
Tools and techniques for working with subject matter experts

Presented by:
Nad Rosenberg
TechWRITE, Inc.
www.techw.com
twnad@techw.com
856-848-6593

About TechWRITE

- Located in Woodbury, NJ (USA).
- In business since 1985.
- Experienced every technology change that's come down the pike.
- We create online manuals, hard-copy manuals, online Help, e-learning tutorials

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Background

- Situation:
 - ▶ Manuals often created from documents written by experienced experts.
 - ▶ Experts typically cannot communicate to people with little knowledge.
- Problem:
 - ▶ People with little knowledge need to read and understand the manuals.

Background (cont'd)

- Solution: Technical editor or writer needs to close the gap between the subject matter expert and the novice.
- Solution Methodology: A close collaboration between the technical editor and the expert results in better manuals.

Background (cont'd)

- Good collaboration = manuals written in plain language that can be easily understood by readers.
- Poor collaboration = confusing manuals that are difficult to understand.

Background (cont'd)

- Secret to achieving good collaboration:

Good Communication

Presentation objective:

- To provide some **tools and techniques** and to improve the communication.
 - ▶ Tools
 - MS Word Comment feature
 - Adobe Acrobat Comment feature
 - TechWRITE's query boxes
 - ▶ Techniques
 - It's not what you say but how you say it.



Tools to help you improve communication

Tools: MS Word Commenting feature

- To use MS Word Commenting (Word 2003/2007)
 - ▶ 2003 - Insert menu and select Comment.
 - ▶ 2007 - Review menu and select New Comment.
- Comments appear in “bubbles” in margin.
- To see comments:
 - ▶ 2003 - On View Toolbar, Markup must be selected.
 - ▶ 2007 - On Review menu/Show Markup, Comments must be selected.

Tools: MS Word Commenting feature

- To change how the name of the comment author appears:
 - ▶ 2003 - Tools/Options/User Information and then change in Initials box.
 - ▶ 2007- Review/Track Changes/Change User Name
- Different comment authors automatically assigned different colors.

Tools: MS Word Commenting feature

- Other display options:
 - ▶ 2003 - To display comments in bottom pane:
 - Display Review Toolbar (right-click on Menu bar and select Review).
 - Click Show.
 - Click Reviewing Pane icon to show or hide.
 - ▶ 2007 - To display comments in bottom pane:
 - Click Review menu.
 - Click Reviewing Pane.
 - ▶ More options from Show or Review menu:
 - Insertions, deletions
 - Reviewers

Tools: MS Word commenting feature

- To delete ALL comments:
 - ▶ On Review Toolbar, click Reject Changes/Delete Comments.
 - ▶ Select Delete All comments in Document.
- To print comments:
 - ▶ If you want the comments to print, display the comments.
 - ▶ Then, on the Print Menu, select Print: Document with Comments (2003) or Document with Markup (2007).
 - ▶ If you do NOT want the comments to print, on the Print Menu, select Print: Document.

Tools: MS Word commenting feature

- To convert Word comments to PDF notes:
 - ▶ From Adobe PDF/Change Conversion Settings menu/Word, select Convert displayed comments to notes in pdf.

Tools: Adobe Acrobat commenting feature

- To use Adobe Acrobat commenting (Adobe Acrobat 8 Professional):
 - ▶ Comments menu and select "Add Sticky Note" (other shapes also available)
- Features:
 - ▶ Minimize each comment
 - ▶ Move **(WARNING: This could be a problem.)**
 - ▶ List at bottom (show comment list)
 - ▶ Check (by reviewer)
 - ▶ Reply to a comment (gets inserted within original comment)
 - ▶ Create summary
 - ▶ Sort by date, author, checkmark status

Tools: Adobe Acrobat commenting feature

■ Printing

▶ File/Print/Summarize Comments:

- Documents and comments with connector lines on separate pages.
- Documents and comments with connector lines on separate pages.
- Comments only
- **Documents and comments with sequence lines on separate pages. (Recommend)**

Tools: Adobe Acrobat commenting feature

■ Other features:

- ▶ Enable comments in Reader:
 - Need Professional version of Acrobat 7 + 8 to do this.
- ▶ Shared review:
 - Initiator sends invitations to reviewers (who have access to same server). They can see other reviewers' comments.
 - Reviewers are notified when new comments are published by other reviewers, even if Acrobat is closed.
 - Review tracker helps manage the process.
- ▶ Export comments to Word
 - Only works if the document was originally created in Word and then Tagged prior to PDF conversion.

Tools: TechWRITE's query boxes

- At TechWRITE, we developed our own version of commenting boxes.
 - ▶ Created using text boxes in MS Word.
 - ▶ Used in conjunction with shading and arrows.
 - ▶ Positive and negative:
 - Pro = Can arrange objects to clearly point to issue.
 - Con = A little more time-consuming and no summary.



Techniques to help you improve communication

Techniques

- Technique 1:
 - ▶ It's not what you say but how you say it.
 - ▶ Remember: Everyone DOES take it personally.

Techniques

- Technique 2:
 - ▶ Adopt a courteous tone and phrase comment as question.
 - ▶ Apply this to **e-mail** too.

Techniques

- Technique 3:
 - ▶ Let them know that you'll go back to doing it "their way" if they really want.

Techniques

- Technique 4:
 - ▶ Give them a reason for making the change.

Techniques

- Technique 5:
 - ▶ Throw the ball back in their court - gently.

Techniques

- Technique 6:

- ▶ Pull out the rules of grammar.

HINT: Most normal people have no clue what passive voice means and they will agree to anything rather than admit that.

Techniques

- Techniques 7 + 8:
 - ▶ Encourage your subject matter expert to give you concrete examples.
 - ▶ Encourage your subject matter expert to give you correct graphics that match the examples. Make sure the graphics are meaningful.

The Bottom Line

Better communication with your subject matter expert always results in better documents.

If you'd like to contact Nad Rosenberg:

twnad@techw.com

856-848-6593

Discussion

- What are some of the tools and techniques you use to facilitate communication with your subject matter experts?