

Using Graphic Elements to Enhance Reader Interest in P&P Documents

by Audrey Cielinski Kessler

Whether a document catches—and keeps the reader's attention depends in large part on how the document looks. If it is attractive, the reader is more likely to become and remain engaged in the subject matter. If all the reader finds is a sea of black type across each page, that person is far more apt to close the book, put it on a shelf and forget it even exists.

That outcome makes your efforts all for naught. You wrote the book to be read, not to be stuffed away on a shelf to gather dust.

To overcome this kind of reader rejection of the useful information you are providing, try

spicing up your P&P documents with judiciously placed graphic elements.

These include icons, screen captures, flow charts, graphs, clip art, illustrations and line drawings.

You don't have to use all of them in a single chapter or even in one book. And you don't want to use them just for the sake of having them in the document.

They're not just for decoration. They are meant to be useful for the reader, allowing him to grasp important information quickly by drawing his eyes to picture elements.

When people flip through books, magazines and other publications, most tend to be

drawn first to the pictures. The graphic elements you use, then, should be both informative and eye-catching.

Let's focus on one of the graphic elements mentioned earlier: icons.

Icons

Icons can be used as symbols for key information. With icons, it usually is a good idea to explain the meaning of the icon in an introductory or "getting started" chapter.

Then when the reader sees the icon later in the book, he will know its significance. The following is a discussion of some

Continued on p. 3

ISO 9000: Dispelling Some Myths

by Patricia A. Brown

The term *ISO 9000* is gaining familiarity among technical communicators, but my finding is that misconceptions and misunderstandings about ISO follow closely behind.

I appreciate the opportunity to offer some insights into ISO and to dispel some myths. Please understand two things before reading this article:

- I am not an ISO 9000 registered lead assessor.
- I am a technical writer/editor with experience in ISO documentation.

ISO Defined

ISO is an acronym for the International Organization for Standardization. The organization was founded in 1946 with the goal of developing a common set of standards for manufacturing, trade and communications.

At last count, ISO had 92 member countries. The American National Standards Institute (ANSI) is the United States' member body to ISO.

The first ISO 9000 standards were published in 1987; they were revised in 1994.

Twenty clauses appear in the ISO 9000 standards. Companies in pursuit of ISO registration are assessed to one of three standards: ISO 9001, ISO 9002 or ISO 9003.

Continued on p. 2

Inside . . .

Member Profile	2
P&P PIC Debut	3
PIC Members Offer Reactions to Annual Conference	4
P&P Briefs	5

Profile: Diane Whitmer

by Pat Susin

Diane Whitmer, a graduate of Memphis State University and leader of the P&P PIC's programs and projects team, has focused her career on technical writing.

Her first professional writing experience was as an intern in the Scientific Publications Department at the University of Tennessee-Memphis. It was there that she was mentored by **David Armbruster**, past president of STC.


Diane moved on to become assistant editor for the *Journal of Clinical Psychiatry*. Next she created a position for herself as a consulting editor at the Center for Earthquake Research and Information. While there, she used a knowledge of geology acquired through undergraduate and graduate courses.

Diane's career path took her later to a small, family-owned chemical processing and manufacturing company where, as the only policy and procedures writer, she developed and wrote standard operating procedures. Eventually, two other writers were hired, and Diane began seeing herself in the role of document control manager.

When the company began downsizing, it abandoned its pursuit of ISO 9000 certification. Diane noted, however, that the job was "a great experience which really helped prepare me for the wonderful job I have now."

"What I like best about policy and procedure writing," said Diane, "is working with documentation teams, guiding the process and seeing the light come on."

Now a project coordinator for a community college in Kan-

sas City, Missouri, Diane is doing what she likes best: writing project proposals, coordinating state funding, supporting ISO 9000, conducting statistical process control training, and writing policies and procedures for her own group of 15 consultants. 

Pat Susin is a policies and procedures writer at American Greetings in Cleveland, Ohio. Pat is a member of the Northeast Ohio chapter of STC.

STEPS & SPECS is published quarterly by the Society for Technical Communication's Policies and Procedures Professional Interest Committee.

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Continued from p. 1

ISO 9001 is the most rigorous, as it addresses all 20 clauses of the standards; ISO 9002 addresses 18 of the 20; and ISO 9003 addresses 12 of the 20. ISO 9000 and ISO 9004 are guides that go along with ISO 9001, 9002 and 9003.

What ISO Is Not

ISO 9000 is often thought to be a quality control standard, but it is not. No "acceptance criteria" appear in the standards, and products cannot meet ISO 9000 requirements. Only organizations can do so.

What ISO Is

ISO 9000 is a quality system guideline. Only a company's management can and should

decide how the company will meet ISO recommendations and requirements.

Two Misunderstandings

Of the misunderstandings I encounter about ISO, two come up frequently:

- The ISO standard is a prescriptive quality guide.
- ISO requires a tremendous amount of documentation.

Remember that ISO is a quality system guideline. Instead of being prescriptive, it is descriptive. It requires that a company evaluate its processes and offers guidance—not how-to instructions—for improving them. Companies are required to address the clauses of ISO,

Continued on p. 4

P&P PIC Debuts at Annual Conference

by Raymond E. Urgo

The Policies & Procedures PIC made its debut appearance at STC's annual conference in April. The PIC's presence was evident in the exposition hall and at technical sessions, networking luncheons, and business meetings.

Exposition Hall. A special thanks to **Audrey Cielinski Kessler**, our PIC's newsletter editor, for making the first edition of *STEPS & SPECS* avail-

able to conference attendees. As a result, we have received new PIC members and inquiries about P&P-related resources. Also available in the hall were buttons that attendees could wear to promote the PIC throughout the conference.

Technical Sessions. The PIC sponsored two technical sessions. The first was a panel of four of our members, moderated by **Diane Whitmer**. The panel gave procedures-development strategies and discussed

the following topics: marketable P&P skills (**Raymond E. Urgo**), a model for procedure development (Diane), project management of procedures development (**Diana Farrell**) and a case study in developing procedures (**Verna Richardson**).

The other session was a workshop I presented on using flowcharts to communicate processes and procedures. Both sessions were filled to capacity,

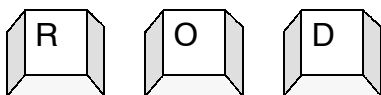
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specific types of icons and how you can apply them.

Keyboard Keys. This type of icon could be used in software manuals and other documents that give steps for entering data on a computer screen.

The icon can be designed to let the reader know at a glance which fields must be completed, which ones can be left blank and which ones have an automatically supplied default value and require no user action.



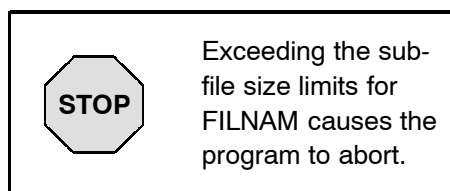
In the examples shown here, the letter *R* on the key means that an entry is required, the letter *O* indicates that an entry is optional, and the letter *D* indicates that the field has a default value.

When placed in the margin of each field discussion, the icon gives the reader a quick accounting—without plowing through the text—of the nature of each field.

Authorization-Level Indicator. Another quick-reference type of icon can be referred to as an authorization-level indicator. If only some persons within an organization (for example, managers vs. staff personnel) are allowed to perform a particular step or function yet all use the same document, an authorization indicator such as the one shown here can alert the reader that permission to perform the task is or is not allowed for someone at his level in the organizational hierarchy.

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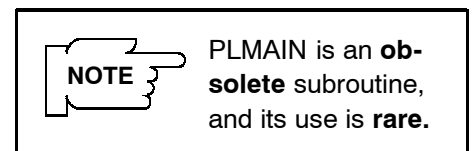
Warning Messages. Warning messages are pull-out text that alerts the reader to key, and perhaps vital, information. Rather than simply using the word *warning* or *caution*, try using a symbol to catch the reader's eye.



In this example, a stop sign is used to indicate that the read-

er should stop and read the material presented before proceeding. Placing the text and the icon inside a box also helps to attract the reader's attention.

Notes. Notes are similar to warning messages, except that the information is more for elaboration on noncritical information in the document.



Use of an icon, such as the pointing finger shown here, draws the reader's attention to the information. The box enclosing the text and icon enhance that effect.

These are just a few examples of how graphic elements can be used to enhance reader interest in P&P documents. The possibilities are limited only by your imagination. 📐

Audrey Cielinski Kessler is the owner of *The Write Hand*, an editing and desktop publishing company in Silver Spring, Maryland, and a member of the D.C. chapter of STC.

P&P PIC Members Offer Reactions to Annual Conference

by Pat Susin

STC's 42nd Annual Conference is history, but what did attendees get from the experience? To answer that question, three random interviews were conducted. Each person was asked: What did you gain by attending the annual conference? Here are their replies.

Maggie Cunningham

Maggie Cunningham, who writes for an engineering and

construction firm, has attended many STC conferences since 1977 and, she said, she always comes away feeling that she has gained from the experience. "I attend STC conferences because they keep me from becoming an antique," she said.

At this year's conference, Maggie focused on how her "hard-copy" employer can use today's technology to produce the various types of manuals it generates.

Her conference mission, said Maggie, was to learn how to put these manuals on-line in an intelligent and cost-effective manner. She looked at several software programs and considered issues such as the appropriateness of using CD-ROM technology. She also collected brochures and took mountains of notes.

By working closely with fellow employees, Maggie said, she expects to make some sound decisions about putting P&P documents on line. She added that she is certain the knowledge gained at the conference has benefited both herself and her employer.

Maggie lives in Birmingham, Alabama, and is a member of the Birmingham chapter of STC.

David Farkas

David Farkas, an associate professor at the University of Washington in Seattle, is an ardent P&P advocate. According to David, it was intellectual curiosity that attracted him to the P&P sessions.

"I was curious about how we, as technical writers, instruct people to perform tasks which are essentially administrative," said David.

While satisfying his curiosity, David said he discovered that policies and procedures involve real issues.

He noted that he enjoyed the session on marketable skills for P&P professionals (presented by **Raymond E. Urgo**, P&P PIC manager), even though his expertise is in the areas of education and computer documentation.

Continued on p. 6

Continued from p. 2

but the standard does not dictate how the company should meet the requirements. That is left to the company's discretion.

For example, clause 4.16, Quality Records, says: "Retention times of quality records shall be established and recorded." Translated, this means the company must keep quality records and must note in writing how long they will be retained. It does not tell the company that records must be retained for a certain number of years. How long records are retained is a company decision.


ISO does require documentation. A quality manual is required (clause 4.2, Quality System). In total, the standard requires 44 documented procedures and implies another 76.

Further, the word *shall* appears 137 times in the 20 clauses, and the quality system must respond to each *shall*.

But remember: The standard is descriptive, not prescriptive. In other words, while a company must address each *shall* in its documentation, it is

not required to have a system in place for each *shall*.

For example, I know of one company in pursuit of ISO 9001 registration, but they do not service their product as outlined in clause 4.19, Servicing. To ensure that service issues would be addressed if they ever arose, the company responded to this clause by saying: "Customer contract dictates the type and amount of service provided. The intention is to satisfy the customer's requirements."

Certain areas or operations do require documentation. How do you pinpoint those areas? As I tell my clients, if you are not certain whether a process requires documentation, reference the standard and answer this question: Would the absence of documentation adversely affect quality? If the answer is yes, then document the process. 

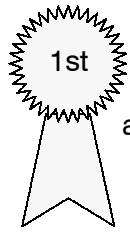
Trysh Brown is owner of *TBF Publications*. She is currently on assignment with *Sykes Enterprises, Inc.* Trysh is a member of the St. Louis chapter of STC, is managing editor of the chapter's newsletter, *Archetype*, and is the chapter's P&P PIC coordinator.

P&P Briefs

Publications Competition . . . Conference Presentation . . . Help Wanted

Entries Needed for STC Publications Competition

If you have not thought about it, please consider entering an organizational policies and procedures manual in a regional publications competition.



Enter your manual under the category "organizations" to give yourself a better chance of winning an award. This category usually is very underrepresented in the publications competition.

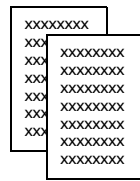
Who knows—maybe you will win an award or be placed in the international competition. But even if you don't win, your entry will gain exposure to and comments from the judges. The feedback can be invaluable.

Watch your chapter newsletter for competition dead-

lines. Give it a try. After all, what do you have to lose?

PIC Members Encouraged to Make Conference Presentations

Interested in policies and procedures? Want to share a hot topic that will benefit other communicators?



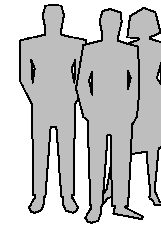
Then consider making a presentation at next year's annual conference.

The P&P PIC is planning to sponsor some conference sessions and welcomes your participation.

For more information about being a conference presenter, contact **Diane Whitmer**, P&P PIC team leader for programs and projects, at 816/672-2392.

Help Wanted!

With regrets, **Kevin Schmidt** is no longer able to lead our membership team because of business commitments.



However, he will continue assisting the team with the processing of membership enrollments.

If you would like to lead the team, please call **Raymond E. Urgo**, P&P PIC Manager, at 213/876-2186.

Volunteers also are needed to help conduct a membership survey, develop a database of the membership, publish a membership directory and work on a joint effort with the Online Communication PIC in establishing a Web site on the Internet. If you can help with any of these projects, please contact Raymond.

Continued from p. 3

and the attendees participated enthusiastically with lots of questions and comments. This all points to a growing interest in policies and procedures among STC members.

Networking Luncheons.

Two P&P networking luncheons were held at the conference. One dealt with policies and procedures writing, while the other one focused on the P&P PIC.

Both luncheons drew about 30 people at three tables. Plenty of interesting ideas were exchanged along with probably an equal number of business cards.

Business Meetings. I represented the P&P PIC at the annual meeting of PIC managers. **Chris Juillet**, assistant vice president for PICs (whose term expires on June 30) led the meeting. For the past two years, Chris has been an ardent supporter of our desire to form a P&P PIC. We appreciate his support.

At the meeting, one person noted that the PIC is addressing needs that had gone unattended for more than 15 years.

A second business meeting was a gathering of the P&P PIC's team leaders who met in person for the first time to discuss our roles as leaders.

A third gathering was the PIC's annual business meeting, which was open to all conference attendees. Here we reviewed accomplishments and goals and began identifying P&P topics and speakers for next year's conference.

This was our first year, and we opened on an overwhelmingly positive note. Let's work for an even greater P&P presence in 1996. Make plans now to participate.

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

Continued from p. 4

He added that he believes the P&P PIC has a promising future. "Policies and procedures may sound mundane," said David, "but they are actually quite exciting."

David lives in Seattle and is a member of the Puget Sound chapter of STC. He was named an associate fellow at this year's conference.

Cheryl Hultquist

"I need STC conferences to keep me up-to-date about the newest communications tools," said Cheryl Hultquist.

Four years ago, after years of writing user manuals for a software company, Cheryl began a new career as a P&P writer for a physics research facility. She describes this position as

having no budget, no frills and, as the only writer, offering total isolation.


"My greatest challenge was acclimating myself to a physics lab environment," Cheryl said. "I've had to gain the trust of the physicists. I've also had to convince them to use on-line documents."

During this year's conference, Cheryl concentrated her time on the technology stems. She came away, she said, with a greater understanding of what it means to "go on line," what the Internet is all about and the most effective use of the World Wide Web for her employer. Her favorite session was one that discussed how to develop a Web page and how to sell the idea to management.

Since returning from the conference, Cheryl said she has

shared her new knowledge with colleagues and found that support for on-line documentation from management and fellow workers has increased. She also has noticed that the physicists are not only using on-line documents but also are demanding an increasing amount of on-line information.

"Working in such an isolated environment," said Cheryl, "the STC conferences keep me plugged into the people and the technology I need as a P&P professional."

Cheryl lives in Cupertino, California, and is a member of the Silicon Valley chapter of STC. 

Pat Susin is a policies and procedures writer at American Greetings in Cleveland, Ohio. Pat is a member of the Northeast Ohio chapter of STC.

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