

<b>Training Package</b>	Information and Communications Technology (ICA05)		<b>HSC Requirements and Advice</b>
<b>Title</b>	<b>Create user documentation</b>		
<b>Unit code</b>	<b>Unit sector</b>	<b>HSC Indicative Hours</b>	
<b>ICAD3218B</b>	Documentation	<b>20</b>	
<b>Unit descriptor</b>	This unit defines the competency required to create user documentation that is clear to the target audience and is easy to navigate. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.		
<b>Prerequisite units</b>	There are no prerequisites for this unit.		
<b>Employability skills</b>	This unit contains employability skills.		

<b>Required skills and knowledge</b>		<b>HSC Requirements and Advice</b>
This section describes the skills and knowledge required for this unit.		
<b>Required skills</b>	<b>Required knowledge</b>	<b>Key Terms and Concepts</b>
<ul style="list-style-type: none"> <li>• Selecting and using appropriate software and tools</li> <li>• Identifying target audiences</li> <li>• Analysing audience needs</li> <li>• Identifying relevant content</li> <li>• Determining appropriate content, formats and styles</li> <li>• Writing content.</li> </ul>	<ul style="list-style-type: none"> <li>• Content features, such as clarity and readability</li> <li>• Instructional design principles</li> <li>• Functions and features of templates and style guides</li> <li>• Document design, web design and usability.</li> </ul>	<ul style="list-style-type: none"> <li>• documentation requirements</li> <li>• principles of instructional, document and web design</li> <li>• target audience</li> <li>• tracking processes</li> <li>• types of user documentation</li> </ul>

## Evidence Guide

The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

<b>Critical aspects for assessment and evidence required to demonstrate competency in this unit</b>	<b>Context of and specific resources for assessment</b>	<b>Method of assessment</b>	<b>Guidance information for assessment</b>
<p>Evidence of the following is essential:</p> <ul style="list-style-type: none"> <li>• assessment must confirm the ability to create user documentation that meets business requirements, caters for a diverse readership, is clear to the target audience and easy to navigate.</li> </ul> <p>To demonstrate competency in this unit the person will require access to:</p> <ul style="list-style-type: none"> <li>• documentation standards</li> <li>• software tools for effecting documentation</li> <li>• access to information about system, platform, network or application being documented.</li> </ul>	<p>The breadth, depth and complexity of knowledge and skills in this competency would cover selecting, adapting and transferring skills and knowledge to new environments and providing technical advice and some leadership in resolution of specified problems. This would be applied across a range of roles in a variety of contexts with some complexity in the extent and choice of options available.</p> <p>Assessment must ensure:</p> <ul style="list-style-type: none"> <li>• performance of a defined range of skilled operations, usually within a range of broader related activities involving known routines, methods and procedures, where some discretion and judgement is required in the selection of equipment, services or contingency measures and within known time constraints would be characteristic.</li> <li>• applications may involve some responsibility for others. Participation in teams including group or team coordination may be involved.</li> </ul>	<p>The purpose of this unit is to define the standard of performance to be achieved in the workplace. In undertaking training and assessment activities related to this unit, consideration should be given to the implementation of appropriate diversity and accessibility practices in order to accommodate people who may have special needs. Additional guidance on these and related matters is provided in ICA05 Section 1.</p> <ul style="list-style-type: none"> <li>• Competency in this unit should be assessed using summative assessment to ensure consistency of performance in a range of contexts. This unit can be assessed either in the workplace or in a simulated environment. However, simulated activities must closely reflect the workplace to enable full demonstration of competency.</li> <li>• Assessment will usually include observation of real or simulated work processes and procedures and/or performance in a project context as well as questioning on underpinning knowledge and skills. The questioning of team members, supervisors, subordinates, peers and clients where appropriate may provide valuable input to the assessment process. The interdependence of units for assessment purposes may vary with the particular project or scenario.</li> </ul>	<p>Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.</p> <p>An individual demonstrating this competency would be able to:</p> <ul style="list-style-type: none"> <li>• demonstrate some relevant theoretical knowledge</li> <li>• apply a range of well-developed skills</li> <li>• apply known solutions to a variety of predictable problems</li> <li>• perform processes that require a range of well-developed skills where some discretion and judgement is required</li> <li>• interpret available information, using discretion and judgement</li> <li>• take responsibility for own outputs in work and learning</li> <li>• take limited responsibility for the output of others</li> <li>• maintain knowledge of industry products and services.</li> </ul>

Elements	Performance criteria	Range Statement	HSC requirements and advice
1 Determine documentation standards and requirements.	1.1 Determine <i>documentation</i> requirements.	<p>The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. <b><i>Bold italicised</i></b> wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.</p> <p><b><i>Documentation</i></b> may include but are not limited to:</p> <ul style="list-style-type: none"> <li>• user manuals and procedure manuals</li> <li>• training materials in either hard copy or electronic copy</li> <li>• on-line help</li> <li>• internet/intranet</li> <li>• design specifications.</li> </ul>	<p><b>Learning experiences for the HSC must address:</b></p> <p><i>NB Students are required to produce both paper-based and online user documentation.</i></p> <p>An understanding of the difference between:</p> <ul style="list-style-type: none"> <li>• user documentation</li> <li>• technical documentation.</li> </ul> <p>An awareness of the broad purpose of user documentation including:</p> <ul style="list-style-type: none"> <li>• providing instruction for use</li> <li>• as a training resource</li> <li>• recording of policies and procedures</li> <li>• as a reference/source of information.</li> </ul> <p>Types of user documentation including:</p> <ul style="list-style-type: none"> <li>• paper-based</li> <li>• online</li> <li>• internal (for in-house use, used by the same company/organisation that develops it)</li> <li>• external (for outside use, for users outside the company/organisation that develops it).</li> </ul> <p>Identifying the needs of the target audience and analysing their needs in order to:</p> <ul style="list-style-type: none"> <li>• determine documentation requirements</li> <li>• produce effective user documentation.</li> </ul> <p>Characteristics of effective user documentation including:</p> <ul style="list-style-type: none"> <li>• takes into consideration the differences between target audience (users) <ul style="list-style-type: none"> <li>- personalities</li> <li>- experience</li> <li>- cultural background</li> <li>- attitudes and values</li> <li>- language</li> <li>- environment</li> </ul> </li> <li>• sees everything from the user’s point of view</li> <li>• available in a form and place that users can refer to when needed</li> </ul>

Elements	Performance criteria	Range Statement	HSC requirements and advice
			<ul style="list-style-type: none"> <li>• has information that is <ul style="list-style-type: none"> <li>- easy to find</li> <li>- easy to comprehend</li> <li>- up-to-date, reflecting latest changes and revisions to the system</li> <li>- reliable and convincing</li> </ul> </li> <li>• shows the user how to <ul style="list-style-type: none"> <li>- call information to the screen</li> <li>- manipulate the information</li> <li>- store the information as required</li> </ul> </li> <li>• target audience (set of users) makes use of it.</li> </ul> <p>A knowledge of the documentation process including:</p> <ul style="list-style-type: none"> <li>• plan</li> <li>• draft</li> <li>• review/edit</li> <li>• test</li> <li>• produce</li> <li>• distribute</li> <li>• maintain/revise.</li> </ul> <p>An awareness of the possible consequences of ineffective documentation including:</p> <ul style="list-style-type: none"> <li>• reduce efficiency</li> <li>• waste resources</li> <li>• increase costs of training</li> <li>• users reject a system that they don't understand or find difficult to use</li> <li>• legal action.</li> </ul> <p>An awareness of the possible reasons for failure of user documentation including:</p> <ul style="list-style-type: none"> <li>• user attitude <ul style="list-style-type: none"> <li>- too hard to find information</li> <li>- too difficult to understand</li> <li>- information is old</li> <li>- too lazy to look</li> <li>- turned off because manual is too thick</li> <li>- not easy to access</li> </ul> </li> <li>• management attitude <ul style="list-style-type: none"> <li>- time</li> <li>- budget constraints</li> </ul> </li> </ul>

Elements	Performance criteria	Range Statement	HSC requirements and advice
			<ul style="list-style-type: none"> <li>- failing to communicate with technical staff</li> <li>- documentation is not highly valued</li> <li>• writer's attitude <ul style="list-style-type: none"> <li>- not taking enough time to understand the system before writing</li> <li>- more concerned about the look of the document (design factors) than content.</li> </ul> </li> </ul>
	<p>1.2 Investigate <b>documentation</b> and industry <b>standards</b> for requirements and determine appropriate application to <b>user documentation</b>.</p>	<p><b>Documentation</b> may include but are not limited to:</p> <ul style="list-style-type: none"> <li>• user manuals and procedure manuals</li> <li>• training materials in either hard copy or electronic copy</li> <li>• on-line help</li> <li>• internet/intranet</li> <li>• design specifications.</li> </ul> <p><b>Standards</b></p> <ul style="list-style-type: none"> <li>• may include but are not limited to policy relating to cataloguing, sign-off, storage, distribution, revision</li> <li>• may include ISO/IEC/AS standards, organisational standards, project standards. For further information refer to the Standards Australia website at: <a href="http://www.standards.com.au">www.standards.com.au</a></li> </ul> <p><b>User documentation</b></p> <ul style="list-style-type: none"> <li>• user documentation can include project specifications, reports, help references, user manuals, training materials and self-paced tutorials, on-line help, user guides, brochures.</li> </ul>	<p><b>Learning experiences for the HSC must address:</b></p> <p>Media for user documentation:</p> <ul style="list-style-type: none"> <li>• paper-based</li> <li>• online.</li> </ul> <p>Points to consider when selecting media for user documentation:</p> <ul style="list-style-type: none"> <li>• user's needs</li> <li>• appropriateness to task</li> <li>• usability</li> <li>• budget</li> <li>• time constraints.</li> </ul> <p>General features, benefits and limitations of a range of user documentation including:</p> <ul style="list-style-type: none"> <li>• paper-based <ul style="list-style-type: none"> <li>- user reference guide (manual)</li> <li>- trainer's manual</li> <li>- brochure</li> <li>- student workbook</li> <li>- quick reference card</li> <li>- wall chart</li> <li>- keyboard overlay/template</li> <li>- terminal sticker</li> </ul> </li> <li>• online <ul style="list-style-type: none"> <li>- help</li> <li>- tutorial</li> <li>- manual</li> <li>- wizard</li> <li>- screen prompt/message</li> <li>- navigation aid</li> <li>- trouble-shooting information</li> <li>- CD-ROM and DVD</li> </ul> </li> </ul>

Elements	Performance criteria	Range Statement	HSC requirements and advice
			<ul style="list-style-type: none"> <li>• paper-based and/or online               <ul style="list-style-type: none"> <li>- frequently asked questions</li> <li>- glossaries.</li> </ul> </li> </ul> <p>An awareness of:</p> <ul style="list-style-type: none"> <li>• the benefits of standards</li> <li>• the result if standards are not used.</li> </ul> <p>A basic knowledge of standards in relation to creation of user documentation including:</p> <ul style="list-style-type: none"> <li>• industry               <ul style="list-style-type: none"> <li>- Australian Standards (AS)                   <ul style="list-style-type: none"> <li>▪ ‘Software user documentation process’ (AS/NZS 4258:1994)</li> </ul> </li> </ul> </li> <li>• company/organisation</li> <li>• project-specific.</li> </ul>
	<p>1.3 Design <i>documentation</i> templates using appropriate <i>software</i> and obtain approval from <i>appropriate person</i>.</p>	<p><i>Documentation</i> may include but are not limited to:</p> <ul style="list-style-type: none"> <li>• user manuals and procedure manuals</li> <li>• training materials in either hard copy or electronic copy</li> <li>• on-line help</li> <li>• internet/intranet</li> <li>• design specifications.</li> </ul> <p><i>Software</i> may include but is not limited to:</p> <ul style="list-style-type: none"> <li>• commercial software applications; organisation-specific software, word processing packages, graphics packages, presentation applications, multimedia authoring tools and help file creation software.</li> </ul> <p><i>Appropriate person</i> may include:</p> <ul style="list-style-type: none"> <li>• supervisor</li> <li>• teacher</li> <li>• authorised business representative</li> <li>• client.</li> </ul>	<p><b>Learning experiences for the HSC must address:</b></p> <p>A basic knowledge of the principles of:</p> <ul style="list-style-type: none"> <li>• instructional design</li> <li>• document design</li> <li>• web design.</li> </ul> <p>A range of examples of paper-based and electronic user documentation currently available.</p> <p>An understanding of the difference in design elements and requirements between paper-based and electronic user documentation.</p> <p>An understanding of the function and features of templates including:</p> <ul style="list-style-type: none"> <li>• helps to establish and maintain standards</li> <li>• outlines the structure and format of the document</li> <li>• ensures standard text, diagrams and styles</li> <li>• allows more than one person to work on the document and maintain same structure.</li> </ul> <p>Types of style guides including:</p> <ul style="list-style-type: none"> <li>• corporate</li> <li>• project-specific.</li> </ul>

Elements	Performance criteria	Range Statement	HSC requirements and advice
			<p>An awareness of the information provided in a style guide including chosen style for:</p> <ul style="list-style-type: none"> <li>• terminology</li> <li>• spelling</li> <li>• company/organisation and product names</li> <li>• problem words</li> <li>• abbreviations</li> <li>• acronyms</li> <li>• quotation marks</li> <li>• italics</li> <li>• numbers and symbols</li> <li>• punctuation</li> <li>• bullets and numbering</li> <li>• lists</li> <li>• headings</li> <li>• captions, figures and tables.</li> </ul> <p>The importance of knowing when to vary from the style guide.</p> <p>General features, benefits, limitations and working knowledge of a range of software tools/packages available to produce paper-based and electronic user documentation including:</p> <ul style="list-style-type: none"> <li>• word processing</li> <li>• desktop publishing</li> <li>• drawing</li> <li>• image capture</li> <li>• html editor</li> <li>• help files</li> <li>• web authoring.</li> </ul> <p>For a specific purpose, development of the specifications and template for the documentation to be produced.</p> <p>Appropriate person(s) including:</p> <ul style="list-style-type: none"> <li>• supervisor/team leader</li> <li>• management</li> <li>• trainer</li> <li>• vendor representative</li> <li>• client.</li> </ul>

Elements	Performance criteria	Range Statement	HSC requirements and advice
2 Produce user documentation.	2.1 Conduct a review of the subject system, program, network or application in order to understand its functionality.		<b>Learning experiences for the HSC must address:</b> Investigation and research into the system/platform/network/application being documented.
	2.2 Gather existing technical, design or user specifications and supporting <i>documentation</i> .	<i>Documentation</i> may include but are not limited to: <ul style="list-style-type: none"> <li>• user manuals and procedure manuals</li> <li>• training materials in either hard copy or electronic copy</li> <li>• on-line help</li> <li>• internet/intranet</li> <li>• design specifications.</li> </ul>	
	2.3 Create <i>user documentation</i> based on template to record the operation of the subject system, program, network or application.	<i>User documentation</i> <ul style="list-style-type: none"> <li>• user documentation can include project specifications, reports, help references, user manuals, training materials and self-paced tutorials, on-line help, user guides, brochures.</li> </ul>	<b>Learning experiences for the HSC must address:</b> Points to consider when writing the content for the user documentation including: <ul style="list-style-type: none"> <li>• relaxed, conversational and personal style</li> <li>• active voice</li> <li>• correct spelling, grammar and punctuation</li> <li>• concise information</li> <li>• simple words, sentences and paragraphs</li> <li>• defined technical terms and jargon</li> <li>• positive language</li> <li>• supplementing with diagrams and pictures.</li> </ul>
3 Review and obtain sign-off.	3.1 Submit <i>user documentation</i> to target audience for review.	<i>User documentation</i> <ul style="list-style-type: none"> <li>• user documentation can include project specifications, reports, help references, user manuals, training materials and self-paced tutorials, on-line help, user guides, brochures.</li> </ul>	<b>Learning experiences for the HSC must address:</b> Proof-reading and review of documentation by: <ul style="list-style-type: none"> <li>• appropriate company/organisation person(s)               <ul style="list-style-type: none"> <li>- team leader/supervisor</li> <li>- editor</li> <li>- technical expert</li> <li>- trainer</li> <li>- experienced colleague</li> </ul> </li> <li>• representative(s) of the target audience.</li> </ul> Points to be reviewed: <ul style="list-style-type: none"> <li>• standards</li> <li>• style</li> <li>• consistency</li> </ul>

Elements	Performance criteria	Range Statement	HSC requirements and advice
			<ul style="list-style-type: none"> <li>• content               <ul style="list-style-type: none"> <li>- clarity/readability</li> <li>- plain English</li> <li>- explanation of technical terms/jargon</li> <li>- accuracy</li> <li>- spelling, grammar and punctuation</li> </ul> </li> <li>• usability</li> <li>• completeness.</li> </ul>
	3.2 Gather and analyse feedback.		<p><b>Learning experiences for the HSC must address:</b></p> <p>How to interpret feedback in order to improve user documentation.</p>
	3.3 Make changes to user documentation.		<p><b>Learning experiences for the HSC must address:</b></p> <p>A knowledge of company/organisation practices for:</p> <ul style="list-style-type: none"> <li>• naming standards</li> <li>• version control</li> <li>• tracking processes.</li> </ul>
	3.4 Submit <i>user documentation</i> to appropriate person for approval.	<p><i>User documentation</i></p> <ul style="list-style-type: none"> <li>• user documentation can include project specifications, reports, help references, user manuals, training materials and self-paced tutorials, on-line help, user guides, brochures.</li> </ul>	<p><b>Learning experiences for the HSC must address:</b></p> <p>A knowledge of company/organisation practices for:</p> <ul style="list-style-type: none"> <li>• sign-off</li> <li>• storage</li> <li>• distribution</li> <li>• maintenance/review.</li> </ul>