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Communicator

The Institute of Scientific and Technical Communicators
Autumn 2011

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Regular columns

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Editorial

Well, it's been a busy quarter. This issue is a bumper 64 pages long, which is the longest issue so far this century! There's lots to read and lots of support from advertisers. It's good to see so much quality content coming in from contributors. Thank you to everyone who's made this issue possible.

APEX Awards

For the second year running, *Communicator* has won an APEX Award. See page 7 for more information on this honour.

In this issue

For the Autumn issue, there are articles on colour blindness, bid writing, and a new design methodology — SeSAM, a case study on mobile help and more. There's also an easy to read article showcasing historical technical illustrations.

There are a couple of articles on software as well as an article on localising e-learning, a must read for anyone involved in this field.

Remember to look at the regular columns at the end of *Communicator*. Have you spotted the new star rating system in the book review? We started using this system in the Summer issue to try and give you an at-a-glance rating as well as the comprehensive review.

And if you want a fine example of communication at all levels, take another look at the cover illustration from Mrs Beeton's book.

Events

This issue will be distributed at TCUK www.technicalcommunicationuk.com in September. I'll personally be attending some of the event. It's hosted by the ISTC and I look forward to meeting those of you that can make it.

We also regularly distribute copies of *Communicator* at technical communication events across the world, and, this issue is no different. In this issue, attendees at three of the events in 2011 have written about how they got on.

A big welcome to anyone who's picked up a copy of this issue at an event. If you like what you read here, why not join the ISTC or subscribe to the journal (page 39)? And, if you're interested in writing a review of a technical communication event you've recently attended, let me know.

Finally

The winner of the competition in the Summer 2011 issue was Nick Kenney. See page 11 for further details.

Don't forgot that in every issue we have ethical dilemmas where we invite feedback from our readers.

If you're studying, just starting a career in technical communication or have been involved in the field for a while you might like to read the Technical Writing career article in Nature magazine's July issue: http://tiny.cc/NatureTechWriter

We hope you enjoy reading this issue and attending any conferences on technical communication. C

Contributing to *Communicator*

Are you interested in writing an article:

- About a case study of work you've recently completed.
- Explaining a project that involves social media.
- Describing the roles of technical communicators, for example technical illustrators, technical authors, copyeditors, proofreaders, editors, e-learning… and more.
- Exploring the world of technical communication in the engineering or scientific field.

Would you be interested in writing about your experiences in these or other areas? We are always looking for ideas, suggestions, contributions and feedback.

Why not get in touch:
commissioning.editor@istc.org.uk

Katherine Judge MISTC
E: commissioning.editor@istc.org.uk

Letters

Inspired by Beck

Su O'Brien MISTC comments on an article (Communicator, Summer 2011).

Richard Truscott's article about Harry Beck's underground map suggested the versatility of the map layout could readily be applied to other processes. His comments brought to mind this example that I came across recently of one person's highly creative interpretation of the form as a CV (see Figure 1). I can only hope that M. Arnaudet's efforts paid off and he got the job he wanted!

Figure 1. © Renaud Arnaudet, published with permission. www.renaudarnaudet.com

Nick Kenney MISTC compliments the author on his article.

Thanks for publishing the great article 'Harry Beck's underground map' by Richard Truscott FISTC, it was most uplifting after all the 'dry' technical documentation I have had to read and write over the course of 2011. This was the first article I went to when I unwrapped *Communicator* this morning at my local coffee shop.

It has rejuvenated my interest in technical communication proving that it is possible to be creative in this mad, tech-head, I've got an app for that, world. Reading it has strengthened my resolve to seek more creative Technical Writing goals.

How about a Mind Map based upon the London underground map, perhaps planning and illustrating one's technical communication objectives?

Editor: Richard Truscott has recently spotted a new London Underground map http://london-tubemap.com which goes back to the old geographic style last used prior to Beck.

The olden days

Ted Jarrold recalls his time working in the 1950s.

I was introduced to the Technical Publications Association (TPA) around 1955 by my old boss at De Havilland, George Frodsham. I was a paid up member until at least '59 when I started to exist on a grant of £72 a term and about 10 times that from my father.

I retained my membership when the TPA merged with the Presentation of Technical Information (PTI) Group and the Institute of Technical Publicity and Publications (ITPP) to become the ISTC and I did obtain FISTC status.

George was DH's Chief Illustrator and a Council member of the TPA. I think all of us boys joined quite early on. I illustrated the City and Guilds syllabus and also taught it at some technical colleges.

As part of my job at DH I had to illustrate the then top secret rocket handbooks. These are now in the Science Museum!

After DH, I moved on to Goldsmith's College School of Art and from there became Head of 2D studies, including illustration, at the Hornsey School of Art, now Middlesex Uni. I had the pleasure of inviting Major Hockley to judge the work of my students for several years. Today, I live and work in Israel.

I would very much like to make contact with any of the old 'boys' from our studio or with my old students at Hornsey.

Editor: If you would like to get in contact with Ted or have information about the days before the ISTC, please email Ted@HelenDoronGroup.com or the Letters page.

E: communicator@istc.org.uk

Presidential address

Professional development

The ISTC has been working hard this year to establish practical ways for technical communicators to develop, no matter how experienced you are or how advanced you are in your career. I wanted to take this opportunity to tell you about the things we are doing to support every stage of a technical communicator's career.

Understanding what it's all about

Telling people about careers options is a key part of the ISTC's role. So far this year, we have been:

- Attending careers events, with the ISTC stand and marketing materials and talking to students
- Contacting, and providing content for, careers websites and university careers services
- Creating a new flyer about technical communication as a career, see http://tiny.cc/istccareers
- Taking up opportunities to contribute to industry journals, see our recent contribution to Nature http://tiny.cc/NatureTechWriter.

Early learning

We recognised earlier this year that the ISTC open learning course wasn't the best basis for us to support the early learning of technical communicators in future. Although many aspects of technical communicator roles haven't changed much over the years, some have. The ways in which people want to learn was not being reflected in how the course content was designed or delivered.

Instead of continuing as a training provider, the ISTC is becoming a standards body that grants accreditation to courses offered by respected training providers. These may be existing courses, new courses, or modules developed at the ISTC's request.

Alongside this, we have established a mentoring scheme for new entrants to the profession. Junior members receive impartial advice on career development, and the mentor provides technical advice; helps to develop technical skills and provides specific tuition. Junior members also have access to the wider set of experience provided by the ISTC community.

Continuing to learn

A key goal for us is to provide continuing professional development (CPD) for all our members, not just for those who are new to our profession. A formal CPD programme will take time to achieve but there are many ways you can keep learning in the meantime:

- Read and follow up on articles in *Communicator* and InfoPlus+
- Go online to ask questions: discussion forums (page 8), LinkedIn and Twitter @istc_org
- Attend the Technical Communication UK conference and ISTC Local Area Group meetings
- Take advantage of ISTC discounts on business affiliate training courses in tools and techniques
- Get involved with ISTC projects.

Old dogs?

Of course, you may be just too experienced to learn anything new. It happens! For those of you who have done all the learning, how about passing some of it on to those of us who would benefit from your wisdom and scars:

- Become a mentor, to help guide a new technical communicator
- Contribute articles to *Communicator* and InfoPlus+
- Answer questions in online forums
- Present at the Technical Communication UK conference
- Enter your work for one of the ISTC Technical Communication Awards
- Join the ISTC Council.

Mind you, I can't promise you won't learn something new. Sorry. C

Paul Ballard FISTC
E: president@istc.org.uk

The Institute

The Institute of Scientific and Technical Communicators is the largest UK body for people engaged in technical communication. The ISTC encourages professional development and standards, provides research resources and networking opportunities, and promotes technical communication as a profession.

To join the ISTC, change your grade, or get involved in what we do, contact the ISTC office on +44 (0) 20 8253 4506 or istc@istc.org.uk

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Communicator wins APEX Award of Excellence, again

We are delighted to announce that *Communicator* has received an Award of Excellence in Class 12 of APEX 2011, the 23rd Annual Awards for Publication Excellence sponsored by Communications Concepts, Inc. *Communicator* has won this award for two years running.

APEX Awards are based on excellence in graphic design, editorial content and the ability to achieve overall communications excellence. APEX Grand Awards honour the outstanding works in each main category, while APEX Awards of Excellence recognise exceptional entries in each of the individual categories. The judges included John De Lellis — Concepts Editor and Publisher; Carolyn Mulford — Senior Evaluator for the Publication Evaluation Program and Senior Writer, and Editor of Writing That Works; Christine Turner — Contributing Editor of Writing That Works; and Bill Londino — Consulting Editor of Writing That Works.

With more than 3,300 entries, competition was exceptionally intense. 100 Grand Awards were presented to honour outstanding work in 11 major categories, with 957 Awards of Excellence recognising exceptional entries in 130 subcategories. *Communicator* was one of 529 magazines and journals competing in 11 classes, from which the ISTC had entered 'Magazines & Journals — print, over 32 pages'. The Award of Excellence places the publication in the top third of entries and everyone who has helped Communicator to develop over recent years should be proud of this result, given that all entries are from professional communicators.

The Winter 2010 issue was entered in these awards, our objective being to gain recognition that *Communicator* is a worthy winner of an award in quality, content and relevance to the technical communication community. We would like to thank all contributors, the production team and everyone who has made my first year as Commissioning Editor a successful one.

WINNER 2011 APEX® AWARDS FOR PUBLICATION EXCELLENCE

For more information about APEX Awards, visit www.apexawards.com

Katherine Judge MISTC
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Online groups

http://finance.groups.yahoo.com/group/ISTC_Discussion
http://finance.groups.yahoo.com/group/ISTC_IASIG

Wikis for documentation

Some members think that wikis are useful for documentation, but other members do not agree.

One member thinks that editing a wiki is difficult and can confuse people who do not use the wiki regularly, because the methods of mark up are unusual. Usually, when people edit a wiki, the result is not good. "Even Wikipedia has a hard core of 'subject editors'… [who] periodically go in and tidy up the bad writing and misinformation left by others."

Some members think that software developers are happy to write for wikis, because writing for a wiki is different from writing documentation. After the content is reviewed, a technical communicator can use the content to create other documentation.

One member likes Confluence® (www.atlassian.com/software/confluence) and MindTouch TCS (www.mindtouch.com), because he can use them in a similar way to Word. Confluence and MindTouch TCS are designed for technical documentation, but they are less complex than most help authoring tools. However, the programs do not have the features that are in most help authoring tools for managing links and for creating a table of contents.

Another member does not like Confluence. "The Wiki markup syntax is ill-thought out and confusing, the editing and page maintenance tools are poor and have a very confusing user interface, and the help documentation is really bad."

To help with publishing to Word, one member used the Scroll Office plug-in for Confluence (www.k15t.com/display/web/Scroll+Office). "Both Confluence and Scroll Office may be limited if you're doing complex tasks, but I found them reasonably easy and clear to write short user manuals."

Members suggested the following resources:

- http://en.wikipedia.org/wiki/Wikis
- 'Delivering documentation with a wiki' by Katja Mannerkorpi in *Communicator*, Spring 2007.
- *Wikis: grow your own for fun and profit* by Alan Porter, XML Press.
- http://ffeathers.wordpress.com. Sarah Maddox writes the ffeathers blog. Sarah is a technical writer at Confluence.
- *Wikipatterns* by Stewart Mader. John Wiley & Sons (2007). For a review of *Wikipattens*, see *Communicator*, Autumn 2008.

Reading Kindle e-books

To read a Kindle e-book, a Kindle reader is not necessary. Amazon supplies free software that lets people read Kindle e-books on different operating systems such as Windows®, Mac OS X, and Linux®. Download the software from http://tinyurl.com/KindleReaderAmazon.

Writers, authors, or communicators?

A member started to look for freelance work. She thinks that most people do not know what a technical writer does. What terms do technical communicators use to explain what they do?

When a member wrote manuals, the term 'technical author' gave good results. However, now he has work from charities. He records business processes, writes funding applications, and creates websites. People in charities do not know the term 'technical author'. He has better results if he uses the term 'technical communicator'. Make sure that your website and brochures include all possible descriptions of what you do. Explain how your skills let you to solve many communication problems.

Another member wrote, "I call myself whatever they want to read, Author or Communicator (as I do training as well I prefer Communicator)."

In 2005, someone asked a similar question on the IASIG list. For a summary of the discussion, see www.techscribe.co.uk/ta/describing.htm.

Abelard Consulting in Australia asked a similar question in a web-based survey. The November 2009 issue of *Words* has the results of the survey in 'What should technical writing be called?: survey results' (www.abelard.com.au/words-1-4.pdf).

Adobe AIR

A member wants to use RoboHelp® version 8 to create context-sensitive help with Adobe® AIR®.

The process is dependent on the type of help:

- For help that is supplied through a web browser, the procedure to call a topic is the same as for WebHelp.
- For locally installed help, Adobe supplies an API.

Good information is on www.grainge.org/pages/authoring/air/8/air_rh8.htm C

Mike Unwalla FISTC
E: mike@techscribe.co.uk

Local area groups

The ISTC local area groups are an opportunity for technical communicators to network and share knowledge and expertise. The groups are open to everyone from all industries in the local area (you don't need to be an ISTC member to attend), and it's free. The groups meet at intervals over the year and hold talks, peer discussions, demonstrations and social evenings.

If you're interested in attending or you'd like more information, please contact the ISTC Office or your local organiser.

Cambridge
Organiser: Richard Truscott
E: Cambridge_areagroup@istc.org.uk

London
Organiser: Claire Hooper
E: London_areagroup@istc.org.uk

North West England
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E: northwestengland_areagroup@istc.org.uk

North East England
Organiser: Janine Weightman
E: northeastengland_areagroup@istc.org.uk

Southern
Organiser: Elaine Cole
E: istc@istc.org.uk

West of Scotland
Organiser: Katja McLaughlin
E: westscotland_areagroup@istc.org.uk

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You may be eligible for funding towards your training. For details of grants that you may be entitled to, see armada.co.uk/trainingfunding

Technical authoring courses

- Intro. to technical authoring (1 day, £350) 26 Sep, 3 Oct, 7 Nov
- Intermediate technical authoring (2 days, £595) 27-28 Sep, 4-5 Oct, 8-9 Nov
- Advanced technical authoring (2 days, £595) 29-30 Sep, 6-7 Oct, 10-11 Nov

Discounted price for above three courses (5 consecutive days): £1,195

Print, publishing and design

- Basic/Intermediate Framemaker (2 days, £395) 2-3 Nov
- Advanced Framemaker (1 day, £295) 4 Nov

Discounted price for both Framemaker courses (3 days' training): £595.

- Introduction to InDesign (2 days, £295) 15-16 Sep, 24-25 Nov
- PageMaker - all levels On-demand
- Arbortext APP
  - Foundation (5 days)
  - Dynamic Showstrings (5 days)

  All Arbortext training on-demand. Other Arbortext training available.
- QuarkXpress - all levels On-demand
- Introduction to Photoshop (2 days, £295) 25-26 Aug, 20-21 Oct, 1-2 Dec
- Introduction to Illustrator (1 day, £195) 18 Nov
- Acrobat - all levels On-demand
- Paint Shop Pro - all levels On-demand

Online help development

- Basic/Intermediate RoboHelp (2 days, £395) 17-18 Oct, 19-20 Dec
- Advanced RoboHelp (1 day, £295) 19 Oct, 21 Dec

Discounted price for both RoboHelp courses (3 days' training): £595.

- Basic/Intermediate Madcap Flare (3 days, £745) 28-30 Nov
- Madcap Flare advanced modules
  - Print publishing
  - Cascading style sheets
  - Migrating from RoboHelp

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E-learning and Web

- Introduction to Captivate (2 days, £395) 22-23 Sep, 3-4 Nov, 15-16 Dec
- Dreamweaver - website creation (2 days, £295) 13-14 Oct, 8-9 Dec
- Flash - all levels On-demand

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TCeurope Colloquium in Brussels

Eeva Viljanen reports on the April 2011 event.

The annual TCeurope Colloquium was organised in Brussels, the EU capital city, in April. The location fitted the theme; this year's topic was the impact of European directives and standards on technical communication. The venue, CEN-CENELEC Centre, likewise was appropriately chosen as it houses the European Committee for Electrotechnical Standardization.

The Colloquium was opened by Wouter Verkerken, representing Belgian technical communicators. Belgium does not have an association for technical communication, as according to Wouter, Belgians tend to have a *hands on* attitude towards technology; do first and plan second. This attitude, of course, is well-known among technical communicators. Wouter also mentioned that there is no formal university-level education in technical communication in Belgium, even though the European Commission has its seat in the country. Let's hope the Belgians find the inspiration to set up an association.

Participants

This year the number of participants was affected by various national celebrations. Some British delegates had, quite understandably, prioritised the Royal wedding. Holland, in turn, celebrated the birthday of Queen Beatrix, and Finns were getting ready for the May Day feast. Those present made use of the intimate setting by actively discussing with one another during the Colloquium, over lunch and at the dinner table. Business cards were exchanged and new connections were made in a warm and welcoming atmosphere. The expertise and experience of the speakers was well appreciated, and conversation about the different topics was lively.

Machinery Directive

Work in the European Commission around the Machinery Directive (Directive 2006/42/EC) was presented by Ian Frazer, an expert on occupational health and safety, who works for the Commission, DG Enterprise and Industry, and is Chairperson of the Machinery Working Group. The basis of the Machinery Directive is to guarantee the free movement of machinery that is either imported to or manufactured in Europe. The aim of the directive is to ensure a high level of protection for users, workers and consumers alike. The free movement of goods is possible only when user safety is assured. The Machinery Directive lays out the principles of user information in documentation (see section 1.7.4. of the Directive). Ian stressed the importance of addressing safety already in the design phase, that is, to provide *safety by design*. The vision for the future is to equip machinery and parts with a micro chip that would function as a technical file including all the necessary information on safety, manufacturer and compliance with other parts.

Pharmaceuticals

A different view on users and documentation was presented by Karel van der Waarde who is the Scholar in Visual Rhetoric at the University of Avans in the Netherlands. Karel has wide experience in the pharmaceutical industry developing medicine packaging into a more user-friendly format. According to Karel, EU legislation on medicine packaging and information on medicines could not be better, which should guarantee high-quality products. The implementation, however, is far from the strict and exact laws aimed at safety and user-friendliness.

Karel demonstrated the situation by showing the audience an information sheet the size of a bath towel instructing the user on a medicine for schizophrenia. The sheet had only one language, but was in a tiny font. Another example was a matchbox-sized booklet on aspirin with several languages and 160 pages. A headache is surely the result of reading such small pages. The problem, according

Figure 1. Participants

Figure 2. Karel van der Waarde

to Karel, is the lack of standards in the industry, which results in unclear information and hard-to-follow instructions. Sadly, this sometimes causes loss of life. Rather surprisingly, XML is not widely used in the pharmaceutical industry, even though version control is in this case a deadly serious matter.

Warnings

Overdosing was also addressed by Information Developer Marie-Louise Flacke from France. She referred, though, to the excessive use of warnings in documentation. Her message was that when it comes to warnings, less is more. Using too many warnings in instructions numbs the user and the warnings, in fact, become ineffective. Marie-Louise notes that manufacturers often add superfluous warnings to instructions to gain legal protection for their products. Informing or warning the user may indeed be a secondary motive. She also mentions an interesting research result; eye movement tracking tests show that warnings placed in text boxes are skipped. Marie-Louise stresses the fact that instructions should inform the users, not scare them away. She recommends avoiding such outcomes as *Dangerous iPad!*

Further presentations

The last one to step onto the podium was Dutch Paul Hoogerkamp who has 20 years' experience on machinery safety, both as instructor and consultant in his own company. Paul is co-writer of *Practical Guide to the Machinery Directive.* He described the catch-22 in technical communication with two claims: *designers "dislike" writing (or are not allowed to do the writing)* and [there are] *"no comments" on the design by technical writers of the manuals.* According to Paul, in the ideal situation designers and writers will genuinely interact with each other in the design process. What an excellent aspiration that is!

Several other speakers presented their views on different issues at the Colloquium in addition to the ones viewed in this article. All the presentations can be found on the TCeurope web page (see Resources).

Next year

Next year the colloquium will be organised in Aveiro, Portugal. Aveiro will certainly have my attendance — so inspiring was my first visit to the European forum of technical communication! C

Figure 3: CEN-CENELEC Centre, the venue

Figure 4: Gordon Dennis and Marie-Louise Flacke were among the speakers at the colloquium

References and resources

CEN-CENELEC, www.cenelec.eu

Ekelenberg HP, Brown DA, Hoogerkamp P, A Practical Guide to the Machinery Directive

Machinery Directive 2006/42/EC http://tinyurl.com/MachineryDirective

TCeurope Colloquium 2011 presentations www.tceurope.org/index.php/colloquium/37-2011.html

Eeva Viljanen, M.A., is a member of STVY, the Finnish Technical Communications Society. STVY sponsored her attendance to the Colloquium. In return, she wrote the article for Näkymä, the STVY web journal. She is a self-employed Technical Writer and Translator, and a visiting lecturer at Tampere University, Finland.
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And the winner is . . .

The winner of the "Guess the UK city" competition on page 33 of the Summer 2011 issue of *Communicator* is Nick Kenney. He wins a tea-towel of the UK city.

The answer was: **Liverpool**.

Nick Kenney's answer:

Crafted and drafted in the great North of England before being 're-drafted' to Australia at a tender age, I couldn't help noticing the names of some of the famous and infamous on the *Communicator* underground map and I reckon the city must be LIVERPOOL.

Doddy was a big giveaway, but I thought 'hang-on a mo, it could be Notty Ash.' Then I saw 'Stev Gerr' sneaking off the page and almost shouted 'yep, Steve Gerrard, has to be Liverpool'.

Section of the tea-towel

Congility 2011 redux — addressing content agility

X-Pubs was reborn this year as Congility. Conference chairperson Noz Urbina takes us through goings-on and feedback from the inaugural event in May 2011.

The three day Congility 2011 Conference gathered over 200 participants near Gatwick in Crawley, UK. As the Firehead 'Reviews and Notes' blog said, it featured:

"40+ speakers and three workshops, and aimed to bridge the gap between tech comms and other CS [Content Strategy] specialisms — not an easy task."

Still, with a line-up including figurehead names like Ann Rockley, Rahel Anne Bailie, and Don Day, and a panel discussion facilitated by Scott Abel aka The Content Wrangler, by all accounts it was one of Europe's most thought-provoking and significant events. Even with the X-Pubs legacy to live up to, it was the best event to-date.

But what is Content Agility?

X-Pubs came from 'XML Publishing'. Congility takes a wider perspective, beyond addressing the storage format (XML) and changing some aspects of 'publishing', organisations today need to go deeper and think differently. Event Speaker Mark Forry, of NetApp software said "For many organisations, the expectations of their customers have outpaced what the information managers can provide — and in some cases, can even conceive of."

Presentations focused on how to open up our eyes to these new expectations and then detailed how organisations must not only change process, but the content itself, to meet new needs.

Simply put, today's content needs agility: the ability to be unlocked from its original context and format — be it internally or externally sourced — and quickly and easily be re-purposed for new business needs.

Presentations at Congility covered: content strategy, content management best practices, the impact of the web, search and social media, and case studies leveraging standards like DITA and S1000D. The aim was to bridge the silos in our *thinking*, so that we would be better equipped to tackle the actual content and departmental silos.

Keynote highlights

Ann Rockley's keynote *Developing an Intelligent Content Strategy,* featured practical examples of various cross-silo implementations. She explained that to be agile and intelligent, you need a content strategy that addresses how content assets will be 'discovered', and 'dynamically reconfigured', not just created and published.

She talked step-by-step through delivering business, user and task oriented content, and how to make decisions on what media and content to prioritise. She also reminded us not to pick tools before defining content and process.

Day two's keynote by Rahel Anne Bailie was also very well received, and when posted on Slideshare.net and Linkedin, shot up on both to being a 'most discussed' presentation.

Rahel explained how being a content strategist is like being a doctor: Medicine is one field, but there are many specialisms (dentist, paediatrician, and so on), and many people outside it may not appreciate the subtle differentiations.

She delivered many case studies in both business-to-business and business-to-consumer environments showing how different strategies made sense, but all required a: "repeatable system that governs the management of content throughout the entire lifecycle."

Warnings and reassurances

Andrew Bredenkamp and Rahel Anne Bailie showed us how broken content strategies that didn't properly transmit technical information online or into product 'marketing' content hurt customer experience and sales.

David Farbey was quoted many times for his soundbite: "[We should] deliver the minimum effective dose of content". Similarly, Marie Louise-Flacke and Nicholas Rowland (my co-presenter) cautioned that a move to structured processes should always focus on minimalism and content optimisation *first*.

On the other hand, throughout the event, and especially in case studies from eBay, Symantec and Nokia, we were reminded as technical communicators that we need to listen as much as talk if we're to handle the constant 'need for speed', while adapting to meet changing market and user expectations.

An eye opener

One of my favourite conference tweets was from Lisa Moore: "Content Strategy has to evolve fast or die young" following

Sponsors take a time out during sessions in the exhibition area

Don Day, 'The father of DITA' presenting at Congility 2011

Getting up to speed on new ideas at Congility 2011

Question time expert panel discussions were held at the end of Congility S1000D (the S1000D focussed sub-event, above) and the main Congility Event

suit with feedback on the day. Many others used the phrase "eye opening", and one old hand at DITA and CMS [Content Management System] came up to me and said they "thought they had a content strategy" until they attended Congility.

Overall, the message was — we must take a renewed, strategic, integrated and business-led approach to content, if we want to deliver great customer experiences and do our bit to drive revenues. This field is changing so fast that even the 'experts' have something to learn when everyone gets together to exchange experiences.

Following on

Congility will continue its efforts to deliver thought-leading, challenging events. Webinars and whitepapers from the X-Pubs days are available on Congilty.com, as is information about this September's Congility South — the introductory and advanced DITA training event. C

References and resources

Slides available from congility.com

Keith Schengili-Roberts on Ann Rockely's Keynote: http://bit.ly/qBlyo8

Firehead Blog: http://bit.ly/quOzlB

David Farbey's retrospective: http://bit.ly/oGiXGq

DITA Training: www.congility.com/south

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17th Localization World focuses on the future

Katie Botkin reports on the June 2011 event in Barcelona.

Localization World had a record attendance of just less than 550 at its latest event held over June 13–16, 2011, in Barcelona, Spain. Localization World is an established biannual localisation industry conference with a programme large enough to provide stimulating debate and information sharing, and small enough that newcomers don't get lost in the crowd.

Futurist Patrick Dixon set the tone for the conference with a June 15 keynote entitled "Futurewise," where he also gave out signed copies of his book by the same name. Dixon laid out the six faces of global change discussed in the book, focusing on three in particular. First of all, as he sees it, demand for speed worldwide will only rise. Dixon predicted that the pace at which companies are required to respond will increase tenfold, as will the speed at which you're required to work. For translation companies, said Dixon, this means "an absolute commitment to automatic translation."

For all the speed and machine-driven efficiency that Dixon claimed lies ahead, he said the future is about emotion. "Innovation alone cannot tell you the future." Any innovation that has staying power touches the heart in some way, and innovation is about what you want and how people want to live.

Tied in with this is the concept of tribalism, which creates poetry, family and a sense of belonging. "Every tribe has its own brand, every brand creates its own tribe. Every community has within it hundreds of tribes," said Dixon. The opposite of tribalism is universalism, and the two actually feed on each other because people want to find common ground even as they want their separate identities. "In my own country, the UK is breaking up into tribes," Dixon said, giving as an example the re-emergence of Scots Gaelic in the last five to ten years. "The more McDonalds is everywhere, the more people want their own culture."

But within the universal of these fragmented tribes lies consumer power in more ways than one, said Dixon. "Authority has moved from CEOs to the crowd. What the crowd is saying is more important than the company." Hence, for example, "how those crowd comments are translated" makes a huge amount of difference for the company.

Many sessions within the conference echoed the ideas that Dixon had touched on. In a session on the future of standards, Jaap van der Meer of TAUS commented that the ultimate goal is to "make translation so easy it's part of everything you do." To address this, TAUS's goals for the future of standards are to consolidate fragmented functions in the global translation industry, drive translation interoperability, deliver a dynamic quality evaluation framework and develop a market for open-source machine translation.

The second keynote continued Dixon's themes, with moderator Paula Shannon of Lionbridge stating that "user-generated content is a steamroller coming."

Panellist Calijn Roeters van Lennep of KLM Royal Dutch Airlines agreed, quoting McKinsey Quarterly Report that "the outreach of consumers is dramatically more important than the outreach of marketers." On the whole, sessions were well received, and Tim Young, senior operations manager at Cisco, said "I definitely see a buzz" at this Localization World he hadn't seen before, which could turn out to be a "flash point" where localisation industry players start understanding where they're going.

Localization World is also a touchpoint within the language industry, and many attend to network and catch up on the latest industry trends. Industry non-profit Translators without Borders (TwB) underwent a fundraising effort at Localization World, with prizes donated from a host of companies. The fundraising effort was part of a broader goal to ensure full-time management of TwB's scaled-up enterprise, complete with a new translation platform put together by Proz.com. "Much as I love the technology, it's all about the community," said TwB co-founder Lori Thicke, and due to this community they've already donated almost $3 million in services to non-government organisations such as Doctors Without Borders. The organisation is particularly concerned with making medical information available in minority and local languages.

The next Localization World will be held in Silicon Valley, California, October 10–12, 2011.

Delegates at the opening reception

Lunch between pre-conference sessions

Researching the schedule in the exhibit hall

Barcelona

Katie Botkin is the managing editor of *MultiLingual* magazine, which publishes articles on language, language technology and the broader business of how people communicate across cultures.

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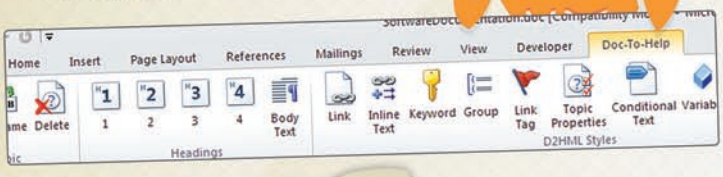

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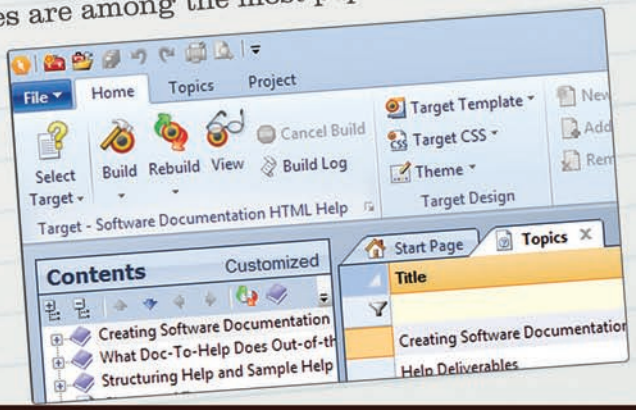

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Online survey with professional authors

This survey was conducted by Lorcan Ryan as part of a PhD investigating the development of user assistance for global audiences.

The main objective of this survey was to explore what tools and resources professional authors use in the development of user assistance (UA) material for global audiences. *UA material for global audiences,* in this context, refers to help documentation written for both native and non-native English speakers, and which has been translated into different languages for international users.

The second objective of the survey was to establish which guidelines are most useful to professional authors in the development of high quality UA for global audiences. Academic research and industry resources such as style guides advocate numerous guidelines aimed at improving the quality of text-based content. The goal of the survey is to investigate which guidelines professional authors rate the highest in terms of developing high quality UA material that is usable, readable and translatable. Human translatability is the focus of my PhD at the University of Limerick, so any reference to translatability in this article hereafter refers to human translatability rather than translatability for machine translation (MT) systems.

Web design tools are used weekly by 42.9% of respondents

Survey design

The exercise was created and carried out using SurveyMonkey™, the web-based software. The resulting online survey was distributed to potential respondents via email. It consisted of four main sections: general introduction and disclaimer; professional profile; authoring tools and resources; and rating of authoring guidelines.

Table 1. Explanation of guideline ratings

Rating	Explanation
1	This guideline is very useful to all professional authors developing usable, readable and translatable user assistance for global audiences.
2	This guideline is quite useful to most professional authors developing usable, readable and translatable user assistance for global audiences.
3	This guideline is useful to some professional authors developing usable, readable and translatable user assistance for global audiences.
4	This guideline is of little use to professional authors developing usable, readable and translatable user assistance for global audiences.
5	This guideline is of no use to professional authors developing usable, readable and translatable user assistance for global audiences.

There were nine questions about respondents' professional experience and authoring tools and resources used. This was followed by a list of 200 authoring guidelines, each of which was accompanied by a five-point scale for participants to rate it. The survey was carried out in June and July 2010.

The general introduction explained the objective of the survey, with the disclaimer assuring respondents that their personal details remained confidential. The professional profile section asked respondents general questions about their job title, number of years' professional experience and type of user-assistance material developed.

The next section asked respondents which tools and resources they used to develop UA for global audiences, and how frequently they used them. Respondents were initially asked how frequently they used popular authoring tools such as Microsoft Word™, Google Docs™, OpenOffice Writer™, Adobe FrameMaker™, Quark Xpress™, Arbortext™ and Adobe InDesign™. They were also asked how frequently they used other types of software during the development of UA for global audiences, including web design tools, help authoring tools, screen capture tools, quality assurance tools, controlled language tools, terminology management software and content management systems (CMS). Finally, the survey asked particpants how frequently they used resources such as dictionaries, glossaries, term bases, lexical databases, style guides and controlled languages to develop UA material for global audiences.

The final section in the survey presented respondents with a list of authoring guidelines derived from the secondary research I conducted. They were asked to rate each guideline on a scale of 1 to 5 based on how useful they felt that guideline was to the development of usable, readable and translatable UA material.

Table 1 shows that positive ratings were assigned in ascending order, with a rating of 5 indicating a guideline was extremely useful in developing high quality UA for global audiences, and a rating of 1 indicating that a guideline was of no use to the development of high quality UA for global audiences. This section also contained definitions for usability, readability and translatability to ensure that respondents understood each of these quality attributes. The University of Limerick Ethics Committee approved the final design of the survey prior to its distribution to the authoring community.

Survey distribution

Survey respondents were required to be expert professional authors that developed user assistance material in English for global audiences. Professional authors are the technical writers, help authors and other UA professionals that develop user assistance material as their main responsibility, as opposed to software developers or engineers who only occasionally write UA content on an ad-hoc basis. For the purposes of this survey, an 'expert' was an author with three or more years' professional experience. Respondents were also required to author content primarily for user assistance rather than other types of documentation such as marketing communications. The final criterion for survey respondents was that they wrote UA material for both native and non-native speakers of English, and that the material was human-translated in different languages for international users. This control ensured that the concept of translatability was relevant to respondents' professional authoring responsibilities, as well as usability and readability.

I contacted professional authors in several technical writing agencies, software vendors (with internal technical writing or documentation departments), universities, social networking groups and professional associations to establish if they were willing to participate in the survey. A link to the online survey was emailed to any professional authors that fitted the respondent profile required, and who had expressed an interest in participating in the study.

Survey results

Given the precise profile of respondent required, it was not possible to calculate the total population size or the exact sample size required to generate statistics of quantitative relevance. Instead, the aim of this survey was simply to obtain an overview of what tools and resources professional authors use, as well as how they rate the usefulness of authoring guidelines in the development of usable, readable and translatable UA material for global audiences. Due to the extensive nature of the survey and the limited timeframe available to conduct the research, it was only possible to collect 24 full survey responses and this limitation should be considered when analysing the survey results.

Professional profile

All respondents met the profile required and were based in a variety of different locations including Australia, Belgium, Canada, England, France, Ireland and Singapore; but all of them wrote source language UA material in English. The job titles of respondents included director of technical communications, documentation manager, author, technical editor and technical writer.

Table 2. Authoring tools used by respondents

Authoring tool	Daily	Weekly	Rarely	Never
Microsoft Word™	66.7%	12.5%	20.8%	0%
GoogleDocs™	5.6%	11.1%	16.7%	66.7%
OpenOffice Writer™	0%	10.5%	26.3%	63.2%
Adobe FrameMaker™	15%	25%	20%	40%
QuarkXPress™	0%	0%	11.1%	88.9%
Arbortext™	9.5%	9.5%	14.3%	66.7%
Adobe InDesign™	5.6%	16.7%	16.7%	61.1%

Table 3. Other tools used by respondents

Other tools	Daily	Weekly	Rarely	Never
Web design	9.5%	42.9%	28.6%	19%
Help authoring	10.5%	15.8%	31.6%	42.1%
Screen capture/ graphic design	31.8%	50%	18.2%	0%
Quality assurance/ testing	4.8%	38.1%	19%	38.1%
Controlled language/ test analytics	5.3%	10.5%	26.3%	57.9%
Terminology management	14.3%	19%	19%	47.6%
Content management systems (CMS)	43.5%	21.7%	8.7%	26.1%

Authoring tools

The results of the survey reveal that most professional authors developing UA material for global audiences use Microsoft Word™ as their primary authoring tool (see Table 2). The majority (66.7%) of respondents used it on a daily basis, with a further 12.5% using it on a weekly basis. Adobe FrameMaker™ was the next most frequently used authoring tool, with 15% of respondents using it daily and 25% using it weekly. The least used authoring tool was Quark Xpress™, with no respondents using it either daily or weekly, and 88.9% (16 respondents) having never used it at all.

The next set of results reveals an insight into the other tools used by the respondents. Content management systems are the software applications, other than dedicated authoring tools, that professional authors use most frequently on a daily basis. 43.5% of respondents use CMS every day with a further 21.7% using it on a weekly basis. Respondents also regularly used screen capture and graphic design tools, with over 80% using these applications at least once per week.

Surprisingly, a significant portion of respondents claimed that they never used dedicated help authoring tools (42.1%), terminology management tools (47.6%) and controlled language tools (57.9%).

Table 4. Resources used by respondents

Authoring tool	Daily	Weekly	Rarely	Never
Dictionaries	65.2%	26.1%	8.7%	0%
Glossaries	43.5%	39.1%	17.4%	0%
Termbases/lexical databases	21.7%	30.4%	47.8%	0%
Style guides	62.5%	25%	12.5%	0%
Controlled languages	15%	20%	65%	0%

Table 5. Top ten guidelines based on average ratings from survey

Ranking	Guideline	Average rating
1	Use consistent terminology.	4.96
2	Correctly identify warnings and cautions.	4.75
3	Be logical, literal and precise.	4.67
4	Define acronyms and abbreviations.	4.67
5	Ensure that all words are spelt correctly.	4.67
6	Avoid buying procedural information in narrative text.	4.63
7	Avoid slang, humour and sarcasm.	4.63
8	Start numbered items at one.	4.63
9	Write verbs in the imperative.	4.63
10	Eliminate idioms.	4.58

Authoring resources

Respondents were next asked which authoring resources they used in a professional context. Table 3 shows that the two most frequently used authoring resources were dictionaries and style guides, with 65.2% and 62.5% of respondents respectively using each of them on a daily basis. Glossaries were also popular, with 43.5% of respondents using them daily. The least frequently used resources were controlled languages, with 65% of respondents having rarely used them in their professional duties.

Rating authoring guidelines

The next results were the ratings assigned by respondents to each of the 200 authoring guidelines presented to them in the online survey. The list of authoring guidelines (derived from secondary research I conducted) related to the lexical, orthographical, morphological, syntactic and structural properties of sentence-level text in user assistance material.

Survey respondents rated each individual guideline on a scale of 1 to 5, according to how useful they felt it was to the development of high quality usable, readable and translatable UA material for global audiences. I then derived an average rating for each guideline from the individual ratings assigned by respondents in order to identify the top ten guidelines they felt were most useful to the development of usable, readable and translatable UA material for global audiences. All of the top ten guidelines achieved an average rating of between 4 and 5, which equates to the opinion *"This guideline is quite useful to most professional authors developing usable, readable and translatable user assistance for global audiences"* (see Table 1).

Table 5 shows that the guideline directing authors to use consistent terminology was ranked highest by respondents, with an average ranking of 4.96. Consistent terminology enhances comprehension for native and non-speakers, it improves the opportunity for content reuse and facilitates translation leveraging with Translation Memory (TM) tools, so perhaps it is not surprising that this was the highest rated guideline.

The guideline with the second highest average rating was the instruction to identify cautions and warnings correctly in user assistance material. This guideline is important as it helps readers of UA to recognise if certain actions have negative consequences, such as a loss of data. The guidelines ranked third, fourth and fifth all achieved an average rating of 4.67 and, therefore, are ranked alphabetically in Table 5. These guidelines recommend using precise language, defining acronyms and abbreviations and spelling all words correctly to improve the usability, readability and translatability of UA material for global audiences.

The guidelines ranked sixth, seventh, eighth and ninth also achieved the same average rating (4.63) and, again, are ranked alphabetically. Two of these guidelines address the text structure of UA material in terms of the placing procedural text in distinct units of information and beginning lists with the number one rather than the number *zero* or the letter *a*. The other two guidelines, ranked in seventh and ninth place, recommend avoiding slang, humour and sarcasm; and writing verbs in the imperative form in UA material.

The guideline with the tenth highest average ranking from the online survey advises professional authors to avoid the use of idioms when developing UA for global audiences.

Conclusions

It is important to consider the limited response rate for this survey before attempting to draw any meaningful conclusions from its results. The survey provides a brief overview of the tools and resources used by professional authors in the development of UA for global audiences. Interestingly, despite the increased popularity of open source software and Web 2.0 applications in recent years, the most frequently used authoring tools by survey respondents were still commercial, desktop-based tools such as Microsoft Word™ and Adobe FrameMaker™.

As well as authoring tools, professional authors also frequently used content management systems (CMS) and graphic design tools. The common use of CMS suggests that increasing numbers of enterprises are interested

in organising and reusing user assistance material for global audiences, while the high usage rate of screen capture software suggests that significant numbers of professional authors are responsible for screenshots and graphics, as well as text-based content. However, despite the importance of consistent terminology as outlined in the top-ranked guideline in Table 5, less than 15% of professional authors used terminology management software on a daily basis.

Dictionaries and style guides are the resources used most frequently by survey respondents in the development of UA material for global audiences. Even though respondents did not use terminology management software extensively, terminology resources such as glossaries, term bases and lexical databases were used on a frequent basis. Over 80% of respondents, for example, referred to glossaries at least once per week. Despite the perceived benefits of controlled languages (CLs), only 15% of respondents used CLs on a daily basis to write UA material.

The final conclusions derived from this survey relate to the attitude of practitioners toward a selection of guidelines from the fields of technical communication, controlled language and internationalisation that address the development of high-quality usable, readable and translatable UA documentation for global audiences. Despite the fact that controlled languages often highlight the importance of sentence lengths, the guideline receiving the highest average rating in this survey pertained to terminology consistency. In fact, none of the top ten guidelines outlined in Table 5 relate to the length of sentences. This may be because a significant number of controlled languages aim to improve the translatability of content for MT systems rather than human translators.

The fact that sentence length guidelines were not ranked as highly for human translatability may suggest that sentence length is less of an issue for human translators than it is for MT systems. Indeed, guidelines related to the use of terminology accounted for five of the top ten highest rated guidelines in the survey. Given this fact, it is perhaps a little surprising that professional authors do not use terminology management software more frequently in the development of UA for global audiences.

Unfortunately, due to practical constraints, the scope of this survey was limited in nature. It would be interesting for future studies to investigate in more detail some of the issues raised by the results of this survey; particularly in terms of the different types of tools, resources and guidelines used by professional authors in the development of usable, readable and translatable UA material for global audiences. C

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Blinded by colour

Max Williams explains colour blindness and suggests how to use colour for those unable to distinguish red and green colours clearly.

Introduction

No one disputes the fact that colour makes for good illustrations and is especially useful for conveying information. But have you ever wondered how your hard work would appear to someone with defective colour vision? The chances are that the information you are trying to convey is at best misunderstood and at worst, not even noticed.

These days it is politically correct to try to appreciate and accommodate the disabled person in the workplace and this is as it should be, but colour blindness is an invisible impediment that is not obvious to the average person. It tends to be dismissed or ignored except when the sufferer comes to work dressed in clashing colours or mismatched socks!

I, together with a substantial percentage of the male population have a genetically deficient colour vision termed red-green colour blindness. Colour blindness is largely misunderstood by those of you who are not afflicted. If I asked the person in the street to define red-green colour blindness, the answer would probably be a variation on "You see red grass" or "Do you see strawberries as green?" This is actually not the case and is in fact very simplistic. Can anyone explain to me what the colours red or green actually look like anyway?

Do you see green strawberries?

Colour perception is very subjective and no-one knows how anyone else sees colours. Those of us who have lived our lives with the disability, have developed many wild and wonderful ways of working out the colours of things usually based on the context in which we find the colours. For example, one day I found myself trying to work out the colour of some fabric my wife had bought. I couldn't work out whether it was blue or something else. Eventually I likened it to strawberry milkshake. Strawberries, I am told are red, milk is white; I learned at school that if you mix red paint with white you get pink. Therefore, the fabric was pink! Rather long winded isn't it? This highlights the fact that the main problem colour-blind people have (well me anyway) is recognising colours out of context. We have been taught that grass is green, sky is blue, tree bark is brown but how do we recognise the colours on a page with nothing to refer them to?

The purpose of this article is to try to educate the technical communicators who insist on using colour to convey information, to think twice and to consider what colours they use. First though, what is colour vision?

Simple rules to observe when using colour to convey meaning

1. Pick a maximum of one colour from each box (see Figure 1).
2. Use large expanses of colour. If using coloured fonts, then also use bold and a large font size.
3. If small expanses of colour are being used, such as thin lines, clearly label them with text or use non-colour techniques such as font styles, line styles or cross hatching.
4. Use bright mid-range colours, like children's crayons.
5. Use primary colours.
6. Do not use light or dark variants of colours.

Colour vision

The average human retina contains two kinds of light receptive cells, the rods cells, which are active in low light and the cone cells, which are active in normal daylight. Cone cells consist of three types, each being activated by a different range of light frequencies and are known as 'Blue, Green and Red Cones'. Although referred to by these names, they are in fact sensitive to a far wider colour range. The Red Cone, for example has its peak sensitivity in the yellow frequency range. Normal colour vision, therefore, requires an overlap between the absorption spectra of the three cones. Different colours are recognised when the different cones are stimulated to different degrees, causing a gradual change in colour. So what happens when your cones malfunction?

Colour blindness

Any defect to, or lack of the cones, either genetic or otherwise, can cause problems with colour vision. There are a number of colour blindness conditions:

People with protanopia (male population 1%, female 0.02%) lack the long-wavelength sensitive retinal cones that are required to distinguish between colours in the green-yellow-red section of the spectrum.

People with dueteranopia (male population 5%, female 0.03%) lack medium-wavelength retinal cones and are, therefore, also unable to distinguish between colours in the green-yellow-red section of the spectrum.

People with colour blindness involving the inactivation of the short-wavelength sensitive cone system have tritanopia, a very rare blue-yellow colour blindness.

There is also an extremely rare condition giving monochrome vision.

Many of the genes involved in colour vision are attached to the X chromosome. Colour blindness is more common in males as they have only one X chromosome.

For the purposes of this discussion, I will confine myself to the most common type usually affecting males known as red-green colour blindness.

"That's easy to get around", I hear you say. "Just avoid red and green" Not so, that's a gross oversimplification!

The mechanics of colour vision mean that the deficiency we suffer from will determine which colours are confused and can include the following:

- No perceptible difference between red, orange, brown, yellow and green.
- Certain shades of red may be confused with black or grey.
- Violet, lavender and purple are indistinguishable from various shades of blue because their reddish components are dimmed to the point of invisibility.
- Pink objects that reflect both red and blue light may appear to be blue.
- Dark green can appear black.

Obviously this can cause severe problems if, as a communicator, you are relying on the recognition of different colours to portray information within your latest manual, perhaps using coloured illustrations or a colour legend to a chart. In fact, when I was at university doing my first degree in mining engineering and a Master's degree in minerals engineering, it was a constant battle trying to interpret geological maps or deciding on the colour of certain mineral samples. This same problem will repeat itself in colour-coded manuals! So what can we do about it?

The solution

To assist those readers with colour deficient vision, it would not only be wise, but polite to avoid those confusing colours. There are a few simple rules (see References and text box), which when followed, will give us the best possible chance to understand what you are going on about.

If you do use colour to convey meaning or make distinctions between visual items and not merely for decoration, Figure 1 shows safe groups of colours that should be distinguishable to most red-green colour-blind people.

Conclusion

I hope this article has helped those of you who are not colour blind to understand some of the problems that people like me have to cope with. No-one would think twice about making allowances for someone with a visible impediment or disorder, but to a substantial part of the population, colour blindness is something they just cannot comprehend and in fact do not even think about. In future when you are colour coding an illustration or table, spare a thought for those of your readers who have problems with colour. C

References

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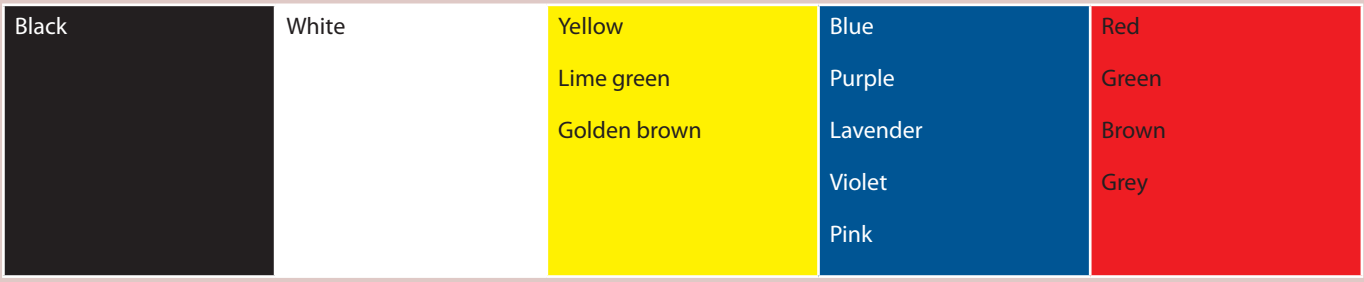

Figure 1: Safe groups of colours, distinguishable to most red-green colour-blind people.

How do you design end-user assistance?

Jonatan Lundin presents SeSAM, a new design methodology for technical communicators based on the searching user.

One of the most important tasks of a technical communicator is to develop end-user assistance for technical products; designing and writing information that helps end-users to use the product as easily, efficiently and securely as possible. Planning what to write is essential. Before you start to write you need to have a stable design, which reveals what type of information to write about and how to organise it.

Do you have a clear view on what type of information your end-users need and how to classify and organise information so that it is easy for users to find answers? If not, this article is for you. This article introduces SeSAM (Search Situation based Architecture and Methodology), a new design methodology for technical communicators.

What type of information do end-users typically need?

How do you design end-user assistance?

The task to design end-user assistance should not be based on gut feeling or an artistic approach. A good design is a well thought out plan. Every decision to include specific types of information or to organise a topic in a certain location in a content hierarchy must be based on firm design rules and principles. The design rules and principles are captured in a design methodology.

So what is a design methodology? A design methodology is a framework of methods, instructions, rules and principles that guide the designer in developing a content specification. The methodology describes the process on how to carry out the design work. But more importantly the methodology must be built from a user and usability point of view to answer, for example:

- What type of information do end-users typically need? When and why?
- How shall information be organised in deliverables for ease and efficiency when searching?

A design methodology can be captured in a company's content strategy which is consulted every time a technical product is documented or when information analysis is conducted. The design methodology should be explicit, communicated and understood by every member of the content creation process to ensure efficient designing, writing and reviewing phases. To start designing without having a design methodology in mind, is like starting the day without having breakfast. It will probably lead to inefficient work, especially in global content creation teams where many individuals are cooperating. An unclear design methodology means that you may spend a lot of time thinking how to arrange information in a deliverable, getting team members to understand your design, arguing why you have organised information the way you have etc.

An explicit and communicated design methodology can improve the relationship with Subject Matter Experts (SMEs) who frequently give input and conduct reviews. If the SMEs understand what you are trying to do, they will want to assist you. And, a clearly defined design methodology can be used to inform end-users about the type of information they can expect to find in your deliverables.

So, what kinds of design methodologies exist? There are various approaches and traditions. The approach depends on the type of product and domain (military, industrial, consumer, software, vehicle etc), the size/complexity of the product/system, the company tradition etc. Let's look at the traditional user-centred design approach, with its roots in minimalism, along with its challenges before exploring the SeSAM design methodology.

The user-centred design approach

A technical communicator starts by identifying user groups and their information needs. The information needs are assessed by looking at the goals the users are trying to accomplish when using the product. Then the tasks the user carries out to reach a goal are identified, either by asking 'surrogate users' or by observing real users in the field (or in a lab). Hierarchical task analysis (HTA) can, for example, be used to model large user tasks in hierarchies.

The descriptive information that supports the user in doing a task is derived from the tasks. Based on an assumption about what the user already knows, the amount of information needed to be included in a deliverable is identified. An outline is created, giving the structure of how tasks and supporting descriptive information (for example topics) are organised. Once a stable version of the outline is available, the writing can begin.

The environment in which the tasks are carried out must be analysed. It is important to find out how the information, and how to do a task, is best transferred to users. Reading long text is probably not what some end-users want, instead an e-learning package or a training course may be better.

There are other approaches for determining the type of information end-users need. In

Logistics Support Analysis (LSA)/S1000D (product lifecycle data management standard in military/aviation domains for the procurement and production of technical publications), the starting point is pre-defined information types and the breakdown structure of product material. A specific type of information about a particular product object is captured in a data module.

User-centred design approach challenges

Let's look at the challenges regarding the user-centred design approach. What is a user group? Imagine a technical product that is used in many different types of organisations around the world, which means that there are many users. The way the product is used and the way the tasks are performed can differ from organisation to organisation. Consider a product that has engineering, installing, commissioning, operating and maintaining tasks. The tasks are performed by:

- One individual in small Company A in Country 1.
- Many different roles, each responsible for a particular set of tasks, in large Company B in Country 2

Which market, country, organisation type is targeted in user analysis? Is a user group (or target audience) defined as a role, occupation, individual or education level in a certain organisation? Furthermore, is content organised in deliverables according to user needs in the large organisation or in the small one?

One of the biggest challenges with the user-centred design approach is the fact that you might end up documenting how a certain role in a certain organisation is performing its duties. This can imply that you, as a technical communicator, are looking at tasks that are irrelevant to your work of documenting the product. The user may be working with other products and tools that are not in the scope of your documentation project. Do you end up adapting your documentation for a user that is not representative of the rest?

Finally, how do you organise the information you have identified to meet end-users' needs? Do you develop one deliverable including task-oriented information and another deliverable including descriptive information?

Introducing SeSAM

SeSAM is a design methodology to enable end-user assistance to be designed (see Figure 1). The methodology guides the technical communicator through the design phase to develop a specification that reveals what type of content to write about and how to organise it. SeSAM's main objective is to enable content creation teams to create usable manuals where it is easy to find information. After a SeSAM design analysis has been conducted, the specified content must be written, reviewed and approved, published and distributed (how this is done is not specifically addressed in SeSAM).

SeSAM is built around the searching user

SeSAM is rooted in minimalism and the notion of the searching user. SeSAM is built on the assumption that users are searching in manuals rather than reading the manuals methodically. Users are searching for answers when they get stuck using a product. SeSAM assumes that users are active and first try to use a product based on prior knowledge, experience and the information that can be perceived when using the product, for example from the user interface. At a certain point when prior knowledge is not sufficient or when the product fails to communicate its use, the user starts to search for information. The user finds themselves in a search situation. The user could try to find information by asking colleagues or searching the internet but at a certain point user assistance of some sort is consulted.

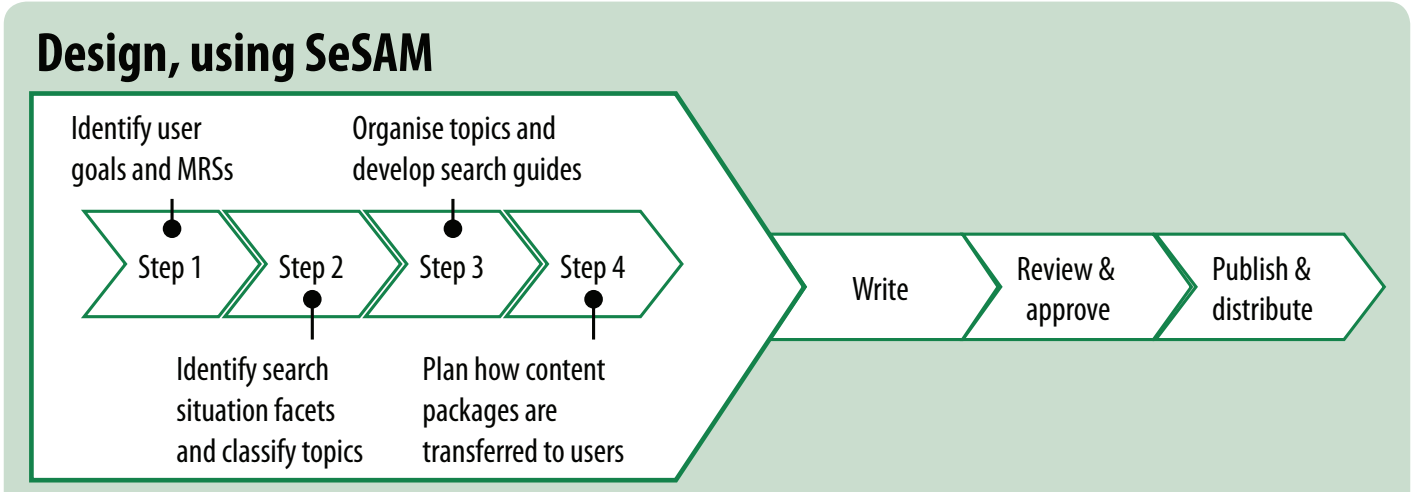

Figure 1: SeSAM is a design methodology that guides the technical communicator in designing end-user assistance.

Table 1. Example of an MRS matrix for email software product X

User goal MRS	1	2	3	4	5	6	7	8
Receive and read email	Topic 1	Topic 2	Topic 3	Topic 4	Topic 5	Topic 6	Topic 7	Topic 8
Write and send email	Topic 9	Topic 10	Topic 11	Topic 12	Topic 13	Topic 14	Topic 15	Topic 16
Store contact information	Topic 17	Topic 18	Topic 19	Topic 20	Topic 21	Topic 22	Topic 23	Topic 24
Create and keep track of meetings and invitations in a built-in calendar	Topic 25	Topic 26	Topic 27	Topic 28	Topic 29	Topic 30	Topic 31	Topic 32

Table 2. Search situation examples for 'write and send email' MRS

No.	User goals	Search situations/information needs	Example topics
1	Understand and evaluate if the product can deliver a result that solves a particular need.	The user is evaluating if it is possible to write and send an email. The user can be located in this search situation before the email software has been purchased or when the software is used during normal operation.	Describe that it is possible to write and send an email, where a sent email is visible in the product interface, what limitations exists, the customisation possibilities and much more.
2	Deploy the product into normal operation.	The user wants to know if something needs to be done (and how), prior to deploying the product into normal operation, to enable writing and sending emails.	Instruct how to set up, configure and test sending an email.
3	Use the product, when in normal operation, to solve the need.	The software is in normal operation. The user needs information on how to write and send an email.	Instruct how to write and send an email.
4	Ensure that the product has delivered the result that solves the need.	The user has written and sent an email and is uncertain if the email was sent at all. The user needs information on how to ensure that an email was sent properly.	Instruct how to ensure that an email was sent properly.
5	Find the reason why the product has not delivered the result that solves the need.	The user has concluded that the email was not sent properly (which was revealed in search situation 4). The user needs information on how to find out why the email could not be sent properly and what to do about it.	Instruct how to find the reasons why an email was not sent properly. Note that this information is not troubleshooting due to hardware or software failure.
6	Customise how the product is solving a need.	It is often possible to customise an MRS. To customise means that the user has several options to choose from to make the product adaptable to the various user contexts. The user needs information on the options and how to customise the writing and sending of emails.	Instruct for example, how to select where a sent email is stored. The customisation instructions shall present the various options available and guide the user in selecting and setting the appropriate options.
7	Understand why the product is communicating or behaving in a certain way.	The software prompts 'The receiver has opened the email'. The user does not know what it means. The user needs information on how to interpret the product when it is communicating something or behaving in a certain fashion.	Describe what the prompt means, why it has been issued and if the user must acknowledge/stop/reset etc. Each communication/behaviour is related to a certain MRS.
8	Understand or look up, a specific interface element (command, button, switch, menu etc) or if the product includes a specific element and where it is located in product interface.	The user is trying to, for example write and send an email. The user believes that a certain menu command should be used, but is uncertain if it is the correct one. The user needs information about the purpose of the current menu command.	Describes each interface element from several perspectives, such as its purpose, location, role in which MRS (for example the writing and sending of an email), technical data etc. An interface element is a part on the product interface such as a switch, button, dialog, menu, icon, display, software or hardware module etc.

Key concepts in SeSAM

The SeSAM methodology introduces a number of key concepts, such as search situations, meaningful result statements (MRS), user goals, information types, user profiles and organising and classifying information types.

Search situations

A user can be located in many different types of search situations. A search situation is characterised from several facets, for example: What is the user's goal? What type of result does the user want the product to deliver? In what operating environment is the product used? What part (for example the administrator or user interface) of the product is being used? Which lifecycle is the product in (for example not installed, being installed, in normal operation, out of service)? SeSAM pre-defines a set of search situation facet taxonomies, used to categorise every search situation. The knowledge of various search situations is vital in determining how information is best transferred to user.

Meaningful result statements

A typical product has many possibilities that are aimed at solving a number of user needs, problems or requirements. In other words: a user is using a product to make it deliver one or more results, which are meaningful to the user and solve one or more needs, problems or requirements. In SeSAM, each possibility or meaningful result the product can deliver to a user is called a Meaningful Result Statement (MRS). An MRS is not the same thing as a user task, as many products can deliver meaningful results without the user interacting with the product during normal operation. Furthermore, an MRS is not the same thing as a software or hardware component, as many components often cooperate within the product to generate a meaningful result.

User goals

The most important search situation facet in SeSAM is the user goal. The user is solely using a product to enable it to deliver the MRSs in an easy, efficient and secure way. To do this, there are a number of goals the user is looking for. SeSAM pre-defines eight user goals:

1. Understand and evaluate if the product can deliver a result that solves a particular need.
2. Deploy the product into normal operation.
3. Use the product, when in normal operation, to solve the need.
4. Ensure that the product has delivered the result that solves the need.
5. Find the reason why the product has not delivered the result that solves the need.
6. Customise how the product is solving a need.
7. Understand why the product is communicating or behaving in a certain way.
8. Understand or look up, a specific interface element (command, button, switch, menu etc) or if the product includes a specific element and where it is located in product interface.

Note that all user goals may not be applicable to a particular product. A user may be looking for any goal at any time, and travel through several goals during the same product usage occasion.

Information types

The user needs information to reach a goal in a search situation. An information type in SeSAM is the type of information a user needs to reach a specific goal. An information type is task-oriented or conceptual (descriptive) oriented.

Every meaningful outcome of a product is called a meaningful result statement in SeSAM

Each MRS must be equipped with a set of topics, each classified according to one information type. Thus it is possible to build an MRS matrix where the different MRSs are on one axis and the user goals on the other (see Table 1). The MRS matrix reveals the topics that need to be written. SeSAM content is modularised, which means that it can be managed with modular approaches such as DITA. The MRS matrix helps the technical communicator determine the DITA topic granularity.

Let's take office email software as an example. The following bullets are needs, or 'results — MRS' according to SeSAM terminology, the software can solve.

Using email software X the user can:

- Receive and read email.
- Write and send email.
- Store contact information.
- Create and keep track of meetings and invitations in a built-in calendar.

Let's use the 'write and send email' MRS from the MRS matrix in Table 1 as an example when describing the type of information needed for each user goal, see Table 2.

User profiles

It is possible to state, for each user goal related to a specific MRS, the type of knowledge the user is assumed to possess to do the task. For certain complex products, one single individual will probably not possess the knowledge that all tasks for all MRSs require. By identifying similar knowledge requirements, looking at all MRSs, it is possible to build user profiles that can be described as personas. The user profiles reassemble the type of knowledge that the manufacturer is assuming the user possesses to use the product in a secure, efficient and easy manner. The domain knowledge among targeted product users should be assessed to ensure that the assumed knowledge level is met. Consider developing different user profiles for the same user goals if the knowledge level is diverse in different markets. The user profiles are important for the writers so that they know who to write for.

Answers must be easy to find for the end-user

Organising and classifying information types

One fundamental objective of SeSAM is that answers must be easy to find for the end-user. A user located in a specific search situation, searching for information to reach a user goal, does not want to navigate through information that does not apply to the current search situation. It is, therefore, important to organise topics in content packages and categorise SeSAM topics according to the search situation facets. A search guide helps the user find the content package that is searched for in a search situation. A search guide must have multiple entry points, such as a faceted search browser, since users have different starting points when searching. A search guide is built and organised around the search situation facets. The purpose of the search guide is to help the user narrow down the current search situation and display or link the user to the corresponding content package.

Using SeSAM to design end-user assistance

The starting point when using SeSAM is to focus on the product and its MRSs. The design phase (see Figure 1) in SeSAM is de-composed into the following main steps:

1. Identify user goals and MRSs, determining the information types required for each MRS.
2. Identify search situation facets and classify topics.
3. Organise topics into (and within) content packages and develop a search guide.
4. Plan and determine the best method for transferring the content packages to end-users.

Roles in a SeSAM project

A typical SeSAM project includes an information designer and one or more technical communicators. The information designer is responsible for carrying out the SeSAM analysis. If the designer or writers do not possess enough domain knowledge about the product, a main SME and subject area SME roles must also be allocated.

SeSAM design steps

Step 1: Identify user goals and meaningful result statements

First, the designer identifies if the pre-defined user goals in SeSAM are valid for the product being documented. If not, additional user goals are defined. Then the designer identifies the MRSs. The MRSs can be analysed in a series of workshops together with an SME. Finally, the topics needed for each user goal and MRS are identified. The result of step 1 is the MRS matrix (see Table 1). The MRS matrix is communicated to the rest of the content creation team.

Step 2: Identify search situation facets and classify content

The designer identifies every possible search situation, where the user goals are the starting point, and the different facets are captured. Topics identified in step 1 are further divided into smaller topics and classified according to the facets. The designer develops user profiles and technical writing can start as soon as the user profiles are developed. The technical communicator must model the step-by-step procedures, using for example hierarchical task analysis, for each task topic.

Step 3: Organise topics in packages and develop a search guide

The designer organises topics in content packages based on the results from steps 1 and 2. The designer also specifies how topics are

organised within a content package. A search guide is developed to help the user find the content package required.

Step 4: Plan and determine how content packages are transferred to users

In the final step the designer determines how the content packages are best transferred to the end-user, which includes the form (text, illustration, animation, audio etc), the recommended way to distribute (media channel) and present (layout) content.

Summary

Use SeSAM when you want to increase content creation team efficiency and when you want to focus on developing user assistance with high findability. SeSAM is preferably used when user diversity is great, thus it is difficult to define user groups. One of the advantages of using SeSAM is that you do not need to develop your own company-specific design methodology; something that can be costly. Instead, start off with SeSAM and cut the costs of developing a design methodology.

SeSAM is suitable for designing user assistance for any type of product. But, certain information types, such as maintenance information, are not yet included in SeSAM. SeSAM content is preferably managed as DITA topics, but DITA is not a requirement. C

References

Shepherd, A (2000) 'Hierarchical task analysis', Taylor & Francis.

About SeSAM

SeSAM (Search Situation based Architecture and Methodology) is a non-proprietary open innovation design methodology developed by Jonatan Lundin. For more information, www.sesam-info.net

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watch SeSAM presentations on YouTube
www.youtube.com/user/jonatanlundin

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10 Golden rules for bid writing

Alison Reeves outlines some techniques to show us how to write a winning bid.

Bid writing is a skill in itself. Although there can be very technical elements to a bid document, for the most part it is a selling document. The purpose of a bid document is normally to demonstrate to a potential customer that the business has the knowledge and skill to provide a product or service; and to do so in a timely manner and to an agreed budget. The whole purpose of the document is to provide this information in a clear and concise way — the holy grail of bid writing!

Many of you may have been engaged to provide technical writing for your organisation, but of course if you are good at what you do, then you will be 'encouraged' to undertake all sorts of other business writing as part of your job. One of those tasks may be bid writing. What I shall attempt to do here is to give you some tips on how bid writing is different so you can get off to a flying start.

I am going to assume that you are all competent writers — so this piece will only focus on the differences you will encounter between bid writing and other forms of writing.

Bid writing – what is it all about?

Have a clear message for your prospective customer

If your organisation is in the business of trying to sustain its growth, keep the competition at bay and make in-roads into new areas, is it enough to bid low, blind the customer with technical content and hope for the best? I doubt it.

Anyone who has recently been involved in a bid writing experience will know that the required response documents are invariably intricate and detailed. Indeed the whole bid writing process can take you through several stages. The key to success is to navigate through the minutiae whilst not losing sight of the overall thrust and unique selling point of your bid. Easier said than done? To get you started, there are the 10 Golden Rules of Bid Writing (see text box).

1. Start early

The best way to lose a bid is to leave it to the last minute, then burn the midnight oil. The minute a bid opportunity makes itself known, start to evaluate it. There are a number of stages to go through to produce a well-written bid, so the longer you give yourself to evaluate, plan and write a bid, the higher your success rate will be. If you end up being responsible for sourcing Invitations To Tender (ITTs), then it makes sense to get notified of tenders in your area of expertise as soon as they are published — either through online tender portals or via specialist websites. You can also pay to be registered with a notification site such as Tenders Direct (www.tendersdirect.co.uk) and get the tender opportunities delivered to your inbox.

10 Golden Rules of Bid Writing:

1. Start early
2. Plan
3. Get an early win
4. Do as you are told
5. Demonstrate ability
6. Don't assume friendship
7. Pitch your price
8. Be interesting
9. Cultivate your image
10. Create a punchy presentation

2. Plan

The most important element of bid writing is to have a clear message for your prospective customer, and this will only happen if you plan your approach. This involves both time and resource planning as well as an overall plan for the bid itself. This is probably something you are used to doing already as a technical writer.

This is also the time to plan how you are going to respond to the ITT. This involves studying the tender in some detail in order to make sure that you understand exactly what the prospective customer (the 'prospect') is looking for — what level of service, what type of product, or even just what problem they want to solve. Once you have identified this, you can then go on to plan how you can deliver a product or service that will solve this problem, before deciding how you can demonstrate that you have the relevant skills and expertise.

3. Get an early win

Most probably, the first document you will be asked to submit will be the Pre-Qualification Questionnaire (PQQ). These documents are designed to check that an organisation is fit for purpose to deliver this size and type of contract.

Prospects may also be interested to see what other projects you are committed to — they will want to ensure that no one project will overwhelm your organisation. The PQQ can sometimes require quite a high level of detail. However, many PQQs ask for the same

information, so it makes sense to create a table which contains all these details so you can replicate it quickly and easily for the next PQQ. This means you can spend more time on the more creative elements of the document.

Ensure that time is allocated to complete the PQQ properly and that all questions are answered. Many PQQ questions are designed to obtain an eligible or ineligible response and any ineligible responses may lead to an organisation being immediately rejected at the PQQ stage. Answer the questions carefully to ensure that you get through to the next stage.

4. Do as you are told

Human nature often makes us want to jump straight in and get the job done. In Bid Writing, this can be a recipe for disaster. The first thing to do is to get hold of a highlighter pen and print out the tender document instructions, the contract specification and the evaluation criteria. Read these very carefully and highlight the important information you need. This includes the submission date and time and any particular instructions regarding length of questions, font type and size, and so on.

It is particularly important to make sure you follow instructions. Many bids have failed because the word count has been too high — if the tender asks for 200 words in answer to a question make sure you don't go above this, even by one word.

As you write, compare what you have written with the instructions, to make sure you are on track. It can also be useful to get a second opinion — ask colleagues or a bid writing consultant to proof read your tender and score it against the published evaluation criteria well in advance of the submission deadline.

5. Demonstrate ability

Your bid needs to answer the questions set and promote your unique selling points to your readers. Write professional, formal and succinct sentences that provide all of the required information, supported by evidence. The response document is your opportunity to demonstrate to your prospect that you are the best organisation to deliver the contract. You cannot demonstrate this if questions remain unanswered, or the answers are incomplete or inaccurate. The implication is that you would be incapable of delivering the contract accurately to completion.

Another great way to demonstrate ability is to provide relevant case studies. These are documents you can prepare and reuse with some tweaking. If your prospect has not provided a natural place for case studies in the tender, you can usually include them in the appendices. One thing to remember about case studies is that they must focus on the measurable benefits that were achieved

6. Don't assume friendship

If you know the prospect, or anyone in their organisation, or if the tender is related to a contract that you are currently delivering, make sure that you promote your organisation as if you were an unknown entity. It is quite common for a bid document to be reviewed by a third party, or people who have no direct connection with the current contract. Don't assume they know all about how good you are — you have to remind them. If there have been any problems with the current contract, make sure you concentrate on explaining how they were resolved and what steps you have taken to make sure it doesn't happen again.

7. Pitch your price

Price can be a tricky element — it's a commonly held belief that price is the only thing that matters. There is no doubt that price is extremely important, however, I've often found that more than one bid can come in at a similar price — therefore the differentiator then becomes service and quality. Make sure you have a differentiator other than price and that you have stated it very clearly.

Bid writers seldom determine what the best price will be; however, they are often required to present it in the best light. On presenting the price make sure that it is linked to the benefits the prospect will receive. Also, make sure that you place prices in a separate section (unless you are instructed to do otherwise) because prospects often like to remove this section and review it separately.

8. Be interesting

Let's face it — a bid document is not the most exciting thing to read. However, you can give yourself an advantage by capturing your reader and making the information you present more interesting. So how do you do this?

Simple really — just make sure that you talk about the prospect, their organisation and the benefits you can bring to them throughout the document. There is nothing more interesting to any one of us than ourselves or our business, so make sure you take advantage of this. Here are some great examples of what *not* to do:

- **Forelock tugging**. 'We are delighted to be able to respond to your invitation to tender…' or 'We are pleased to announce…'
- **Telling the client what they already know**. 'As a Finance Director you need to cut costs and deliver shareholder value…' or 'Recent years have witnessed an increase in the use of Lean process improvement…'
- **Your company history**. 'We were founded in 1915 and have grown organically since then…' or 'We have completely redesigned our website…'

Tell clients how your product or service will make their life easier, better, richer…

This sort of bid comes across as bland, generic and boring. Tell them how your product or service will make their life easier, better, richer, or will deliver the objectives and outcomes they want (translate into the language of your particular sector). This is all about benefits, as opposed to features. Benefits sell, features don't. Many bid writers confuse the two.

To render your bids more exciting, you must tailor them to each prospect. By 'prospect' I don't mean the organisation. I mean the individual flesh-and-blood decision-makers in an organisation.

Many bids (not all) are won where a strong relationship has already been developed. If you don't already have a strong relationship with the prospect, and a clear understanding of their specific needs, objectives, issues and agenda, you may have a disadvantage. If that's the case and you don't have access to the prospect, you need to think twice about bidding, because if a competitor already has those relationships sewn up, you're unlikely to win.

It is amazing how seldom bidders ask to meet the prospect. If the client asks why you want to meet them, tell them you want to understand their needs, objectives, culture and issues better, to be able to submit a robust and tailored bid. This in turn will allow you to deliver a more relevant, efficient and cost-effective performance if you win the contract.

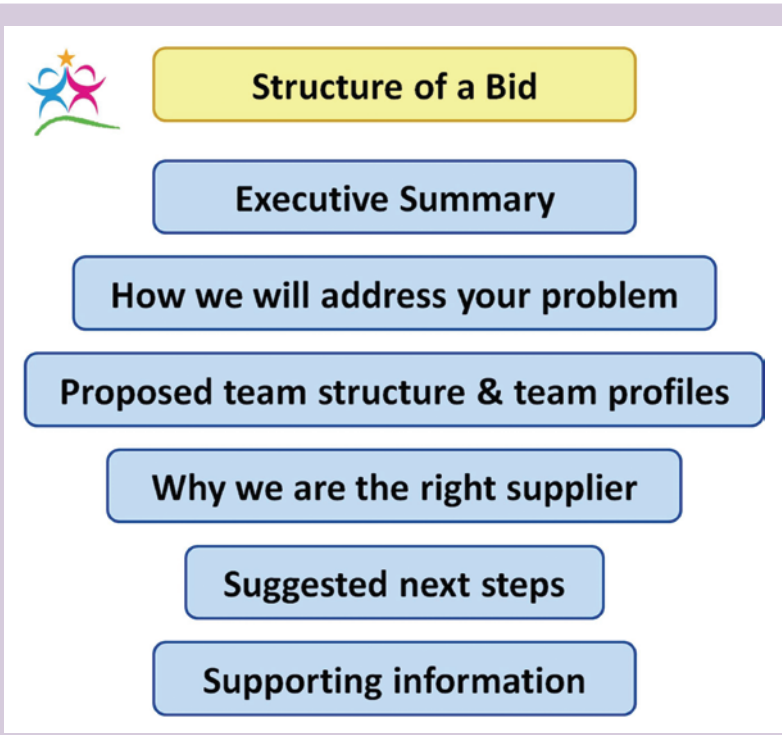

Figure 1. A good bid structure

9. Cultivate your image

Your bid represents your organisation — therefore it should look attractive, be accurate and fulsome when describing your product or service, have a good structure, and be well-written with no errors of grammar or punctuation. Oh, and it helps to spell the prospect's name correctly (I've seen this error a few times!). Here are a few pointers:

- Is this a prescriptive or free format bid? A prescriptive bid is where you answer all the questions set by the customer in the order they have set them — sometimes in a specific document or form. Often you have to complete answers within a specific word count, or page size. Free format bids allow you to suggest a solution, but with no preset structure. Make sure you understand what sort of bid this is — the wrong format can easily cost you the bid.
- Structure your bids for maximum impact. Free format bids allow you to choose your own structure. A good structure is shown in the diagram in Figure 1.
- Check your readability statistics to make sure you have hit the right tone.
- Use language that makes it easy for your reader. This means removing all 'management speak'. For example: win/win scenario; scalable client service platform; blue sky thinking; get our ducks in a row; brain dump; realign for parallel delivery; core competencies; going forwards… to name but a few. Use everyday, conversational language. Help the bid evaluator to get your meaning in one go and, in the case of a question-based submission, award you top marks for each answer. The harder you make the evaluator work, the less tolerant they will be of your answer and the more likely they will be to mark you down.

  A procurement specialist recently told me, 'If I have to spend more than two minutes assessing a simple answer, I give up.'
- Take away the marketing fluff as it just obscures your message.
- Make sure your document looks attractive. Content is very important, but so is the 'look

and feel' of the document. You want your document to stand out and look professional — it's all your potential customer sees of you before making their decision — you want to impress them. If you can't put together a professional looking document that has been checked carefully for spelling, grammar and punctuation, then they will think you have the same shoddy approach to the way your business is run.

10. Create a punchy presentation

Once your bid has been short-listed you need a presentation to sell your organisation, sell your bid and convince prospects that you are best placed to deliver the contract.

Presentations need to be clear, concise, punchy and easy to follow. Your presentation needs to stimulate your audience rather than sedate them. All that planning you did in the early stages will now be valuable all over again to make sure that you can summarise the key messages in your bid at the presentation.

Summary

So there are my top ten tips — if you need any help you know where to find me!

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Help goes mobile at CCC

Riyaz Adamjee describes how CCC is strengthening support via a holistic, and now mobile, approach to technical communications.

At CCC Information Services Inc. (CCC), we provide more than 24,000 businesses with technology solutions for managing automotive insurance claims and auto body collision repairs. So, clear communications are a top priority for us. Consequently, we are continually seeking new ways to deliver highly relevant and accessible online help and documentation to our corporate customers and our sales teams who support them.

Today we are addressing this challenge with a combination of tools from MadCap Software: MadCap Flare for delivering help in print, on the Web and to mobile devices; the MadCap Feedback Service for understanding how we can tune help to support our users' needs; and MadCap Analyzer for improving the quality of our help.

By taking a holistic approach, we have been able to reduce the demands on our support team while enhancing the user experience. In fact, our support team is seeing anywhere from a 15 percent to 35 percent drop in "how-to" calls, which suggests that customers are finding it easier to follow our help instructions.

Following is an overview of how we are using each of the MadCap tools at CCC to achieve these results.

Mobilising our help

For nearly five years, we have been using the MadCap Flare single-source, multichannel-publishing software to develop and publish our Web-based help systems and print documentation. This has proved to be very effective for our customers. However, we wanted to make it easier for our sales and account teams to respond to customers' questions even when they are in the field.

We began to look at producing mobile help content and were intrigued by the growing use of Quick Response (QR) codes for mobile access to information and transactions, particularly in Europe and Asia.

It turns out our timing was good. MadCap, which had introduced native mobile output to Flare in 2010, added QR Code generation support in February 2011.

There was no need to rely on additional software. Mobile was simply one more publishing target in addition to the current Web and PDF print targets. We just had to set the condition tags in Flare to identify which topic elements we wanted to publish (or refrain from publishing) in the mobile format.

By March, we had the mobile Help content in place and had sent QR codes to the sales and account teams.

Now when a customer calls, a sales representative in the field or on the road can simply use his or her smartphone to scan the QR code and be automatically linked to the mobile Help system in order to search for the answer. Our sales people have been thrilled by the time savings and the ability to say, "Hold on, let me look that up," instead of "Let me get back to you."

Of course, the move to mobile is not a fully automated process. There is some content in the Web-based help that we do not need for the mobile version, so we have to correctly mark the condition tags to prevent them from being published.

Additionally, we have learned that not all mobile platforms support all video formats. For instance, some formats that work on a Blackberry or Android device don't work on an iPhone, and vice versa.

In many cases, we have found that the Adobe Flash videos in our Web-based help are not required on the mobile devices. Our sales and account teams just want to read the answer, and the smartphone screen is too small to be practical for most videos.

In those few instances where we want mobile access to video, notably for short introductions, we have met the need by working with a mix of formats, including QuickTime and Audio Video Interleave (AVI).

In the short term, we will continue to focus on delivering mobile help to our employees, but we are evaluating the potential benefits of extending mobile content to our customers.

Figure 1. Mobile help

Evaluating the user experience

In the last five years, we have grown from providing one Help system to more than a dozen. While we expanded where we publish online help, we have also invested in gaining deeper insights into how effectively they serve our users.

Since 2009, we have been using the hosted MadCap Feedback Service to support this effort. Provided via a software-as-a-service (SaaS) model, it has enabled us to begin using the tool immediately without having to set up the local infrastructure.

Feedback Service, which is tightly integrated with Flare, enables us to analyse how customers are using the Flare-based online help. We can see what people are looking for in the help systems, what search terms they are using, and

when those searches are not coming up with results. It also helps us identify if there is a keyword issue or a missing topic.

The tight integration between the Feedback Service and Flare means that if, for example, I'm working on a topic within a given help system in Flare, with the click of a button, I can go to the Feedback Service to get trending, reports, and search results that guide me on what to do to update the topic.

It may require updating the keywords to increase the rate that the topic is found in a search, and all I need to do is get back into Flare with a simple click, to adjust it accordingly.

MadCap Feedback Service can also conduct a time analysis to compare the number of people using a help system from one month to the next. It has enabled us to demonstrate a clear increase in the number of people using the help systems.

As a result, we are able to cost-justify purchasing the in-house MadCap Feedback Server, which offers additional functionality. One is support for analysing mobile help. Another is Feedback Server's Web 2.0 functionality for letting users rate and add comments to the help content in real time, providing more direct interaction with our customers.

We are currently putting the necessary infrastructure in place and expect to deploy Feedback Server in the near future.

Evaluating the user experience

Most recently, we have rolled out MadCap Analyzer to all of our technical communicators. As with the Feedback Service, Analyzer is tightly integrated with Flare.

By running one of our Flare-based help systems through Analyzer, we obtain detailed reports on broken links, orphan topics to which there are no links, images that are not being used, and other areas where the system can be improved.

Because of the tight integration, we can make corrections to any Help topic by opening MadCap Flare directly from within Analyzer.

Figure 2. Webhelp

Initially, we had the typical learning curve in using Analyzer. Since then, however, it has helped us tremendously in cleaning up our output and the help projects overall. That translates into higher quality documentation and a superior experience for our customers.

Bringing it together

On average, we now publish a dozen updated help systems each month. Together MadCap Flare, MadCap Feedback Service and MadCap Analyzer are enabling us to create new topics and update existing ones to make our help easy to access and understand.

As a result, we are continuing to enhance the customer experience while improving the cost-management and efficiency of our sales and support teams. It's a win for everyone.

Figure 3. Feedback Service

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Celebrating technical illustration

For TCUK11's theme 'Anything but text', Theresa Cameron showcases a selection of jewels from the archives of technical illustration.

The hardest task in writing about technical illustration is selecting the examples. We're surrounded by images, a veritable abundance of diagrams, maps, flowcharts, pictograms and more, created mostly by clever anonymous designers. Scientists, inventors, craftspeople and observers of all aspects of life throughout history have turned to graphics to help shape their ideas. Etchings on ostrich shells found in the Diepkloof Rock Shelter in South Africa are estimated to be around 60,000 years old and demonstrate that humans were thinking symbolically long before the Neolithic Age in Europe.

To acknowledge the extraordinary work of technical illustrators, here is an eclectic gallery of historical illustrations that I hope readers will agree are worthy of celebration.

Figure 1: Medicine

Claudius Galen (or Galenus) was a second-century Roman who acquired much of his anatomical knowledge from dissecting bodies left on battlefields and carrying out surgical operations on live animals. Galen's medical studies and practices were followed by generations of medics until the Renaissance, not least because his approach was to study 'bodies, not books' (Fara 2009). Certainly, in the times of hand-to-hand combat, many of the wounds in Figure 1 would have been familiar to physicians and surgeons.

Figure 2: Botany

Flemish doctor and botanist Carolus Clusius was prefect of the imperial medical garden to Emperor Maximilian II in Vienna in 1573 before being appointed the first director of the botanical gardens in Leiden, South Holland. Clusius is known in the field of botany for his writings on Spanish plants *Rariorum aloquot stirpium per Hispanias observatarum* (1576). This book includes the first description of the potato plant, Austrian and Hungarian flora, and a plant that he discovered through Viennese connections in the Turkish court, the tulip. In Leiden he grew and experimented with tulips and the attributed date of the first tulip flowering in the Netherlands is 1594, a year after Clusius took up the Leiden post. The spread of tulip mania[1] is commonly attributed to Clusius' cultivation of the flower.

Figure 3: Sign language

When Francis Bacon (1561–1626) encouraged a new science of man, John Bulwer (1606–1656) took up the challenge literally. Bulwer considered hand gestures, which Bacon called 'transient hieroglyphics', to be a universal language, comprehensible by all. In *Chirologia,* Bulwer presents a catalogue of gestures with their meanings. It was the first attempt to codify hand gestures as non-verbal communication and is apparently still used in British Sign Language today.

Figure 4: Etching

The first manual about the technique of etching was written by a Frenchman, Abraham Bosse (c. 1602–1676), who believed that technical method 'should be the guide in creating artworks' (Wikipedia: Bosse) — a controversial view in those days when 'genius' was considered to be above technique. In his treatise, Bosse writes '*les deux figures I & II que j'ay faites en plus grand afin d'y faire mieux appercevoir*', that is, he enlarged figures 1 and 2 so that they are easier to see. In the unusual details of the different shirt cuffs Bosse was probably indulging another passion, clothes. His father was a tailor.

Figure 5: Mathematical instruments

If Henry Sutton (c. 1624–1665) hadn't died young from the plague, he might have become better known but during his short lifetime, he was recognised as a knowledgeable and superior craftsman who made high-precision instruments. Apart from applying his skills to mathematical instruments, remarkable for their accuracy of scale, Sutton made many popular cheap sundials printed on paper from etchings that he had engraved on plates of copper.

Figure 6: Gardening

Although La Quintinie (1628–1688) is famous in France for the gardens of Vaux-le-Vicomte and Versailles, his first chance of a commission came from English royalty. King James II extended the offer when La Quintinie was visiting England, but was turned down. It was left to an Englishman, John Evelyn (1620–1706) to translate La Quintinie's treatise and introduce some of the methods to English aristocracy. Evelyn was passionate about gardening and garden design and also wrote his own tomes. You can see his glorious doodles of garden tools in the British Library's online image archive.

1 Deborah Moggach's *Tulip Fever* is a thoroughly enjoyable fictional account of tulip mania.

Figure 1. *Wound man* after Claudius Galen, from Anathomia, mid-15th century, English. Hand-drawn manuscript.

Figure 3. Chirogram from *Chirologia* by John Bulwer, London 1644. Etching.

Figure 2. Red narcissus by Carolus Clusius in a letter to Matteo Caccini, 1608, in: *The exotic world of Carolus Clusius 1526–1609*, Leidse Universiteitsbibliotheek, Leiden 2009. Hand-drawn manuscript.

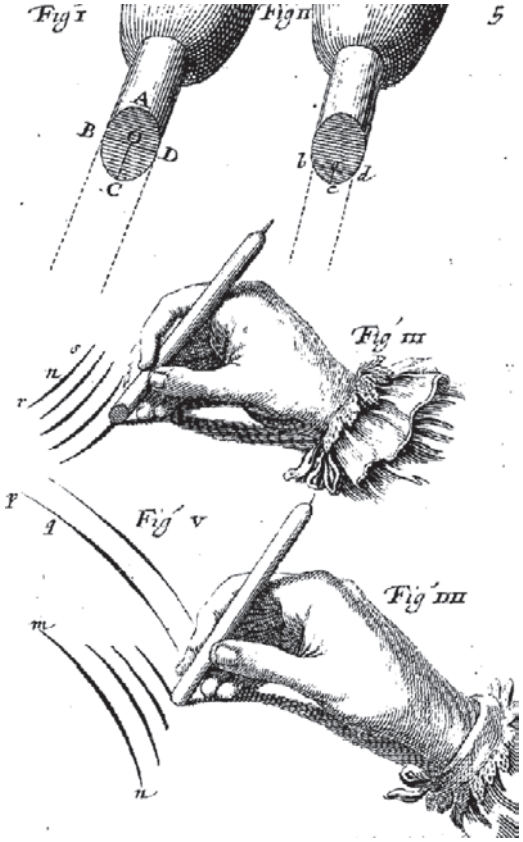

Figure 4. Etching technique by Abraham Bosse in *Traicté des matières de graver en taille douce*, Paris 1645. Etching.

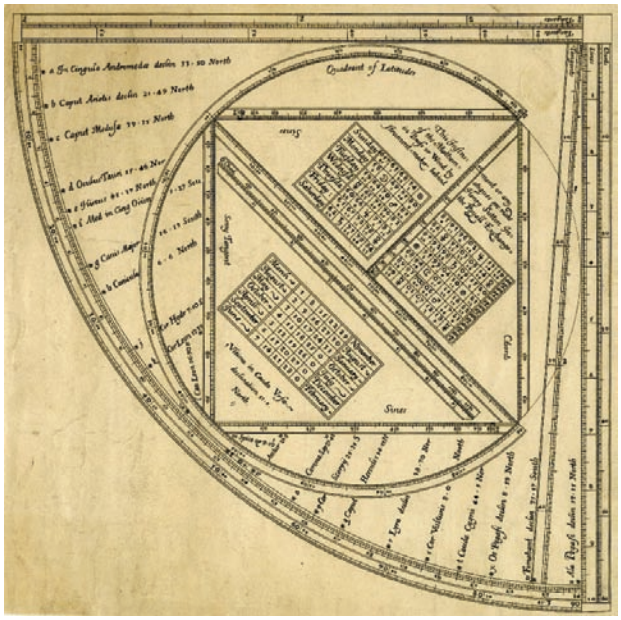

Figure 5. Quadrant, with inscriptions and scales for measuring latitude by Henry Sutton, in John Collins *The Sector on a Quadrant, or a Treatise containing the Description and Use of Four Several Quadrants*, London 1659. Etching.

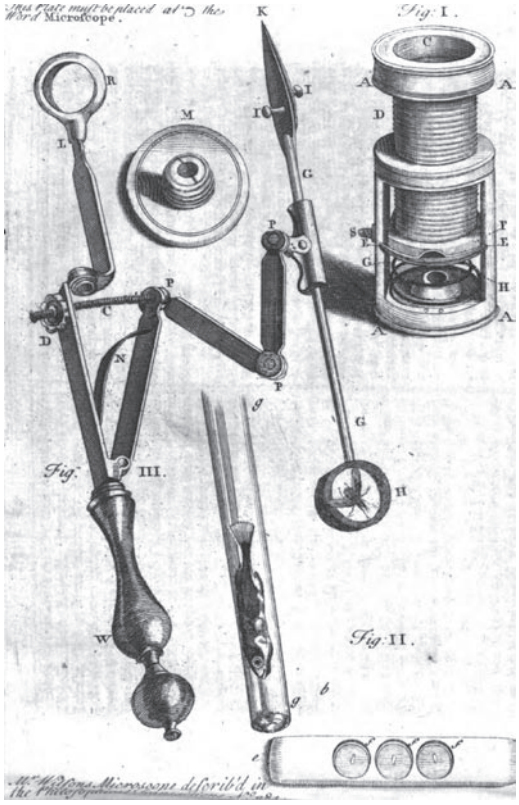

Figure 7. Microscope by John Harris DD in *Lexicon Technicum: or, an Universal English Dictionary of Arts and Sciences*, vol. II, second edition, London 1723.

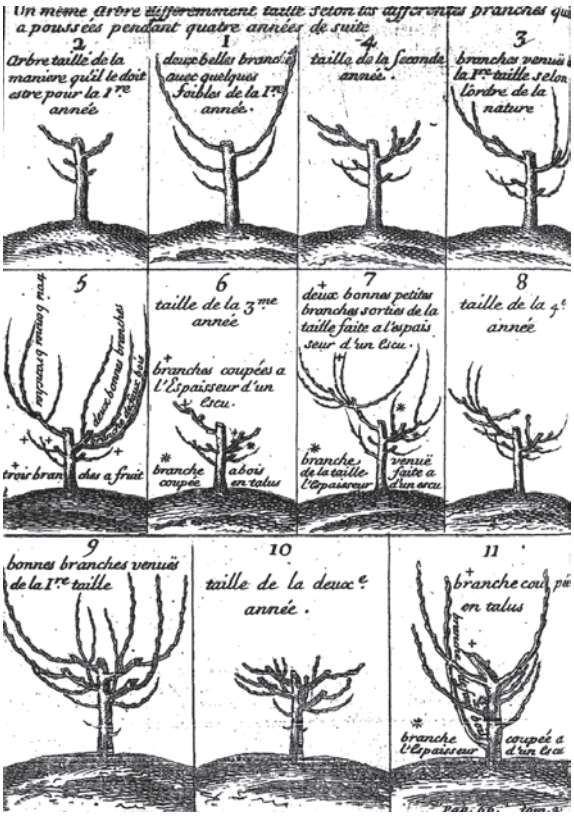

Figure 6. The same tree cut differently showing the variations of growth over four years by Jean-Baptiste de La Quintinie in *Instruction pour les jardins fruitiers et potager*, Paris 1690. Engraving.

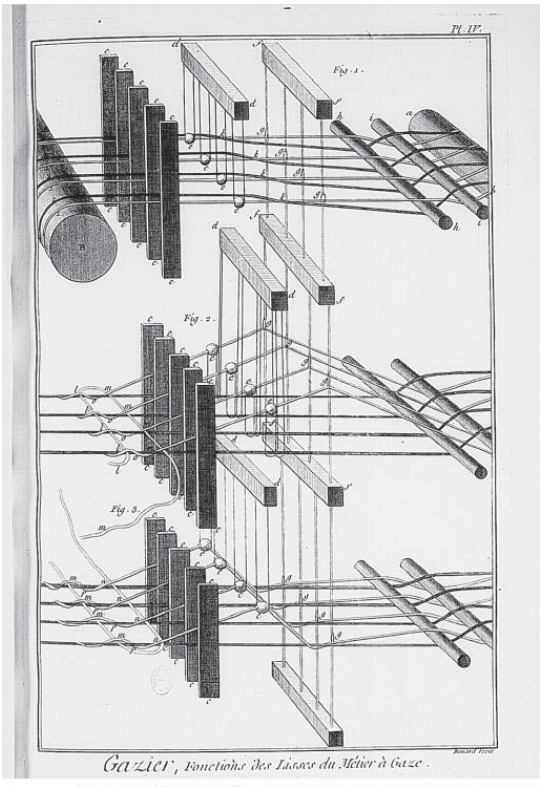

Figure 8. Plaiting for gauze material with a *gazier*, in *Encyclopédie, ou Dictionnaire raisonné des sciences, des arts et des métiers*. Drawing: Lucotte, Etching: Bénard. Paris, 1777–9.

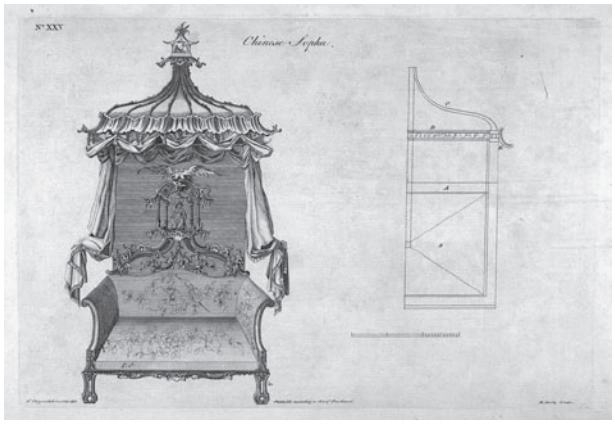

Figure 9. Chinese Sopha by Thomas Chippendale in *The Gentlemen and Cabinet-Maker's Director*, London 1754.

Figure 10. *Troisième coup de feu: sphères et girandoles*, Versailles 1782. Hand-drawn manuscript.

Figure 11. Puddings and desserts in *Every Day Cookery and Housekeeping Book* by Mrs Beeton, London 1872. Coloured plates.

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Fireworks: *Sciences et Curiosités à la cour de Versailles*, Editions de la Réunion des musées nationaux, Paris 2010.

Cookery: *Every Day Cookery and Housekeeping*, Ward Lock & Co, London 1872; Isabelle Beeton, in *Oxford Dictionary of National Biography*, online edition, January 2008.

Meteorology: Professor J D Barrow FRS, *Maths with Pictures*, Gresham College Lecture, 5 October 2010.

Automobiles: Lord Montagu-Scott, in *Oxford Dictionary of National Biography*, online edition, January 2008; Ford Model T, in Wikipedia, accessed June 2011.

Contemporary graphics: Wellcome Image Awards website.

Figures 7 and 8: General science and technology
John Harris' (c. 1666–1719) *Lexicon* was one of the first books to introduce Newton's science to the general public and quickly became a prototype for other dictionaries and encyclopaedias produced in the 18th century, for example, Ephraim Chambers' *Cyclopaedia* published in London in 1728.

Across the Channel, a project to translate Chambers' volumes into French was abandoned in favour of a completely new work. Denis Diderot (1713–1784), scientific editor, published the first volume of his *Encyclopédie, ou Dictionnaire raisonné des sciences, des arts et des métiers* in 1751. The complete set comprised 17 volumes of articles and 11 of illustrations, and encompasses an extraordinary breadth of subjects from armoury to cheese-making to fencing to mechanics, marble and much more. Amongst the numerous illustrators involved, Louis-Jacques Goussier (1722–1799) was apparently responsible for more than 900 plates in the *Encyclopédie* during his 25 years' work on the project. Diderot, in his turn, acknowledged Goussier's work by etching a portrait of his dedicated illustrator.

Figure 9: Furniture
Thomas Chippendale (1718–1779) was the first cabinet-maker to publish a catalogue of furniture designs with instructions for the dimensions of each piece of furniture. Just as French texts were translated into English, the second edition of *The Director* was translated into French and acquired by Catherine the Great and Louis XV. It can be reasonably assumed that the catalogue was as eagerly perused by gentlemen and women as it was by fellow craftsmen, and was undoubtedly instrumental in expanding the popularity and fame of Mr Chippendale and his furniture to the extent that *The Director* is still in publication today.

Figure 10: Fireworks
This drawing is one of a rare set showing the designs for a firework display celebrating an aristocratic wedding held at the Palace of Versailles. The firework elements in this scene are numbered one to five (starting with the king's head in the centre), to indicate the sequence.

Figure 11: Housekeeping and cookery
The sub-title of Isabella Beeton's book continues 'and one hundred and forty-two coloured figures showing the proper mode of sending dishes to the table'. Mrs Beeton (1836–1865) followed the organisation of the encyclopaedists in the previous century by using alphabetical order for her books.

Figure 12: Meteorology
The first weather chart to appear in a newspaper was retrospective. Forecasting the weather for landmasses was unknown as an accepted science until the 20th century, so the meteorological aspects over the British Isles published on 1 April 1875 were those of 31 March.

Figure 13: Automobiles
Henry Ford's Tin Lizzie, or Model T car gained particular fame for being the first production-line vehicle. Through a refined manufacturing process, it could be produced simultaneously in Trafford Park, Manchester (UK) as well as in Walkerville, Canada and Detroit, US.

Lord Montagu (1866–1929) was an aficionado of the motor car, publishing a weekly magazine *Car Illustrated* and becoming a leading spokesman for motorised transport, especially for the military on land, sea and in the air.

Figure 14: Zoology
The Madagascan moon or 'comet' moth is an endangered species and one of the world's largest moths with a wing span of 20 cm. Scanning electron micrographs are black-and-white so the image was coloured green to reflect the natural colour of the moth.

Summary
This selection is by no means representative of all the different historical forms of technical illustration but it does attempt to highlight the exceptional skills of illustrators who have contributed to the visualisation of sciences and techniques. Even amongst these few examples, we can see a variety of styles and methods, and notice that magnifying parts of an image and using numbered figures to accompany texts have evidently been deployed for centuries.

Mastering techniques and technologies, from hand drawings through engravings and etchings to print, illustrators have continually devised pictographic forms for enhancing technical texts. New tools too, are likely to introduce even more exciting images that we can look forward to. Thank you to all the illustrators that have given us this legacy of illuminating images. C

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Figure acknowledgements

Figures 1 and 14: Wellcome Trust Image Gallery.

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Figures 4, 6 and 8: Bibliothèque Nationale de France online archives www.gallica.bnf.fr

Figure 5: Copyright The Trustees of the British Museum.

Figure 7: Google Books.

Figure 10: Courtesy of Versailles Municipal Library.

Figure 12: Copyright British Library Board.

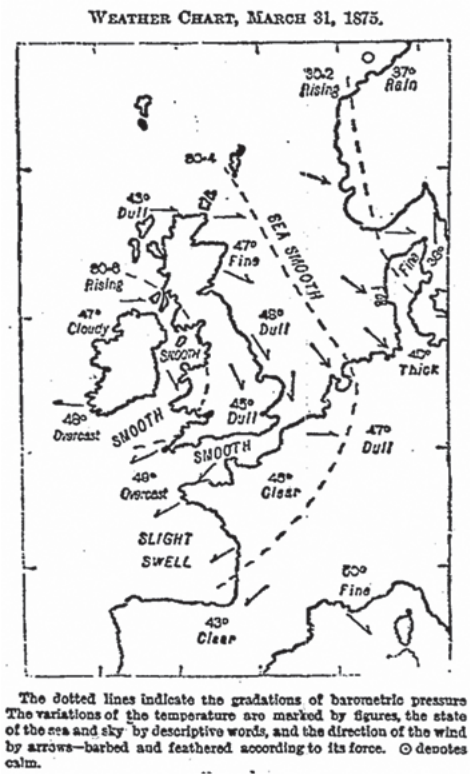

Figure 12. Weather chart in *The Times*, 1 April 1875.

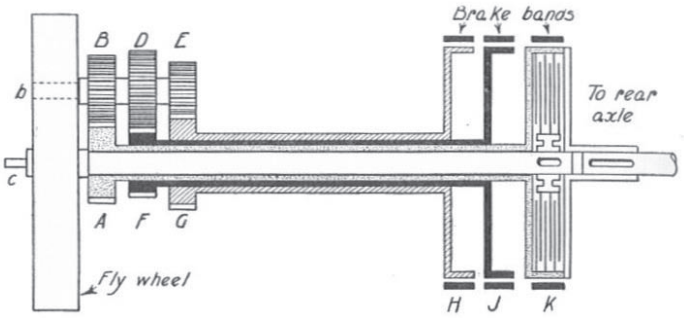

Figure 13. Model T Ford epicyclic gearbox in *Cars and Motor-Cycles*, Vol III, by Lord Montagu of Beaulieu, London 1928.

Figure 14: Moth wing scales by Kevin MacKenzie, University of Aberdeen. Scanned electron micrograph coloured green, 2008. Wellcome Image Award Winner 2011.

The changing role of digital learning content

Clive Shepherd discusses how content that is designed to support learning and/or performance is changing.

Digital learning content can be:
- *self-paced*
- *reference*
- *classroom aids*

Coming to terms with content

Content plays a big role in our lives. We consume vast quantities of content every day in emails, web pages, newspapers, magazines, TV and radio programmes. Content informs us, entertains us and persuades us. It provides a basis for many of our discussions with family, friends and colleagues.

According to the *Concise Oxford Dictionary* content is: "The substance or material dealt with in a speech, work of art, etc. as distinct from its form or style; what is contained in something, such as a book."

That's not a bad start. This is an article about content and, as such, we're clearly focused on material, in particular material that's designed to support learning. But in our case we very definitely *are* interested in the form that this material takes, in the nature of the container for our content. We want to know what is different when the material is digital.

We'll be defining digital content quite broadly, as material stored on a network server, local drive or some form of removable storage, which is accessed through a browser, media player or some other application, whether that's on a personal computer, tablet, mobile device or any other piece of computing equipment, however disguised. A long definition perhaps, but then digital content comes in many shapes and sizes, as we shall see.

In particular, our interest is in content that is designed to support learning and/or performance. There is a difference. Learning is a more or less permanent rewiring of the synapses, manifested as knowledge or skill. Performance, on the other hand, doesn't always depend on learning: it can be supported by information provided at the point of need.

Digital learning content can be used in a number of ways:
- As the basis for self-paced learning
- As reference materials, accessed by employees on demand
- As classroom aids, for use by teachers and trainers with a group.

Interestingly, content is not always an input to a learning activity; it can also be the result. Many learning assignments require individuals or groups to create their own content in the form of documents, forum or blog postings, wiki pages, presentations, podcasts or videos. This content can then, in turn, form an input to the learning of other learners. In this way, every participant in the learning process can be seen as a creator of (typically digital) learning content.

Digital learning content comes in many forms

Learning can be achieved in many different ways and content can play a number of different roles in this process. Here's a sampling of some of the more common forms of digital learning content:

- **Interactive tutorials** have a long history going back 30 years, but still represent the most common type of digital learning material, particularly for corporate training. Historically labelled as CBT (computer-based training), this content has typically been employed on a stand-alone basis, but can just as easily be integrated into a blended solution.

  Interactive tutorials are typically delivered in web-native formats (HTML, JavaScript, Java, Flash) through a web browser, but if designed for usage offline (such as on CD-ROM), could also be delivered as Windows, Macintosh or mobile applications.
- **Games and simulations** represent the most interactive and potentially engaging types of digital learning content, but can be complex and expensive to develop. Like interactive tutorials, most learning games and simulations are now designed for delivery online over the internet or a corporate intranet, although they could also be delivered offline as self-contained applications.
- **E-assessments** provide a convenient way of testing knowledge and some skills. They are relatively easy to develop from a technical perspective but must be carefully designed to ensure reliability and validity. E-assessments are typically delivered online, so they can be graded and scored centrally. They can be deployed independently, but can also be integrated into interactive tutorials. Similar software can be used to develop questionnaires, such as evaluation forms.
- **Streaming media** allow audio and video to be accessed easily online, without the need for users to first download the media files on to their local computers. Given reasonable bandwidth, streamed media commences playback quickly and at an acceptable quality. Streaming requires specialist server software and a fair amount of bandwidth so should probably only be employed with the full co-operation of the IT department.
- Simple **web pages** provide an ideal way to communicate information online, particularly when this can successfully be presented using text and still graphics. It used to be that some technical knowledge was necessary to create web pages, but modern online content

Note from the Editor: This article was originally published in Inside Learning Technologies, 2010.

management systems have made the process accessible to all. Web pages provide an ideal way to view information that can be succinctly presented. Where a substantial amount of reading is required, users will typically prefer to work with printed materials.

- **Word, Excel and PowerPoint** documents (or their counterparts from sources other than Microsoft) can be easily distributed online for learners to download. Assuming the learner has a copy of the relevant application, they will also be able to edit the documents.
- **PDF files** provide an excellent way for distributing Word, Excel and other documents in a non-editable format and without the need for the learner to have a copy of the application that was used to create the original document. Although PDF files can be viewed on-screen, many users will still want to print out extracts to read more comfortably away from their computer.
- **Presentations** developed in PowerPoint or similar programs can be exported in web-friendly formats such as HTML and Flash for easy viewing online. A number of applications also enable presenters to record a narration to accompany their slides, which enhances their ability to be used on a stand-alone basis. Narrated slide shows can also be exported as movies.
- **Podcasts** are essentially downloadable audio files which can be transferred from a computer to a portable media player such as an Apple iPod, for listening to offline, while on the move. Vodcasts are the video equivalent.
- **Screencasts** are recordings of the steps needed to carry out a task using a software application, sometimes with explanatory labels and/or a voiceover. Screencasts can be exported as Flash movies or as videos, for distribution online.

Four strategies for learning content

Those who design learning interventions and performance support materials have big choices to make, not only in terms of the social context in which the learning or support will occur (will the learning be self-directed, one-to-one or in a group?) and the medium (will the learning take place face-to-face, online or offline?), but also in terms of the underlying learning strategy. We're going to be taking a look at the potential applications for four key learning strategies, in particular the role that digital learning content can play.

Will learning be self-directed, one-to-one or in a group?:

Exposition

Exposition is the delivery of information from teacher or subject expert to learner. The process is essentially one-way, although it may include some modest Q&A or discussion. The strategy is top-down and teacher-centred because it is the person designing and/or delivering who determines what information is to be delivered and how (and sometimes also where and when).

Exposition can take place in the context of an event, such as a lecture, a seminar or a presentation, face-to-face or online, but it can also take the form of content, using text, images, animation, audio and video. Historically, this content was delivered using offline media, such as books, tapes, CDs and DVDs, although now it is as likely to be consumed online or downloaded for delivery on portable platforms such as iPods and e-book readers.

For exposition to work as a strategy, the student must be a relatively independent learner, with a good awareness of what they do and do not know about the subject in question. That way they will be able to determine what is most relevant and, therefore, most important to focus on and process further, whereas the dependent or novice learner could

easily be overwhelmed by the sheer volume of undifferentiated information.

Because of the risk of cognitive overload, it is common for teachers, trainers and learning designers to opt for more interactive strategies such as instruction or guided discovery (which we'll come to in a minute). This is fine where the target audience really needs support and structure to help them learn, but a major irritation to those who can cope by themselves (particularly senior professionals, such as hospital consultants, lawyers, accountants, executives, academics, and so on).

Because of the absence of interaction, exposition requires less design than, say, highly-participative face-to-face workshops and self-paced tutorials. However, careful planning is still going to be a great help to the reader, listener or viewer:

- Making clear what is the most important information and what is just nice to know
- Using story-telling and anecdotes to bring abstract concepts to life
- Making the most appropriate use of media elements — text, images, animation, audio and video
- Paring down the volume of content to reduce wasted time and minimise the risk of overload
- Modularising the content so it can be easily random-accessed and reviewed.

In summary, choose exposition as a strategy when you need to control what information is delivered and to whom, and when you feel confident that the target audience will happily be able to work with this information without a great deal of support. If you judge the situation right, then you'll save an awful lot of money not having to run workshops or create interactive online materials.

Four strategies:
- *exposition*
- *instruction*
- *guided instruction*
- *exploration*

Instruction

Instruction, the second strategy, is still a teacher/trainer-centred approach, but is much more carefully crafted to ensure that the learning outcomes are actually achieved, regardless of the learner's ability. In this sense it is process rather than content driven. This process depends on the explicit and up-front definition of learning objectives and then the careful selection of appropriate activities and resources that will enable those objectives to be achieved. The process of 'instructional design' is teacher/trainer centred because it focuses on learning objectives rather than learner goals; on the other hand, the fact that instruction is typically an interactive rather than a passive learner experience, means that the process can be adaptive to some degree to the individual differences of particular learners.

Instruction can be a live experience, whether in the workplace ('on-job training') or in a physical or virtual classroom; it can also be self-paced, through interactive materials delivered online or using offline media (workbooks, CDs, etc.). While learning at work occurs in many different ways, it would be fair to say that, for most workplace trainers and e-learning designers, formal instruction is what they do. Hopefully they will be doing it well, and that means the following:

- Being clear about outcomes;
- Concentrating on meeting a small number of key learning objectives thoroughly, rather than a large number only superficially
- Following an instructional process which is appropriate for the objectives in question
- Engaging the learner
- Helping the learner to make new connections with prior knowledge
- Presenting new material clearly and at an appropriate level, making use of demonstrations, stories, examples, visual aids and other tools to aid comprehension
- Providing activities that allow new knowledge and understanding to be reinforced and consolidated
- Allowing for plentiful opportunities to new skills to be practised, with the aid of timely and constructive feedback
- Being responsive to the needs of individual learners
- Providing support until all objectives are achieved.

Perhaps strangely, one of the key skills for instructional designers is to recognise when instruction is and is not an appropriate strategy. You're likely to be safe going the instructional route when your target population consists of

Figure 1. Four strategies of learning content

less confident learners, particularly those who are novices in the field in question, who need or want to be led step-by-step through the learning process, knowing they are capably supported. When these conditions are not met, instruction may still work, but you run the risk of 'over-teaching' and even patronising your population. Best to reserve your efforts for those who need them most.

Guided discovery

The third strategy, **guided discovery**, has many similarities with instruction in that it is very much a structured and facilitated process, but follows a very different sequence of events.

While instruction moves from theory to practice, from the general to the specific, guided discovery starts with the specific and moves to the general. It is an *inductive* process: it leads the learner towards insights and generalisations, rather than providing them on a plate. Because this process is much less certain and predictable, guided discovery rarely has specific learning objectives: every learner will take out of the process something unique and personal. What they take out will depend not only on the insights they gain from the particular learning experience, but also to a great deal on their prior knowledge and previous life experience.

Guided discovery can take many forms: experiments in a laboratory, simulations, scenarios, case studies or teambuilding activities. In each case, the learner is presented, alone or in a group, with a task to accomplish. Having undertaken the task, the learner is encouraged to reflect on the experience: what went well, what less well; how could the successes be repeated and the failures avoided? The conclusions can be taken forward to further exercises and then hopefully applied to real-world tasks.

Content can play many parts in discovery learning:

- It can be used to set the scene and communicate the task, perhaps in the form of a case study
- It can lead the learner interactively through the task, such as with a scenario or simulation
- It can provide support to learners who are experiencing difficulties with the task (sometimes described as the *goal-fail-fix* process: you set the learner a goal, you allow them to fail, you fix the problem).

Less confident, dependent learners should be comfortable with guided discovery, as long as the process is carefully structured and facilitated, and does not leave them floundering. What is more important is that the learner should have enough knowledge and experience of the subject matter or situations underlying the learning activity that they can make a reasonable attempt at completing the task — you can't build on prior knowledge if you don't have any.

Guided discovery works best when the topic is less black and white, when you require more than a superficial commitment to a set of ideas. When poorly designed and facilitated, discovery learning will seem pointless, perhaps even manipulative; well managed and the result could be much deeper learning. As Carl Rogers once warned us, "Nothing that can be taught is worth learning."

Exploration

Exploration, the fourth strategy, is by far the most learner-centred and the only strategy that concentrates on 'pull' rather than 'push' (more on this in a minute). It also represents the closing of the circle, because as with exposition, the first strategy we looked at, the learning design is both simple and relatively unstructured, in stark contrast to instruction and guided discovery.

With the exploration strategy, each learner determines their own learning process, taking advantage of resources provided not only by teachers and trainers but also by peers. What they take out of this process is entirely individual and largely unpredictable. As such, exploration may seem a relatively informal strategy, but no less useful for that. In fact it's probably the way that a great deal of learning takes place.

With exposition, instruction and even guided discovery, learning activities and resources are 'pushed' at the learner by the teacher/trainer. With the exploration strategy, activities and resources are 'pulled' by the learner according to need. Exploration may play a small part in a formal course, perhaps a list of books or links that learners can choose to dip into if they wish; but it could just as easily constitute the central plank in the provision of, say, just-in-time performance support in the workplace.

The role of the teacher/trainer is clearly very different from that in the three previous strategies. With exploration, the emphasis shifts 'from courses to resources', so what is needed is no longer a lecturer, instructor or a facilitator, more a librarian. What's important here is to smooth the way for learners to find resources and to locate like-minded peers; that means providing repositories, search engines and all manner of social media tools.

Exploration is not a universal strategy by any means. Novices and dependent learners will struggle with so little structure and direction. Important top-down initiatives cannot rely on such woolly and inconsistent outcomes. But there's no doubt that the trend is towards more learner-centred approaches: more pull less push, more just-in-time than just-in-case, more flexibility and less structure. The key, as ever, is not in following the fashion, but knowing when the time is right to use each of these strategies appropriately.

Who creates digital learning content?

Probably just about every learning and development professional should have at least a basic level of competence in the design and development of digital learning content, at least those forms of content most relevant to the subject area or population for which they are responsible. In some ways, this can be thought of as no more than a natural evolution from their traditional responsibility for the production of the visual aids and handouts that support most classroom events. The pressures for this to happen are becoming increasingly strong:

- The need, with reduced budgets, to do as much as before or more, but for less money
- The demand for quicker ways to address learning needs
- A shift in emphasis away from courses to resources
- The desire for more flexible, learner-centred approaches
- The need to cut back on expensive travel costs while at the same time reaching out to learners who are geographically dispersed or on the move.

What this is not saying is that every learning and development professional needs to be able to create interactive self-study courses that completely replace their face-to-face predecessors. While some teachers and trainers will have the aptitudes and interests that will help them to excel in this area, in most cases this will remain a job for specialists. It is much, much harder to create a set of fully self-contained instructional materials than it is to develop the components — the explanations, the examples, the demonstrations, the practice exercises and the assessments — yet the latter are often more versatile and perform a more useful function.

Web 2.0 tools such as social networks, blogs and wikis, not to mention ever more powerful and easy-to-use computing devices, are making it ever simpler for consumers to become publishers, for learners to become teachers. It would be ironic if those in the traditional roles of publishers and teachers were not empowered to play their full role in such a revolution. C

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EB.Now! review

Jacquie Rhodes takes a look at the one-click document publishing suite from EasyBrowse.

EB.Now! is a member of the EasyBrowse family, a suite of products providing electronic publishing for online and offline media. With EB.Now! you can instantly create a group of documents and publish them as a suite for easy access by readers. This is useful for putting onto a CD or storing on a memory stick.

Some benefits to readers and providers are:

- All the documents you need are in one place.
- Only the documents you need are there so you won't waste time looking for them.
- You can search all the documents at once.
- You can add a bookmark to documents that you want to highlight.
- You can add notes to documents.

The folder is editable so you can re-arrange the structure, adding and deleting more documents as necessary.

The tool itself, EBNow.exe, is included in the download so recipients can also use it in their own document suites. This enables providers and readers to customise the content to suit themselves.

Creating your document suite

EB.Now! is very easy to use:

1. Create a folder of your documents. For example, this EBDocs folder contains sub-folders of different documents (Figure 1).
2. Add the EBnow.exe file into the folder (Figure 2).
3. Double-click EBnow.exe to create your new browser folder.

The browser display (Figure 3) is clear and uncluttered. Each menu, tab and button has minimal levels and options so you quickly become familiar with the functionality.

Customising the display

When you have created your EasyBrowse folder you can customise how your document suite displays by clicking on the **EB.Now!** tab and selecting **Create project**.

You can customise the display to:

- Change the display colours to match your corporate colours
- Choose the required language from German, English, French and Spanish
- Change the default document language (according to your setup)
- Label the project with a title and subtitle
- Change the EasyBrowse graphic for a bespoke title graphic, for example your company logo, etc. that can be linked to a website
- Protect access to the content by setting up a password
- Remove the EB.Now! logo from the top right of the screen.

You can display the contents of each subfolder. However, you cannot display all the contents of all the subfolders at the same time, which might be useful. For example, you may want to see whether each product has release notes and a user guide.

Listing content

Documents are listed in the same structure as within the folder. I found it a bit of a drawback that file extensions are not shown. For example, you cannot tell if a document is a PDF, a Word file, or a graphic file.

Accessing documents

When you click on documents listed in the project they will display either in the project pane or a new window (Figure 4), depending on your software settings. For example, PDFs for me open in a separate window. I tested out a few file formats and was impressed by the number of graphics formats.

The product literature mentions that Microsoft Office is supported: unfortunately only .doc files are supported, not .docx files.

Highlighting content

Using the button bar on the right side of the project window, you can add bookmarks and notes to documents:

- A bookmark marks the overall document within the structure. You can list all the documents you've bookmarked. You might do this to prioritise reading or to group documents together. Unfortunately, you cannot bookmark individual pages. However, you could set up the structure of the project so that individual sections or pages appear as separate documents that you could then bookmark.
- You can add a note to a document, for example explaining why the document is included in the project.

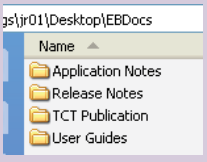

Figure 1. EBDocs folder

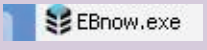

Figure 2. EBnow.exe

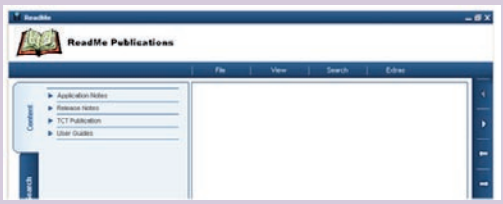

Figure 3. Browse project window

Printing content

- You can add a "printmark" to several documents to print them in a batch. Click the **Print** button, then select **Printmarks** for the print range.

Searching

A major benefit of this tool is being able to search all the content in the project at once. You can perform a full text search or search the Notes that have been added to documents.

In the example project (see Figure 5), EB.Now! has found six documents with the word "package". The documents are listed in their subfolders for you to open individually and search the content.

Help

From the **Extras** tab you can **Open help file**. The help is well designed and succinct. The help structure reflects the order in which you'd perform actions. Descriptions of functionality are clear and concise. Important information and pointers to other help topics are highlighted.

You rarely have to scroll down to find the content you need. Some long headings in the left sidebar are difficult to read.

The GUI

Being a pedantic editor (!), I found the GUI slightly distracting sometimes. For example, the **Examples** menu options are not all phrased in the same way: some are actions, some are objects. Some of the wording in the Help file does not flow, perhaps as a result of translation. Non-standard (or perhaps "non-Microsoft") formatting when describing software is distracting, for example the use of italics and quotation marks when referring to menus and options.

Conclusion

Overall, this is an easy-to-use publication tool that quickly provides a bespoke documentation package. The next version will improve in some of the areas noted here. A free download version can work with PDFs, including adding bookmarks and notes. There are three versions of the product: for a single desktop, for multiple users, and for the web. C

Figure 4. This .jpg opens in the display pane

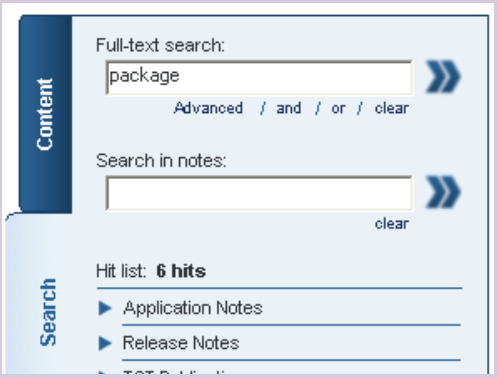

Figure 5. Search example

For more information:
www.easybrowse.com/ebnow.html

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Localising e-learning — an overview

Rob Sexstone and Daljit Hanspal discuss the techniques and trends behind creating localised courseware.

Introduction

This article presents some of the key concepts and techniques that can be used when localising e-learning content. It is based on much of the content we presented at the 2010 ISTC conference, as part of the e-learning stream of seminars.

E-learning — a misnomer?

The demand for multilingual courseware is steadily increasing as a result of regulatory compliance in key growth sectors such as financial services and healthcare. It is fair to say that in our experience, the majority of courseware created for these sectors is actually computer-based training, delivered via intranet or internet, rather than e-learning in its purest sense. E-learning (by academic definition) seeks to embrace pedagogic theories, is geared towards long term learning objectives, supports collaborative learning, and provides electronic library resources as well as student management tools via a professional Learning Management System (LMS).

Current trends in courseware development

Established standards such as the Sharable Content Object Reference Model (SCORM), dynamic XML resource file management and highly visual web content design tools such as Adobe Flash all contribute to the development of the multimedia-rich courseware we see today. Reusable learning objects can be developed in Adobe Flash, built into courseware with an authoring tool that provides SCORM support such as Lectora and then hosted on an LMS for delivery via web to the student audience. This development model is now an established norm for courseware development, and for localisation it means that the range of technologies and tools we need to understand and work with are far less disparate.

Planning your design for localisation

Considering translation and localisation when designing courseware can yield significant benefits both in terms of cost and management complexity, should you ever need to localise. I

Figure 1. Source English courseware

have taken the opportunity to interview Daljit Hanspal, 3di's head of engineering.

RS: What are the most important things to consider when developing courseware for international audiences?
DH: We see a lot of courseware already developed and release-ready in English that has not been audited for localisation readiness. I would say that the single most useful thing to do when planning for international course design is to involve a localisation partner upstream and very early in the development lifecycle. A reliable and experienced localisation partner will be able to steer your development team towards best practices and avoid the common pitfalls and assumptions many monolingual development managers make.

RS: Could you give some specific examples of best practice for courseware design?
DH: Sure. In a nutshell the first thing we like to do is get our hands on the source materials for a course and carry out something we call a 'pseudo translation'. We identify all the localisable components such as XML resource files, Flash animations, Photoshop images and so forth and use industry-standard tools such as Trados and Catalyst to substitute all the source text with dummy text based extended characters sets like German, Polish and Chinese. What this provides is a very quick and easy way to assess areas of the product that have not been designed or exposed for translation. We can then advise on design techniques that will make the extraction and re-insertion of translations as automatic and painless as possible. It also provides a very good insight into the amount of screen real estate we will have to contend with once we have translated the course content. For languages such as German and Russian, we need to make provision for text expansion. For bi-directional languages such as Arabic and Hebrew a more specific approach and re-development effort is required and we have to carry out a deeper level of re-design for the right-to-left languages. Pretty much all the e-learning we see these days is developed using a combination of Adobe Flash, XML and audio (MP4). Unicode character support throughout every level of the design is also something we test for, but pretty much all the Adobe tools now support UTF-8 and UTF-16 encoding — which is a very good thing.

RS: What sort of work is involved when re-creating courseware in Arabic?
DH: Good question! How much time do you have? The initial decision is which locale to target, because there are different Arabic dialects in different countries. Then, with much more sensitivity than we might apply for Western European languages, we need to scrutinise the source material for ethnocentric imagery and cultural references that would not be acceptable in the Middle East and suggest replacements.

Because of the need to support right-to-left text rendering, we always have to port the source files into an Arabic version or a CS5 version of Adobe's Creative Suite, because these are the only tools we can use which implement bi-directional text flows and correctly display the ligatures and glyphs. This stage of the work is always done by one of our native Arabic speaking engineers because the opportunity for error is very high. I guess the key thing to consider when planning for localisation into bi-directional languages is that the engineering effort will increase by a factor of at least 50 percent compared to a western European language.

For languages such as German and Russian, we need to make provision for text expansion

Figure 2. Localised Arabic courseware

RS: What can you tell us about localising audio and video?
DH: First of all, video and audio will always be the most expensive assets to localise for your courseware. There is a natural tension between the creative and the commercial forces that drive courseware development. I constantly find myself having to remind development managers of the potential localisation cost explosion ahead if they insist on commissioning overly complex audio and video scripts with more than a couple of characters. Again, it comes back to the benefit of involving a multimedia localisation specialist at the design stage of your courseware development. I meet many highly talented monolingual English designers and developers, but very few of them have a full appreciation of the impact their designs will have on the localisation budget because localisation re-engineering is not part of their own development idiolect. Even their development managers need help understanding the commercial implications when designing localisation-ready courseware.

Summary

Thank you Daljit, that has been a very useful summary. It is interesting to understand the relationship between multimedia design and cost efficient localisation. I think one of the risks many development managers have to contend with these days is the rapid evolution of web-based media technology, and having to select a technology path that will keep their options open as their product becomes more successful or even international. One of our many goals at 3di is to help designers of software and multimedia learning products consider the benefits of design with localisation in mind, no matter how large and established or small and agile that client may be. C

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Terminology and references

Idiolect – in linguistics, an idiolect is a variety of a language unique to an individual. http://en.wikipedia.org/wiki/Idiolect

Lectora – www.trivantis.com

LMS – Learning Management System

SCORM – http://en.wikipedia.org/wiki/Sharable_Content_Object_Reference_Model

UTF-8 – Unicode Transformation Format compatible with ASCII. It is used for encoding the Unicode character set into its equivalent binary value. UTF-8 only uses 1 byte (8bits).

UTF-16 – Unicode Transformation Format not compatible with ASCII. It is used for encoding the Unicode character set into its equivalent binary value. UTF-16 uses 2 bytes (16bits).

DITA–FMx revisited

Andy Lewis demonstrates some of the more advanced features of the DITA-FMx plugin for FrameMaker.

Introduction

DITA-FMx is a set of plugins and structure applications that enable you to create and edit DITA XML files in FrameMaker. It is jointly produced by Silicon Publishing (www.siliconpublishing.com) and Leximation (www.leximation.com). More accurately, DITA-FMx is a set of three structured applications (topic, map, book) each consisting of an Element Definition Document (EDD), a template and a collection of read/write rules.

In the Summer 2009 issue of *Communicator* I provided an introduction to DITA-FMx and discussed how to use some of its basic functions to create and publish DITA-ready content from within FrameMaker.

In this article I will continue that discussion by demonstrating some of the more advanced features of DITA-FMx, such as:

- Bookmaps
- Relationship tables
- Automated book building
- Ditaval files
- Content management
- Applying custom templates
- Creating an archive

At the time of writing, the latest released version of DITA-FMx is 1.1.13 (released June 2011). This version supports the DITA 1.1 specification and FrameMaker versions 7.2, 8, 9 and 10.

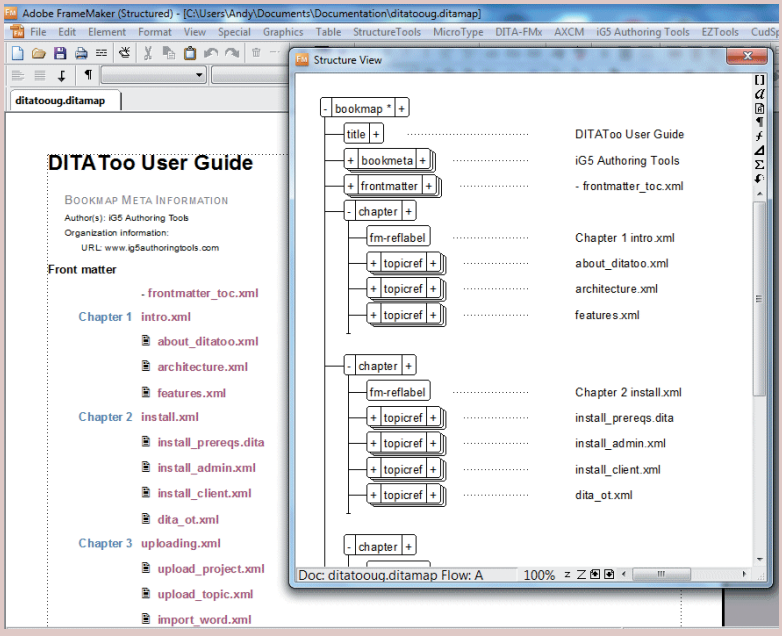

Figure 1. Bookmap <chapter> elements

Bookmap and specialised elements

The bookmap specialisation of DITA's standard DITA map was introduced with DITA 1.1. It is intended specifically for recreating the structure of a printed book, and offers a range of extra capabilities beyond those of the map.

The bookmap provides a set of specialised elements that group topics (via **<topicref>** elements) into book-specific logical sections, such as part, chapter and appendix. The **<part>** element can be used to organise **<chapter>** and **<appendix>** elements into parts, and the **<chapter>** and **<appendix>** elements are used to organise **<topicref>** elements. Figure 1 demonstrates the use of the **<chapter>** element.

Bookmaps also include **<frontmatter>** and **<backmatter>** elements for containing generated lists such as tables of contents and indexes, as well as prefaces, book-level abstracts, amendments, dedications and so on.

Generated lists are added to the structure as children of the **<booklists>** element. When you add a child to **<booklists>**, DITA-FMx prompts you for the folder that will contain a placeholder topic file that defines the location at which the generated list file will be created. DITA-FMx creates a simple topic file in the specified folder.

Relationship tables

A bookmap can also make use of relationship tables in the same way they are used in a map.

Relationship tables provide an alternative to hard-coding links between topics with the **<related-links>** element. Such hard-coded links create dependencies between topics and reduce the degree of reusability for each topic. For example, links may not be relevant for all contexts in which the topic is reused. Additionally, if you rename a topic or change its location, you will need to resolve the link in all topics that reference this link.

Relationship tables avoid this maintenance overhead by enabling you to create and maintain links in a single location in the map or bookmap.

Figure 2 shows a relationship table in which a topic called *delete_topic_from_project.xml* is linked to two other topics called *delete_project_from_rep.xml* and *rename_topic.xml* at the map/bookmap level.

This configuration produces output in which a **<related-links>** element is inserted automatically at the end of each of the topics. The *Deleting a Topic from a Project* topic includes links to each of the other two topics,

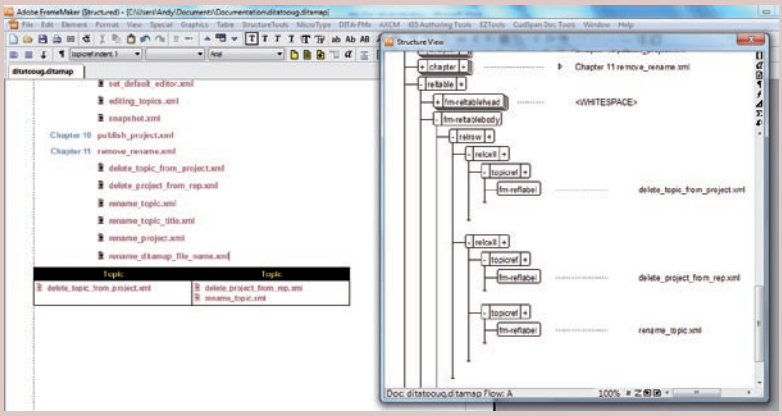

Figure 2. Bookmap with relationship table

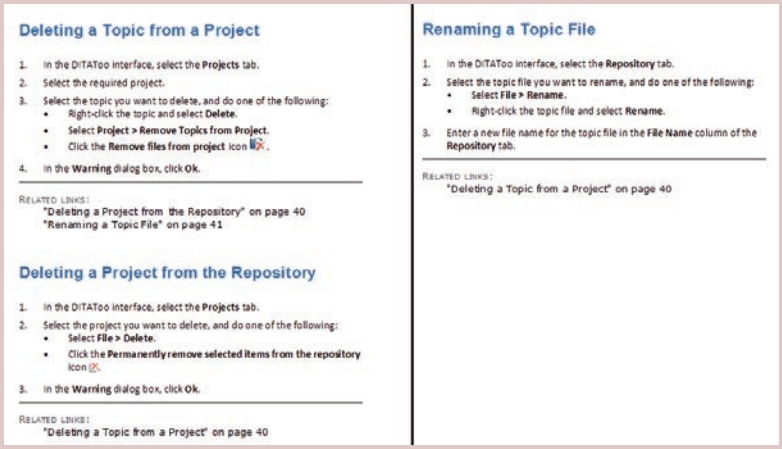

Figure 3. Relationship table output

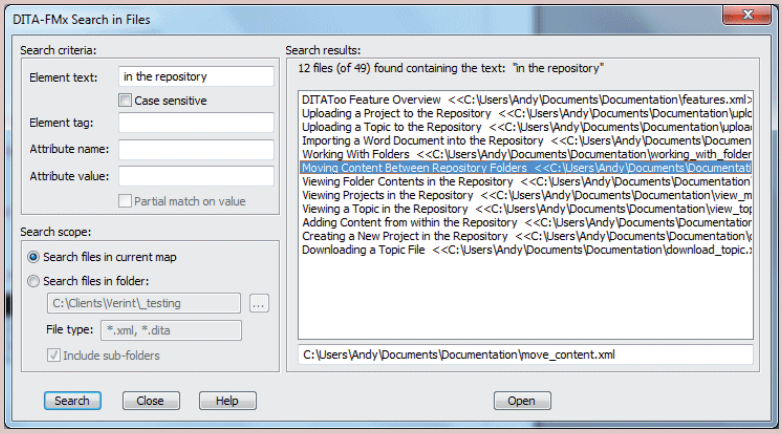

Figure 4. Search results

which in turn both have single links back to the *Deleting a Topic from a Project* topic, as shown in Figure 3.

Book building

DITA-FMx includes the *ditafmx-bookbuild.ini* file, which includes configuration settings for automating the map/bookmap-to-FrameMaker book-building process.

The process operates on individual book components based on the names of the map elements that are referencing the topic files, such as part, chapter, toc, indexlist and so on. The file defines both the numbering and pagination properties for each element type, and the creation of generated FrameMaker files that replace the place-holder list files in the **<frontmatter>** and **<backmatter>** elements.

So, for example, you can instruct DITA-FMx to start each new chapter of your book on page 1, or set continuous sequential numbering throughout your book. Additionally, you can use the *ditafmx-bookbuild.ini* file to apply different templates to different map elements. In this way, you can apply one template to your chapters, another to your table of contents and a further one to your index: see *Using custom templates* for more information.

The snippet below shows how to use the *ditafmx-bookbuild.ini* file to start each chapter on a page 1 while maintaining sequential chapter numbering.

```
[NumberingFirst-chapter]
ChapterProperty=Restart
ChapterNumberValue=1
ChapterNumberFormat=Numeric
PageProperty=Restart
PageNumberFormat=Numeric

[NumberingDefault-chapter]
ChapterProperty=Continue
ChapterNumberFormat=Numeric
PageProperty=Restart
PageNumberFormat=Numeric
```

Working with ditaval files

DITA-FMx allows you to associate a ditaval file with an active FrameMaker book (or file), so that you can apply output conditions from within the DITA book-building process.

You first add a ditaval file to the DITA-FMx Ditaval Manager (**DITA-FMx > Ditaval Manager**), then select that file in the **Apply ditaval as conditions** option at **DITA-FMx > DITA Options > Book Builds**, then set the options for the ditaval action values (*exclude*, *include* and *flag*).

You can use the Ditaval Manager to create new ditaval files or add existing ditaval files to the drop-down list.

Searching for content

DITA-FMx includes a **Search in Files** option (**DITA-FMx > Search in Files**) that enables you to search for content in the DITA topic files stored on your file system. You can search for a text string or for a specific element name and/or attribute value. You can also define the scope of a search as the current map or a specific folder.

Figure 4 shows the search results for the string *in the repository* in a map.

Double-clicking an entry in the **Search results** panel, or selecting an entry and clicking **Open**, automatically opens the relevant topic file.

Identifying dependencies

It is essential to understand what the implications are of modifying a piece of content. By using the **Where Used?**… option you can generate a report of all the dependencies of a specified topic (files that reference that topic).

In the **Where Used?**… dialog box (**DITA-FMx > Where Used?**…), you can search for an element or a topic. Both options are available only if the insertion point is in an element that has an ID: if not, you can only search for topics. You can also define the scope of the search as a map or folder.

Figure 5 shows the search within the map for dependencies for the *delete_topic_from_project.xml* topic file referred to in *Relationship tables* above.

The generated report in Figure 6 shows that only one file in the map (*remove_rename.xml*) refers to *delete_topic_from_project.xml*.

Double-clicking a file listed in the generated report automatically opens that file.

Using custom templates

As part of the bookmap to FrameMaker book-building process, you can apply customised templates to the book component files based on their map element type. For example, you can instruct DITA-FMx to apply different templates to part dividers, chapters, appendices and generated lists such as table of contents, glossary or an index.

You do this by defining the folder that contains your templates in the *ditafmx-bookbuild.ini* file. The templates must be named according to the following conventions:

- For generated files: *gentpl~* followed by the relevant map element name. For example, *gentpl~toc.fm* for a table of contents, and *gentpl~indexlist.fm* for an index.
- For non-generated files: *tpl~* followed by the relevant map element name. For example, *tpl~part.fm*, *tpl~chapter.fm*, and *tpl~appendix.fm*.

Archiving

A final useful feature is the ability to generate a ZIP archive from all files referenced by the current map or topic. To do this, you open the relevant map or topic file and select **DITA-FMx > Create Archive** to run the command.

Conclusion

This article has covered several of the more important DITA-FMx features, but there are many more. For a full list of features, see www.lexemation.com/dita-fmx/#FMxNEW. For a comparison with native FrameMaker DITA functionality, see www.lexemation.com/dita-fmx/featurecomparison.php. C

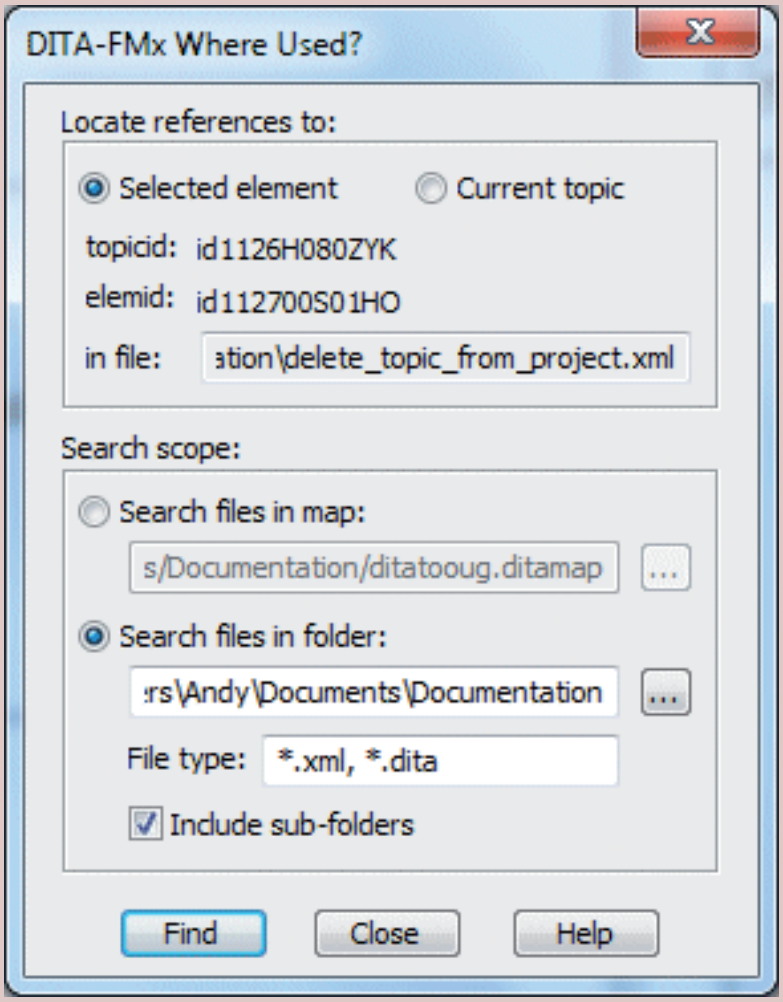

Figure 5. Where Used? dialog

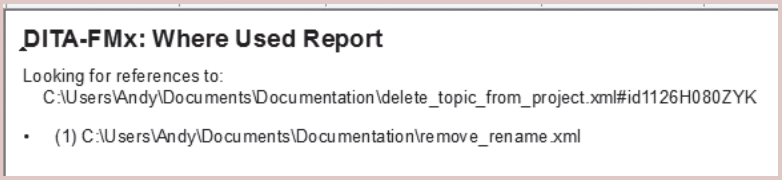

Figure 6. Where Used Report

Andy Lewis is an authorised DITA-FMx reseller and the owner of iG5 Authoring Tools (www.ig5authoringtools.com), a one-stop shop for both technical communicators and developers of FrameMaker plugins and FrameScripts. Andy is a Certified Adobe Expert in FrameMaker and a regular contributor to *Communicator*. He is a long-term user of many FrameMaker plugins in both structured and unstructured environments, and has presented and written extensively about his experiences.
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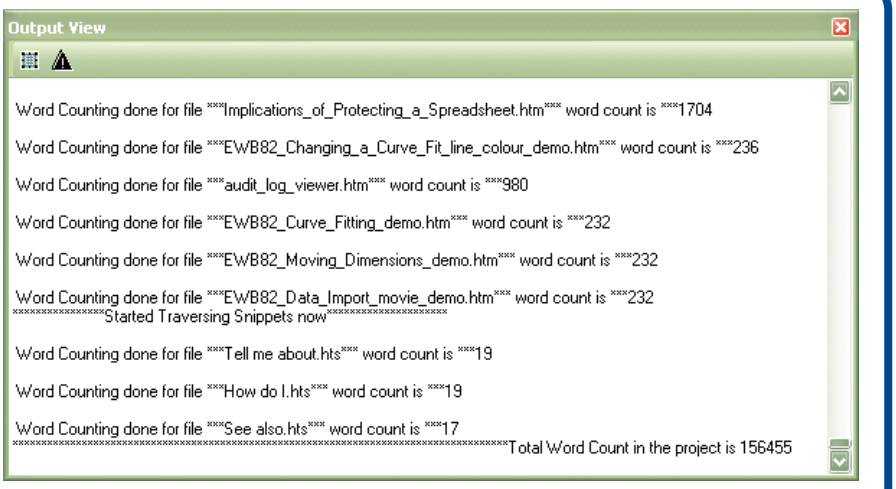
The Adobe technical communication Colum(n)

In this regular column, Colum McAndrew offers tips, tricks, explanations and advice focusing on Adobe technical communication products.

Have you ever found yourself asking, 'If only Application X did this?' We've all been there at some time or another. Maybe it is a piece of missing functionality that would make your life immeasurably easier, or just a mechanism to change content.

Users of more recent versions of Adobe technical communication products will have noticed the addition of a new application that is installed called ExtendScript. As the name suggests it is a scripting tool that allows you to create and run scripts to perform specific actions.

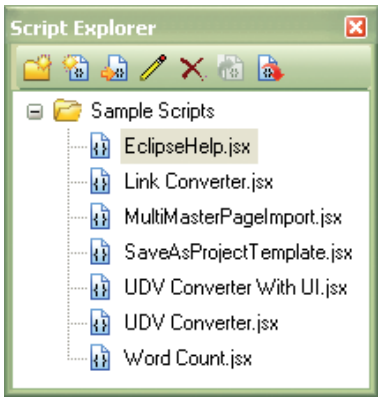
The ExtendScript application also allows you to debug existing scripts using a toolkit that is freely downloadable from the Adobe website. This works with a number of scripting languages. Notable amongst them is JavaScript, the most common web scripting language. However, Adobe has included additional functionality to its JavaScript to allow scripts to interact with Adobe applications.



The Word Count script produces a word count of your RoboHelp project content.

What can ExtendScript do?

Scripting can be incredibly useful for all those time-consuming, repetitive tasks. For example, imagine having to count the number of words you've generated in your RoboHelp project or perhaps you are adding user defined variables to existing text in your FrameMaker files? Maybe this is OK if you only have two or three files, but what if you have 200 to 300? ExtendScript automates just about any process thereby freeing up your time for other tasks.



The RoboHelp Script Explorer pod listing the out-of-the-box scripts.

However, ExtendScript's usefulness doesn't end with simple counting or code replacement. It can also generate different Adobe RoboHelp help outputs not included in the default set of single source layouts; for example Eclipse help or the increasingly common e-Pub output.

What products come with ExtendScript?

ExtendScript is actually part of Adobe's Creative Suite, elements of which are also included in both the Technical Communication Suite and e-Learning Suite. Adobe FrameMaker, Adobe RoboHelp and Adobe Captivate also allow you to run scripts against your content.

What is more, each application comes complete with a set of useful scripts ready to run, out of the box. There are also additional freely available scripts available on various blogs and websites. For example the Adobe Scripting Centre at:

- adobe.com/devnet/scripting.html

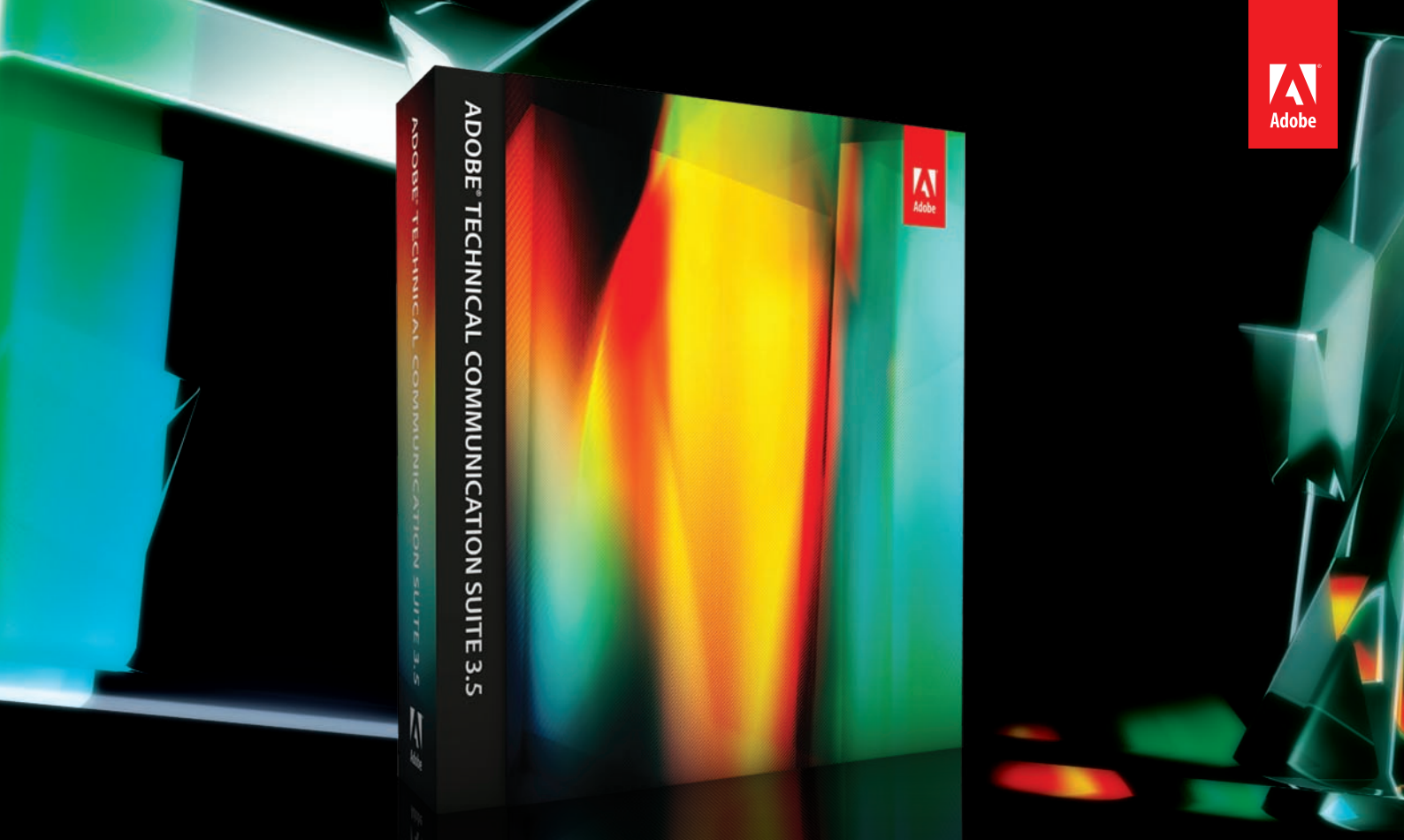
With the plethora of available resources there is no need to know how to write scripts. If you can open a file in Microsoft Word, you can run one of the supplied / downloaded scripts. It is as easy as that.

However, don't think that just because you don't own any Adobe product licences that ExtendScript is unavailable to you. It is freely downloadable from the Adobe website making it available for use with just about any application. Oh, and it is available for both Windows and Mac operating systems.

Isn't scripting for Developers?

Having said that there are a number of useful scripts available, you may well come across scenarios where you have to produce your own. It is true that scripting is not for everyone but you'd be wrong to dismiss it out of hand without taking a look at it first. Scripting is really not that difficult once you get the hang of the rules and regulations. I am not going through those here but there are a number of free online tutorials available if you need them. C

Colum McAndrew MISTC is a Senior Technical Author based in Guildford, UK. A user of Adobe technical communication products since 1999, he can frequently be found on their support forums offering advice to other users.
W: www.cmcandrew.com/robocolumn
Tw: @robocolumn



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Real–life dilemmas

Warren Singer invites you to discuss true dilemmas encountered by today's technical communicators.

Life's really like that! Technical communicators often have to deal with personal issues at work and find solutions to dilemmas for which their education or training may not provide easy answers. These stories provide examples of real-life problems encountered by today's technical communicators.

What would you do in their situation? After reading their story, let us know how you would solve their dilemma. The best responses will be published in the next issue of *Communicator*.

Discrimination at work

The background

It was the first day on her first job as a technical author and on the way to the office, Lilly thought about her new job. Lilly loved writing and English literature. She had read English Literature at University. However, once she'd finished her degree the only work she could find was as a secretary. Then someone had suggested she try a career in technical communication. After some research, she'd enrolled in a distance-learning course with the University of Sheffield, studying part-time for her qualification.

John, her partner, had recently found a new job and they'd relocated. So Lilly had updated her CV and applied for a number of technical communication positions in the area. As luck would have it, a local company was looking for a junior technical author.

During the interview, she'd met Judith, the technical communications manager, who would be her new boss. Judith had been friendly, and interested in Lilly's previous role as a secretary. "This is a junior position," she told Lilly, "so you'll get support from the more senior authors. There'll be plenty of opportunities for hands-on writing: this will be a good opportunity to start your career."

Week 1

Over the next few days, Lilly got to know the team. Paul was rather withdrawn and moody and would eat lunch with Simon, the graphic artist. Martin was neutral towards her. Luke was friendly and helpful. She got her first assignment from him, updating some tables in a user guide with corrections supplied by one of the developers.

Judith insisted that Lilly attend all team and other meetings, and asked her to take notes, book meeting rooms, invite attendees and produce meeting minutes.

Month 2

As the weeks passed, Lilly slowly settled into a routine. She would get into the office early. Co-workers would drift in and drop by for a quick chat.

When Judith arrived later, she'd usually give some instruction to Lilly on meetings that needed to be set up, or staff and suppliers that needed to be contacted.

When she wasn't busy on Judith's items, there was a small amount of manual updating and editing work on her desk. However, this was generally mind-numbing stuff that the other authors weren't interested in doing.

The guys liked to joke around and eat lunch together in the cafeteria, but they didn't tend to include her. Instead, she went to lunch with friends she'd made with the girls in marketing.

Although she didn't find her work that challenging, she liked the office environment, which was relaxed and friendly.

Month 4

Lilly heard that they were now recruiting a second junior technical author. She felt slightly uncomfortable about this, wondering how it would affect her own position. She'd been employed for four months, but most of the work was allocated between the more experienced technical communicators, who tended to pass projects over to her only for editing and updating.

It was a few weeks later when Lilly heard that Ben, the new junior author, had just been given a new and exciting assignment. He would be the lead writer for a new product, which involved producing a user guide, a set of new service brochures and website material.

Lilly silently seethed. Why hadn't she been offered this role, or at least an opportunity to be involved in the project? This was also Ben's first role as a technical author so why was he being given all the best opportunities?

The worst bit, she felt, was that there was nothing she could do about it. If she complained to Judith, she would come across as ungrateful and envious. Perhaps she should wait, she thought to herself. Another project was bound to come along soon, and maybe then Judith would try to involve her.

As her mother had always told Lilly, 'patience is a virtue: all good things come to those who wait'.

Month 8

Eventually, Lilly summoned up the courage to talk to Judith. She told her that she was unhappy that she wasn't been given opportunities to take a more active role in new projects and learn new things, and that she felt she had been passed over by other junior members in the team, who had joined after her, and had less experience.

Judith sighed, crossing her legs and folding her arms as she leaned back to appraise Lilly. "Okay, Lilly, I admit you've been given some administrative tasks, but you have a good background in this and I know I can rely on you to do it right."

Judith leaned forward and looked Lilly directly in the eye for a few seconds before continuing. "I really need you to be on board with this; I shouldn't have to point out that you are still junior and inexperienced as a technical communicator. Just be patient and we'll try to get you more interesting work."

Lilly's dilemma

That night Lilly mulled over her job. She'd been working for over eight months and she liked the company, but it was not all she had expected to get out of her career. Should she leave and apply for another position elsewhere?

➔

Real–life responses

Readers' letters in response to Sue's dilemma, described in the Summer 2011 issue of *Communicator*.

Summary of Sue's dilemma

Sue had been asked to document a product which she felt was dangerous and unsafe for use — having overhead that it could explode in rare circumstances. Although she had raised her doubts about its safety, her concerns have largely been ignored.

Blake Evans

Sue shouldn't worry about it, and just take the money for the job. She's not in charge of the company, and isn't taking it to market. If it's unsafe, then it'll be quickly withdrawn. However, getting it to market in the first place requires so much testing to make sure they don't get returns, it's likely the danger of the product will be toned down. Particularly as due to the features involved, the toy wouldn't actually get sold to anyone below 16 in the UK.

If she's really that concerned about that, she should raise her concerns, and if they're not heard she should quit.

Paul

Sue should point out that it is not in the company's long-term interests to allow an unsafe product onto the market.

And no — she can't be held liable for anything that happens because of what is left out of the guide or what it fails to say about the safety of the product. The company owns the guide — she doesn't.

Katherine

Sue shouldn't have to be documenting a product that is unsafe. Surely, the toy would have to pass toy safety standards (various around the world) before being manufactured and therefore wouldn't these issues be spotted before the toy goes into production?

If Sue does not think that warnings are satisfactory, then maybe she needs to raise her concerns with more senior management before considering her options regarding her employment. C

Due to the limited space available extracts from the responses are provided here.

Editor's note

Products sold in the UK and Europe require significant safety testing and an EC certificate of compliance, before they can be sold. The EC mark must be displayed on the manual and product.

In this dilemma we can assume, given the circumstances of the story that this is either a prototype product, which has not yet gone through certification or that the client is keeping quiet and not disclosing it's potential defects, which might have been missed in testing.

If the former, then perhaps the technical author might feel that the defect will be picked up in further testing and be less concerned - if the latter, and there is deliberate intent to mislead, then the author would have a significant ethical dilemma.

Over to you

Write to dilemma@istc.org.uk

Tell us how you think Lilly should solve her ethical dilemma. The next issue of *Communicator* will feature your responses.

If you have a dilemma you'd like advice about, write to us in confidence. If we think your issue would be of interest to a wider audience we'll air it here (don't worry, we will protect your anonymity!).

Note: To protect the identity (and reputations) of real people, all names and places are fictitious.

Warren Singer MISTC
E: dilemma@istc.org.uk

Short stories about trends

Trends in Technical Communication — Rethinking Help

Edited by Ellis Pratt.
Kindle Edition, 2011, ASIN: B00506U2ZM, £3.94 Cherryleaf Ltd. Reviewed by **Phil Stokes**.

In this collection of six short pieces and extracts, the reader is taken on a journey aimed at helping 'those involved in developing software User Assistance, in all its forms, determine a strategy for the future'. To that end, six core issues facing technical communicators are presented before the book rounds off with ten predictions for the future of the industry.

The first piece, 'Measuring the value of technical communication', is certainly a must-read for anyone struggling to justify the value of their work in a large organisation. The chapter is full of practical advice on how to do just that. Rather than trying to develop a single line of argument which might easily fall on deaf ears or be inappropriate in some contexts, the author helpfully covers a number of different avenues with practical suggestions as to how value can be measured in terms that managers will understand. Along the way, there is an interesting argument that user documentation increases its value when economies are in recession.

In the Winter 2010 issue of Communicator, Ellis Pratt introduced us to the idea of 'affective assistance'. If you missed that issue, you are in luck as the second offering from 'Trends in Technical Communication' reprints the entire article. Pratt argues that there is room for 'the emotion factor' in documentation — more colourful and emotive language — that can help manage the user's experience.

If you sometimes feel that social networking seems to be taking over the world and worry about its impact for technical communicators, the next piece should reassure you. Anne Gentle, in an extract from her book 'Conversation and Community', argues that we should embrace the many varieties of social media rather than fear them. As Gentle points out though, harnessing the power of online communities takes both know-how and experience. This chapter covers some basic guidelines for people new to forums, blogs and SNSs (social networking sites).

In a short piece on rhetorical writing, Tony Self argues that technical communicators, like other professionals across the economic spectrum, need to be versatile. Linking with Ellis Pratt's earlier argument about the emotion factor, Self suggests that technical communicators may need to expand their range to write persuasive documentation such as sales and marketing brochures. In a world where video tutorials and web forums are starting to replace traditional user documentation, we need to have the skills to survive.

Ellis Pratt returns for a second contribution in the lightly-titled 'Getting readers to *RTFM* using techniques from Games'. If you are sceptical, don't be: many of these techniques are already commonplace in places as diverse as Firefox updates, Dropbox and even Apple Discussion forums, where contributors are given points for 'Helpful' and 'Correct' answers. As Pratt notes, the key is to understand the rewards that drive addictive game behaviour and find a way to exploit those in your user assistance.

The next chapter focuses on semantically structured authoring. If you haven't really dipped into the whole XML thing yet, then here is a nice overview of what it is and why it is changing the documentation world. The book comes to a neat conclusion by offering up the editor's predictions for the top ten 'trends in technical communication', aimed at anyone involved in the industry to prepare for the challenges ahead.

Despite the many difficulties facing technical communication as a profession, ultimately the book's conclusion is optimistic. Technological innovations and the need for user assistance are not going away: it is just that help and documentation are being delivered in new ways, and professionals need to adapt themselves accordingly.

If you are looking for a general overview of the trends in the industry, then this book has definitely got something to offer. Being only in electronic format, you will need to be comfortable reading on screen and have some kind of e-reader program such as the free Kindle for Windows or Kindle for Mac, which can be downloaded from Amazon. Also, be aware that the description of the book on Amazon is somewhat misleading. This is not a 762 page mammoth of a book as stated there, but rather an e-book with 762 *locations*, which makes it probably somewhat less than a 100-page physical book.

As indicated in the Introduction, this is a book about strategy and general directions. As such, it tends to be light on practical techniques and at times fails to offer the kind of depth anyone already familiar with the issues might look for. I also found some of the authors harder to read than others. Some pieces lost focus at times and would have benefited from more ruthless editing.

Overall, though, this book does what it promises to do. It provides an overview of trends in technical communication and sets out a vision for the future. If you are wondering what skills you are going to need tomorrow and where the future lies for our profession, this book is a good place to start.

Rating: ★★★★☆ C

Further reading

Gentle A (2009) *Conversation and Community*, XML Press

Pratt, E (2010), 'The emotion factor in user manuals', *Communicator*, Winter 2010:15

Rollinson, J (2010), 'Using social media to your advantage' *Communicator*, Winter 2010:48

About the book's author

Ellis Pratt is the Sales and Marketing Director of Cherryleaf, a technical writing services company that helps organisations create knowledge their users will love. It also offers consultancy and training in Affective Assistance and other technical writing skills.

Grammar terms

Jean Rollinson describes grammar terms she regularly uses when explaining editing decisions.

I went to school in the 1970s and 80s when there was no formal grammar teaching. I therefore sometimes find myself floundering when explaining to authors why I think what they have written is wrong, because I don't know the right technical terms to use. This article covers some of the terms I have discovered and subsequently found useful when asked to explain my editing decisions.

Active voice

The form of the verb used when the subject performs the action. For example, 'The manager received the parcel.' Compare this with the passive voice version included later in this article.

Dangling participle

This is also known as a hanging participle. It refers to a construction where the participle is not grammatically linked to the rest of the sentence. Examples can be seen across many types of writing — sometimes with hilarious consequences.

'Driving down the road, a deer leapt out in front of me.' Here the participial phrase 'driving down the road' is dangling, and if anything, appears to be linked to 'a deer' creating a wild image of a deer driving a car.

Floating quantifier

In this construction the quantifier is moved away from its logical position. Although this may not cause confusion or ambiguity, it can make a sentence clumsy. However, there can be occasions where using a floating quantifier changes the emphasis of the sentence and the author is aware of what they are doing.

For example, 'All the children have had their lunch' can be written as 'The children have all had their lunch'.

Homographs

Homographs are words with different meanings that are spelled the same way, but may not be pronounced the same. Examples include bow: as in 'take a bow'/ the bow of a ship/ hair adornment; bear: large animal/ the verb, as in 'I can't bear this anymore'; and lead: the metal/ the verb, as in 'the brass band will lead the parade'. This use of 'led' is often confused with 'lead' (meaning to go in front) — see homophones.

Homonyms

A cover term for both homographs and homophones.

Homophones

Homophones are words with different meanings that are pronounced the same way but may not be spelled the same. Examples include: dew/due; die/dye; meat/meet/mete; paw/pore/pour/poor; scull/skull; lead/led; and see/sea. Note that words can be homographs and homophones.

Intransitive verb

A verb that does not require an object to complete its meaning. Some verbs can be both transitive (requiring an object) and intransitive, depending on their use. For example, 'He met his sister at the airport' (transitive — sister is the object of the verb met). 'The delegates met last week' (intransitive — there is no object).

Passive voice

The form of the verb used when the subject is the receiver of the action. For example, 'The parcel was received by the manager.' Compare with active voice version.

Reflexive pronoun

These are any pronouns that end with self or selves, i.e. myself, yourself, himself, herself, itself, ourselves, yourselves and themselves. These are often used incorrectly as some writers think they sound more formal than I, me, him, her, he, she etc.

Run-on

This is where two independent clauses are written as a single sentence, without a conjunction or any punctuation separating them. The error can be corrected by adding either of the missing elements.

For example, the sentence 'Peter left his job he could not stand his boss' should be one of the following:

- Peter left his job; he could not stand his boss.
- Peter left his job because he could not stand his boss.
- Because he could not stand his boss, Peter left his job.

Split infinitive

Depending on who you read, this is or isn't a problem, but it's worth knowing the right phrase so you can defend your position. The infinitive is the form of the verb used with 'to'. A split infinitive is where a word is inserted between 'to' and the verb, e.g. I decided to never play tennis again.

Subordinate clause

Subordinate clauses are those, which as their name implies, are less important than or subordinate to another clause. Subordinate clauses are dependent upon a main clause and cannot stand alone as independent units or separate sentences. In the following sentences the subordinate clauses are in italic.

- He moved to London *where he earned a living by busking.*
- I always hug him like that *when he comes in.*
- James was indistinguishable from the wet sand *because he was perfectly covered in it.*
- *As he talked* he enumerated his points on his fingers. C

References

The Penguin Dictionary of English Grammar. RL Trask, Penguin Books

Write Right! Jan Venolia, Ten Speed Press

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WG 2 meets in Louveciennes

Richard Hodgkinson, Convenor of Working Group 2 (Systems and Software Documentation) reports back from Paris.

From 23 to 25 May 2011, ISO/IEC JTC 1/SC 7/WG 2 — Systems & Software Documentation, met, near Paris, France at the training campus of BNP Paribas in Louveciennes. Sponsors included Computer Associates and AFNOR, the French standards organisation. This was the annual plenary meeting of SC 7 (Systems and Software Engineering) and all of the SC 7 Working Groups; almost 300 experts were present.

Working Group 2 comprised Daryl Colquhoun (Australia/ASTC), George Hayhoe (USA/IEEE-Professional Communication Society), Tom Kurihara (USA/Project Management Institute), Usha Mohan (India/STC), Annette Reilly (USA/STC & IEEE Computer Society), Ralph Robinson (Canada/STC), Cerys Willoughby (UK/ISTC), Pr. Yoshikazu Yamamoto (Japan/Information Processing Society of Japan), and myself (UK/ISTC).

Louveciennes is a pleasant wooded suburb, situated to the west of Paris and contains a pumping station and aqueduct, built to provide a water supply to the nearby Palace of Versailles. Our schedule provided the opportunity to visit Versailles and see the magnificent Hall of Mirrors, royal apartments and opera. Impressionist artists, such as Alfred Sisley and Camille Pissarro, painted scenes of Louveciennes.

The modern BNP Paribas campus is situated below ground level in the grounds of the Château de Voisins. Paris can seen in the distance through gaps in the trees of the parkland.

And so to work!

Following the previous WG 2 meeting in Gaithersburg in November 2010, we had revised the drafts of three standards together with their dispositions of submitted national body comments. New international ballots had been conducted, these had all closed prior to this meeting with comments also received from the IEEE, which also publishes the final standards. As planned, we were ready to discuss the results…

ISO/IEC/IEEE 26511

The FCD ballot of this standard (*Requirements for managers of user documentation*) was successful with comments received from Canada, France, IEEE-CS, ISO, Japan, South Africa, the UK and the USA. As is our normal practice, we discussed and resolved only the technical comments (editorial comments are fixed by the editor). The draft has now been updated and is undergoing FDIS (Final Draft International Standard) ballot, which should be completed in time for discussion at our next meeting.

ISO/IEC/IEEE 26512:2011

Development of this standard (*Requirements for acquirers and suppliers of user documentation*) has been completed and it has been published by ISO. WG 2 and SC 7 thanked the Canadian project editor for his work.

ISO/IEC/IEEE 26515

The FCD ballot for this standard (*Developing user documentation in an Agile environment*) conducted following our previous meeting, was successful with comments received from Canada, IEEE-CS, Japan, South Africa, Switzerland and the USA. We discussed and resolved the technical comments. The revised draft is now undergoing FDIS ballot; this should be complete in time for discussion at our next meeting.

ISO/IEC/IEEE 15289:2006

The FDIS ballot for the revision of this standard (*Content of systems and software lifecycle information products (Documentation)*) conducted following our previous meeting was successful with minor editorial comments received from ISO. This standard has now proceeded to publication.

Future documentation standards

During the WG 2 meeting we discussed potential new areas of standardisation related to systems and software documentation. These included:

- Content management for systems and software lifecycle and service management documentation. (This would become ISO/IEC 26520.)
- A standard for user documentation/information for mobile devices. (It was noted that the European Telecommunications Standards Institute has done some work: http://tinyurl.com/mobiledocs),
- A standard that will address the structure of content information, information architecture and navigation.

These are to be researched and will be discussed further at the next meeting.

Maintenance

The current series of 265XX standards was planned to replace, update and consolidate the earlier WG 2 standards and incorporate IEEE 1063-2001 — *Standard for Software User Documentation*. This work is almost complete and instructions have been issued to ISO to withdraw a number of documentation standards and to re-direct searchers on standards websites to the new suite. The latest standards requested for withdrawal are:

- ISO 6592:2000 — *Information technology — Guidelines for the documentation of computer-based application systems*, and
- ISO/IEC 18019:2004 — *Software and system engineering — Guidelines for the design and preparation of user documentation for application software.*

Where next?

WG 2 next meets in Sydney, Australia, in late October prior to the annual New South Wales ASTC conference. Several WG 2 experts have offered papers to that conference. I'll be reporting on the WG 2 meeting (and the conference) in the next issue of the *Communicator*.

Further reading

Palace of Versailles, http://en.chateauversailles.fr

Cameron, T (2011) 'France: Science and Curiosities Exhibition', Communicator, Summer 2011: 14

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A standard for simplified natural language

Richard Hodgkinson provides the latest news of this new ISO standard.

In the Summer 2010 issue of the *Communicator* I reported on the initial proposal for developing this standard. The project is now underway and I've obtained some new information.

ISO 24620 will be a multipart standard and is being developed by ISO/TC 37/SC 4/WG 5 — Terminology and other language and content resources — Language resource management — Workflow of language resource management.

Part 1 of the standard will address *'Basic concepts and general principles'*, whilst part 2 will address *'Simplified natural language and symbols for Semantics of Business Vocabulary Notations'*

UK participation in this standard is managed by the British Standards Institution committee TS/1 (Terminology). If you would like to participate in this work, i.e. review the drafts, provide content and comments, please contact Beverley Webb, the TS/1 secretary, at Beverley.Webb@bsi.group.com. You will also need to provide a nomination from the ISTC together with a brief biography.

I will not be participating directly in this work, but plan to report on progress in *Communicator.*

BSI committee TS/1 covers ISO/TC 37 which produces standards in the following areas:

- Ontologies — Linguistic, terminological and knowledge organization aspects.
- Terminographical and lexicographical working methods.
- Systems to manage terminology, knowledge and content.
- Language resource management.
- Translation, internationalisation and interpreting.

Consequently, participation in TS/1 will mean that you will have access to all of their work.

Current membership of TS/1 includes experts from the Universities of Bangor, Portsmouth, Surrey and Sheffield, Cambridge University, the British Library, the British Computer Society, the Chartered Institute of Library and Information Professionals, the Institute of Translation and Interpreting, the Chartered Institute of Linguists and the UK Association for Terminology and Lexicography.

So, what's it all about?

Bearing in mind that the work is in its initial stages, I will attempt to provide more information on the standard. Here are the purpose and justification from the New Work Item Proposal, and the Scope from an early Working Draft. Please note that the Scope may be modified as the standard progresses.

Purpose and Justification

Simplified English was originally developed as a 'controlled language' (in the information and documentation meaning of the term) for aerospace industry maintenance manuals. It offers a carefully limited and standardised subset of English. However, it cannot be regarded as a sort of deprecated English. Simplified English usually has a lexicon of approved words, and those words can only be used in certain ways. For example, the word 'close' can be used in the phrase 'Close the door' but not 'do not go close to the landing gear'.

For usability professionals it is clear that making text understandable is very challenging, especially in an international environment. Simplified English can help in several respects — depending on the application. The aerospace standard is actually an industry-regulated writing standard for aerospace maintenance documentation. It is not intended for use as a general writing standard. The US government's 'Plain English' lacks the strict vocabulary restrictions of the aerospace standard, but it represents an attempt at a more general writing standard.

Today varieties of simplified national languages have been, or are in the process of being, developed in many languages and application fields, such as:

- User-friendly manuals and product descriptions.
- 'Readable' explanations to packaged drugs for use by patients.
- (For the common citizen), user-friendly forms of public administration.
- In the airline business, banking, insurance, automotive and pharmaceutical industries, and in general for the description of commodities and services geared towards the common consumer.

It's also worth remembering that in many countries, 'ambiguous' product descriptions may invoke the liability of the producer (or importer or distributor).

Scope

General rules and principles concerning simplified natural languages facilitate:

- Reducing ambiguity.
- The speeding up of reading.
- Improving comprehension for people whose first language is not the language of the document at hand.
- The improvement of comprehension for people with different domain or application backgrounds.
- Making human translation and localisation easier, faster and more cost effective.
- Computer-assisted translation and machine translation.
- Re-usability of language resources in larger application scenarios, like Semantic Web or decision-support systems.

The general rules and principles of this standard constitute a systematic approach that makes cross-language and cross-domain, as well as cross-system applications of simplified natural languages, more effective. C

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John Revington ponders the balance between day reality and day dream

We all seem to be rushed off our collective feet these days, so the challenge of writing this article was to look for a wider, less-hurried view, while still satisfying the title, meeting the deadline, and stimulating interest.

Why the flowchart then, and what does a day in my life (Figure 1) have to do with that of a 13th century monk's day (Figure 2)? Yes, I can already hear the inevitable heady discussion about standards, style, and visual representation on one side, and the groans and strident tones of personal opinion on the other.

But for now, as an alternative to that discussion, here's my wider, less-hurried view.

The day's work

Our team's challenge, at the engineering company I work for, is to deliver a technical message about very complex mechatronic equipment. Hence our interest in visual representation, rather than just text, text, text.

A visual approach is the stuff my dream day is made of. Text, largely, is the reality.

The flowchart

In its own 'lean' and minimalist way, Figure 1 satisfies the title of this article. No embellishment; no extras; nothing to confuse readers; boring to a fault, but understandable for a broad audience. After all, as technical communicators we don't usually write to entertain. We write to get our message across as effectively and as cleanly as possible.

Our Stroud team strives to go beyond text, and the typical activities squeezed into the flowchart show that we sometimes spend considerable time each day manipulating graphics to enlighten our readers. This is only a start though.

The need

The company's local staff complement of 500 includes about 40 nationalities. This broadly mirrors our global readership; a readership that often asks for 'more pictures' in the 300 to 1,000-page operations and maintenance manuals we write and update for them. What lifeline might we offer to save them from drowning in the cross-currents of English vernacular and engineering jargon?

The range of choices

The range is wide. At one end, photographs taken on inexpensive digital cameras; at the other, fully integrated software that uses original CAD drawings to generate many different output formats, including detailed, interactive animations of assembly and disassembly procedures. How can we best use these options; what approach to the various options might be the most effective, what new skills do we need, and what can the budget withstand?

Our choice

It looks as if we'll be fortunate enough to be able to help our readers by offering them animations and simulations, while keeping and enhancing the 'pictures' we already use. We'd like to see this balance changing, as resources and time allow, so that the norm is to embed animations in our manuals and to reduce the weight of the text, text, text.

This ambition would undoubtedly require a new mental approach, new skills, and new processes on our side, as well as a cultural change on our readers' side. If all this happens, the benefits to our readers would be enormous.

A monk's life?

A final thought about the typical day in my life as a technical communicator. Rarely are any two days the same, because each day brings a different success to celebrate; a different problem to solve; a new aspect to ponder.

Spare a thought then for those 13th century monks who lived far from the temptations and interruptions of the material world, and who endured a cyclical rhythm of activities, day after day, season in and season out. We can at least put each of our working days in a different shaped box — even if the box *is* a flowchart — and dream about pictures, better communication, and enlightenment. C

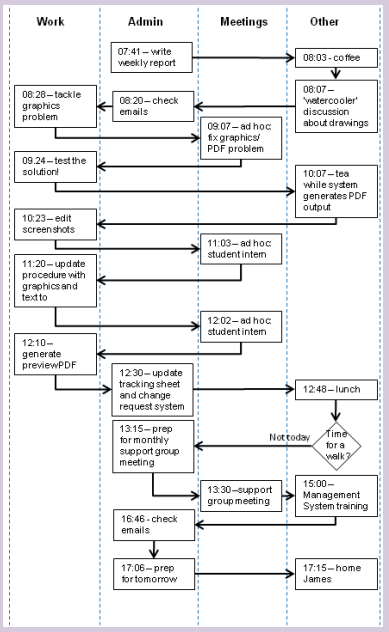

Figure 1. My day in the life – in a box

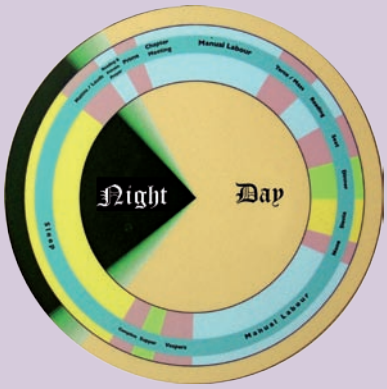

Figure 2. A monk's day in the life – in a circle (Adapted from a Tintern Abbey information display)

Further reading

A day in the life of a monk http://cistercians.shef.ac.uk/multimedia/games/intro.html (accessed 19 July 2011)

Deep Exploration™ and the Visual Enterprise www.righthemisphere.com (accessed 19 July 2011).

Mechatronics http://en.wikipedia.org/wiki/Mechatronics (accessed July 2011)

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