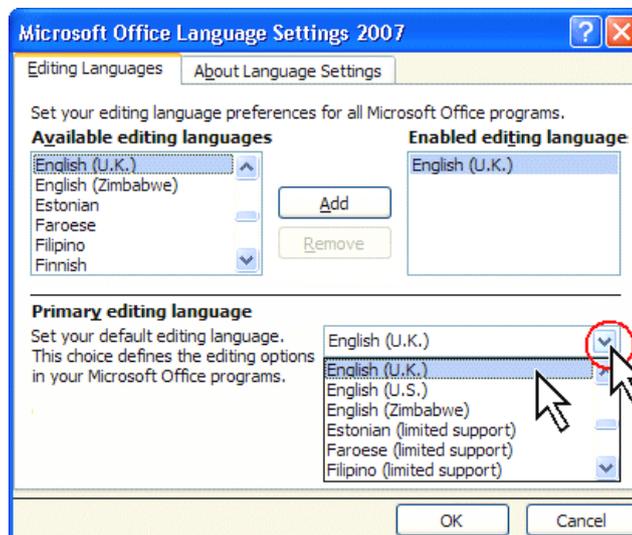
The Spelling and Grammar check features are essential for the Technical Author. The Spell Check is obvious (but not infallible – you still need to proof read your work afterwards). The Grammar Check will validate your writing, and help to correct your style towards Plain English.

### Set Word to the correct Spelling Language

When you install MS Office, the default spell-check language is English (U.S.). If you need UK English, make sure the default Word spelling language is changed to **English (U.K.)**.

#### Word 2007

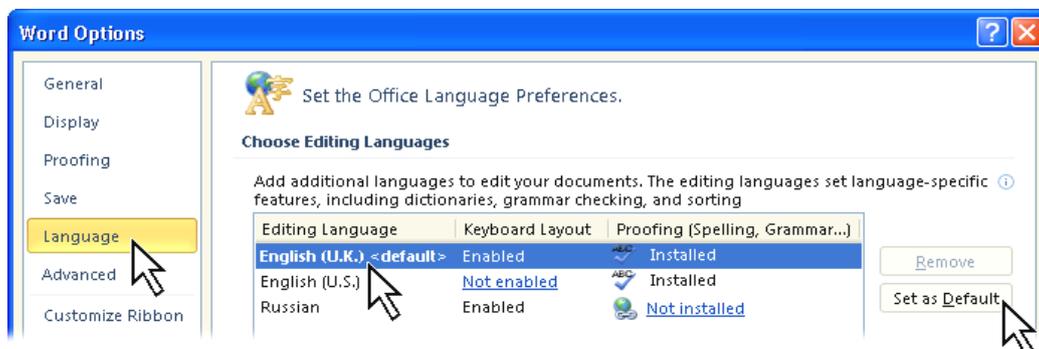
- Use keyboard shortcut **Alt T, O**;
- OR click the **Office button**  and then click **Word Options**  (at the bottom).
- On the left, select **Popular**; then click **Language Settings** ; the **Language Settings** screen appears.
- Primary editing language: select English (UK) and click OK:



- At the next screen, confirm the changes and click **OK**.

#### Word 2010

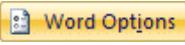
- Select menu > File tab > Options > Language:

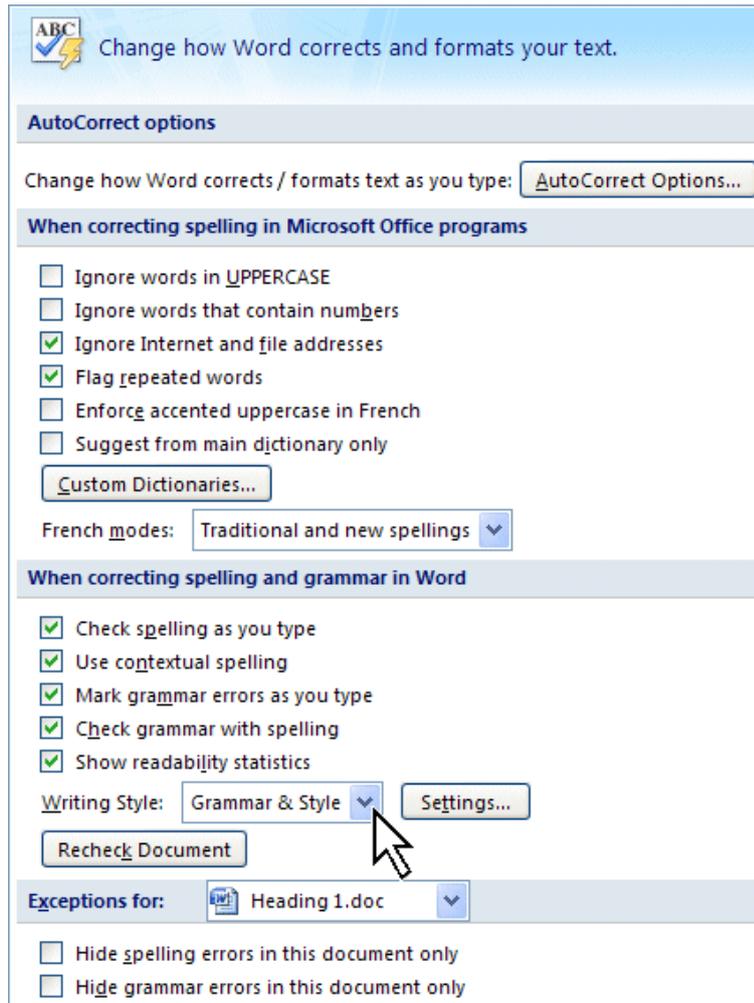


- Select English (U.K.).
- If it is not already marked as **<default>**, then click **Set as Default**, and then click **OK**.

## Switch on the Grammar, Spelling and Readability Statistics

### Word 2007/2010

- Use keyboard shortcut **Alt T, O** OR
- **Word 2007:** click the **Office button**  and then click **Word Options**  (at the bottom).
- **Word 2010:** select menu > File tab > Options.
- On the left, select **Proofing**:



Change how Word corrects and formats your text.

**AutoCorrect options**

Change how Word corrects / formats text as you type:

**When correcting spelling in Microsoft Office programs**

Ignore words in UPPERCASE

Ignore words that contain numbers

Ignore Internet and file addresses

Flag repeated words

Enforce accented uppercase in French

Suggest from main dictionary only

French modes:

**When correcting spelling and grammar in Word**

Check spelling as you type

Use contextual spelling

Mark grammar errors as you type

Check grammar with spelling

Show readability statistics

Writing Style:

**Exceptions for:**

Hide spelling errors in this document only

Hide grammar errors in this document only

- Tick the checkboxes  as shown above.

This switches on the **Grammar checker** and **Readability statistics**. (To read about **Readability Analysis and Statistics**, see page 102.)

## Grammar and Style

- Set **Writing Style = Grammar & Style**, and then click the **Settings** button.

The **Grammar Settings** screen appears.

- I recommend that you tick  the following selections (or the equivalent in other versions of Word):



Screenshot edited to view all options together...

- Click **OK**, and **OK** again to finish.

While you type, Word will now check your grammar, your writing style, and your spelling. It helps you to learn the correct writing style, especially regarding passive sentences.

**Note: Use the prompts as a recommendation, but remember: it is not perfect. Use your own knowledge of good English to check the suggestions that Word makes. Ignore or Accept each one as required.**

## Running a Spell Check

**ALWAYS** spell check your work!



- Click **Review** tab > **Spelling & Grammar** or use shortcut **F7** to start the spelling and grammar check.
- Make sure there is a tick in the **Check Grammar**  **Check grammar** checkbox. This will then look for grammar mistakes and help you to correct them.



**Note:** Because English is complex, and software has its limitations, the grammar check is not always right. It does help you to check things you might have overlooked otherwise, but sometimes you know it is OK, so you click **Ignore Once** and continue.

## ‘Technical Proof Check’

ALWAYS read your work, anyway. But before release, ask a colleague to do a “**Technical Proof Check**”, especially if it is important. It is hard to check your own work, and they may spot things you missed.

## Readability Analysis

To switch on the **Readability Statistics**, see page 99.

### Run the Readability Analysis

If you have made the correct settings as above, then when you finish the Spell and Grammar check, Word will show you the **Readability Statistics** for the document:

The important part is the **Readability** section at the bottom of the screen →

Readability Statistics	
<b>Counts</b>	
Words	33630
Characters	166752
Paragraphs	2468
Sentences	2304
<b>Averages</b>	
Sentences per Paragraph	1.7
Words per Sentence	12.2
Characters per Word	4.6
<b>Readability</b>	
Passive Sentences	4%
Flesch Reading Ease	64.8
Flesch-Kincaid Grade Level	7.1
OK	

The **Flesch Reading Ease** shows the readability figure for this Training Manual. The figures are in the middle of the target range of 60-70.

## What if the Readability Results show as all Zeroes?

If the **Readability Statistics** shows **all Zeroes**, this could be because there are mixed language sets within the document. This can happen if somebody has copied and pasted from a Word doc created in a foreign country. For example, a document from Germany, even if written in English, would have the default spell-check language set as German, and this conflicts with the Readability analysis.

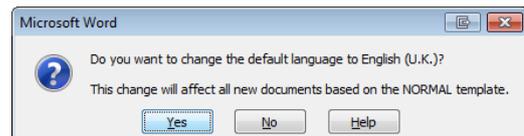
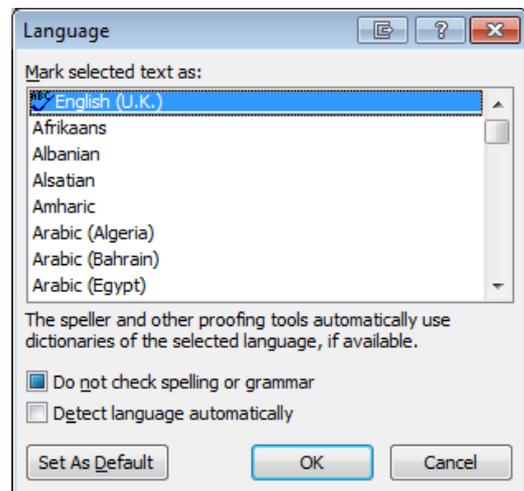
- To fix this, use shortcut **Ctrl A** to select the whole document, then use shortcut **Alt T L L** (this was the original Word 2003 shortcut derived from **T**ools > **L**anguages > **L**anguage).

- Select **English (UK)**:

- Click **Set As Default**, click **OK**.

- Confirm **Yes** at the next screen, then click **OK** to finish.

- Now run the **F7** spelling and grammar check again, and it should now work OK.



## Definitions: Readability scores

When Microsoft Word finishes checking spelling and grammar, you can set it so that it displays information about the **Readability** of the document. Each readability score bases its rating on the number of syllables per word, and the number of words per sentence.

## Technical Talk: the Flesch Reading Ease formulae

### HIGHER SCORE IS EASIER TO READ

This rates text on a **100-point scale**: the higher the score, the easier it is to understand the document. For most standard documents, aim for a score of about 60 to 70. If your score is down in the 30s, then you need to have a serious look at your writing style!

The formula for the Flesch Reading Ease Score test is:

$$206.835 - 1.105 \left( \frac{\text{total words}}{\text{total sentences}} \right) - 84.6 \left( \frac{\text{total syllables}}{\text{total words}} \right)$$

- where total words/total sentences = average sentence length (ASL) AND total syllables/total words = average number of syllables per word (ASW).

As a rule of thumb, scores of 90-100 are considered easily understood by 10-11 year olds. 13-15 year old students could easily understand passages with a score of 60-70, and passages with results of 0-30 will be understood by college graduates. Reader's Digest magazine has a readability index of about 65, Time magazine scores about 52, and the Harvard Law Review has a general readability score in the low 30s. See page 57 for more details.

**General recommendation: aim for a target Reading Ease = 60-70.**

## Reminder – Readability Rules for the Technical Writer

If **ALL** your readers are graduates **and** have a good command of English then you can relax the above recommendations to some extent. However, proceed with caution!

Remember to allow for –

- New members of staff, or
- those whose first language is not English.

These readability formulae are based on **average sentence length** (number of words divided by number of sentences) and the **average number of syllables per word**.

Therefore -

- Avoid long sentences.
- Avoid long words.

Also, for general ease of reading large blocks of text:

- Avoid very long paragraphs.

This workbook scores 4% passive sentences and readability 64.8 – which is great for a training manual that might be used by delegates whose first language is not English.

**Please use this tool: in my experience, it is a very good indicator.**

Try it on your own work, as well as on a few documents that you find around the office – but be diplomatic if you tell the authors!

# Automatic Table of Contents & Index-at-the-Back

## Table of Contents (ToC)

MS Word can create an automatic Table of Contents for you, based on the correct **Heading Styles** Heading 1, 2 and 3 that you need to use in the document.

For a basic Table of Contents, you need to use:

- **Heading 1** – use shortcut **Ctrl Alt 1**
- **Heading 2** – use shortcut **Ctrl Alt 2**
- **Heading 3** – use shortcut **Ctrl Alt 3**

## Insert a Table of Contents (ToC)

- Position the cursor at the point where you want to insert the Table of Contents.
- Type the word “**Contents**” in **normal** text style to make a heading. This prevents it from appearing in its own Contents list.
- Highlight the word “**Contents**” and use shortcut **Ctrl ]** to increase the font size to, say, 16 or 18pt. (Use shortcut **Ctrl [** to decrease if you make it too big.)  
Then use shortcut **Ctrl B** to make it **bold**.
- Move to the next line.

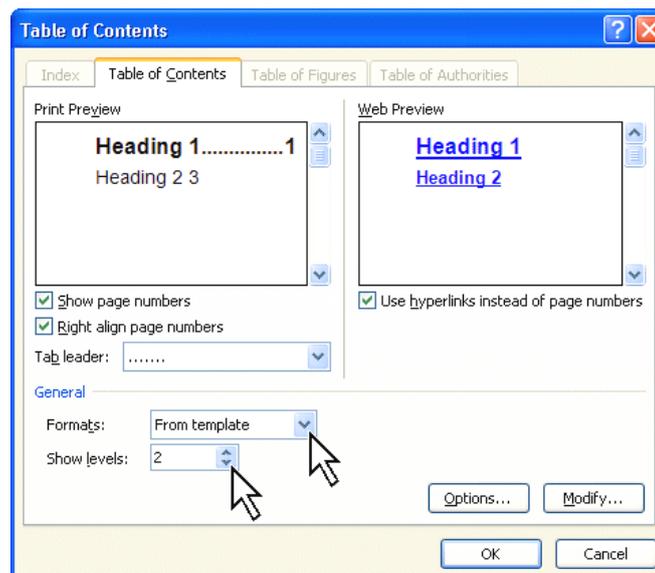
## Word 2007 – Insert the Table of Contents (for Word 2010 – see next page)

- At the top, select the **References** tab;



- Click on **Table of Contents** then lower down, click on **Insert Table of Contents**

The **Table of Contents** screen appears:

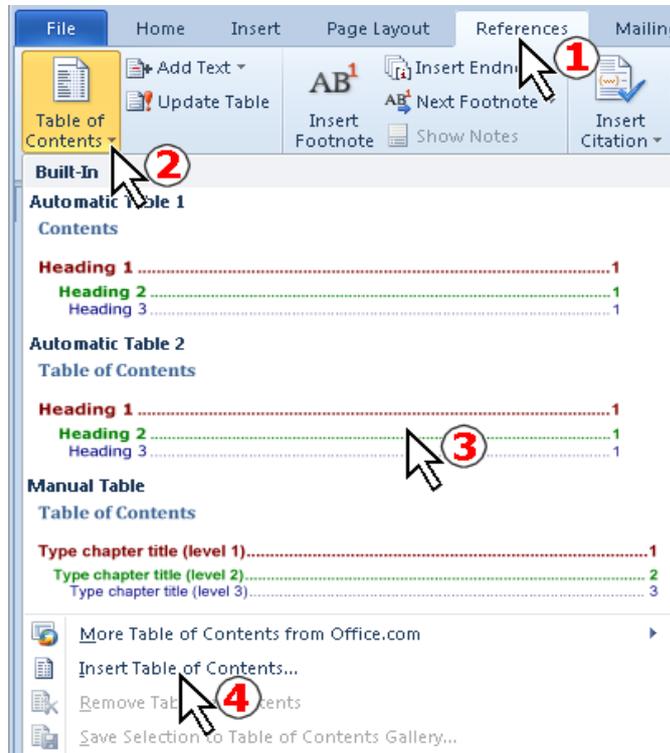


- Tick  Show page numbers and  Right align page numbers
- Select **Tab leader** ..... and **Show levels:** Select the number of heading levels that you want to include in the ToC (normally 2 or 3), and then click **OK**.

## Word 2010 –Insert the Table of Contents



- **1:** At the top menu, select the **References** tab, then click at **2: Table of Contents**



- **3:** Either select one of the pre-formatted Automatic Tables – OR
- **4:** select **Insert Table of Contents** and continue as on page 105 above.

## Update the Table of Contents (ToC)

From time to time, update the **Table of Contents** manually. This will pick up new headings with the correct page numbers as you work.

- Right-click once on the ToC and select **Update Field > Update Entire Table > OK**.

## Whole document: Update the ToC, Index and all links, manually

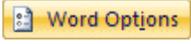
- Use shortcut **Ctrl A** to **Select All** content of the document, and then press the **F9** key.



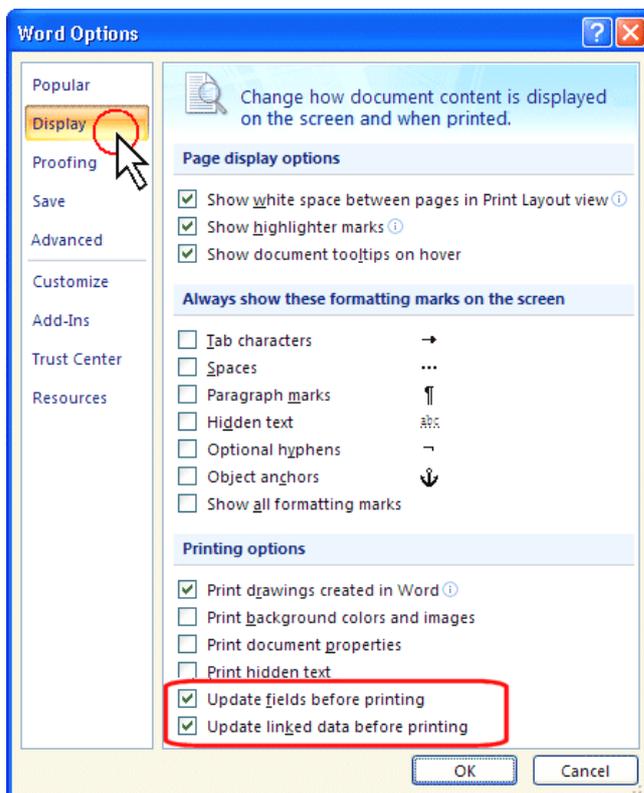
- Select **Update entire table** then click **OK**.
- Click anywhere on the page to de-select the selection.

## Automatic update ToC, Index and links before printing

I **strongly recommend** that you set MS Word to update the Table of Contents and the Index every time you start a print process.

Word 2010	Word 2007
<ul style="list-style-type: none"> <li>Use shortcut <b>Alt T O</b> OR</li> <li>Select menu &gt; File tab &gt; Options.</li> </ul>	<ul style="list-style-type: none"> <li>Use shortcut <b>Alt T O</b> OR</li> <li>Click the <b>Office button</b>  and then click <b>Word Options</b>  (at the bottom).</li> </ul>

- On the left, select **Display**.
- At Printing Options, tick:
  - Update fields before printing, and
  - Update linked data before printing,



- Then click **OK**.

**Outcome:** Every time you print, first it will automatically update both the **Table of Contents** AND the **Index**, as well as any cross-references, bookmarks and other fields. Then it sends to the printer.

## Index-at-the-Back

### THE BEST PLACE TO LOOK FOR HELP!

A good **Index** of important words or phrases can help users to find information quickly, because it is in **alphabetical order**.

This is the “Search Engine” for your manual...

		INDEX	
<b>Index</b>			
Accuracy of Meaning.....	41	Comma.....	12
Acronyms.....	29	Command Path.....	60
Active or Passive – the difference.....	18	Common misunderstandings.....	38
Add to template.....	93	Competence.....	68
Agatha Christie.....	6	Complaints were reduced.....	7
Align paragraph.....	127	Consistency in Writing.....	60
Alignment, left justify.....	94	Contents.....	103
ALL CAPS.....	61	Conversational style.....	10
Alternative Words.....	40	Convert PASSIVE Sentences to ACTIVE.....	25
Ambiguity.....	42	Convert to Bullet Points.....	59
Ambiguity and Consistency.....	60	Copyright symbol.....	126
Ambiguous words.....	41	Correct Spell-check Language.....	97

If someone looks only in the Table of Contents, it may not be much help, as it only shows a list of headings, and they’re not in alphabetical order. Headings are limited in what they can tell you.

In MS Word, you can create an Index, based on keywords and phrases that **you** tag as being significant. Normally the **Index** is located at the back of a book, (but you could put it at the front if you wish).

## Create a Word Macro for tagging Index Keywords

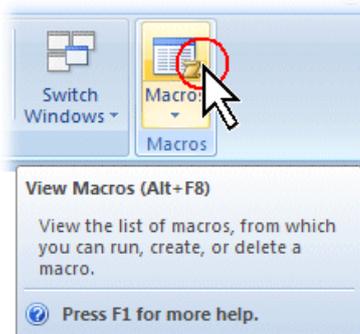
Microsoft has not provided an easy way to tag keywords correctly. Therefore, I have created a **Macro** (a short software programme) that allows you to use a keyboard shortcut to tag selected words. I have used it for more than 15 years without a problem.

You will need to add a custom Macro to your PC first.

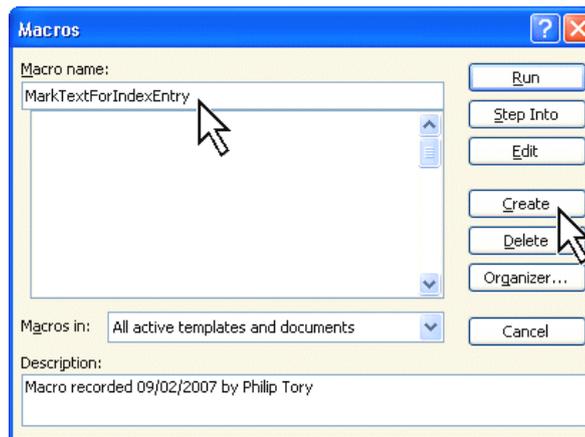
This macro is on the course **Resources CD**, or contact me and ask for a copy by email. PT

## Creating the Macro, Word 2007/2010

- Use **Alt F8**
- OR
- select **menu > View tab** and, on the right, click on the **upper** part of the **Macros** button:



The **Macros** screen appears:

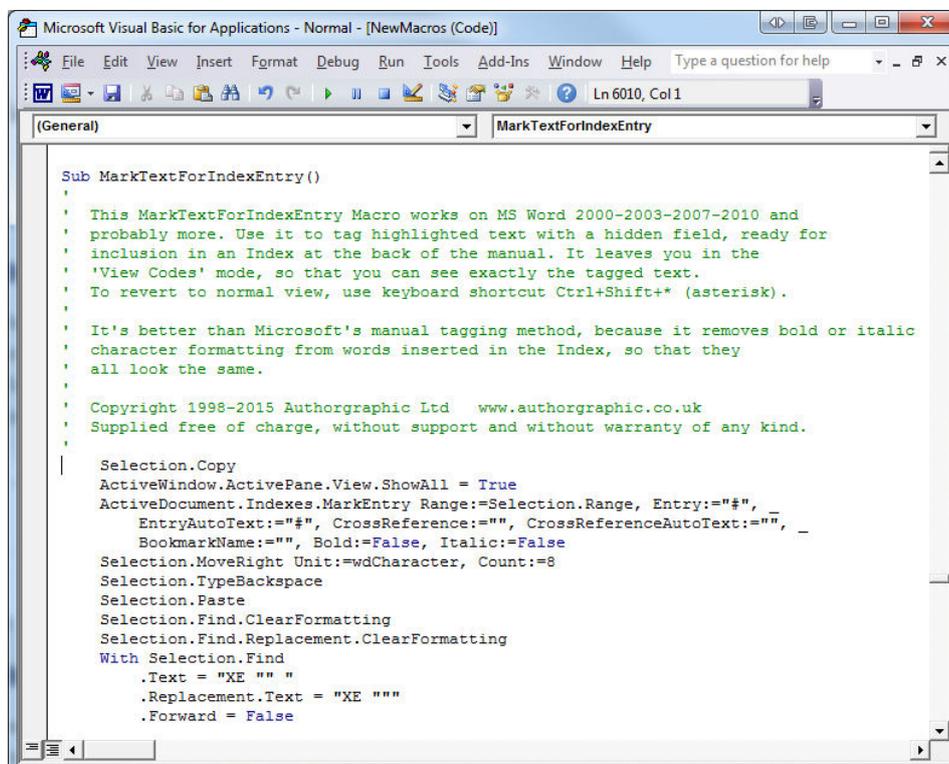


- **Macro name:** type the name **MarkTextForIndexEntry** and click **Create**. (You can't use spaces in a macro name.)

This creates the **start** and **end** statements for the macro (**Sub . . . End Sub**), like this:

```
Sub MarkTextForIndexEntry ()
'
' MarkTextForIndexEntry Macro
'
End Sub
```

- Type the body text of the macro, as shown on page 110, immediately above **End Sub** line.
- OR copy the macro from the course Resources CD, (or download from my web site) and then paste it in place of the entire macro text above. The finished version looks something like this:



Example...

- **Check:** It must begin with **Sub** and finish with **End Sub**.
- Use shortcut **Ctrl S** to save, and then shortcut **Alt Q** to quit.

## MACRO: Mark Text For Index Entry

I'm going to show you how to create this macro, and then link it to a custom keyboard shortcut

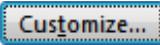
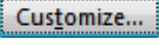
**Ctrl** **↑** **Shift** **\** or **Ctrl** **↑** **Shift** **Z** (depending on keyboard layout; see next page).

```
Sub MarkTextForIndexEntry ()
'
' MarkTextForIndexEntry Macro for MS Word 2000-2003-2007-2010 and above.
' This macro tags highlighted text with hidden code so that it is ready for
' inclusion in an Index (normally at the back of a document). It leaves you
' in 'View Codes' mode so that you can see exactly the tagged text.
' To revert to normal view, use keyboard shortcut Ctrl+Shift+* (asterisk).
'
' Copyright 1998-2017 Philip Tory, UK
' Supplied free of charge, without support and without warranty of any kind.
' We recommend that you link it to a keyboard shortcut Ctrl+Shift+\.
'
' To use it, just highlight the exact characters of the word or words required
for the index, and then press
' Ctrl+Shift+\  to tag it for inclusion in the Index. Quick-And-Easy!
'
' Note: When highlighting text at the end of a paragraph line, make sure you
' *ONLY* include the exact text characters; *DO NOT* include the invisible
' paragraph marker at the end of the line (the highlight appears to extend
' one space beyond the last letter of the highlighted text). If you include
' the paragraph marker, the macro does not work.
'
' Unlike Microsoft's manual tagging method, this removes bold or italic
' character formatting for key words inserted in the Index, so that they
' all have the same font in the final Index.
'
    Selection.Copy
    ActiveWindow.ActivePane.View.ShowAll = True
    ActiveDocument.Indexes.MarkEntry Range:=Selection.Range, Entry:="#", _
        EntryAutoText:="#", CrossReference:"", CrossReferenceAutoText:"", _
        BookmarkName:"", Bold:=False, Italic:=False
    Selection.MoveRight Unit:=wdCharacter, Count:=8
    Selection.TypeBackspace
    Selection.Paste
    Selection.Find.ClearFormatting
    Selection.Find.Replacement.ClearFormatting
    With Selection.Find
        .Text = "XE " " "
        .Replacement.Text = "XE "" ""
        .Forward = False
        .Wrap = wdFindAsk
        .Format = False
        .MatchCase = False
        .MatchWholeWord = False
        .MatchWildcards = False
        .MatchSoundsLike = False
        .MatchAllWordForms = False
    End With
    Selection.Find.Execute
    With Selection
        .Collapse Direction:=wdCollapseEnd
    End With
    With Selection.Find
        .Forward = True
    End With
' Remove character formatting to give consistent appearance in the Index:
Selection.MoveLeft Unit:=wdWord, Count:=4
    Selection.MoveLeft Unit:=wdWord, Count:=3
    Selection.MoveRight Unit:=wdCharacter, Count:=1, Extend:=wdExtend
    Selection.Font.Reset
    Selection.MoveLeft Unit:=wdCharacter, Count:=1
End Sub
```

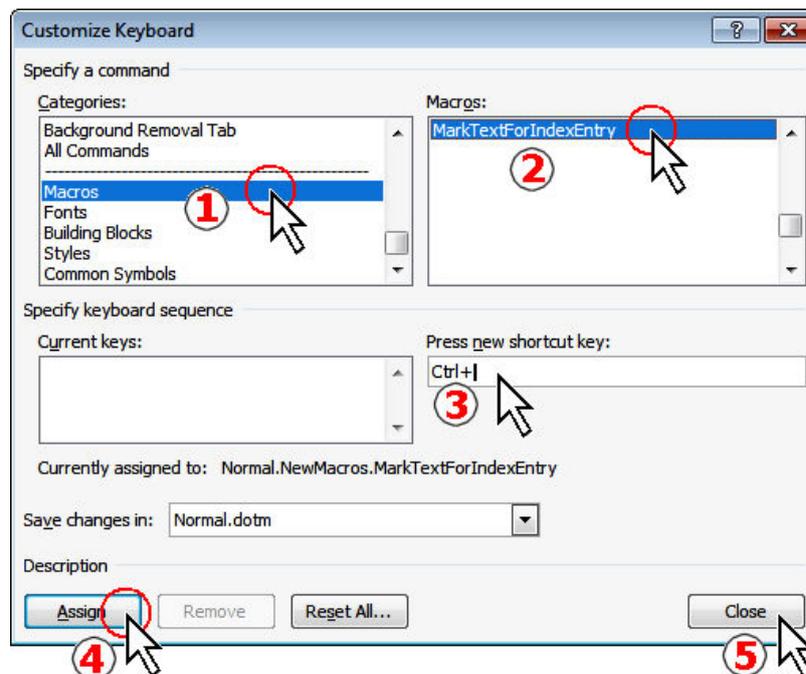
**Note:** Macro is on Course Resources CD, or download from [www.technicalwritingcourse.co.uk](http://www.technicalwritingcourse.co.uk)

## Create a Keyboard Shortcut for the Macro

Now create a keyboard shortcut that allows you to tag your selected words with an Index marker.

Word 2010	Word 2007
<ul style="list-style-type: none"> <li>Use shortcut <b>Alt T, O</b></li> <li>OR</li> <li>Select <b>menu &gt; File &gt; Options</b>.</li> <li>On the left, select <b>Customise Ribbon</b>.</li> <li>At the bottom, click the <b>Keyboard shortcuts: Customize</b> button:</li> </ul> <p>Keyboard shortcuts: </p>	<ul style="list-style-type: none"> <li>Use shortcut <b>Alt T, O</b></li> <li>OR</li> <li>Click the <b>Office button</b>  and then click <b>Word Options</b>  (at the bottom).</li> <li>On the left, select <b>Customise or Customise Ribbon</b>.</li> <li>At the bottom, click the <b>Keyboard shortcuts: Customize</b> button:</li> </ul> <p>Keyboard shortcuts: </p>

The **Customize Keyboard** screen appears:



**1 Categories:** Scroll down and click on **Macros**.

**2 Macros:** (Scroll down if necessary) and click to select **MarkTextForIndexEntry**.

**3 Press new shortcut key:** Keyboards differ, so choose 3 keys at the bottom left-hand corner of the keyboard. Click in the box and press the shortcut, e.g. **Ctrl ↑Shift \** or **Ctrl ↑Shift Z** ...



**4** Click **Assign** and then

**5** click **Close**.

You are now ready to tag your selected text for use in the Index.

## How to Tag Keywords for the Index

### NOTE CAREFULLY:

- Make sure you **only highlight the required words**, and **NOT** the space at the end. **Especially** if your tag includes a word at the end of a heading or sentence.
  - 1: It helps if you first **insert a space at the end of the heading**,
  - 2: then **select the exact words excluding the space**. (If you accidentally capture the hidden paragraph marker ¶, the macro fails: use **Ctrl Z** a few times to **undo**).

- Tag the words using a keyboard shortcut to run the macro.

When finished, this leaves you in the “Reveal Codes” mode, showing you the words that it has tagged for the Index, like this example:

• This switches on the “Reveal Codes” mode, and tags the words as Index words, like this: ¶

You can switch the Reveal Codes mode ON and OFF using the toolbar > ¶ button, or quicker still, use the keyboard shortcut **Ctrl ↑Shift 8**. (Remember this one – it’s useful!)

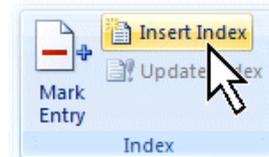
## How to Insert a Keyword Index-at-the-back

To insert an **Index of keywords** at the back of your document:

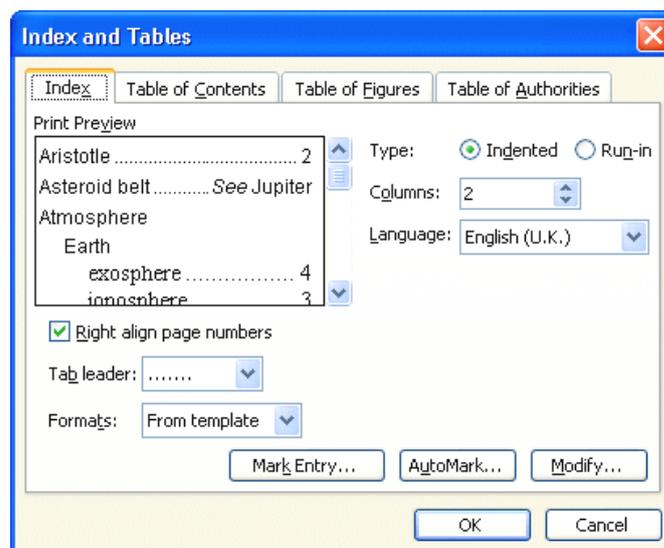
- Use shortcut **Ctrl End** to go to the very end of the document and start the Index on a new page. Use the shortcut **Ctrl Enter** for a **hard page break**.
- Type the word **Index** & apply a heading style, say, Heading 1 (shortcut **Ctrl Alt 1**).
- Go to a new line.

### Word 2007/2010

- Select the **References** tab > **Index** section > click **Insert Index**.



The **Index and Tables** screen appears. Select the **Index** tab:



- Make settings as required. I recommend you use those shown above. Then click **OK**. This inserts an automatic **Index** based on the tagged keywords that you have used in the document. You may need to put a **manual page break** **Ctrl Enter** before the word “Index”.

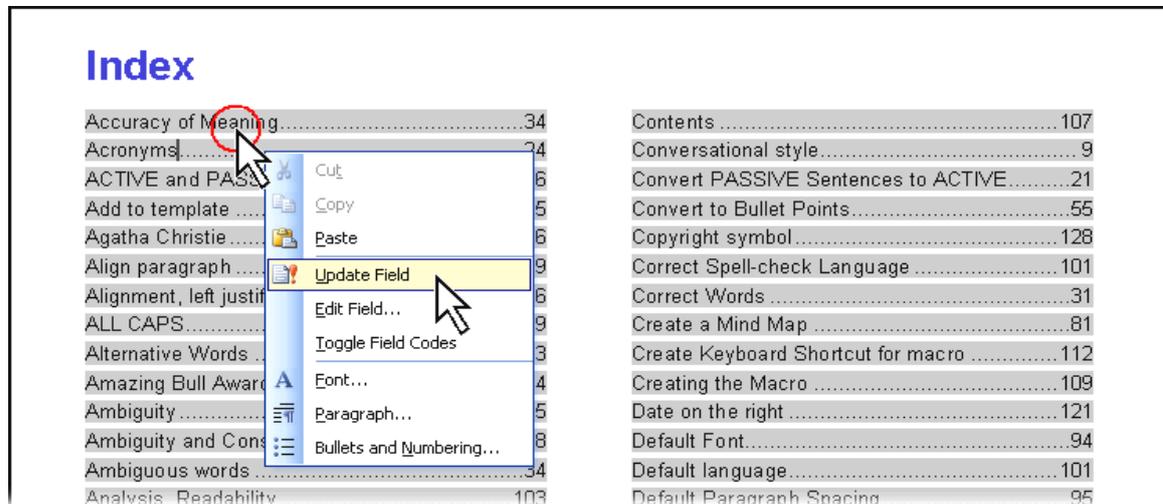
## Identifying Keywords

### How do you know which words to tag as keywords for the Index?

- **IDENTIFY.** Think how someone uses an Internet search engine.
- What thoughts are in the user's mind if they want to find something on the page you're tagging?
- Include verbs / actions, such as:
  - 'Add user'
  - 'Change password'
  - 'system backup'
  - 'Printing reports'.
- Reference words / phrases:
  - 'Help desk'
  - 'Modem settings'
  - 'Disclaimer'.
- Include alternatives: '**amend** address', '**change** address', '**update** address';
  - OR stick to one only throughout the documentation
- Tag:
  - significant screen text
  - labels on equipment
  - names of other reference documents.

## Update the Index

- To update the Index so that it picks up new index keywords and the correct page numbers, **right-click** on the table and select **Update Field**.



See **Automatic update ToC, Index and Links** before printing on page 107.



## Exercises on Identifying Keywords for the Index

Which words would you tag for the Index-at-the-back?

		INDEX	
<b>Index</b>			
Accuracy of Meaning.....	41	Comma.....	12
Acronyms.....	29	Command Path.....	60
Active or Passive – the difference.....	18	Common misunderstandings.....	38
Add to template.....	93	Competence.....	68
Agatha Christie.....	6	Complaints were reduced.....	7
Align paragraph.....	127	Consistency in Writing.....	60
Alignment, left justify.....	94	Contents.....	103
ALL CAPS.....	61	Conversational style.....	10
Alternative Words.....	40	Convert PASSIVE Sentences to ACTIVE.....	25
Ambiguity.....	42	Convert to Bullet Points.....	59
Ambiguity and Consistency.....	60	Copyright symbol.....	126
Ambiguous words.....	41	Correct Spell-check Language.....	97

On the following pages are two keyword exercises, each spanning TWO pages →

- Use a **highlight pen** to mark the words or phrases you would tag for the Index. →

→ Your Notes on **Exercises 14 and 15 Highlight Keywords & Phrases** →

After you finish the exercises on the following pages 116 and 118, answer these questions:

**1. How could you apply this in your writing at work? How might you use this in future?**

**2. What difficulties would this overcome?**

**3. What kinds of existing documentation would benefit?**

**4. Discuss your ideas with somebody else.**

## Exercise 14 – Highlight Keywords & Phrases

The following extract comes from a **Software User Manual**. Use a **highlight pen** to mark all the words or phrases that you would tag for the Index.

### Adding QSoft Users

*menu > Utilities > User Maintenance*

This Help topic tells you how to add new Users onto QSoft, set their system role, and set a new password.

There are three categories of QSoft user.

- Administrators, who can access all facilities in QSoft.
- Users, who can access most facilities, but cannot access system setup features.
- No Role, not defined yet – still in development. Do not use this for the time being.

To change somebody's **role**, please see below.



**Note:** You must be a QSoft Administrator to access this facility.

### View list of Users

- Go to *menu > Utilities > User Maintenance*.

The **User Details** screen appears.

User Full Name	User Name	Role	Remarks
Philip Tory	ptory	Administrator	
Jane Matthews	JaneM	User	
Robert Wilkins	RobertW	User	

User Full Name

User Name

Password

Role

Remarks

Example User Details window...

Here you can see the current users on the system.

### Add New User

- Use **Ctrl+N** to add a New User.
- Enter their full name.
- Then enter their login User Name. For example, for John Williamson you might use the abbreviation "JohnW".
- Enter the person's new password. Type it carefully - there is no double-check for typing errors here. Make a note of what it is and hand it to the new user. Remember to keep it secret.  
At the Role drop-down, select their Role as a QSoft User: will they be an Administrator, or an ordinary User?  
( The 'No Role' function is not available yet; subject to further development).
- Optionally, you can enter remarks about this person; it could be anything. You might want to keep their home telephone number here, for example.
- Finally, use **Ctrl+S** to save changes and close.

## Issue New Password

You have to be a QSoft Administrator to issue new passwords.

If a member of your staff has forgotten their password, you can come into this screen and issue them with a new one.

- View the [list of users](#).
- Click to select the relevant person in the list.
- Click in the Password field on the screen where you can enter information, or where information is displayed. Delete the asterisks and enter a new password.  
( ➡ See [Choosing a Password](#) on page 37.)
- For security reasons, QSoft does not show you the characters as you type. (It does not double-check at this point for typing errors, so type carefully!)
- Tell the new user, in private, what their new password is. This will be valid next time they log in.
- It is good password security practice if the user changes their password next time they log in.
- Finally, use **Ctrl+S** to save changes and close.

## Change Role

QSoft users have three categories - Administrator - User - No Role.

- View the [list of users](#).
- Click to select the relevant person in the list.
- At the Role drop-down, select a new role level.
- Finally, use **Ctrl+S** to save changes and close.

➡ See related topics: [Choosing a Password](#) on page 37 and [Changing your Password](#) on page 48.

(Passives = 2%, Reading ease=70.4)

1. When you have finished, swap your work with somebody else.
2. Check their key phrase selections.
  - Do you agree?
  - Did they miss any?
  - Did they mark any that would not be valid?
  - Why are they not valid? Discuss.

**DO NOT TURN TO THE NEXT EXERCISE YET!**

**After you've finished – see the answer on p. 140**

## Exercise 15 – Highlight Keywords & Phrases

The following extract comes from documentation for a Ship Tracking System.

Use a highlight pen to mark the words all the words or phrases that you would tag for the Index.



### Find Ship Details

*Oilspace > Ship Directory screen*

This topic tells you how to find a Ship and look up its details. For information purposes only.

You can look up the details of any ship listed in the World Shipping Directory Fairplay database. It shows you information such as Speed and Consumption, Technical Information, Commercial Information, Name History, tonnage, deadweight and so on.

- In the **Ship Directory** pane, click in the **Name** field and delete any name that is already there.
- Start to type the new name. You can type the first few letters, or the whole name if you wish. (1)
- Press **Enter**, OR click on **Search**. (2) The search will find any name that matches the letters you type in, wherever they appear in the ship's name. For example, if you type "tain", it will find names that include "Captain".

Name	DWT	Year	Flag	Draught	LOA
BALTIC CAPTAIN I	37,389	2000	CYP	11.2	182.5
BALTIC CHALLENGER	37,300	2003	IOM	11.2	182.55
BALTIC CHAMPION	37,343	2003	IOM	10.9	182.55
BALTIC CHIEF I	37,000	2000	CYP	10.9	182.55
BALTIC COMMANDER I	37,000	2000	CYP	11.2	182.5
BALTIC COMMODORE	37,343	2003	IOM	10.9	182.55
BALTIC CRUSADER	37,300	2004	IOM	11.2	182.55

Example [search for ship](#) "Baltic Captain I"...

The system searches and displays a list of matching names. (3)

- To view the details of this Ship, click on the required Name in the list. (3)
- If the name does not appear in this view, click on Next at the bottom of the Ship Directory screen. Wait for the screen to refresh and show you the next set of matching ship names. (To return, click Prev to see the previous set.)

The Ship Information screen appears:

The screenshot shows a 'Ship Information' window with several tabs: General Information, Technical Information, Speed and Consumption Information, Commercial Information, and Name History. The General Information tab is active, displaying details for the ship 'BALTIC CAPTAIN I'. The Commercial Information tab contains several blue links: 'Known fixtures', 'Detention and accident history', 'Warranted description', and 'Questionnaire'. An 'OK' button is located at the bottom right of the window.

General Information		Technical Information	
Name:	BALTIC CAPTAIN I	DWT:	37389
Last name:	Baltic Captain	Year:	2000
Original name:	Baltic Captain	Flag:	CYP
Capacity:	0	Draught:	11.20
Gross tonnage:	23235	Tanks:	12
Net tonnage:	10107	LOA:	182.5
Double Bottom:	N		
Double Side Skins:	N		
Speed and Consumption Information		Commercial Information	
Ballast speed:	Primary: Secondary:	Current owner:	Last 3 cargoes:
Laden speed:	Primary: Secondary:	Next open port:	Opening Date:
Canal/port speed:	Primary: Secondary:	<a href="#">Known fixtures</a>	
Disch.	Primary: Secondary:	<a href="#">Detention and accident history</a>	
		<a href="#">Warranted description</a>	
		<a href="#">Questionnaire</a>	
Name History			
2002	BALTIC CAPTAIN I		
2000	Baltic Captain	Original Name	
1999	Androcles		



**Note:** The blue Commercial Information links are not active in this version.

- When you have finished, click **OK** to return.

## Change number of rows to view

The Ship Directory screen shows you a preset number of rows of search data.

The screenshot shows the 'Ship Directory' window with search criteria: Name 'baltic c', Return '10' rows, DWT 'min dwt - n', and Year built 'min year - n'. A 'search' button is visible. Below the search criteria is a table of search results with columns: Name, DWT, Year, Flag, Draught, and LOA. The first row is highlighted, and a mouse cursor is pointing to the 'Return' field.

Name	DWT	Year	Flag	Draught	LOA
<a href="#">BALTIC CAPTAIN I</a>	37,389	2000	CYP	11.2	182.5
<a href="#">BALTIC CHALLENGER</a>	37,300	2003	IOM	11.2	182.55
<a href="#">BALTIC CHAMPION</a>	37,343	2003	IOM	10.9	182.55
<a href="#">BALTIC CHIEF I</a>	37,000	2000	CYP	10.9	182.55
<a href="#">BALTIC COMMANDER I</a>	37,000	2000	CYP	11.2	182.5
<a href="#">BALTIC COMMODORE</a>	37,343	2003	IOM	10.9	182.55
<a href="#">BALTIC CRUSADER</a>	37,300	2004	IOM	11.2	182.55

- To change the number of rows to view, click in the **Return**  rows field, change the number and press **Enter**.

(Passives = 0%, Reading ease=78.3)

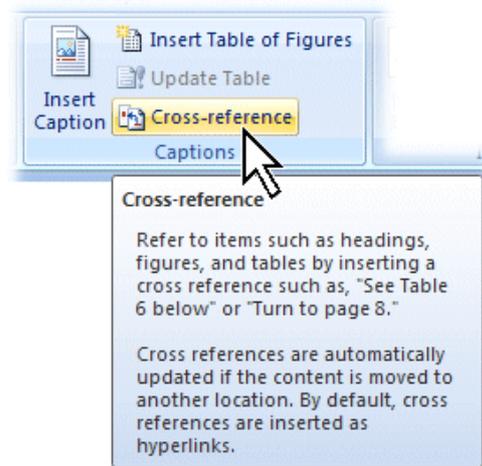
1. When you have finished, swap your work with somebody else.
2. Check their key phrase selections.
  - Do you agree?
  - Did they miss any?
  - Did they mark any that would not be valid?
  - Why are they not valid? Discuss.

**After you've finished – see the answer on p. 142**

## Navigation: Inserting Cross References / “See also” hyperlinks

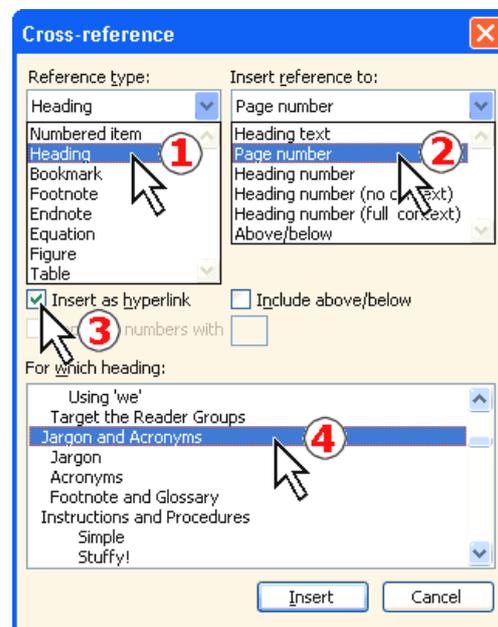
It is useful to provide cross-reference links to other sections in a Manual; for example: “**See also ‘Jargon and Acronyms’ on page 31.**” But how do you insert a page number that will update automatically as you add new content to the manual?

- First, decide where you want to place the cross reference, and type the necessary text; for example, “ **See also ‘Jargon and Acronyms’ on page** “. Now, instead of typing the page number manually, position the cursor where you want to insert the page number reference. Then –
- At the top menu, select the **References** tab.
- Then click on **Cross-reference**:



The **Cross-reference** screen appears:

- 1 Reference Type:** Select your chosen target type, normally **Heading**, or select what you need to hyperlink to.
- 2 Insert reference to:** You might select **Page number**, or perhaps **Heading number**.
- 3 Insert as hyperlink:** Tick this check box.
- 4 For which Heading:** Scroll down and select the item that you want to refer to.



- Click **Insert** and then click **Close**.

This inserts the “hyperlink” that displays the page number.

Remember to set the links to update automatically before printing – see **Automatic update before printing** on page 107.

**Note:** While you are working in Word, you can use **Ctrl+Click** on the hyperlink, and you will jump to that page number.

## Tips for Layout



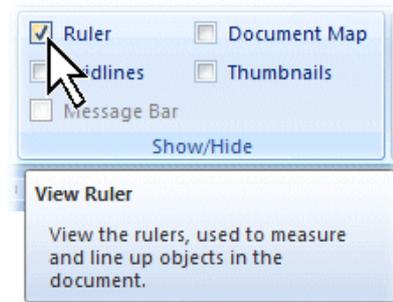
Some reminders, in case you have forgotten...

### Tips for setting Tabs

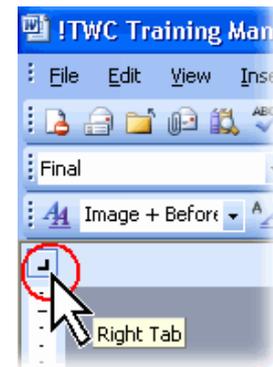
Sometimes you want to put a short heading on the left and then, say, a date on the right.

#### Word 2007/2010

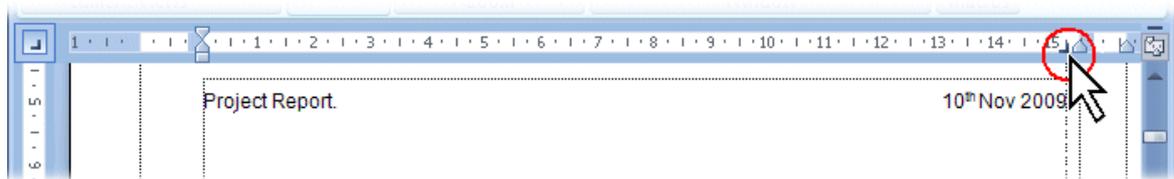
- Make sure **View** tab > **Show** > **Ruler** is selected (click to tick):



- Type your text.
- \*Click on the small Tab control button at the top left of the page area. Click again until it changes to 'Right Tab' like this :



- Point the mouse to somewhere to the right-hand end of the ruler, and click. This inserts the tab marker. Drag it to the right-hand edge:



- Now return to the page text area. Click at the **end** of the line of text and press the **Tab** key. This now inserts a right-aligned tab.
- Now type your text, e.g. the Date (or whatever you want to appear on the right). Job done!

## Tips for working with Tables

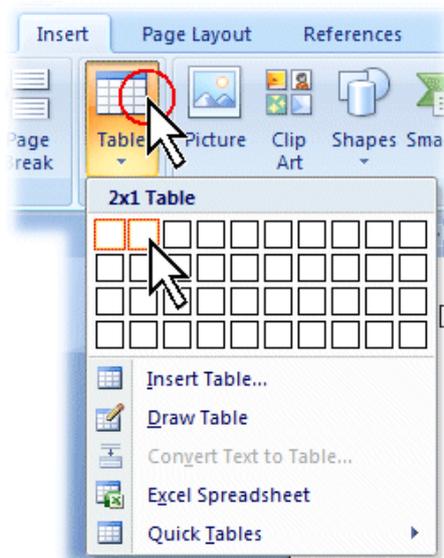
Many of you will have used Tables to lay out information in rows and columns. Here are some useful tips.

### Use tables to keep images beside text

**Unstable floating images:** You may have noticed that trying to float images beside text is unstable. The picture never seems to stay in place, and the text flow around it is unpredictable – it can jump out of position by the smallest editing of nearby text.

To overcome this problem, use a 2x1 table with invisible borders. Put the image on one side and the text the other side:

- Select **top menu > Insert > Table**. A drop-down menu appears.
- Hover over the second cell in the top row, and the screen shows “**2x1 Table**”, then click to select:



This creates a simple table like this:

--	--

- Click in the **left-hand** cell.
- Hold the **↑Shift** key down and then click in the **right-hand** cell. This selects both cells of the table.

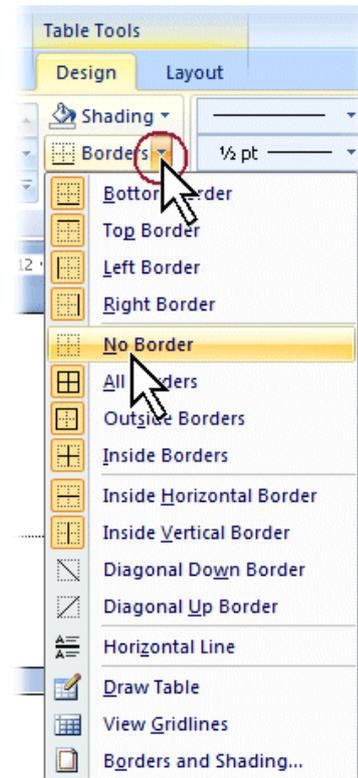
## Word 2007 / 2010

- **First, click in the table.** Then the **Design** tab appears at the top toolbar.

- Click the **Design tab** at the top..... →

- Click on **Borders**, and a drop-down menu appears →

- Select **No Border**: ..... →



You should now see the table outlined in faint grey lines, like this:



If you cannot see the table lines at all, you need to switch on an option to **Show text boundaries**, like this:

Word 2010	Word 2007
<ul style="list-style-type: none"> <li>• Use shortcut <b>Alt T, O</b> OR</li> <li>• Click menu &gt; File &gt; Options.</li> <li>• On the left, select <b>Advanced</b>.</li> <li>• On the right, scroll down nearly halfway to the <b>Show document content</b> section, then tick the checkbox beside <b>Show text boundaries</b>, and then click <b>OK</b>.</li> </ul>	<ul style="list-style-type: none"> <li>• Use shortcut <b>Alt T, O</b> OR</li> <li>• Click the <b>Office button</b> , then click <b>Word Options</b>  (at bottom).</li> <li>• On the left, select <b>Advanced</b>.</li> <li>• On the right, scroll down nearly halfway to the <b>Show document content</b> section, then tick the checkbox beside <b>Show text boundaries</b>, and then click <b>OK</b>.</li> </ul>

The lines that you can see on screen will not actually appear in print – they are just there to show you the cell boundaries. If you want to check, use **menu > File > Print Preview**.

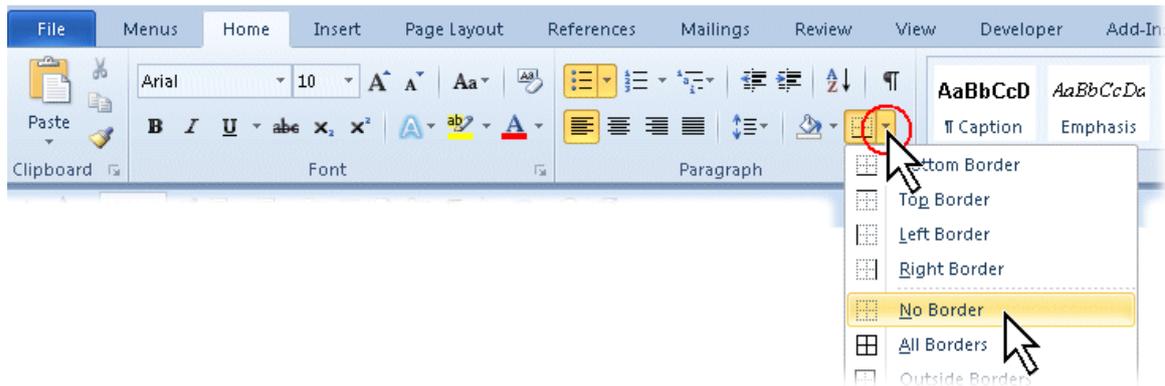
[I added grey lines into the example above so that you can see what I mean.]

## How to Locate an Image beside Text

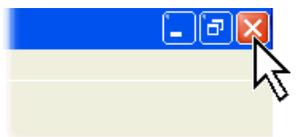
- Create a table of one row and two columns.
- Paste the image into one cell, and type your accompanying text into the other, like this example:

	<ul style="list-style-type: none"> <li>• To close your application, click on the red <b>Close</b> icon at the top right-hand corner of the screen.</li> </ul>
---	---

- Now make the borders invisible. Select the whole table and then click the “**No Border**” icon. (This screenshot is from Word 2010):



This is the result:

	<ul style="list-style-type: none"> <li>• To close your application, click on the red <b>Close</b> icon at the top right-hand corner of the screen.</li> </ul>
---	---

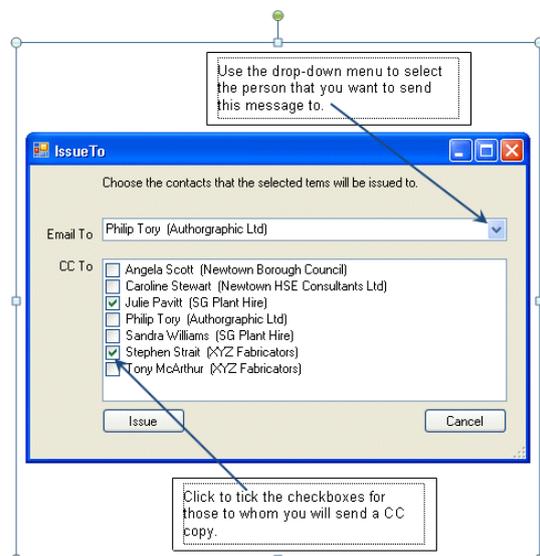
The image and the text will now sit beside each other in a well-behaved and predictable manner.

If you move the table down to another page by inserting text above it, the complete table will jump to the next page, with the image in perfect alignment.

The same technique is used in web page design.

## Annotating Images

- See Annotating Images and Diagrams on page 66.



## Learn your Keyboard Shortcuts!

- Learn your keyboard shortcuts!  
It's much quicker than using a mouse.
- Research shows that most tasks in Microsoft Word are performed **three times faster** with the keyboard instead of the mouse.



I have highlighted those that I find particularly useful, like this: 

### Quick Commands that move the Cursor

**Move cursor to a character, word, paragraph, column, or object**

MOVE ACTION	KEYS
One character to the left	<b>Left Arrow</b>
One character to the right	<b>Right Arrow</b>
One word to the left	<b>Ctrl+Left Arrow</b>
One word to the right	<b>Ctrl+Right Arrow</b>
One paragraph up	<b>Ctrl+Up Arrow</b>
One paragraph down	<b>Ctrl+Down Arrow</b>
One column to the left (in a table)	<b>Ctrl+Up Arrow</b>
One column to the right (in a table)	<b>Ctrl+Down Arrow</b>



**Move cursor to a line, to a page, to a screen, to the beginning or end of a document, or to the previous revision**

MOVE ACTION	KEYS
Go up one line	<b>Up Arrow</b>
Go down one line	<b>Down Arrow</b>
Go to the end of a line	<b>End</b>
Go to the beginning of a line	<b>Home</b>
Go up one screen	<b>Page Up</b>
Go down one screen	<b>Page Down</b>
Go to page number ...	<b>Ctrl+G</b>
Go to the very end of a document	<b>Ctrl+End</b>
Go to the very beginning of a document	<b>Ctrl+Home</b>
Go back to last edit position (stores 3 places). This is <b>very useful</b> if you want to return to the place you were last working when you closed the document. Just open it again and use <b>Shift+F5</b> .	<b>Shift+F5</b>



## Edit commands

EDITING	KEYS
Undo	<b>Ctrl+Z</b>
Repeat	<b>Ctrl+Y</b>
Clear	<b>Delete</b>
Cut text or graphics (this removes the original from its current position so that you can paste it somewhere else).	<b>Ctrl+X</b>
Copy selected text or graphics.	<b>Ctrl+C</b>
Paste text or graphics. Paste Special	<b>Ctrl+V</b> <b>Ctrl+Alt+V</b>
Select All (whole document)	<b>Ctrl+A</b>
Find	<b>Ctrl+F</b>
Replace	<b>Ctrl+H</b>
Go To (e.g. page number)	<b>Ctrl+G</b>
Reveal codes <code>{XE."Reveal codes."}¶</code> (toggle action)	<b>Ctrl+Shift+8</b>



## Deleting text and graphics

DELETING	KEYS
Delete one character to the left of the insertion point	<b>Backspace</b>
Delete one word to the left of the insertion point	<b>Ctrl+Backspace</b>
Delete one character to the right of the insertion point	<b>Delete</b>
Delete one word to the right of the insertion point	<b>Ctrl+Del</b>
Cut (delete) selected text	<b>Ctrl+X</b>
Undo the last action	<b>Ctrl+Z</b>



## Inserting special codes

INSERT CODES	KEYS
Manual line break - moves you to the next line within the same paragraph.	<b>Shift+Enter</b>
Manual page break – forces a ‘start new page’.	<b>Ctrl+Enter</b>
Non-breaking hyphen (stops a word splitting across a line break)	<b>Ctrl+Shift+Hyphen</b>
Non-breaking space (stops two words splitting across a line break). For example, if you want “9 mm” to stay together at a line break.	<b>Ctrl+Shift+Spacebar</b>
Copyright symbol ©	<b>Ctrl+Alt+C</b>



## Changing Font Size and change Word Case

FONT SIZE / CASE ACTION	KEYS
<b>Increase</b> font size of selected characters by 1 point.	<b>Ctrl+] ]</b>
<b>Decrease</b> font size of selected characters by 1 point.	<b>Ctrl+[ [</b>
Change the case of a <b>word Word WORD</b> . Highlight the word(s) you want to change, and then use →	<b>Shift+F3</b>



## Using shortcut keys to format paragraphs

### Setting paragraph alignments and indents

POSITIONING ACTION	KEYS
Centre a paragraph	<b>Ctrl+E</b>
Justify a paragraph	<b>Ctrl+J</b>
Left align a paragraph	<b>Ctrl+L</b>
Right align a paragraph	<b>Ctrl+R</b>
Indent a paragraph from the left	<b>Ctrl+M</b>
Remove an indent from the left	<b>Ctrl+Shift+M</b>
Create a hanging indent	<b>Ctrl+T</b>
Reduce a hanging indent	<b>Ctrl+Shift+T</b>



### Applying Styles

STYLE ACTION	KEYS
Apply the <b>Normal</b> style	<b>Ctrl+Shift+N</b>
Apply the <b>Heading 1</b> style	<b>Ctrl+Alt+1</b>
Apply the <b>Heading 2</b> style	<b>Ctrl+Alt+2</b>
Apply the <b>Heading 3</b> style	<b>Ctrl+Alt+3</b>
Apply the <b>List Bullet</b> style	<b>Ctrl+Shift+L</b>
Remove character styles from selected text	<b>Ctrl+Space</b>



## Final Exercise – Start your own Documentation

Start your own Technical Writing projects:

- Define the reader group(s)
- Do a Mind Map
- **Forget** how you've done it before: take a fresh look!
- Make it **TASK-based** where possible - what do people need to **DO**?
- Create the Table of Contents
- Add the Introduction, Help Desk details, Reference topics etc.
- Remember to Manage the user's Expectations.

## Summary

We have covered:

- How to write Good Documentation
- How to use Plain English
- How to plan your work using Mind Maps \*
- How to use MS Word to analyse our work.
- MS Word Hints and Tips.

---

# END OF MODULE 3

---

# **APPENDIX**

**Answers to Exercises**

**and**

**Further Reading**

No cheating!

Please do the exercises  
**BEFORE** you look at  
the answers!

## Answers 2 – Convert Long Sentences to Short

See the exercise on page 16.

### REWRITE THESE LONG SENTENCES INTO SHORT AND MEDIUM SENTENCES.

“The Document Administrator shall check that procedures have been formatted correctly, including the Footer or for Mechanical Integrity documents, the Header, (Issue No. and Date, Revision No and date, Document Number and Title, Page Numbering and review period interval etc); whether any hard copies are required and if so the distribution and copy numbers, or alternatively for electronic only masters, that no hard copies are required, but showing who needs to be communicated with if the document should change (by job title); the format should comply with the document control template.”  
(91 words, Reading Ease 24.5)

The Document Administrator must check that procedures are formatted correctly.

- Footers (or for Mechanical Integrity documents, the Headers) must include:
  - Issue No. and Date
  - Revision No. and date
  - Document No. and Title
  - Page Numbering
  - Review period interval, etc.
- Are any hard copies required? If so, check the distribution and copy numbers. Alternatively, for electronic-only masters, check that no hard copies are required.
- If the document changes, do the procedures show who to inform (by job title)?
- Does the format comply with the document control template? (Reading Ease 47.3)

### REWRITE USING SHORT AND MEDIUM SENTENCES.

“The Clinical Team Leader or designate (CTL): Develops the Clinical Management Plan (CMP) (Operating Procedure CS.OP.CM010, Clinical Management Plan), defines the Data Query process, co-ordinates the monitoring activities of the Monitor, including development and distribution of monitoring guidelines, and review of the associated site visit report.”  
(Reading Ease 0)

SHORT SENTENCES:

The Clinical Team Leader or designate (CTL):

- Develops the Clinical Management Plan (CMP). Refer to Operating Procedure CS.OP.CM010, Clinical Management Plan.
- Defines the Data Query process.
- Co-ordinates the monitoring activities of the Monitor. This includes developing and distributing the Monitoring Guidelines, and reviewing the associated Site Visit Report.

(Reading Ease 11)

### QUESTION

- How do these this compare with the original?
- Which is easier to understand?

**← Your Notes: Answers 2: Convert Long Sentences to Short**

← What have you learned from the answer opposite? Write yourself a reminder below:

**1. How could you apply this in your writing at work? How might you use this in future?**

**2. What difficulties would this overcome?**

**3. What kinds of existing documentation would benefit?**

**4. Discuss your ideas with somebody else.**

## Answers 4 – Convert PASSIVE Sentences to ACTIVE

See the exercise on page 24.

### Before:

The following activities **will be conducted** in accordance with the Research Management Plan (RMP). Data Collection Files (DCFs) may **be generated by** Data Management (DM) or Research staff during the data query process. DCFs may **be provided** to the Supervisor for resolution at the testing site as specified in the Scope of Work and the RMP. If DCFs **are provided** directly to the site **by** someone other than the Supervisor, the CTL will request that copies of the DCFs **be provided** to the Supervisor.

The visit timing **is to be confirmed** with the relevant study site staff, and a confirmation letter **is to be provided** detailing to the investigator what **is to be accomplished** at the visit, if these details **were not included** in the previous site visit follow-up letter.

(Passive 100%, Reading ease 37.2)

### REWRITE THE PROCEDURE USING ACTIVE SENTENCES = Subject > Verb > Object

**After:** Here is a suggested solution – you might have a version that is similar to this:

Conduct the following activities according to the Research Management Plan (RMP).

Data Management (DM) or Research staff may generate DCFs during the data query process. You may provide DCFs to the Supervisor for resolution at the testing site as specified in the Scope of Work and the RMP. If someone other than the Supervisor provides DCFs directly to the site, the CTL will ask you to provide copies to the Supervisor.

Confirm the visit timing with the relevant study site staff. If the previous site visit follow-up letter did not include details of what to accomplish at the visit, write a letter to tell the investigator.

(Passive 0%, Reading Ease 46.8)

### QUESTIONS

- How does this compare with the original?
- Which would be easier to understand?

**← Your Notes: Answers 4 – Convert PASSIVE Sentences to ACTIVE**

← What have you learned from the answer opposite? Write yourself a reminder below:

**1. How could you apply this in your writing at work? How might you use this in future?**

**2. What difficulties would this overcome?**

**3. What kinds of existing documentation would benefit?**

**Discuss your ideas with somebody else.**

## Answers 5 –Find the Passive Phrases

See the exercise on page 26.

Here, the passive sentences **have been highlighted**. There is also a cross **X** in the right-hand margin beside any sentence that does not define clearly who has to do the (passive) action.

### Conducting a Supervisory Visit

A Supervisor must address all activities described below over the course of Supervisory the study in accordance with the RMP (Research Management Plan) or equivalent documentation and instructions. However, not all of the activities described in this section may necessarily **be performed** at each interim Supervisory visit.

- Meet with study site staff and/or Investigator to obtain an overview of study progress and any issues since the previous contact, and to identify any issues that require additional site training.
- Ensure that all new and on-going Immediately Reportable Adverse Events (IRAEs) and Unanticipated Adverse Device Effects (UADEs) **have been documented, reported and followed** up appropriately.
- Verify continued acceptability of study site staff and facilities and **discuss any planned changes**. If changes occur, check whether the appropriate RDs **are updated**.
- Determine the status and review the time line for completing pending and outstanding issues from previous contact(s).
- Verify compliance with the informed consent procedures and conformance with the required subject visit schedule, and confirm whether all study-specific procedures **were performed** after written consent **was obtained**.
- Review the accuracy, completeness, and legibility of the CRF entries, DCFs, source documents, and other trial-related records against each other, and ensure that any known deviations from the protocol **are documented**.
- Review the Investigator Site File or equivalent and determine whether the investigator or designate is maintaining the RDs, Research Study Documents (RSDs), forms, logs and other study documents appropriately.
- Check whether any changes to data on CRFs **were made by** authorised study site staff and **were initialled and dated**.
- Check that the Investigator has verified the accuracy of all DCFs, if applicable.
- Check that resolved DCFs **are filed** at the study site.
- Check whether the Investigator or authorised designate has reviewed all research results, including abnormal laboratory results.
- Inspect the storage conditions of laboratory kits, expiration date and adequacy of supplies.
- Document and discuss with the Investigator and/or designated staff any issues relating to the handling and documentation of IP, including storage conditions, IP records, reconciliation, expiration date and adequacy of supplies.

(Passives 41%. Reading Ease 17)

**← Your Notes: Answers 5 – Find the Passive Phrases**

← What have you learned from the answer opposite? Write yourself a reminder below:

**1. How could you apply this in your writing at work? How might you use this in future?**

**2. What difficulties would this overcome?**

**3. What kinds of existing documentation would benefit?**

**Discuss your ideas with somebody else.**

**Answers 9 – Simplify and translate into Plain English (1)**

See the exercise on page 52.

'Certain of the components comprising our electrical appliances have inherent characteristics the effect of which, whether before or after such components have been introduced into appliances or during such introduction, make it desirable, in the interests of **safety**, for the introduction of spare components into, and/or the repair of, our appliances to be carried out by a **competent person**. The parts now supplied are done so on the clear understanding that such introduction and/or repair will not be otherwise **interfered with** beyond the extent of normal **cleaning** as recommended in the operating instructions, and that no **liability** attaches to ABC Electrical Appliances Limited for any damage or personal injury from such introduction and/or repair.'

**(117 words, Passive sentences 100%, Reading Ease = 0)**

*(From a Safety Leaflet. Company name changed to protect the guilty!)*

**Write a new Safety Leaflet in Plain English.**

**After:** Here is a suggested solution:

- In the interests of **safety**, only a **competent person** should do repairs.
- Once fitted, do not **interfere with** these parts, apart from **normal cleaning** as described in the manual.
- ABC Electrical Appliances accepts no **liability** for damage or personal injury that occurs because of any repair.

**(46 words, Reading ease=43)**

**QUESTIONS**

- How does this compare with the original?
- Which is easier to understand?

← Your Notes: **Answers 9 – Simplify and translate into Plain English**

← What have you learned from the answer opposite? Write yourself a reminder below:

**1. How could you apply this in your writing at work? How might you use this in future?**

**2. What difficulties would this overcome?**

**3. What kinds of existing documentation would benefit?**

**Discuss your ideas with somebody else.**

(This page is intentionally blank.)

## Answers 11 – Convert to Bullet Points and Plain English

See the exercise on page 58.

### Before:

“Staff members shall not reveal personal passwords to any other person, within or outside the company. Staff members shall not permit any other person to access their computer account. If a breach of personal account security is suspected User Management and IT Support shall be notified immediately. In addition, staff members should avoid assigning passwords that might be readily discernible, such as a person’s name or birth date, or a common term (e.g., a holiday or name of a month). Staff members should not write down computer system passwords or record in other media. Failure to follow these procedures may be considered grounds for disciplinary action.”

Readability	
Passive Sentences	33%
Flesch Reading Ease	43.6
Flesch-Kincaid Grade Level	11.5

(BEFORE)

### After: Suggested solution

As a Member of Staff:

- You must not reveal passwords to anybody else, within or outside the company.
- Do not let anyone else access your computer account.
- If you suspect a breach of personal account security, you must tell User Management and IT Support at once.
- Do not use easily guessable passwords, such as a name, a date of birth, a holiday, or the name of a month.
- Do not write down passwords or store them in any other media.

If you do not follow these rules, we may take disciplinary action.

Readability	
Passive Sentences	0%
Flesch Reading Ease	65.0
Flesch-Kincaid Grade Level	7.9

(AFTER)

### QUESTIONS

- How does this compare with the original?
- Which is easier to understand?

Note how the **Reading Ease** has improved.

## Answers 12 – Logical Sequence

See the exercise on page 74.

“Proceed to the third house on the right after you’ve taken the second left after the third traffic lights, which you come to after the first exit off the roundabout at the end of the bypass.”

At the end of the bypass, there is a roundabout.

- Take the first exit.
- Continue until you come to the third traffic lights.
- Go through the traffic lights and take the second turning left.
- Go to the third house on the right.

## Answers 14 – Keywords – Highlight Keywords...

These are suggested answers for the **Keywords Exercise** on page 116.

### Adding QSoft Users

*menu > Utilities > User Maintenance*

This Help topic tells you how to add **new Users** onto QSoft, set their **system role**, and set a **new password**.

There are three categories of **QSoft user**.

- **Administrators**, who can **access all facilities** in QSoft.
- Users, who can access most facilities, but **cannot access system setup** features.
- **No Role**, not defined yet – still in development. Do not use this for the time being.

To change somebody's **role**, please see below.



Note: You must be a **QSoft Administrator** to access this facility.

### View list of Users [List of Users](#)

- Go to **menu > Utilities > User Maintenance**.

The **User Details screen** appears.

User Full Name	User Name	Role	Remarks
Philip Tory	ptory	Administrator	
Jane Matthews	JaneM	User	
Robert Wilkins	RobertW	User	

User Full Name:

User Name:

Password:

Role:

Remarks:

Example User Details window...

Here you can see the **current users** on the system.

### Add New User

- Use **Ctrl+N** to add a New User.
- Enter their **full name**.
- Then enter their **login User Name**. For example, for John Williamson you might use the abbreviation "JohnW".
- Enter the person's **new password**. Type it carefully - there is no double-check for typing errors here. Make a note of what it is and hand it to the new user. Remember to keep it secret.
- At the **Role** drop-down, select their Role as a **QSoft User**: will they be an Administrator, or an ordinary User? (⊘ 'No Role' is not available yet; subject to further development).
- Optionally, you can enter **remarks** about this person; it could be anything. You might want to keep their **home telephone number** here, for example.
- Finally, use **Ctrl+S** to **save changes** and close.

## Issue New Password

You have to be a QSoft Administrator to issue new passwords.

If a member of your staff has **forgotten their password**, you can come into this screen and issue them with a new one.

- View the [list of users](#).
- Click to select the relevant person in the list.
- Click in the Password field on the screen where you can enter information, or where information is displayed. Delete the asterisks and enter a new password. ( ➤ See [Choosing a Password](#).)
- For security reasons, QSoft does not show you the characters as you type. (It does not double-check at this point for typing errors, so type carefully!)
- Tell the new user, in private, what their new password is. This will be valid next time they log in.
- It is good **password security practice** if the user changes their password next time they log in.
- Finally, use **Ctrl+S** to save changes and close.

## Change Role

QSoft users have three categories - Administrator - User - No Role.

- View the [list of users](#).
- Click to select the relevant person in the list.
- At the Role drop-down, select a **new role level**.
- Finally, use **Ctrl+S** to save changes and close.

➤ See related topics: [Choosing a Password](#) [Changing your Password](#) *←Don't highlight these!*

**Note** – don't tag the "See related topics" links, because the actual content is somewhere else!

**Check your key phrase selections.**

- Do you agree?
- Did you miss any?
- Did you mark any that would not be valid? Why are they not valid?

## Answers 15 – Keywords Exercise – Highlight Keywords

These are suggested answers for the **Keywords Exercise** on page 118.

### Find Ship Details Ship details

*Oilspace* > **Ship Directory screen**

This topic tells you how to find a **Ship** and look up its details; for information purposes only.

You can look up the details of any ship listed in the **World Shipping Directory** **Fairplay database**. It shows you information such as **Speed** and **Consumption**, **Technical Information**, **Commercial Information**, **Name History**, **tonnage**, **deadweight** and so on.

- In the **Ship Directory** pane, click in the **Name** field and **delete any name** that is already there.
- Start to type the **new name**. You can type the first few letters, or the whole name if you wish. (1)
- Press **Enter**, OR click on **Search**. (2) The search will **find any name** that matches the letters you type in, wherever they appear in the ship's name. For example, if you type "**tain**", it will find names that include "**Captain**".

Name	DWT	Year	Flag	Draught	LOA
BAL TIC CAPTAIN I	37,389	2000	CYP	11.2	182.5
BAL TIC CHALLENGER	37,300	2003	IOM	11.2	182.55
BAL TIC CHAMPION	37,343	2003	IOM	10.9	182.55
BAL TIC CHIEF I	37,000	2000	CYP	10.9	182.55
BAL TIC COMMANDER I	37,000	2000	CYP	11.2	182.5
BAL TIC COMMODORE	37,343	2003	IOM	10.9	182.55
BAL TIC CRUSADER	37,300	2004	IOM	11.2	182.55

Example **search for ship** "Baltic Captain I"...

The system searches and displays a list of **matching names**. (3)

- To view the details of this Ship, click on the required **Name** in the list. (3)
- If the name does not appear in this view, click on **Next** at the bottom of the Ship Directory screen. Wait for the screen to refresh and show you the next set of **matching ship names**. (To return, click **Prev** to see the previous set.)

The **Ship Information screen** appears:

General Information		Technical Information	
Name:	BALTIC CAPTAIN I	DWT:	37389
Last name:	Baltic Captain	Year:	2000
Original name:	Baltic Captain	Flag:	CYP
Capacity:	0	Draught:	11.20
Gross tonnage:	23235	Tanks:	12
Net tonnage:	10107	LOA:	182.5
Double Bottom:	N		
Double Side Skins:	N		
Speed and Consumption Information		Commercial Information	
Ballast speed:	Primary: Secondary:	Current owner:	Last 3 cargoes:
Laden speed:	Primary: Secondary:	Next open port:	Opening Date:
Canal/port speed:	Primary: Secondary:	<a href="#">Known fixtures</a>	
Disch.	Primary: Secondary:	<a href="#">Detention and accident history</a>	
		<a href="#">Warranted description</a>	
		<a href="#">Questionnaire</a>	
Name History			
2002	BALTIC CAPTAIN I		
2000	Baltic Captain	Original Name	
1999	Androcles		



**Note:** The blue **Commercial Information links** are not active in this version.

- When you have finished, click **OK** to return.

**Change number of rows to view** **Rows to view** **Number of rows**

The Ship Directory screen shows you a **preset number of rows** of **search data**.

**Ship Directory**  
Enter ship lookup data:

Name:  Return:  rows  
 DWT:  Year built:

Name	DWT	Year	Flag	Draught	LOA
<a href="#">BALTIC CAPTAIN I</a>	37,389	2000	CYP	11.2	182.5
<a href="#">BALTIC CHALLENGER</a>	37,300	2003	IOM	11.2	182.55
<a href="#">BALTIC CHAMPION</a>	37,343	2003	IOM	10.9	182.55
<a href="#">BALTIC CHIEF I</a>	37,000	2000	CYP	10.9	182.55
<a href="#">BALTIC COMMANDER I</a>	37,000	2000	CYP	11.2	182.5
<a href="#">BALTIC COMMODORE</a>	37,343	2003	IOM	10.9	182.55
<a href="#">BALTIC CRUSADER</a>	37,300	2004	IOM	11.2	182.55

Next

- To change the number of rows to view, click in the **Return**  **rows** field, change the number and press **Enter**.

**Check your key phrase selections.**

- Do you agree?
- Did you miss any?
- Did you mark any that would not be valid? Why are they not valid?

## Off the shelf: further reading

If you would like to read more about Technical Writing, here is a book list.

### Books about Good English

- **The Elements of Technical Writing** – Gary Blake & Robert W. Bly. Published by Longman.
- **The Economist Pocket Style Book** – Economist Publications.
- The new language in International Business: Simplified English – Tedopres International BV.
- **The Penguin Guide to Plain English** – Harry Blamires.
- **Eats Shoots and Leaves** – the zero tolerance approach to punctuation, by Lynne Truss. (Good fun!)
- **The Penguin Dictionary of English Grammar** – R. L. Trask.

### Books about Mind Mapping

- **Mind Maps at Work** – Tony Buzan, Thorsons Publishers (Harper Collins).
- **How to Mind Map** – Tony Buzan, Thorsons Publishers (Harper Collins).

### Technical Writing Organisation

The **Institute of Scientific and Technical Communicators (ISTC)** is the largest UK-based society for professional communicators. Web site [www.istc.org](http://www.istc.org).

### George Orwell's Writing Tips

George Orwell is one of the finer writers in the English language. He is famous for such novels as "1984" and "Animal Farm", and such essays as "Shooting an Elephant" and his memoir "Down and Out in Paris".

Orwell was a passionate defender of good writing. Here are some of his writing tips.<sup>37</sup>

**A scrupulous writer, in every sentence that he writes, will ask himself at least four questions, thus:**

1. **What am I trying to say?**
2. **What words will express it?**
3. **What image or idiom will make it clearer? \*\***
4. **Is this image fresh enough to have an effect? \*\***

**And he will probably ask himself two more:**

1. **Could I put it more shortly?**
2. **Have I said anything that is avoidably ugly?**

**One can often be in doubt about the effect of a word or a phrase, and one needs rules that one can rely on when instinct fails. I think the following rules will cover most cases:**

1. **Never use a metaphor, simile, or other figure of speech that you are used to seeing in print.**
2. **Never use a long word where a short one will do.**
3. **If it is possible to cut a word out, always cut it out.**
4. **Never use the passive where you can use the active.**
5. **Never use a foreign phrase, a scientific word, or a jargon word if you can think of an everyday English equivalent.**
6. **Break any of these rules sooner than say anything outright barbarous.**

[ \*\* Note: Not for Technical Writing! Avoid idioms, figures of speech, etc.]

<sup>37</sup> From Orwell's essay, "Politics and the English Language", 1946



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