Technical Communication UK 2011

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Communicator

The Institute of Scientific and Technical Communicators
Winter 2011

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Interacting with theatre scripts

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ISTC news

Articles

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WINNER 2011 APEX® AWARDS FOR PUBLICATION EXCELLENCE

Editorial

This is another bumper issue full of articles on localisation, translation, interactive learning, user assistance, Arbortext, FrameMaker, agile and more.

In addition to the usual journal this issues has a special supplement accompanying it. The supplement was inspired by the 'Anything but text' theme at TCUK and contains articles on Technical Illustration. Adobe has kindly sponsored it.

In this issue

Here are some of the highlights from this issue.

Tom Gannon discusses machine translation, a subject that was also covered from a different angle by Rob Sexstone in Summer 2011. Rob's current article on internationalisation contains a useful checklist for anyone wanting to localise content.

The centre pages describe this year's annual TCUK conference, hosted by the ISTC. I attended the event for two days and it was great to get out and meet the readers, contributors and advertisers of *Communicator*. I was also able to talk to lots of potential future contributors. Some of the speakers have written for this issue.

As this issue is the Winter issue, you may be looking for some ideas for presents. The Editing column is a good place to start. If any reader would like to contribute their top 5 or top 10 list of reference books, I'd be happy to publish them.

Whilst I was reviewing the articles I read Philip Murray's article on creating video and then Phil Stokes' article on recording video. I found both articles interesting and they link together well.

Lastly, if you want to apply your skills in other areas of your life, read Ron Blicq's fascinating article on developing theatre scripts.

Back issues

You may like to know that back issues of *Communicator* can be found in the Members' Area of the ISTC website if you want to look up previously published articles. Steve Rickaby refers to some of these in his case study on structured FrameMaker. Thanks to Steve for his hard work in writing or editing every FrameMaker column since Spring 2006.

…And finally

Don't forget to enter the competition to win a copy of Snagit on page 5. Five copies of Snagit have been kindly donated by TechSmith. The competition closing date is 31 January 2012 and winners will be notified shortly after the closing date.

I hope you enjoy the Winter issue as much as I enjoyed putting it together. C

Contributing to *Communicator*

Would you like to write an article?

- Exploring the world of technical communication in the engineering or scientific field.
- About a case study
- Reviewing software for the Mac

We are always looking for feedback, ideas, suggestions and contributions.

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

Katherine Judge MISTC
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Letters

Request for Mac reviews

Martin Smith MISTC asks if Communicator can cover software reviews for Macs.

Since joining the ISTC and reading its quarterly journal, I have noticed that most, if not all, of the subject matter is Windows based. As more and more Apple devices are being purchased nowadays (iPhones, iPads, iMacs and MacBooks), would it be possible for future issues to include some topics for the Mac platform (OS X/iOS 5)?

My first thoughts would be for reviews on word processing applications (Office for the Mac 2008/2011, iWork (Pages, Numbers and Keynote (Word, Excel and PowerPoint equivalents respectively)), QuickOffice, NeoOffice, etc.

Editor: Martin Smith has raised some good points. We'll try and include more Apple devices in future issues of Communicator. A recent Mac software review was included in the Summer 2011 issue on Scrivener for Mac OS X.

Being logical

Theresa Cameron FISTC comments on one of the guidelines in Lorcan Ryan's survey in the Autumn 2011 issue.

In the article *Online survey with professional authors*, Lorcan Ryan gives the ten most highly ranked guidelines in his survey for user assistance (UA) authoring for global audiences.

Number three intrigued me: *Be logical, literal and precise*, especially the word 'logical'. In my experience, logic does not cross borders: in Germany, pedestrians can be fined for crossing at a red light; strikes happen in France for reasons that baffle outsiders; Belgian floor numbering follows its own peculiar conventions. These are all logical things for the locals. Has the personal computer and/or the internet removed all the 'logical' distinctions because the online world has no borders? I wonder.

Colour blindness

Jean Rollinson FISTC now knows more about colour blindness.

I found the article on colour blindness very interesting and useful. There were so many things I'd assumed about colour blind people, some of which were confirmed and others dispelled. As the company I am currently working for uses colour in its software, I took the Communicator to work for the software developers to read. The feedback from them was also very positive, as it gave them things to think about too. C

E: communicator@istc.org.uk

Communicator competition

TechSmith are giving away five copies of Snagit.

Snagit®

This competition is open to all *Communicator* readers. To win a copy, just answer the following question.

Which answer describes Snagit?

1. Snagit is for creating and editing videos.
2. Snagit is for taking snapshots of your screen.
3. Snagit is authoring software.
4. Snagit is for designing page layouts for printing.

Send the answer to: communicator@istc.org.uk
Competition deadline: **31 January 2012**.

Presidential address

A year of good progress for the ISTC

As a small, members-led, professional institute, there is always the risk of relying too heavily on volunteers and goodwill to get anything done.

This time last year, we made some changes to the way Council was organised and agreed on some clear strategies, objectives, resources and budgets for each team. Many thanks to my fellow Council members, the wider network of member volunteers, and our paid specialists for making so much progress. What follows is my perspective on what we have achieved on our members' behalf in the last year.

Communicator journal

Communicator continues to attract high-quality submissions and the first year of the new editorial and publishing team led by Katherine has settled down well. Advertising revenues have grown well and the pipeline of future contributors looks healthy. We found out at the beginning of July 2011 that *Communicator* had won an APEX Award of Excellence (our second such award in recent years). Current initiatives include widening the *Communicator* subscriber base outside the ISTC membership, and trialling an online delivery option.

Community

This has always been at the heart of what the ISTC is for and about, but has taken on a much more coherent form with some clear goals and objectives in the last year or so, under Rachel's leadership. Good progress has continued to be made in the last year, particularly with new local area groups setting up, engagement with business affiliates, the ISTC's increasing contribution to online communities, and the reputation of the ISTC's community credentials through the ongoing success of Technical Communication UK.

The ISTC benefits the most when ISTC members themselves get involved and make things happen; so if you are not already, why not do just that. There is so much to gain, both personally and professionally.

In January 2011, the first ISTC survey since 2004 was carried out. This attracted considerable interest and the aim is to conduct regular ISTC surveys in order to monitor skills, experience, remuneration and other important aspects of technical communication. A poll was also conducted in the summer to establish the main challenges facing technical communicators today.

Technical Communication UK conference

This was the third year of the new conference and we attracted a record 200 attendees. The reputation of the event has developed to the extent that we were heavily oversubscribed for speaker proposals and exhibitors with the accommodation sold out more than a month ahead of the event. We have invested in ensuring that the event is professionally run and delivered, and even though it is still by far the best value (and best fun) technical communication conference in the world, we have still managed to make a small profit for the ISTC each year.

Professional development and recognition

The key development this year has been the decision to replace the ISTC's own course with an accreditation scheme that recognises excellent courses for technical communicators provided by specialist organisations. David and Alison now have a scheme ready to be launched, and it will be form a key part of what we hope will become a thriving CPD (continuing professional development) programme from the ISTC.

The new mentoring scheme is now firmly up and running, with over 20 junior members benefitting.

Resources

The documentary 'Appuyez sur le bouton : au pays des modes d'emploi' was produced and broadcast across France in 2008.

'Push the Button' is an excellent little film: entertaining, informative and telling the story of how our lives have become so dependent on and entwined with the technical instructions that support so much of life's stuff.

The ISTC and the IDA (Information Design Association) shared the sponsorship for creating a version with English subtitles and it is now available for our members and the wider public to rent the DVD through the ISTC office. STOP PRESS: Don't miss the London Premier of 'Push the Button' on 18th January 2012!

In other news…

The marketing capability and output of the ISTC has seen significant improvements in the last year led by Rachel, with a growing team of paid specialists and volunteers:

- Gordon McLean has taken on the new website project and Phase 1 of the live, new site is already a significant improvement.
- A new specialist marketing design and PR company is providing new materials that properly reflect the ISTC's benefits and value.
- A new volunteer member now represents the ISTC on Twitter.
- A dedicated specialist is now liaising with Business Affiliates, encouraging them to get more from their support of the ISTC.
- Several of us on Council have been contributing to the ISTC's growing reputation, including contributing to the *Nature* journal feature about technical communicator careers. C


CAREERS

The best words in the best order

Those who prefer organizing ideas to working at the bench should consider a career in technical writing.

Paul Ballard FISTC
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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

The Council and its supporting team

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Introducing the ISTC Accreditation Scheme

One of the goals of the ISTC is to improve the quality and availability of technical communication training and education in the UK. After the City and Guilds Institute (C&G) discontinued its courses on the *Communication of Technical Information* the ISTC offered its own *Open Learning* courses and its own examinations, based on the original C&G syllabus.

Operating these courses and examinations proved to be a complex and time-consuming activity for the ISTC. The ISTC Council became aware that the number of students enrolling on the courses was lower than expected, and that the proportion of students dropping-out without completing the courses was high. The courses were offered as self-study home-learning courses with tutorial support, but it was difficult to recruit and retain tutors for the courses and to maintain appropriate support mechanisms for students. Above all, the ISTC Council felt that the course syllabus and teaching methods had not kept up with current practices in our industry.

In response to these concerns the ISTC Council decided to stop offering these courses in their original form. The ISTC Council hoped that it would be possible to create a new set of courses to replace them but after further investigation concluded that the costs involved and the time required for such an effort would be excessive. Instead, the ISTC Council has decided that the best way to promote training and education in our field is to partner with existing training providers, rather than to develop and manage its own courses. The ISTC's role will be to review and assess training offered by others, and to promote suitable courses to its members.

Under these new arrangements, to be known as the ISTC Accreditation Scheme, ISTC members benefit from greater visibility of available courses that have been independently assessed, training providers gain greater exposure to the ISTC membership, and the ISTC advances its aims of improved professional education and training. It must be emphasised that the ISTC Accreditation Scheme offers recognition to specified courses offered by providers, and not to providers or to students.

Look out for specific information for prospective students and for prospective training providers, which will be available very soon through the ISTC website. If you have any questions or comments, or if you are an experienced corporate member (MISTC or FISTC) and you'd like to volunteer to serve on the panel that will review courses, please email: education@istc.org.uk C

Member news

New Members

Member

Andrew Healey	Sheffield
Mark Lees	Lancashire
Hilda Ragragio	Ireland
Richard Wells	Gloucestershire
Rowan Shaw	Germany
Sean Beckles	London
Fiona Tayler	Buckinghamshire
Peter Vallender	Hampshire
Joanne Childs	Surrey
Martin Cooper	Telford
Tanya Brown	Cambridge

Junior member

Jonathan Glassman	London
Damien Sherlock	Ireland

Associate

Roberta Urnikaite	London
Helen Allcock	Cheshire
Kenneth Whyte	London
Neil Telford	Cheshire

Student

Lorcan Ryan	Ireland
Fiona Heathcote	Cambridge
Mark Allen	Cheshire

Transfers

Junior member

Matthew Rayner	Hampshire

Rejoiners

Associate

Christopher Western	Wiltshire

Online groups

http://finance.groups.yahoo.com/group/ISTC_Discussion – general discussion forum for members of the ISTC
http://finance.groups.yahoo.com/group/ISTC_IASIG – independent authors' special interest group forum for members of the ISTC

Approval of documents

After one technical communicator changes a document, other people review the document. The technical communicator makes more changes, and the cycle continues until the technical communicator and the reviewers are happy with the document. However, the technical communicator cannot get final approval from an authority who 'signs off' the document for publication.

Members gave the following comments about approval systems in other organisations.

Ideally, each document has an owner. The owner is never the technical communicator. Usually, the owner is the operations manager or the product manager. A manual is part of a product. Therefore, the applicable owner is responsible for final approval. If the owner has problems with giving approval, the organisation must decide what the product includes.

Making someone responsible for a product is part of the quality assurance function. If no person has the final authority, then there is a problem with quality assurance. Possibly, there is also a problem with management.

Software is checked, tested, and approved before it is released. Similarly, product documentation must be checked, tested, and approved. The product managers are responsible for making sure that the product is satisfactory. Frequently, a technical communicator has no authority and cannot make people do their jobs. However, a technical communicator can explain the problem to a senior manager or to a director. These people can tell the product managers to do their jobs correctly.

If an organisation is ISO 9000 certified, then the approval system must be documented. Most organisations that are ISO 9000 certified have a cover sheet with each document. The applicable people sign the cover sheet to confirm that they give approval to the document.

Terms for touch-screens

One member thinks that 'click' is not a good term to explain the operation of a touch-screen. She asked whether the terms 'touch', 'press, and 'select' are satisfactory.

Some terms from members are as follows:

- Tap. "I 'tap' the screen on my smartphone."
- Touch. "Touch the screen anywhere."
- Wipe. For some features, possibly you "wipe the screen to the left".

Possibly, use pictures to show the meaning of a term.

Recently, Joe Welinske from WritersUA published *Developing User Assistance for Mobile Apps* (www.writersua.com/mobile/book.htm). The book suggests the terms to use with touch-screens. Examples of new terms are 'flick', 'pan', 'pinch', and 'stretch'.

Sometimes, a user can use a mouse or a keyboard instead of a touch-screen. Therefore, one member uses 'select', because he does not know how the users access the software.

Ratio of developers to communicators

In one organisation, the ratio of software developers to technical communicators is approximately 35:1. A manager wants to increase the number of technical communicators in the organisation, because the organisation increased the number of software developers. Therefore, the manager wants to know the ratio of software developers to technical communicators in organisations that produce software or embedded electronics. To keep things simple, the term 'software developer' includes other technical roles such as testers.

Seven technical communicators supplied numbers. Six of those technical communicators are the only technical communicator in their organisation. The ratio of software developers to technical communicators was between 6:1 and 27:1. One technical communicator thought that at one organisation, the ratio was 35:1. (Previously, he worked at the organisation, but he is not there now.)

In 2003, Cherryleaf did a survey. Cherryleaf found the average ratio was 12:1, but there were ratios of 50:1 and 100:1. Some studies suggested that the best ratio is 7:1 (http://tiny.cc/cherryleafratios). Probably, in most organisations now, the ratio is between 10:1 and 15:1. C

Mike Unwalla FISTC
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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.

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London
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North West England
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North East England
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West of Scotland
Organiser: Katja McLaughlin
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The UK Technical Communication Awards 2011

The Instructional Class this year was won by Alison Peck with her *Guide to ROSEGold*, a new Interflora order management system.

Timing was on my side for the Technical Communication Awards this year. I had just started working on the *Guide to ROSEGold* when I began to see reminders about the awards, and I mentioned them to the project team at our initial meeting. Asking for permission to enter the guide that early in the process meant that I was not desperately trying to obtain authorisation as the deadline approached, removing some of the pressure.

The guide is a standard user guide, which makes extensive use of screenshots and captions to provide information to an audience who are – as might be expected from their jobs as florists – extremely visual in their communication style. This theme was built on for the 'information' screens within the application, which did not fall into a particular task but instead provided an overview with links to different elements. Describing these procedurally was impossible – annotating a populated screenshot was a much more effective way of explaining what the florists could see. I was very pleased that these sections of the guide were noted and liked by the judges.

Developing this guide was a collaborative affair, with feedback from the project team and testing department as well as – most importantly – a small group of florists drawn from those who were moving to the new system.

Alison Peck receiving the award from Doc-to-Help, who sponsored the class.

The layout that was chosen for the guide – with the majority of the text on the left and the images on the right – plus the desire to use aesthetically pleasing arrows and other highlighting elements (borders and tinted boxes) encouraged me to create the document in InDesign, an application I had only tried before for very small personal projects. Since then I have used the expertise I gained, on other projects.

Overall, I was very pleased with the result, as were the project team at Interflora. I felt I had something that I was happy to enter into the competition.

Since winning the award, Phase 2 of the ROSEGold project has completed, including an update of the documentation to incorporate a number of new features.

Entering for the first time

In common, I expect, with many technical communicators, I find it difficult to enter the ISTC Technical Communication Awards. This is not because of any difficulty with the entry process, or the support received from the Awards team (which was straightforward and encouraging, respectively). It is because much of my work is not in the public domain, and obtaining permission to enter it can be problematic, to say the least. Some clients are concerned about commercial confidentiality, and (depending on the sector) it can be difficult to find someone who is authorised to make that decision.

As I have already stated, the timing this year was ideal for me. I have learnt from this, and have already incorporated a simple question to my 'project briefing' document, reminding me to ask a potential client if it might be possible in principle to submit an entry based on the work, even if only a short extract could be used. Asking the question early on in the process may help me to get a few more positive answers.

What does winning mean to me?

The Technical Communication UK Awards are confirmation from my peers that my work is of a good standard. From a personal perspective, that means a lot. Knowing that the judges themselves are experienced technical communicators makes the comments and feedback extremely valuable to me.

From a commercial perspective, as a freelance technical communicator this is something I can put on my website as an undisputable fact. Something that gives a clear indication to prospective clients that I can deliver.

Finally, I feel motivated to continue to learn and improve. Who knows, if the timing is right I may enter again another year.

Acknowledgements

A number of people deserve my thanks:

- Mike Unwalla of TechScribe for passing Interflora back to me as a client.
- The project team at Interflora: Nicole Moore, Josie Thurston, Kate Baxter and many others, who answered my questions and guided me through the system.
- Martin Block, for his inspiring talk at TCUK 2010. See Block, M (2011) 'More pictures, fewer words', *Communicator*, Spring 2011:35
- Doc-to-Help, the award sponsors, who also kindly presented me with a licence for the Doc-to-Help product. C

Alison Peck FISTC is a freelance technical communicator, trading under the name of Clearly Stated. She creates documentation (in its widest sense) for products and services of all types, but mostly those involving software.
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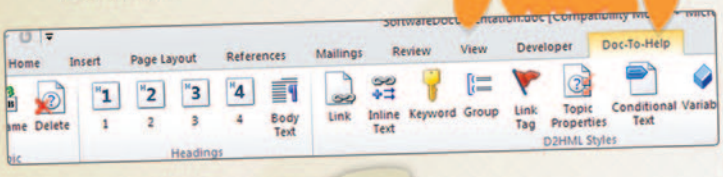

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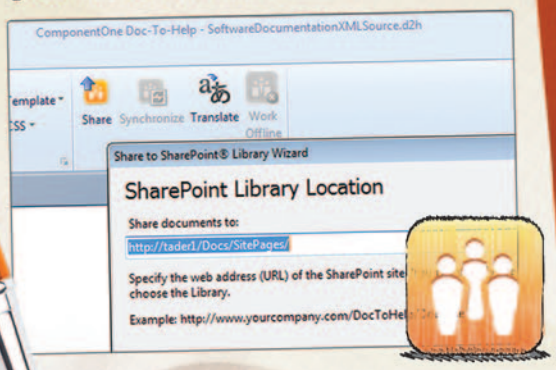

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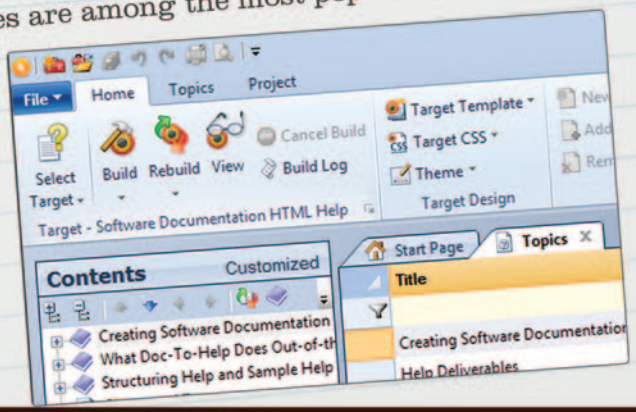

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Countering the offshore outsourcing trend

Many technical authors have lost their jobs to authors abroad. Can this trend be reversed? Lynn Kolber from OnTarget Communications describes a unique alternative.

During a recession, cost-cutting measures often include outsourcing work to companies offshore. For example, a technical author in the UK earning £30k a year may be replaced by a author in India earning half that wage.

The true cost of moving work offshore is often not calculated correctly as many hidden costs and factors influence the total cost of outsourcing.

A global USA-based hi-tech company moved seven technical author positions to Pune approximately 18 months ago. Twelve months later they had managed to fill only two of these vacancies. Frustrated by the lack of progress in recruiting in an over-heated outsource market they started to look for alternatives.

Building a team with a range of experience levels

The customer had a team of 18 authors in total and decided to try a unique programme designed to create skilled entry-level authors. Over a period of four months they trained a group of six technical writing interns in conjunction with OnTarget Communications.

The programme applicants were unemployed or underemployed graduates, ranging in age from 25 to 55.

The interns came from a wide-range of backgrounds: a commercial lawyer, a person with an advanced degree in film-making, a computer programmer, an English teacher, a journalist, and a linguist. All were tested to ensure that they had fundamental writing skills.

The programme included one day of training every week, either in a classroom instructor-led training session or an online instructor-led training session. The topics covered included:

1. Writing technical documentation using Microsoft Word™ and Adobe FrameMaker™.
2. Authoring DITA-compliant structured content in XMetaL.
3. Editing and proofing content.
4. Researching and managing information.
5. Information technology essentials for technical authors.
6. Creating graphics and schematics using several tools.
7. Planning and managing writing projects.
8. Interpersonal skills.
9. Creating presentations and training materials.
10. Analysing data and creating graphs.
11. Creating PDFs.
12. Publishing online help.

Immediately productive

These core competencies ensured that the apprentices could be productive as junior technical authors within a very short period of time.

The team balanced the workload between the dozen experienced authors and the six new authors, assigning work according to complexity.

Other issues to consider

When companies cost offshoring they often forget to include indirect factors that influence both the productivity and cost.

- *Retention*: In several of the outsource markets, employee loyalty may be difficult to foster, and authors change jobs on average every 12 months. This results in a re-recruitment cost as well as the cost of lost productivity due to the learning curve required for new authors to become familiar with your product, work processes, tools and company. The cost of these delays and reduced productivity may be significant.
- *English:* Authors may not be mother-tongue English and work may need to be edited or proofed, incurring further costs.
- *Work culture:* Authors may be more used to playing a passive role and may require detailed instruction, feedback and monitoring. A telecom company reported that they needed to add an additional documentation team leader for every four authors outsourced offshore. This wiped out the cost benefit of outsourcing.
- *Collaboration:* Time zone differences make collaborating in real-time harder, and this requires more careful planning of meetings and reviews. The net result is often an increase in time-to-market.
- *Productivity:* Metrics for technical authors vary substantially from country-to-country, and a false sense of saving may arise when comparing hourly rates, not taking the real rate of work (per deliverable) into account.

What makes a great author

A great author needs much more than a knowledge of authoring tools, for example:

- Writing ability
- Organisational and project management skills
- Knowledge of technology
- Strong detective skills
- Assertiveness
- Interpersonal skills
- Flexibility and ability to cope with change
- Interest in lifelong learning

In conclusion

Expanding your documentation team with well-trained entry-level technical authors here in the UK can help to stem the tide of offshoring. C

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Horace Hockley award 2011

Tony Self FISTC wins this year's annual ISTC award.

Each year the Council of the ISTC invites nominations for the Horace Hockley Award, and selects a winner. The award recognises someone who has made a considerable contribution to the profession over a long period of time.

Tony Self, who is based in Australia, was unable to attend the Technical Communication UK conference to receive his award in person, but he sent a video of his acceptance speech.

"I was surprised and very thrilled to learn I was the recipient of this year's Horace Hockley award, and so I would like to thank everybody very much for bestowing this honour upon me."

Tony started as a technical writer in 1979 writing aircraft manuals, and as a young man interested in aircraft this was a dream job. In those days he used pens and pencils because typesetters and typists were those responsible for keyboard tasks.

While still at the aircraft manufacturer, he became interested in Computer Aided Design, and then later on whilst writing banking documentation, he got involved with Computer Based Training and the use of hypertext.

In 1993, he co-founded HyperWrite and still works through that company as a consultant and trainer. He has always been drawn to working with emerging technologies, which today is less and less about help text and more and more about implementing DITA and XML database documentation solutions.

He has worked all over the world, establishing the Australasian Online Documentation Conference in 1998, and he has been a regular lecturer at the Swinburne University's postgraduate programme in technical communication.

Most recently, he has been involved with the OASIS DITA Technical Committee, and he chairs the Help sub-committee.

"I've had, so far, a very interesting and rewarding career. Technical communication has given me the opportunities to travel; opportunities to work on really interesting projects; opportunities to make friends: different people all round the world. I hope for all of you that technical communication is, likewise, a rewarding profession and one that is intellectually stimulating, and one that makes you feel good about yourself!"

Paul Ballard FISTC
ISTC President

Tony Self FISTC

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www.hyperwrite.com

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www.helpml.com/horace.wmv

Double win for Welocalize

Louise Law provides a business update on Welocalize's recent successes.

Welocalize strengthens partnership with Terex

Welocalize (trading as Lloyd International Ltd) has provided translation services for Terex technical documentation for over 12 years and from October 2011 will become a supplier of global localisation services for technical publications for the Terex Construction and Materials Processing business segments. This three-year contract is a result of a thorough RFP (Request for Proposal) process launched by the Terex Global Sourcing Team at the beginning of this year to review localisation vendors.

Mark McLeod, Global Head of Customer Information at Terex Construction and Quality Management System Manager at Terex said, "Welocalize already provides us with high-quality localisation services for technical documentation and has done for many years. The reason we decided to review our localisation vendors was simply because we are committed to delivering the highest quality to our customers and we see providing localised information as part of our commitment to quality."

"Throughout the RFP process we were completely focused on building on our levels of quality and timely delivery to allow Terex to serve its customers even better," comments Jill Fifoot, Business Development Director at Welocalize. "This new contract gives us the opportunity to continue to build on our strategic relationship with Terex and provide them with next-generation localisation services."

Mark McLeod continues, "Welocalize really raised the bar in this review process. Since Lloyd International Translations merged with Welocalize in November 2010, it has meant more innovation, more solutions and more resources that will help us better serve our customers and succeed in our global business."

About Terex

Terex Corporation is a diversified global manufacturer operating in four business segments: Aerial Work Platforms, Construction, Cranes, and Materials Processing. Terex manufactures a broad range of equipment for use in various industries, including the construction, infrastructure, quarrying, mining, shipping, transportation, refining, energy and utility industries. Terex offers financial products and services to assist in the acquisition of Terex equipment through Terex Financial Services. More information on Terex can be found at www.terex.com.

Welocalize receives award from Ricoh Europe

Welocalize has been awarded Best Localization Vendor 2010 by Ricoh Europe B.V.

Ricoh is a global provider of technology and services that transform high volume, document intensive business processes into more efficient ones. The company provides end-to-end solutions to clients all over the world through expertise in four core capabilities: Managed Document Services, Production Printing, Office Solutions and IT Services.

Working closely with Ricoh's European Localization Centre in the Netherlands, Welocalize has provided translation services to Ricoh for over 4 years. The Welocalize team in the UK provides translations of Ricoh's technical documentation and Help in up to 20 European languages.

As part of Ricoh's overall localization vendor evaluation, the annual award ranks vendors in a number of areas – Welocalize was ranked as "excellent" and received the highest score overall. Welocalize was recognised for high performance in the areas of project management and translation quality.

About Ricoh

Ricoh Company, Ltd. (Ricoh Company) is a Fortune 500 company specialising in technology and services that transform high volume, document intensive business processes into more efficient ones. This is achieved through Ricoh's expertise in Managed Document Services, Production Printing, Office Solutions and IT Services. By working with Ricoh, businesses can streamline the way they work, become more efficient and profitable, and share knowledge more effectively with their organisations. With a global workforce of 109,014, Ricoh operates in Europe, the Americas, Asia Pacific, China and Japan.

Ricoh Europe Holdings Plc is a public limited company and the EMEA headquarters of Ricoh Company with operations located in London, United Kingdom and Amstelveen, the Netherlands. In the fiscal year ended 31st March 2011, revenues from Ricoh's EMEA operations totalled ¥413.9 billion (approx €3.5 billion based on the US Federal Reserve exchange rate 31st March 2011). Ricoh's group's worldwide sales totalled ¥1,942 billion (approx €16.4 billion based on the US Federal Reserve exchange rate 31st March 2011). C

About Welocalize

Welocalize offers integrated translation services and products to support the need for on-demand translation. We provide globalisation consulting, translation, localisation, testing solutions and enterprise translation management tools that are optimised to be able to deliver on-demand translation in over 100 languages. With over 500 employees worldwide, Welocalize maintains offices in the United States, UK, Germany, Ireland, Japan and China.

Louise Law is a writer and marketing professional at Welocalize. Based in the UK, she has worked internationally as a professional writer for 16 years, creating high-level business and marketing communications for organisations all over the world.
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The ISTC at tcworld

Promoting the ISTC, Alison Peck describes attending the event in October 2011.

The ISTC attended tcworld in Wiesbaden, Germany, from 18–20 October 2011. We had a stand in Associations World, along with associations from many other countries including Poland, India, Korea, China, Japan and, of course, Germany.

Associations World is, as its name implies, the area where technical communication associations from around the world can promote their own national organisations, as well as sharing best practice with others. Some of the associations organised social events for visitors to the conference. There was Japanese drumming, Poland organised a vodka, cheese and sausage event (very tasty!) and the countries of the Far East (Japan, Korea and China) provided rice wine (of various types) and sushi.

The exhibition itself was huge, filling a number of large halls, with all the names in technical communication. We met a number of old friends – those who exhibit at TCUK – as well as a number of new organisations.

We had a number of visitors to our stand over the three days – and the eagle-eyed among you may recognise Kai Weber, who spoke at TCUK 2011. We first met Kai at tcworld two years ago, when we last attended, and he is a good example of the relationships that can be forged at such an event.

The sessions were varied and were delivered in either German or English, so you did need to do a bit of careful planning to get the most out of the conference as a delegate. I only managed to squeeze in one seminar, but now know a little more about HTML5.

Figure 1. Kai Weber talking to Felicity Davie at the ISTC stand

We (the ISTC) attended tcworld to raise our profile among the international technical communication community. We did this by promoting the ISTC itself, and by distributing copies of *Communicator* and raising awareness of Technical Communication UK, our very successful annual conference.

A big difference we noticed this time compared with two years ago (we do not attend every year) is that far more people have heard of us. We had a number of enquiries about TCUK, with some potential speakers coming forward. We also had people enquiring about subscribing to *Communicator* and, of course, about joining the ISTC.

Our stand was ideally situated just outside one of the suites of seminar rooms, and immediately adjacent to a refreshments area, which meant we attracted people who browsed through our copies of *Communicator* while having a break.

Overall, the ISTC has benefited from our attendance, and we hope to return in two years' time. C

Alison Peck FISTC is a freelance technical communicator and a member of the ISTC Council who attended tcworld on behalf of the ISTC.
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Figure 2. Japanese drumming – with a collection to raise funds for the tsunami

Figure 3. Polish vodka, cheese and sausages being set up – just in front of the ISTC stand

More than words

Cerys Willoughby reports on the Australian Society for Technical Communication (NSW) Conference 2011.

The ASTC (NSW) Technical Communication Conference was held in Sydney on the 28th and 29th of October with around 60 attendees.

The theme of the conference, 'More than words', was chosen to reflect the fact that although words are important, there are many other skills and tasks required for effective technical communication. The sessions across the two days reflected this theme, with everything from agile development to illustrations, and webinars to wikis.

Conference keynote

The keynote presentation on Friday morning was by Professor Pam Peters, Adjunct Professor of Linguistics at Macquarie University. This session covered practice and research in a number of areas where formatting can be used in print and online materials to improve the readability and accessibility of technical and scientific writing. Areas included text formatting such as utilising different typography and styles to highlight information; how fully justified text inhibits a user's ability to read the text, and the importance of reducing the complexity of sentences.

Other ways of communicating information were also presented, such as the use of photos to tell a story, and graphs and illustrations to convey meaning across space and time. There were interesting examples of different attempts to provide context for terms and definitions, such as tree representations, concept maps, ontologies, and horizontal relationship diagrams. The idea is to introduce new terms to users who have no knowledge of a particular field, or for whom English is a second language.

Working practices and standards

A number of the sessions focused on techniques for working in projects or with clients. In 'Keeping your customer happy' Elizabeth Abbott provided a number of hints and tips for working with customers. Most importantly, don't argue with the customer even if you know better!

Julie McKibbin gave a presentation on project management including a practical group exercise to plan the preparation of a roast dinner. What was surprising was the variety of different ways a roast dinner could be planned, and how many teams resorted to McDonald's as a backup plan!

There was a strong focus on standards with the presence of Working Group 2 who scheduled their meeting alongside the conference. In addition to a Q&A panel with four of us from WG2, Annette Reilly provided some best practice from the ISO/IEC/IEE 26512: *2011 Requirements for acquirers and suppliers of user documentation* International Standard in her presentation on 'Winning proposals for documentation'.

I had the first presentation to give on the Saturday morning 'Agile development – a guide for writers' which included best practices from ISO/IEC 26515 *Developing user documentation in an agile environment*, in addition to my own experiences with agile, both good and bad.

A bit of everything

David Whitbread presented 'A bit of everything – multiple platforms with minimal editing'. The presentation covered a range of techniques for creating content for presentation in different formats. In his work, he needs to extract information from very busy solicitors. The way to do this was to get the solicitors to quickly record the information in the form of a podcast. This podcast material could then be reused to create a transcript and other written content. Another example demonstrated was the use of interactive PDFs for presenting offline but navigable content.

James Robertson gave an inspiring presentation on 'Delivering surprise and joy to staff' with examples of where serious companies have added joy into their employees lives through well designed, smart, collaborative, and even fun intranets.

Wikis and webinars

Steve Moss described his experiences of using both face-to-face workshops and webinars to deliver education, including the pros and cons of each approach. Steve also discussed the issues around running a webinar, such as choosing webinar software and the planning steps required to run a successful webinar. It was clear from the presentation that webinars are an excellent way to deliver education and have a number of benefits such as significantly reduced costs and the potential for global participation. It is important to have a plan B in case the technology goes wrong though!

A presentation each was given using Confluence by Sarah Maddox and Paul Watson. This included workflows for using a wiki, collaboration, and creating PDF content.

Illustrations and wordless instructions

Charles Cave presented best practices on designing illustrations to use with technical information, including styles, the use of callouts, ordering, and flow charts. He also advocated the use of video for explaining steps. Many of the issues raised by Charles were also highlighted in Richard Hodgkinson's presentation on Wordless Instructions. Richard's presentation covered the story of how wordless instructions were designed, developed, and tested for one of IBM's typewriter products. The story also highlighted the pitfalls of inadequate instructions leading to damage to both the product and the users!

Death by PowerPoint

The final session by Frank 'Choco' Munday was guaranteed to wake anyone who had been sleeping in the conference. Choco didn't advocate the need to throw PowerPoint away like some, but instead provided tips (well commands actually) on what not to do in a PowerPoint presentation! C

Cerys Willoughby MISTC

Machine Translation: Yes or No?

Tom Gannon introduces you to Machine Translation, the different types, and assesses its impact.

Say the words 'Machine Translation' (MT) and you automatically think Google Translate or Babelfish. Somehow, there's no way you could use them to translate complex technical documents. Or is there? There are many myths and misunderstandings about MT and its use commercially. In this article, the impact of MT on the way content is authored, created and ultimately, translated is assessed.

You are more familiar with MT than you realise…

MT often gets a bad press. Hilarious mistranslations understandably make you think that it just wouldn't be commercially viable to use MT to translate technical communications. Nonetheless, there is a place in the localisation world for MT and there are some cyber places you may have been to that, without you realising, have had a helping hand from MT. If you've taken a look at parts of Wikipedia in Thai, then you have Asia Online to thank. You may have purchased a PC or laptop from Dell, using Dell's machine-translated product descriptions. There's also a strong chance you've solved an IT issue with Microsoft's machine-translated knowledge base.

successful MT bridges the gap between machine and human translation.

Content has a shorter shelf life now because the way it is published is more agile. With more and more content being published every minute of the day and accessed via the Internet, the demand for translated content is increasing, but translation budgets are not. MT automates translation and, in theory, should make creating multilingual content a lot quicker and cheaper.

So what is MT?

'MT is a sub-field of computational linguistics that investigates the use of computer software to translate content from one natural language to another.' Source: Wikipedia.

MT was first started in the 1950s. One of the first MT systems translated 49 Russian sentences into English using a 250-word vocabulary and only six grammar rules. Back then, many authors claimed that within 3–5 years MT would be a solved problem but progress was slow (and expensive). After 10 years of research, MT was still an unsolved problem and had failed to meet user expectations. MT funding was stopped and the whole concept of using a machine to provide multilingual content was shelved. Semantic ambiguity was one of the key reasons for failure. However, as computational power increased in the 1990s, research and funding for MT started up again and new statistical models for MT began to emerge.

"MT has been 5 years away from perfection since 1952"

Hans Fenstermacher, Translations.com

Types of MT

There are three main types of MT: rules-based, statistical and hybrid systems. Rules-based MT involves complex, grammatical rule sets, in which the grammatical structure is directly transferred from the source to the target. Pure rules-based MT is fully retired now though, and there are no more pure rules-based solutions available on the market. Statistical MT analyses existing bilingual text using probability-based statistical models. In a similar way to translation memory (TM), it builds intelligence based on what has been translated before. Examples of statistical MT engines are Asia Online, Language Weaver and Safaba. Without going into detailed mathematical or technical details regarding these two types of MT, it is quite easy to see where flaws may arise, as no one language has an exact formula. Hybrid systems use the key strengths of both approaches.

A successful MT engine bridges the gap between machine and human translation. Any automated linguistic process achieves optimum when there is an element of human intelligence: at the content creation stage (the authors) and at the post-editing stage (translators and reviewers). In the commercial world, if a technical manual needs to be translated into 20 languages, pure MT won't work. To optimise MT output, it needs to be integrated into the overall translation system.

Deciding if MT is the answer?

The type of content and its purpose are key factors in assessing whether to use MT. If you've used Google Translate, the chances are that it's because you simply want to get the gist of the content and not an exact, grammatically perfect translation. Commercially, you need to consider the content and its purpose: is the content for internal use or for marketing purposes? Does it need to be accurate or is the gist of the content enough? Is the content user-generated (that is, is it a blog or a website)? Is the content structured (technical documentation) or informal? You also need to consider whether the goal of using MT is to simply achieve cost savings: what is your localisation budget and would there be a vested interest in owning the MT solution?

Typical MT solution

The main components of a typical MT solution are shown in Figure 1.

Training the MT engine is an important factor: regardless of the quality of translation required, an un-optimised MT engine will just never be up for the job. Training your MT engine is the process of reducing the gap between the linguistic intelligence of the engine and how it views the complexity of the content for translation. The main influencing factors in terms of how much training is required are the complexity and length of a sentence, its density of the idiosyncratic lexicon and its flexibility with regard to the end result. The MT system needs to "learn" how to handle words in a specific domain. For example, "IT" and "Welocalize" are not limited domains. "Welocalize On-Demand Translation Services" is a limited domain. Google has an excellent MT engine but it has been trained on very broad domains. It basically knows how to say a little about a lot of things. Microsoft's MT engine is very good for Microsoft and Microsoft-like materials because it has been trained extensively on Microsoft support content. MT engine training is highly hardware- and processor-intensive and few linguists know how to appropriately train an MT engine.

MT output evaluation: There are two types of MT evaluation, automated and human. The overall goal of the evaluation process is to ensure that the content is fluent, that the relevance has been retained and that the overall voice and terminology has been preserved. Automated MT evaluation compares and scores MT output against a set of reference human translations. The score doesn't always reflect the accuracy of the translation but can be a useful tool to measure incremental improvements based on training of a given MT system. Human evaluation is effective, yet subjective, time-consuming and expensive, which almost defeats the object of using MT in the first place. The optimum method of output evaluation is to combine both automated and human evaluation.

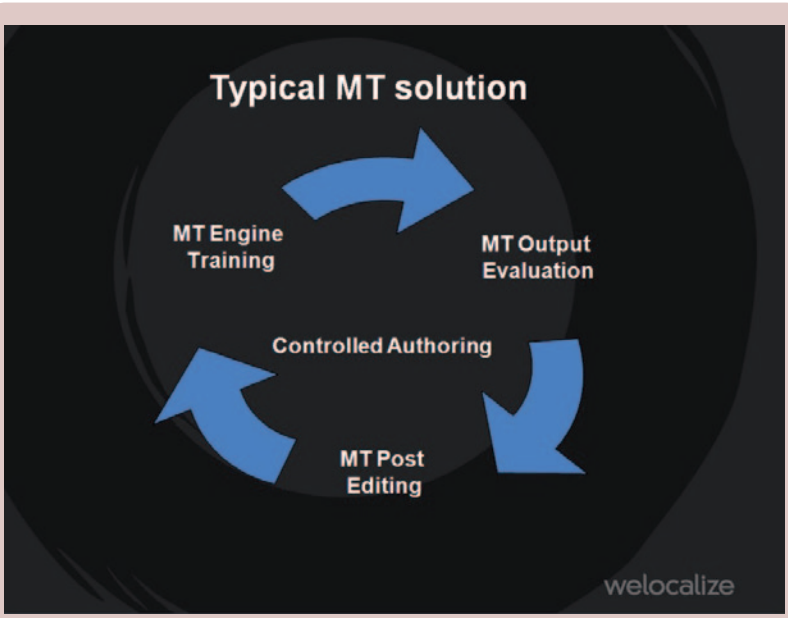

Figure 1. Typical machine translation solution

MT post-editing: This is the process of improving an MT piece by an experienced translator. Having a post-editing process in place fixes the errors and ensures that the tone of voice has been preserved. A key factor to successful post-editing is to correct only what is necessary. This prevents this stage in the MT process from becoming time-consuming and costly. Effective MT output can produce 3000–9000 translated words per day. When combined with quality post-editing by a translator, this can improve the speed and cost efficiency of just using translators without MT. How much post-editing is required depends on a number of factors, such as the quality of the raw MT output and the expected quality of the final product.

Controlled authoring

Controlled authoring involves the use of a set of language rules and restrictions. These are used as a guide for content creators, which limits the fluidity of the language they use. The reason for using these guides is that the readability of the content is improved and by using pre-defined limitations, misunderstandings are eliminated. This is particularly effective in the creation of technical communications because content tends to be complex and highly repetitive, unlike sales and marketing content, which tends to be more creative and subjective. Having fixed language parameters for content creation can greatly improve the quality levels of MT output because of the highly repetitive nature of the content, which also helps the continuous training of the MT engine. Using structured, consistent and limited language in the source content will thereby increase the quality of MT output.

Some MT myths busted

Contrary to popular belief, MT is not a magic wand. It is not the 'band aid' that can fix the mismatch of growing content volumes and decreasing translation budgets. It is a productivity tool within the content translation supply chain. If it is implemented correctly, trained and used in conjunction with other components of the supply chain, then in the long term there will be a return on investment and an increase in the speed of translation. The total localisation technology tools market is worth less than $100 million per annum and MT represents only 25% of this figure. Typical MT success stories are in-house initiatives with little MT provider (or language service provider) input. All MT engines start out equal and all MT

engines are flawed. It is fair to say that if you rely purely on MT, then you will get colourful output that you will never be able to use for your clients and communities.

Conclusions

- Pure MT will never replace human translation: It is a tool designed to reduce translation cost and increase productivity in the long term, forming part of the overall translation supply chain.
- Highly repetitive content suits MT, for example, technical communications.
- Human intelligence is needed to translate creative content.
- MT facilitates the translation of content that would otherwise (due to budget) not be translated. Sometimes, you just need the gist of something.
- The value of MT depends on correctly matching the MT solution to the purpose and type of content. Highly creative, subjective pieces don't suit MT well. Technical communications do.
- True MT competence comes from building custom systems and seeing what works and what does not. Training your MT engine is vital. It is a long-term solution. C

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Tom Gannon has worked in the translation and localisation industry for over 21 years. After gaining a BSc (Hons) in Computer Science, he started out as a programmer working in localisation for Lotus Development/IBM in Ireland for a number of years. He moved further into the localisation business when he co-founded Connect Global Solutions in 1998, a localisation company. His company was acquired by Welocalize in 2006 where Tom has since worked tirelessly as Technical Services Director. Tom is based in Dublin and his engineering team consists of 25 people in seven different countries.

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Evolving technical communicators?

The evolutionary state of technology and user assistance is discussed by Ellis Pratt.

On the eve of the Technical Communications UK 2011 conference, I was asked if I could step in for an absent speaker and present on the topic of 'The role of the Technical Communicator today'. I've noticed some of the reviews of my presentation on a number of blogs have come to the conclusion that the future for Technical Communicators lies in them becoming more technically adept than they are today. However, I don't think that will actually be the case and, in this article, I'd like to explain why.

The gradual decline in the demand for Technical Communicators in the IT sector

Towards the start of my presentation, we looked at the demand for technical communicators in the IT sector over the last seven years. Between 2004 and 2011, there has been a gradual decline in demand for Technical Authors as a proportion of all the vacancies in the IT sector. This has also been reflected in the salaries and rates for both permanent and contract authors. For permanent authors, the average salary advertised between 2004 and 2011 has risen from £31,500 to £35,000; for contract authors the average rate advertised has remained the same for the last seven years.

We cannot all become specialists

I looked at areas where there has been a demand for technical communicators, and saw it tended to be for those with specialist expertise, for example in Solvency II or API documentation.

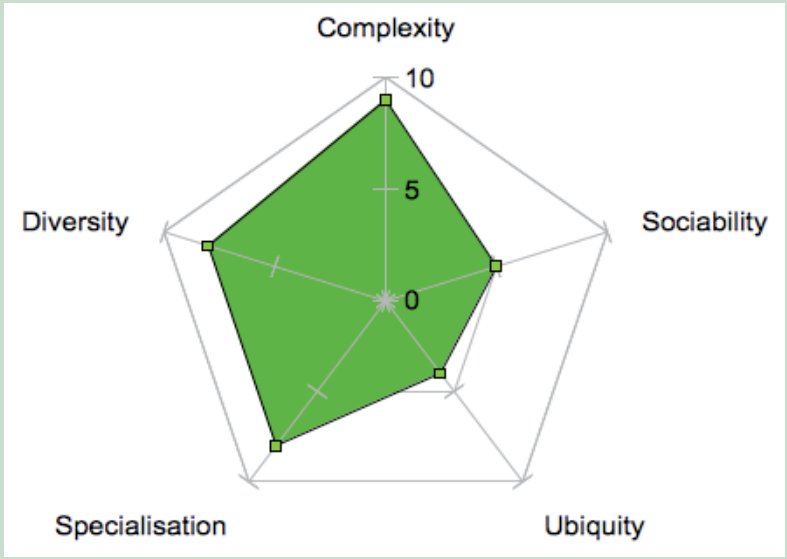

Figure 1. Traditional 'evolutionary state' of technology

The first reason for this belief is there is likely to be only a limited demand for authors who know specialist subjects such as Solvency II.

The evolutionary stages of technology

The second reason is that I believe there are other reasons why the demand for technical communicators in the IT sector has declined over recent years. My conclusion is that the demand has reduced because a large number of technological products and software have moved into a new 'evolutionary stage' of development in recent years.

What do we mean by the evolutionary stages of technology?

In two TED (Technology, Entertainment, Design) presentations (www.ted.com), futurologist Kevin Kelly argued that technology is evolving similarly to the way life evolves. As life has evolved through spurts of diversity, complexity, specialisation and so on, technology is doing the same.

If we take some of the key factors in the evolution of life and use these to map the 'evolutionary state' of technology, for many years it has looked roughly like Figure 1.

Technological products have traditionally been complex, specialist and varied. Based on this shape, Technical Communicators have documented products that are typically expensive, potentially dangerous and complex. This has been reflected in the traditional recommended approach for technical writing: we write clear, succinct, authoritative content.

However, in recent years a great deal of consumer and office technology does not follow this map. Instead, the map is more like Figure 2.

In the areas of greatest technological growth, such as mobile telephony, Web-based applications, portable media devices and tablets, the products have been typically easy-to-use and ubiquitous. The belief is, they just work.

This has led to many developers believing they can design away the need for a manual. Indeed some products, such as the latest Samsung mobile phones and the Apple iPad now come with no manual at all.

We need to adapt to the new evolutionary stage of technology

As developers create more sophisticated and complex Web applications, and new technologies are integrated with other devices, it's possible we'll move to an evolutionary stage

of technology that's broadly the same as the traditional shape we looked at earlier.

However, it's my belief that technical communicators are more likely to have to deal with both evolutionary stages co-existing for the foreseeable future. For products that remain potentially expensive, dangerous, or complex, the traditional model for documenting products and the demand for technical documentation will remain. For the other products in the other 'stage of evolution', however, we'll need to adopt a different model for assisting users.

New approaches for simpler, easier to use products and services

We can see some new approaches for assisting users being suggested by a number of technical communicators:

- Using technical communicators to improve the user interface and dialog messages;
  - Joe Welinske has written a book on developing user assistance for mobile apps and Rachel Potts has written about how the technical communicators at Redgate write the dialog boxes.
- Making greater use of illustrations and comics;
  - Alan J. Porter has written about the potential for this approach and Scott McCloud has presented on the use of comics within Google's user assistance area.
- Encouraging community and user-generated content;
  - Anne Gentle has written a book on conversation and community: *The Social Web for Documentation*.
- Adopting a more narrative-based communication.
  - I presented at TCUK 2010 on adding an emotional element to user assistance
- Creating more fun and game-based user assistance.
  - I presented at UAEurope 2011 on gamification and its potential for Technical Communicators

Without realising it, I believe all of these people have been investigating approaches aimed at products in the new technology evolutionary stage. With further discussion and development, I believe we can create a user assistance model that suits these products.

Conclusion

It would be a mistake to assume that any decline in the demand for technical communicators has been because products have become more technical. Instead, it may be for the opposite reason – many products have become simple to use.

That may change, but if doesn't, I believe it's possible to restore the demand for user assistance, and technical communicators in these technology sectors, as long as we can create new approaches that meet the particular needs of the evolving technology user. C

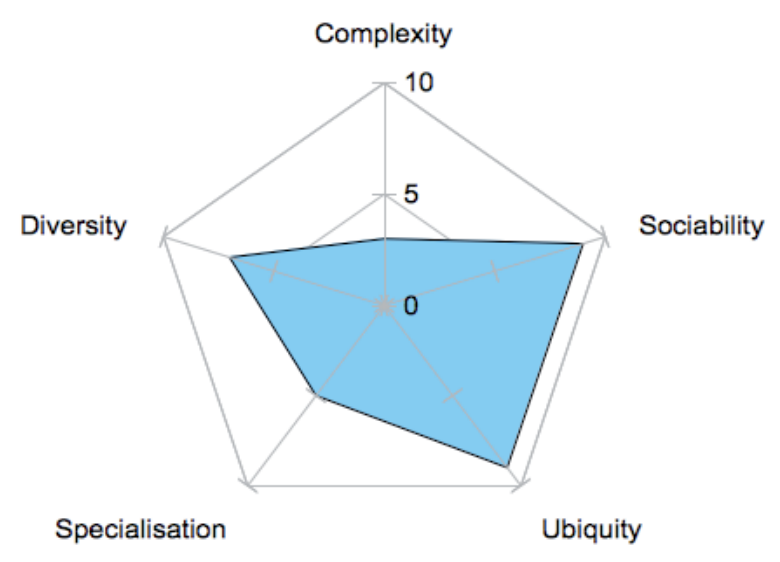

Figure 2. Present 'evolutionary state' of technology

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Documentation that the Doctor ordered

Peggy Spencer explains how athenahealth uses MadCap Software to meet online help demands for its cloud-based physician services

At athenahealth in California, USA, we believe that liberating doctors and patients from the administrative expense and stress of the health care system is not just a job; it's a passion. Today, more than 29,000 medical providers nationwide take advantage of our cloud-based practice management, electronic health record (EHR), and patient communication services.

To help our customers get the most out of our services, we deliver a combination of online help and documentation.

This is no small task. Each month, a new release of our software is pushed out instantly to the entire network. In the past, we averaged 15 topics per release, but as our cloud-based services have grown, that has tripled to an average of 45 topics with each release.

The keys to meeting these demands are a streamlined process for adding content from our knowledge experts and single-sourcing to eliminate the unnecessary duplication of efforts.

Today, we use products from MadCap's technical communications suite to support these processes: MadCap Contributor and MadCap Flare. Additionally, we use the hosted MadCap Feedback Service for insights into how we can enhance the user's experience.

Corralling the contributors

For many years, the subject matter experts (SMEs) in our organisation submitted information via Microsoft Word documents, emails, and even sheets of paper. The SMEs appreciated that we made it easy for them. However, it meant that all of our technical writers had to manually incorporate the content into our documentation and online help.

Manual entry was do-able with 15 topics per service release, not so much with 45 topics.

We knew that any solution we came up with would have to be easy to use if we expected our SMEs to embrace it. At the same time, we were long-time users of MadCap Flare, which is a powerful tool but requires more expertise than you can expect from a casual user. That is why, when MadCap Contributor and Flare 7.0 came out in early 2011, we jumped at the chance to upgrade.

Contributor lets our SMEs enter their content into a pre-formatted template that we have created for them. It also enables them to add comments or edits to text developed by our technical communicators.

With ease-of-use a top priority, we conducted a training session to help our SMEs get started. Nearly all of our 45 SMEs attended the training. However, even those that didn't said they found the software easy to use. Within a couple months, everyone was using Contributor.

Ease of use extends to those of us on the technical writing team. Providing the templates in Contributor is simply a matter of importing our existing templates from Flare. Moreover, adding the new or edited content into the Flare-based documentation is simply a matter of clicking the 'Accept' button: we no longer need to manually enter the text, or cut and paste it.

Overall, Contributor is enabling us to complete roughly twice the amount of work with the same number of technical communicators. We certainly could not have kept pace with the increased workflow without it.

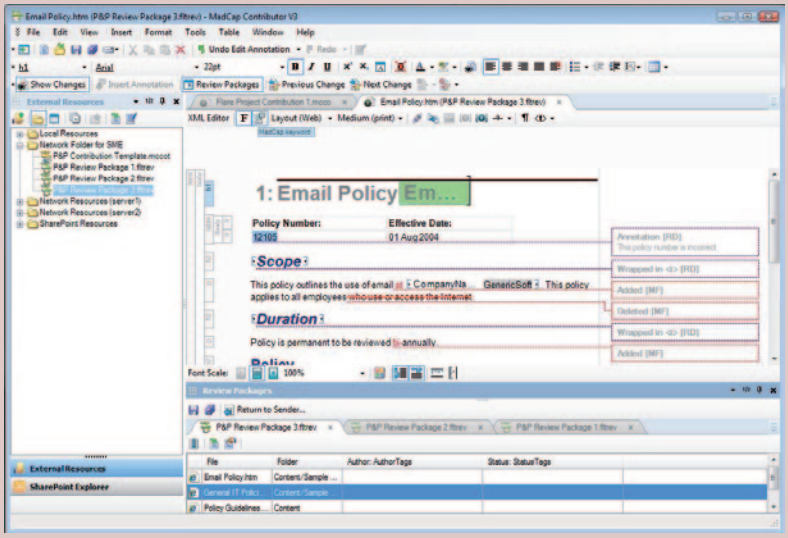

Figure 1. MadCap Contributor screenshot*

Maximising content re-use

The use of MadCap Contributor builds on the efficiencies we have already gained by using MadCap Flare to create and publish both our print documentation and online help. Central to these efficiencies are the use of single-sourcing and conditional build tags to produce multiple outputs of our content from a single, central Flare project.

We basically have a three-week cycle for each monthly software release in which we need to create and publish six print and online versions of our documentation.

In each of our release cycles, we first publish a PDF of the beta release notes internally for our own employees. Then we use conditional build tags in Flare to generate a subset of that

information as a PDF for our beta customers.

Next, we update the release notes for the production version and create PDF documents for both our internal team and customers. These are delivered two weeks in advance of the new cloud-based release, so that our employees and customers both know what to expect.

Last, when the new release is available, we then publish updated internal and customer versions of our online help, based on the approved release notes content.

Each time, conditional tags enable us to simply choose which pieces of content will be published in the different formats, and then Flare automatically publishes it in the designated outputs. Without this functionality, it is hard to imagine how we could meet this schedule and ensure consistency across our content.

Meeting government mandates and customer demands

Conditional build tags combined with single-source publishing also help us support documentation requirements from the government and our customers.

For example, each year we need to certify our EHR technology with the Certification Commission for Health Information Technology (CCHIT). Delivering the printed manual for CCHIT certification used to be a time-consuming effort. Now it is just a matter of creating a conditional build of our Flare-based project

Similarly, some of our customers want to receive our documentation in Microsoft Word, so that they can modify the content for their own practice. Supporting these requests is as simple as creating a conditional build for Word.

Enhancing the user experience

The third solution we use is the hosted MadCap Feedback Service, which guides us on how to enhance our users' experiences.

It is a delicate balance. We want to get as many insights into how customers use our documentation and web-based help as possible, but we have to balance that with government protections on healthcare privacy.

The Feedback Service strikes that balance by letting us monitor what customers are looking for and how many hits a particular topic is getting, without divulging any specifics about the users.

Collectively, MadCap's tools make it so much easier to provide our customers with the information they need in their format of choice. In turn, that makes my job a truly enjoyable one. C

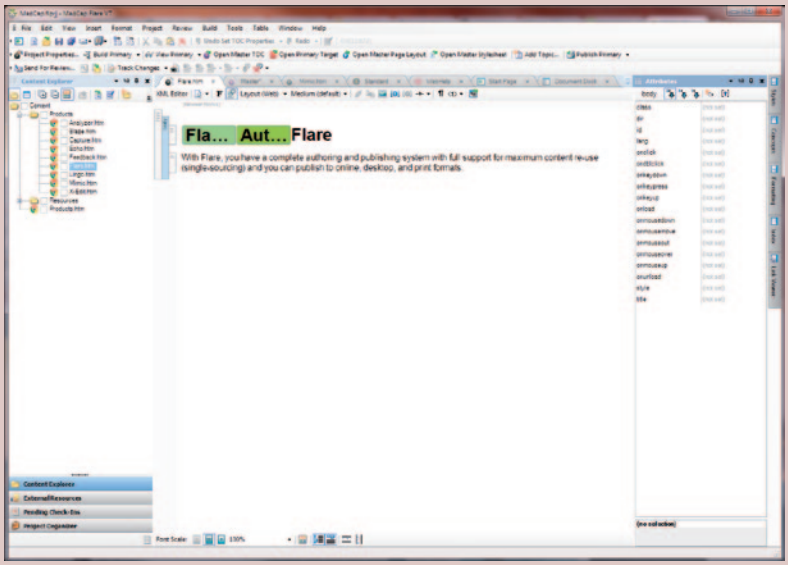

Figure 2. MadCap Flare screenshot*

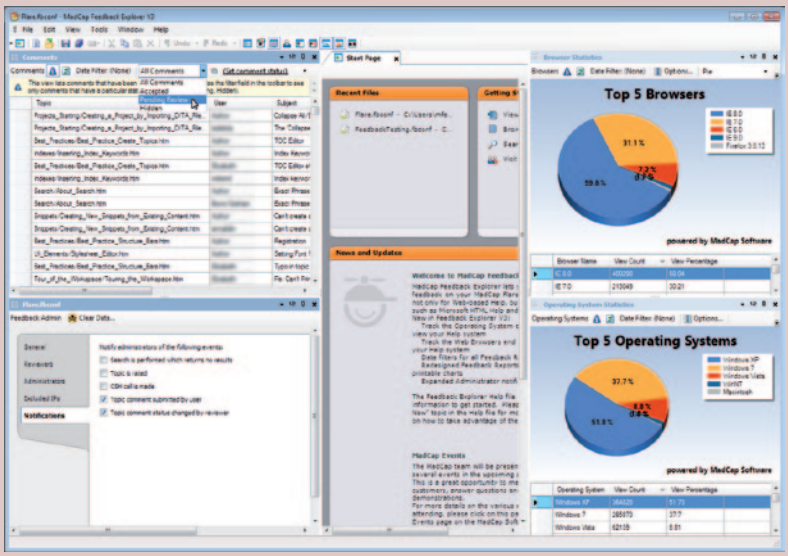

Figure 3. MadCap Feedback screenshot*

About athenahealth

In 1997, athenahealth's co-founders Todd Park and Jonathan Bush purchased a birthing practice in California. Almost immediately, they were buried in paper and spent most of their time and energy trying to get paid. They looked for a solution, but couldn't find one. So they built their own.

What resulted are athenahealth's easy-to-use medical billing, practice management, and electronic health record (EHR) services. athenahealth's web-based software, intelligent rules engine, and dedicated team of specialists address the many practice needs that impact both the quality of patient care and practice revenue.

Peggy Spencer is a technical writer at athenahealth, Inc. She has more than a decade of experience in the technical communications field.
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* MadCap screenshots in this article are not images captured from the athenahealth system due to government restrictions on what healthcare information can be shared publicly.

Developing scripts for 'Round Table Theatre'

Ron Blicq explains how he's developing interactive learning programmes for unique stage productions.

From time to time, today's technical communicators may be called on to respond to Requests for Proposals (RFP) that require them to develop materials outside their normal area of expertise. In this article I will describe a project in which this happened, and how the project objectives were achieved.

Background

My involvement in the project started when the Director of Community Living in Manitoba, Canada – a non-profit organisation – emailed an RFP to all technical communicators in the Province, calling for proposals to write scripts for training workshops. The scripts were to identify the wrong and the right way to work with vulnerable people, who are people with Down's syndrome, autism, and similar debilitating conditions. The RFP described how the scripts would

'… become part of a theatre forum process called "Round Table Theatre", based on the idea that theatre can provide a place for people to deal with social, justice, or political issues. By becoming co-creators and active participants in the artistic process at different levels of development, including audience participation, a rare learning experience can evolve.'

The RFP called for the technical communicator to:

- Write scripts for three training programmes,
- Write a handbook for facilitators who will implement the programmes,
- Rehearse actors who will act out the scripts, and
- Perform the plays at Round Table Theatre events at selected locations.

Frankly, I doubted whether I was suitable, or even eligible, but decided to 'give it a try'. To my surprise, my involvement in drama productions with GADOC, a theatre group in Guernsey, plus my friendship for the past 24 years with a family who have a severely autistic son, were considered valuable assets and I was awarded the contract.

Figure 1. A moment of conflict during rehearsal of play No. 2: Ernest, the Vulnerable Person (right, played by John Mackenzie) questions senior pilot Greg's (Robert Hayes) decision that he should not fly in the glider to be piloted by Susan (Yvette Jones, left), who has volunteered to take him up.

Planning

Following meetings with the Director of Community Living, and specialists in the field, I outlined a plan containing the following elements:

- I would write two versions of each script: in version 1 the characters would treat the vulnerable person (VP) inappropriately; in version 2 the characters would treat the VP appropriately. Each version would be 12 to 15 minutes long and there would be an exploratory discussion between the two performances.
- Each pair of plays would deal with an increasingly difficult situation, and evoke increasingly in-depth (and sometimes heated) discussion among the audience.
- I would write a facilitation plan for each pair of scripts, which would detail how the facilitator should introduce Round Table Theatre, then show how to involve the audience in discussions after each play and so create an interactive learning experience. (Integrating the plans with each script would replace the need for a handbook.)

The scripts

Because both the Director of Community Living and I were breaking new ground, we decided I should write just one script at first, and let our learning experience provide direction for the subsequent scripts. This worked well. The three double-version scripts deal with these topics:

- In Script 1 the focus is on listening, allowing VPs time to process information, because their thinking works more slowly than ours, and enabling them to make decisions that affect them, rather than letting care-givers make decisions for them. (Excerpts from actors performing this script were shown at TCUK.)
- In Script 2 the focus is on respecting the VP and encouraging personal decision-making. The action concerns a 44-year-old male VP

who wants to fly (to be taken up in) a glider, but meets tremendous resistance from glider pilots who fear he may take over the controls.
- In Script 3 the focus is on encouraging VPs who discover a deep liking for one-another to develop their love, and possibly even encouraging them to develop a sexual relationship. (Believe me: this was by far the most difficult script to write!) The Director of Community Living fully expects the topic to provoke severe variances in opinion.

To date I have rehearsed actors for the two versions of Script 1, we have performed it as a pilot test with the Director of Community Living as facilitator, and are preparing for further performances both in the city of Winnipeg and at towns within a 50-mile radius. Scripts 2 and 3 also have been written and first performances will be in November and December of this year.

The actors

I drew on a local amateur drama group to provide actors of suitable sex and age. Here are some of our experiences:

- The five actors in Script 1 took part enthusiastically, recognising that they were performing a community service rather than just rehearsing and performing a play.
- Performing the two versions of the play with a 10–15 minute interval between the versions proved a challenge, because the scripts for each version were almost identical, with only minor dialogue changes between each version.
- The first performance was considered a "pilot" and had counsellors, case workers, and several VPs with Down's syndrome in the audience. The latter contributed even more effectively than the Director had expected. The response from both case workers and counsellors was very positive and they are eager to see the next two productions.
- Although it would have been easier to draw on the same actors for all three plays, I chose not to; this will avoid having audience members whispering to each other: "Oh, we saw her in the first play, as the intransigent mother; do you remember?" I would rather that audiences saw each of the actors in only one play, which would give a greater sense of reality: I want the audience to feel they are watching real people.

Redefining the scope

As the play-writing evolved, I chose to vary the original approach slightly: rather than have all three plays demonstrate a good and a bad version, for Script 2 I chose to extend the second version to show the result of positive action, and how it affected the participant. Similarly, I made Script 3 into a normal two-act play with an evolving situation and a denouement at the end. This would prevent audiences from anticipating the format for the second and third plays.

Because it would not be practicable for actors to travel to remote northern locations in Canada, the project will be extended so that the plays will be videotaped and supplied to facilitators on DVDs. My role will be to:

- Prepare an RFP to send to potential DVD production companies,
- Re-write the scripts into film/television production format,
- Select realistic locations to videotape the plays in real locations, rather than the bare-bones locations where the plays are currently performed (at one end of a community hall, with no stage and only essential props), and
- Assist the Director of Community Living to research sources for funding the project (throughout most of 2012).

In summary

My involvement in this project has been – and continues to be – the most satisfactory and the most gratifying technical communication project I have ever undertaken. It has been well worth looking outside my normal 'writing boundaries' to achieve such an extraordinary experience.

Now, you may think that I must have taken training in script writing, but frankly the reverse would be more accurate. I simply transferred some of the techniques that apply to writing technical documentation and applied them to writing for live theatre, and read numerous contemporary playscripts to observe current methods. And that steered me along the correct road!

The Paper was presented in the Anything But Text stream at TCUK, 22 September 2011. C

Figure 2. Stephanie is a VP with Down's syndrome (played by Holly Steele in play No. 1). When she ignores her father's questions, he pulls the headphone roughly away from her right ear and bellows at her, provoking immediate audience reaction.

Although **Ron Blicq FISTC** has been a technical communicator for over 50 years and, although supposedly "retired", he still is active in the field. He has been a navigator with the RAF, a technical editor with an engineering firm and a teacher of technical communication. Currently, he is a consultant presenting workshops for engineers and scientists in Canada. He also is a Fellow of the STC and ATTW, a Life Senior Member of the IEEE, an author of six books on technical and business communication plus two novels and a biography, and (most recently) a produced playwright.
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Eighteen principles for using graphics

John Revington explores some principles we should consider when setting graphics standards.

"I don't know much about X, but I know what I like" often reflects a personal preference for art, music, writings, life, and perhaps certain aspects of the universe. At least it's an honest admission, even if it's not always appreciated. At most it's an insight, but of limited value to anyone except perhaps the speaker.

*"I don't know much about **technical graphics**, but I know what I like"* may also be an honest admission, but if the speaker is the person who determines the graphics standards then the implications for our readers, and for us as technical communicators, can be serious.

This article explores some areas of research that support graphics standards. It sets out to search for a set of principles on which we might build co-ordinated, credible, and effective standards for our publications.

What it doesn't offer is a set of rules or a prescriptive method for delivering perfect graphics. Nor does it contain a checklist of Do's and Don'ts.

Perhaps after reading this you will understand why: some graphics carry a clearer message than others; what works, and what doesn't work, and perhaps some of the thinking behind those mysteries might become clearer.

Only graphics that are carefully designed and appropriate are beneficial for representing complex systems

Some common problems with graphics

In the wide landscape of information we look out upon every day, we see and interpret graphics of all kinds. Some are clear, logical, and easy to interpret, and some seem to miss the point completely and leave us guessing. In our world of technical communication the message is everything, and our use of graphics as part of that technical message is more important for our readers than in many other kinds of written communication. If we get it wrong the results can range from hilarity to irritation, and from anger to catastrophe.

Research findings suggest that only graphics that are carefully designed and appropriate are beneficial in representing complex systems such as procedures and technical documentation. Thoughtless or poor design often leads to graphics which do not clearly explain concepts or processes.

A short list of common problems might include:

- the random use of different types of graphics in one document - for example, photographs, line drawings, and CAD drawings in a single procedure;
- different orientations of the same object when a single view point is clearer – for example, a standard isometric 30° view might be the clearest viewpoint for several of the steps in a procedure;
- poor labelling – this includes too much or too little information, and inaccurate or incorrect labels;
- graphics and their labels are too small;
- the graphic message and the text message are different – for example, ambiguous or conflicting information, or the writer hasn't used parallel language;
- poor contrast of shading or colours – for example, black text on a dark background which can hide detail online and on paper;
- an inappropriate level of detail for the target audience.
- … and the list goes on.

Some positive examples

And yet many organisations get it right – or seem to get it right – most of the time. Think of IKEA's wordless procedures for assembling furniture (whether you have personally been successful with such tasks or not), as well as several toy makers such as Airfix®, Meccano®, and Lego®. Their instructions and graphics are clear and simple enough to transcend age and language, while still enabling us to reach complex outcomes. What do they do with their procedures and graphics that others (some household appliance manufacturers spring to mind), don't do?

Surely they can't base their approach to technical graphics on the whims and personal preferences of the Technical Communications team, nor on trial-and-error? They must base their message on some fundamentals, some basic principles of graphical communication, which they have distilled into a set of standards.

The Aberdeen Group, a technology research organisation, reported that top performers – successful companies like those above who 'allow users to explore the product in fine [graphical] detail' – are twice as likely to use graphical communication as the industry laggards.

Following the trend in graphical communications and implementing effective standards, can therefore not only help propel a company to the top of the technology class, but can also deliver significant business benefits.

Searching for some graphics principles

A search such as this can take up a lifetime. This section describes a modest first step towards understanding some of the principles that help make graphics work. The second

step offers some ideas for translating those principles into effective standards.

We consider four groups of principles, 18 in all, progressing from broad generic to ones that are specific for representing images in procedures:

1. Gestalt theory.
2. Principles and guidelines from IBM (Developing Quality Technical Information).
3. The principles of congruence and apprehension.
4. Design principles for assembly instructions.

1. Gestalt theory

Gestalt psychology (or 'the gestalt laws of perceptual organisation') tries to explain perceptual psychological phenomena by viewing them as structured wholes rather than as individual elements. For instance, we tend to perceive a herd of cows rather than many individual cows; read a whole word rather than reading its letters, and interpret a series of images as a single sequence rather than as separate, unconnected pictures.

Four of the six gestalt principles apply to organising both text and graphic elements, and are therefore important for information design and delivery.

Table 1 lists the four principles (based on gestalt theory) which are most important for presenting graphics in documentation.

2. Principles and guidelines from IBM

Although IBM's book on Developing Quality Technical Information is biased towards software, the authors propose that 'quality technical information' must display three characteristics: the information must be easy to use, easy to understand, and easy to find. In a detailed section on visual effectiveness the book lists nine 'guidelines', of which the most relevant to this article are in Table 2.

For instance, if we are writing for a global audience then we must be particularly sensitive to cultural differences when thinking about whether our readers will be able to interpret the graphics we use. This may extend to the icons and colours we use, and even to whether we choose to have men or women represented in the graphic.

3. The principles of congruence and apprehension

The two principles in Table 3 help to keep the reader uppermost in our mind when we plan, design, and present graphics. We should think of our readers' needs throughout the documentation process, but in applying these two principles, we can test how well we know our readers before deciding how we present graphics to them.

For instance, detailed CAD drawings would correspond to an engineer's view of the world more closely than a pencil sketch of the same piece of equipment.

Table 1. Four of the six principles from gestalt theory

Principle	Description
Proximity	Group together elements that are closest to each other.
Similarity	Group together elements with similar visual properties, such as size, shape, and colour.
Common region	See elements enclosed by a line as a single unit.
Connectedness	Perceive uniform, connected shapes as a single unit.

Table 2. IBM's principles and guidelines for graphics

Principle	Description
Use graphics that are meaningful and appropriate	The image must be relevant to the task or to the text.
Choose graphics that complement the text	The image and the text must carry a parallel message and be synchronised.
Use visual elements logically and consistently	Aim to use the same graphic type for each step in a procedure, and avoid using arbitrary graphic types.
Make sure text elements are legible	Make sure readers will be able to read labels on the images, especially if the image size has been reduced.
Use colour and shading discretely and appropriately	Make sure the contrast of the image (colour or black and white) is adequate for delivery online or on paper.
Make sure all users can access the information	One group of readers might perceive and understand a certain set of images, while another group might find them obscure or ambiguous.

Table 3. Two graphics principles for keeping our readers' needs in mind

Principle	Description
Congruence	Our graphics should correspond to our readers' view of the world.
Apprehension	Our readers should readily perceive and understand the graphics we use.

Table 4. Principles specific to designing assembly procedures with graphics

Principle	Description
Hierarchy of parts	An assembly comprises a hierarchy of parts. People prefer to add parts to the assembly at the same time, or in a set sequence.
Hierarchy of operations	People assemble the 'significant' parts, and eventually attach smaller parts and fasteners to the more significant parts.
Step-by-step instructions	People prefer instructions that present the assembly operations across a sequence of diagrams rather than in a single diagram.
Use a structural or an action diagram	**Structural diagrams** present the assembly in its final form. **Action diagrams** spatially separate the parts to be attached from the parts that are already attached. Action diagrams tend to be easier to use.
Orientation	Most objects have a set of natural orientations or preferred views.
Visibility	All the new parts added in each step of the assembly must be visible. Maintaining visibility for all parts in a symmetric group is less important.

18 Principles

Every graphic used should have a purpose. Take into consideration:

1. Proximity of other graphics
2. Similarity with other graphics
3. Grouping of common graphics
4. Connectivity of graphics
5. Meaning
6. Complementary graphics
7. Logic and consistency
8. Legibility
9. Contrast
10. Clarity
11. Congruence
12. Readily understand graphics
13. Overall hierarchy of graphics
14. Detail of hierarchy
15. Sequence of graphics
16. Structural or action graphic
17. Graphical orientation
18. Visibility of relevant parts of graphic

4. Design principles for assembly instructions

The six principles in Table 4 connect people's conceptual model of a task to the visual representation of that task. We can use them both to understand how people interpret and undertake a sequence of manual tasks, and to create procedures that are intuitive and easy for readers to follow.

The academic group that proposed these design principles studied how we plan and present the instructions and graphics for assembling fairly complex objects such as furniture, appliances, and toys. They coded their findings as complicated algorithms in prototype software. The software then printed a sequence of graphics for assembling complex objects from individual parts.

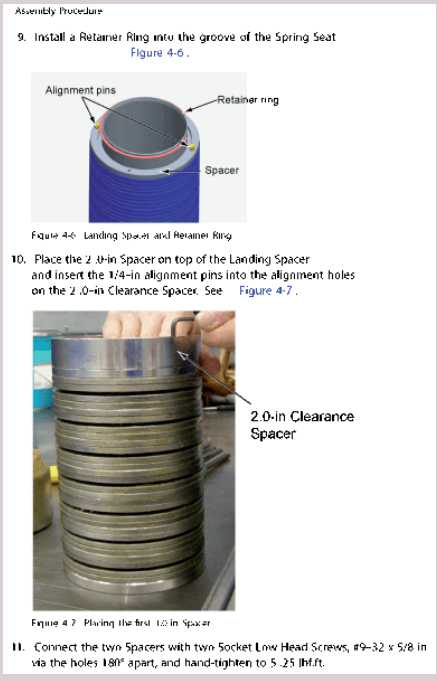
Translating theory into practice

Each of the 18 principles described here has the potential to contribute to a graphics standard. It is not necessary to use all of them in every organisation, nor to use them in all of our graphics work, but many are so important for our readers that they deserve a closer look.

For instance, the gestalt principle of proximity suggests a standard where graphics are placed close to the text they support rather than on the next page or at the end of the topic. Expecting our readers to search for, or navigate to, the associated graphics does not promote the idea of quality documentation.

There is a commonsense principle about making text legible, yet so often we see a graphic with labels that are so small they are difficult to read. This problem might suggest a standard that the font size for labels should match that of normal text.

A final example of translating theory into practice from the design principles looks at the 'natural orientation' for a part or an assembly. Depending on our readership, we might develop a standard that defines 'natural' as the view of the object lying on a workbench, or hanging from a hoist, or maybe a standard 'isometric 30 left hand to front' view. A natural orientation should translate into what is natural for the reader.


Assembly Procedure

9. Install a Retainer Ring into the groove of the Spring Seat Figure 4-6 .

Figure 4-6 Landing Spacer and Retainer Ring

10. Place the 2 .0-in Spacer on top of the Landing Spacer and insert the 1/4-in alignment pins into the alignment holes on the 2 .0-in Clearance Spacer. See Figure 4-7 .

Figure 4-7 Placing the first 2.0-in Spacer

11. Connect the two Spacers with two Socket Low Head Screws, #9–32 x 5/8 in via the holes 180° apart, and hand-tighten to 5 .25 lbf.ft.

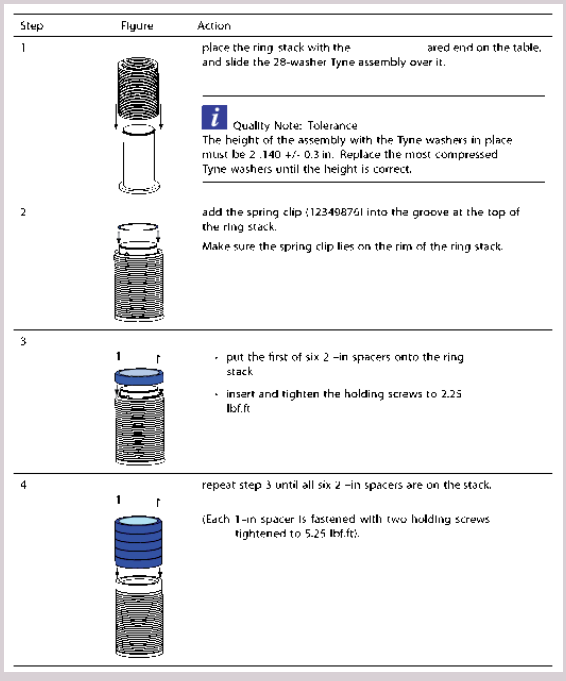

Step	Figure	Action
1		place the ring stack with the ared end on the table, and slide the 28-washer Tyne assembly over it. Quality Note: Tolerance The height of the assembly with the Tyne washers in place must be 2 .140 +/- 0.3 in. Replace the most compressed Tyne washers until the height is correct.
2		add the spring clip (12349876) into the groove at the top of the ring stack. Make sure the spring clip lies on the rim of the ring stack.
3		• put the first of six 2 –in spacers onto the ring stack • insert and tighten the holding screws to 2.25 lbf.ft
4		repeat step 3 until all six 2 –in spacers are on the stack. (Each 1–in spacer is fastened with two holding screws tightened to 5.25 lbf.ft).

Figure 1 Example of a procedure with a weak graphics standard

Figure 2 Example of a procedure using graphics standards based on the principles

Visual examples

Figures 1 and 2 illustrate the visual difference between applying a poor graphics standard and applying a standard based on some of the principles under discussion. (*Note that these are visual examples only, and are not meant to be read.*)

Figure 1 shows a page from the original procedure in which there seems to be a weak graphics standard. Few of the principles discussed here have been applied.

The procedure in Figure 2 shows a more consistent approach to presenting the graphics; for example, a consistent and natural orientation of the assembly.

So many other considerations

There are of course many other issues to consider when deciding on graphics standards. Examples include: file types (.jpg, .eps, .svg, .gif), file formats (raster or vector), resolution *vs* file size, labelling and callout standards.

On the language side, if our documents are to be translated or localised, we need to think about how we add labels and callouts to our graphics to make the translation and localisation processes easier and quicker. Do we need to consider using a controlled language such as ASD-STE100, or is plain English plain enough for our needs?

At the high end of the standards spectrum we might also want to consider established standards such as ISO128 from the International Standards Organisation, S1000D (AeroSpace and Defence Industries Association of Europe), or ATA (Air Transport Association).

These considerations are, however, at a more detailed level and well beyond the scope of this article – food for another day.

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A confident start

By starting with such fundamental principles as presented here, and keeping our readers' needs in mind, we can take a confident first step towards developing a set of graphics standards which help make our technical message, clear, concise, and accurate.

This approach can not only transform our thinking about the importance of graphics as a way of representing technical information, but it can also lead us to say confidently: '*I know about technical graphics, I know what works, and I now know why they work.*' C

John Revington MISTC would like to see a happier marriage of words and pictures in technical documents, especially in those instructive documents that someone far away might actually have to understand and use.
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Did you know that 50% of your revenue could be generated by international sales?

Many global companies generate up to two thirds of their revenue from international sales. International markets can prove a valuable source of revenue for companies prepared to extend their 'global reach'.

Andrew Ashton, Project Services Director at Prima Lingua explains, 'We see many customers enjoying success in international markets. A sometimes overlooked feature of this success is direct communication to the customer, in their own language. Apart from the legal requirements when exporting, for operation, safety and maintenance documentation, the initial marketing effort

is important in reaching new customers. Failure to create your message for non-home markets can lead to missing out on a valuable source of revenue.'

Prima Lingua, with UK offices in London's Docklands and Warwickshire, support global organisations that rely on the highest quality translation standards when promoting their international interests. Operating in specialist markets such as automotive, power generation and energy, Prima Lingua have specific, technically qualified linguists, for different market sectors and products.

The ability to create your brand and message to fit the 'local' market is key to this success. With around 5,000 registered, highly skilled translators in over 300 language combinations, Prima Lingua offer a wealth of experience covering commercial global markets.

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As a partner company of SDL, the World's largest provider of translation memory software, Prima Lingua can translate your documentation faster and for considerably less cost, giving your business a competitive advantage in international markets.

Providing access to the latest translation technology, Prima Lingua, with headquarters in Warwickshire, deliver World beating solutions in the field of document translation. Prima Lingua offer a free consultation to assess the impact the latest technology can have on your business.

IN BRIEF

Prima Lingua win global contract

Prima Lingua are awarded major contract to provide translation services to the World's leading name in Power Generation.

In support of a multimillion dollar project, Prima Lingua are chosen ahead of World competition to supply all project documentation for major trans Asia gas pipeline project.

Deployment of the latest translation memory technology and a highly skilled team of translators led by Project Manager Agnieszka Czerwinska, allowed same day response, and completion of all documentation, within or ahead of stated time frames.

Agnieszka comments 'Being responsible for a project operated across two continents, three time zones and using three languages was a challenge, but I am pleased to report our team delivered on every level.'

Launch of online quote tool

Prima Lingua launch online quote tool to customers.

The introduction of instant access to up to date pricing for project bids and budgeting has proved a big hit with Prima Lingua's customers. Launched earlier in 2011, Prima Lingua provide customers with their own bespoke online quotation tool. Customers visiting the website simply login and gain access to their individual pricing and information section. Commercial Director, Soriya Gidden comments 'Having instant access to the latest pricing allows accurate forecasting for budgets and bids. We have also had feedback that this allows colleagues in global companies access to the same information at the same time.'

Prima Lingua build on Quality

Prima Lingua have been certified to the British Standard Institute's (BSI) ISO 9001 Quality Management System Standard since 2008.

ISO 9001, the World's most established quality framework, currently being used by 1,064,000 organizations in 178 countries worldwide (source: BSI, 2011), sets the standard not only for quality management systems, but management systems in general. Prima Lingua are proud to be one of only a handful of translation companies in the UK to hold accreditation through the BSI.

Policy at Prima Lingua is to understand customers' needs and to deliver a level of service and quality that exceeds these expectations. The standard has allowed Prima Lingua to develop a quality system within the business framework, enabling a better understanding of the processes required for delivering the highest service to customers. A key part of this strict adherence to quality is the ability to bring continual improvement to business processes. Monitoring of measures such as KPI's (key performance indicators) allow performance within areas such as customer satisfaction, delivery targets and customer cost savings to be continually assessed and improved.

Laura Holloway, Prima Lingua's Quality Manager says, 'We are extremely pleased to have passed our 2011 continuing assessment in April this year. This demonstrates to our customers that we are committed to satisfying and exceeding expectations in service and quality. Annual audits by the BSI are rigorous and demanding but the outcome is definitely worth the hard work.'

For more information on BSI standards, or to find Prima Lingua's listing in the BSI directory, please visit www.bsigroup.com.

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Technical Communication UK 2011

First-time TCUK attendee Eeva Viljanen reports on the conference held in September 2011.

This year's TCUK, despite being held at its previous venue, the Oxford Belfry Hotel, presented a host of new topics. The specialist stream this year was *anything but text.* Some speakers approached the topic from a humanistic perspective, and their themes varied from symbolism to pattern recognition, which have to do with human behaviour and cognition. Others approached the topic from a more technical point of view; speakers shared their knowledge and views on using video or non-text learning programmes for users.

Despite being a large three-day-conference with lots to offer, TCUK 2011 still managed to have an intimate atmosphere. The 200 delegates had time to browse through the exhibitors, make new connections and acquaintances, have interesting lunch-time conversations and take part in the fringe events. This, in my view, is an excellent achievement. It was also lovely to have a glimpse of the Oxfordshire country side.

Getting oriented

A good way of getting oriented to the conference was attending the workshops on the first day, Tuesday. I attended Patrick Hofmann's talk *Intuitive images: tips and techniques for creating and evaluating graphics in your products.* Patrick has wide experience on tackling visual conundrums around the world. His current position is with Google Maps in Sydney.

Figure 3. Karen Mardahl

It is especially with symbols that cultural differences come into the picture, literally. A bed in a road sign will be interpreted as hospital in Korea, for example, but as hotel in most of the Western world. Then again, a red cross on a white background is used to direct drivers to the hospital in Finland. Often it is the case that technology changes faster that people's visual memory. Interestingly enough, school children in Canada, the US, Austria, Switzerland and New Zealand identified a picture of film as a movie, even though they may have never seen a real piece of an old film strip.

Figure 1. Hotel or hospital?

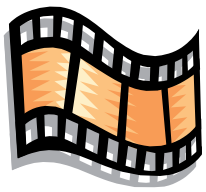

Figure 2. It's a movie!

Personally I liked Patrick's very concrete advice on how to make successful images. You can, for example, exaggerate the correct, positive action in the image. If it is feet you want to emphasise, draw big feet, and so on. Usually images in user instructions have too much detail. In an instruction, the product does not have to look life-like, only the action to be performed matters. "Illustrate the instruction, not the object", as Patrick put it. The next advice is quite funny, but it works. If you want to test the functionality of your image, squint. If what you see is the most important thing in the image, the image as a whole probably works.

The M word (Mathematics)

Next on my TCUK menu was Chris Atherton's, Mike K. Smith's and Karen Mardahl's interdisciplinary workshop on statistics (*Statistics without maths: acquiring, visualizing and interpreting your data*). Chris's background is in humanities; she has researched and taught human cognition and perception. Mike is a statistician with a strong technical background

and he works in the pharmaceutical industry. Karen is a technical writer working with sound systems in Denmark; her areas of expertise are usability, accessibility and content strategy. With this excellent group of professionals we stepped into a world of statistics.

After a briefing into the basic concepts, such as *mean, median and mode,* we looked into some real-life events, in which statistical data (and misinterpretations) have had a key role in moving the masses. In Britain such a case was the big scare caused by the supposed link between MMR vaccination and autism. Besides journalists, technical communicators are sometimes also keepers of information that requires very careful thought when presenting it.

Karen had one quite recent example of a good statistical presentation of a tricky topic, namely radiation at Fukushima nuclear power plant in Japan. After the accident, in several newspapers worldwide a radiation dose chart appeared, where radiation (micro Sieverts) had been concretised by small squares, starting from the amount you get while sleeping next to someone (one square). You can find the drawing on the internet by searching *Fukushima radiation dose chart*.

Despite the rather tough topics in the workshop, the conversation was lively. The facilitators used the method of instant reward by recognising worthy questions and comments with (flying) sweets. The facilitators promised not to include *any* maths in the workshop although some statistical research was conducted with the help of the willing audience by analysing the favourite sweet flavours. After the tastings, the traditional show of hands method was used to collect the data.

Wednesday feast

After a full day of seminars and talks, it was time to sit down and socialise over the gala dinner. A delicious three-course dinner and wine were served to the table. The familiar and friendly conversation began at the tables. In case a table might run out of things to discuss, the Spontaneous Poet came to the rescue. The artist really did do what his name promised. He circled the tables asking for topics for poems, which he would recite then and there. Even though technical communicators proved a tough crowd giving out such terminology 'monsters' that I cannot even repeat them, the poet triumphed over every single one. It's a shame I don't have a better photo of the gifted man.

During the gala dinner, I was happy to notice again the congenial collegiality that I felt throughout the conference. It is most pleasing as a technical communicator to be in a situation for once, where no explanation of your profession is needed. Everyone around more or less understands what you do for a living, and you may freely share experiences in the field. And we were an international group at that. Around the world, the joys and sorrows often seem to be the same; too much to do in too little time. Sometimes the work of a technical communicator can be a lonely business. In my view, conferences like TCUK are wonderful opportunities to network and make new 'colleagues'.

In the forefront of visual guides

IKEA probably leaves no one untouched. This is the case also among technical communicators judging by the eager show of hands among the audience, when Jan Fredlund and Magnus Ohlsson asked about user experiences with IKEA instructions. Jan's and Magnus' talk *The IKEA concept: global and 'textless' communication a pedagogical challenge* had indeed attracted a lot of interest. Both Jan and Magnus have worked at IKEA since the 1980's with illustrations, instructions and communications. The initial decision at IKEA to go with graphics rather than text came from the rapid global growth of the company and the host of languages to be translated. IKEA produces 400 assembly instructions per year. The motto is, of course: W*e do our work, and you do yours, and together we save money.*

Jan's and Magnus's advice on graphics are simple, but they work. With an easy start the user is motivated. Listing the steps in accurate order is essential. Early success encourages the user to go on. If the object needs to be turned around during the process, show the object from different angles. That's the way to do it! And by the way, if you were wondering about the exotic product names, they come from IKEA's Scandinavian heritage, some are Norwegian lakes, among other scenic sites.

Figure 4. Spontaneous Poet

Figure 5. Magnus Ohlsson and Jan Fredlund

Figure 6. Ellis Pratt

Figure 7. Wednesday delegates, speakers and conference organisers

Without the Scandinavian letters, of course, which do not translate particularly well in the global market.

Wrapping it up

The conference ended with Ellis Pratt's keynote speech on the changing roles of technical communicators. Ellis works for Cherryleaf, and is a well-known speaker on the trends in the field of technical communication. In this case, he really had to make haste for TCUK, as the original keynote speaker had to cancel on family grounds.

According to Ellis, few organisations measure the value of their created user assistance, and users often go to search engines to look for product information instead of reading the provided guides. These are sad facts for us. However, with modern web analysis tools it is finally possible to measure the value of user assistance online, and thus measure the value of our work. In the technical world today, what is especially needed is technical information for the growing technical audience. This is of course is something we as technical communicators are more than willing and able to do. In tomorrow's ideal world this demand will meet supply.

Looking forward to TCUK2012

Here I've presented only a few interesting samples of the full serving at TCUK11. Many of the other sessions can be viewed at: http://www.technicalcommunicationuk.com/index.php?/general/tcuk-2011-resources.html. Personally I was satisfied with my first experience of the conference. I made new contacts, shared my views with other like-minded people and went home inspired. Thanks everyone! C

Editor's note:
Thanks to Ken Hoise for providing the photographs.

DIARY DATE
Technical Communication UK 2012
2–4 October 2012
Venue to be announced
www.technicalcommunicationuk.com

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Using video to supplement user assistance

Philip Murray has recently recorded a suite of in-product videos and writes the article he would have loved to have read before he started.

One of the keys to our approach to user assistance in Sage CRM (customer relationship management) is showing users how to solve problems rather than simply outlining the product's features or explaining how well it can perform certain tasks.

We thought that using video to supplement our user assistance could help us achieve this.

Instead of relying on a user having to work their way through a list of sometimes complicated instructions - often having to toggle between the application and the help file if the list of instructions is long, video can be used instead to show a user how to perform a particular action.

Video has the potential to convey more information in a short space of time than text

Also, videos can be more engaging than text, and have the potential to convey more information in a short space of time.

We had a suite of existing training videos that we used to include in our Sage CRM product package. These ranged in length from just under three minutes to just over 10 minutes and sometimes covered several topics. We wanted to make our videos easier to absorb so our plan was to migrate these videos into short, discrete chunks of learning, concentrating on one process or procedure.

Sage CRM video strategy

We decided upon the following main features for our video strategy:

- **Shorter, faster paced style**
  We found that the ability of users to quickly find and understand discrete steps was key. Users do not want to watch a long video to find the short segment of material that is relevant to them.
- **No captions**
  Using a voiceover without on-screen text removes the need for users to read text and listen at the same time, which makes it easier for them to process the information.
- **Fewer recorded mouse clicks**
  We found there was little or no value in users seeing simple steps carried out on screen, and the mouse tracking across the screen can prove quite distracting. We chose not to record the mouse and instead to highlight the end path of any actions performed.
- **More use of icons and annotation**
  We used icons, arrows, highlighting, and other visual cues to clarify important points for users.
- **Single, unified, style**
  We tried to keep the videos that we produced to a running time of less than three minutes. We felt the quicker and clearer the video, the less cognitive effort it would require from users, and the more they would be able to process and internalise the skills being taught. Branding the videos the same and using the same voiceover style and music, created a professional looking 'suite' of videos.
- **Value add on 'tricky' features**
  We liaised with our support team to discover the most common customer issues and tried to tackle those issues in videos.

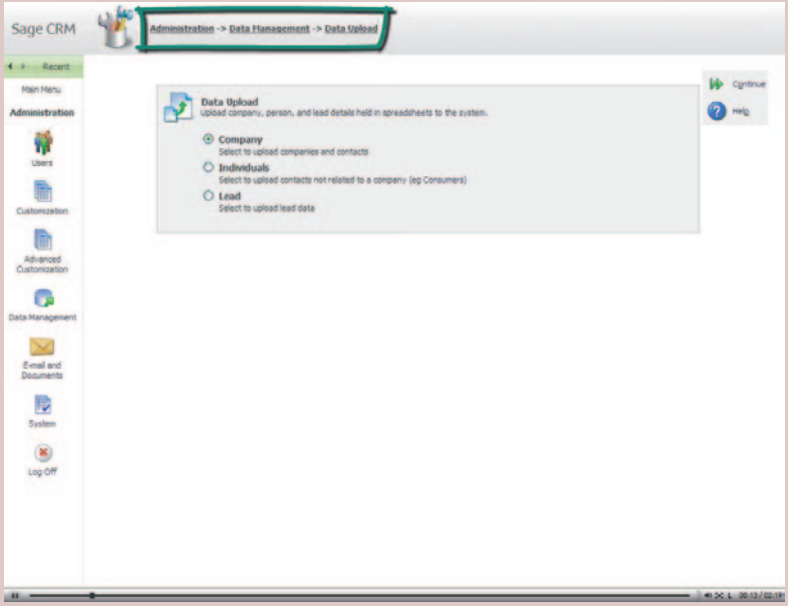


Figure 1. The final path of any actions performed was highlighted, rather than showing the action on screen

Producing the videos

Producing product videos can be time consuming and expensive, and there are many different approaches for doing it. So how did we set about achieving our goal?

First, we focused on producing two types of video content:

- **Presentation of new features**
  We created new feature overviews which are functional overviews of new product features that can play a key pre-sales role whilst explaining the features and benefits of a product.
- **Top support issues that required a 'third dimension'**
  We wanted to explain visually Sage CRM features/tasks that are well documented but still presented problems to users. The aim of these videos was to add value to the

existing help content by focusing on specific areas that users were having difficulty with. We liaised with the support team to come up with the top 5 issues in specific areas and produced videos around these areas to try to reduce support calls.

Second, we looked at how we were going to produce the videos – and how they would be delivered.

You'll need appropriate hardware if you are recording a voiceover for your video

Production method – in-house *vs* outsourced

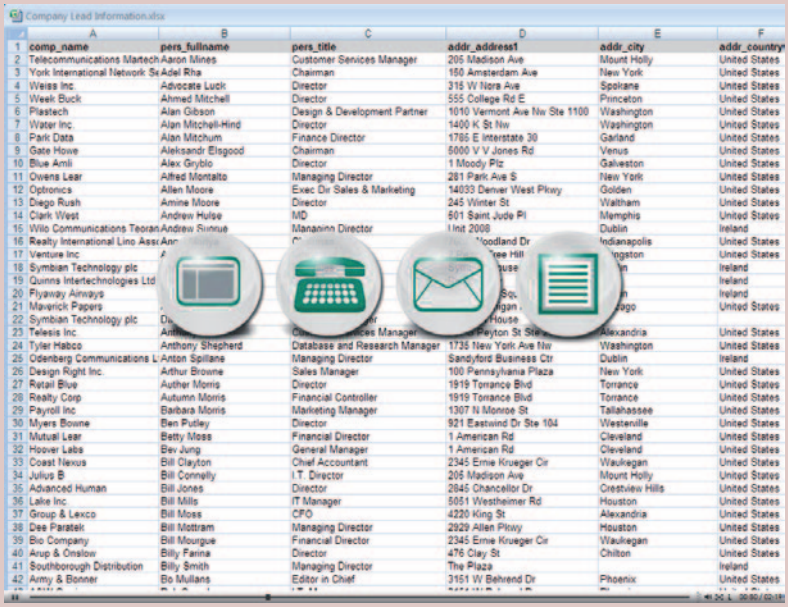
Outsourcing video production can save time and make for a more professional looking product, but it can be expensive, and we found that there are a number of important factors that you must consider before deciding to engage a third party to work with.

Working with your product every day, you are likely to have an expert level of knowledge that is easy to underestimate. It can be difficult to outsource video production to a company and expect their employees to share your level of product knowledge.

If you want a quality video about your product produced by a third party, you may have to provide up-front training and support. At the very least, you are going to have to provide a high-quality script for the third-party company to work with, including detailed directions for how you want the final video to look.

You may even be required to provide icons or graphics that you want to include in the video – as your company may employ strict branding guidelines that the outsource provider may not be able to comply with without extra support from your in-house graphics team.

Finally, it is important to remember that outsourcing video production is not simply a case of handing over a script and forgetting about it – there are still a number of issues you need to consider, such as monitoring the production process to ensure the script is followed accurately, uploading and hosting the video, indexing it, and maintaining it.



comp_name	pers_fullname	pers_title	addr_address1	addr_city	addr_country
Telecommunications Martech	Aaron Mines	Customer Services Manager	205 Madison Ave	Mount Holly	United States
York International Network Se	Adel Rha	Chairman	160 Amsterdam Ave	New York	United States
Weiss Inc	Advocate Luck	Director	315 W Nora Ave	Spokane	United States
Week Buck	Ahmed Mitchell	Director	555 College Rd E	Princeton	United States
Plastech	Alan Gibson	Design & Development Partner	1010 Vermont Ave Nw Ste 1100	Washington	United States
Water Inc	Alan Mitchell-Hind	Director	1400 K St Nw	Washington	United States
Park Data	Alan Mitchum	Finance Director	1785 E Interstate 30	Garland	United States
Gate Howe	Aleksandr Elsgood	Chairman	5000 V V Jones Rd	Venus	United States
Blue Amli	Alex Grybio	Director	1 Moody Plz	Galveston	United States
Owens Lear	Alfred Montalto	Managing Director	281 Park Ave S	New York	United States
Optronics	Allen Moore	Exec Dir Sales & Marketing	14033 Denver West Pkwy	Golden	United States
Diego Rush	Amine Moore	Director	245 Winter St	Waltham	United States
Clark West	Andrew Hulse	MD	501 Saint Jude Pl	Memphis	United States
Wilo Communications Teoran	Andrew Rinnue	Managing Director	Unit 2008	Dublin	Ireland
Realty International Linc Ass			Woodland Dr	Indianapolis	United States
Venture Inc			Tree Hill	Kingston	United States
Symbian Technology plc			House		Ireland
Quinns Intertechnologies Ltd					Ireland
Flyaway Airways					Ireland
Maverick Papers				Diego	United States
Symbian Technology plc			House		
Telesis Inc			Peyton St Ste	Alexandria	United States
Tyler Habco	Anthony Shepherd	Database and Research Manager	1735 New York Ave Nw	Washington	United States
Odenberg Communications L	Anton Spillane	Managing Director	Sandyford Business Ctr	Dublin	Ireland
Design Right Inc	Arthur Browne	Sales Manager	100 Pennsylvania Plaza	New York	United States
Retail Blue	Auther Morris	Director	1919 Torrance Blvd	Torrance	United States
Realty Corp	Autumn Morris	Financial Controller	1919 Torrance Blvd	Torrance	United States
Payroll Inc	Barbara Morris	Marketing Manager	1307 N Monroe St	Tallahassee	United States
Myers Bowne	Ben Putley	Director	921 Eastwind Dr Ste 104	Westerville	United States
Mutual Lear	Betty Moss	Financial Director	1 American Rd	Cleveland	United States
Hoover Labs	Bev Jung	General Manager	1 American Rd	Cleveland	United States
Coast Nexus	Bill Clayton	Chief Accountant	2345 Ernie Krueger Cir	Waukegan	United States
Julius B	Bill Connelly	I.T. Director	205 Madison Ave	Mount Holly	United States
Advanced Human	Bill Jones	Director	2845 Chancellor Dr	Crestview Hills	United States
Lake Inc	Bill Mills	IT Manager	5051 Westheimer Rd	Houston	United States
Group & Lexco	Bill Moss	CFO	4220 King St	Alexandria	United States
Dee Paratek	Bill Mottram	Managing Director	2929 Allen Pkwy	Houston	United States
Bio Company	Bill Mourgue	Financial Director	2345 Ernie Krueger Cir	Waukegan	United States
Arup & Onslow	Billy Farina	Director	476 Clay St	Chilton	United States
Southborough Distribution	Billy Smith	Managing Director	The Plaza		Ireland
Army & Bonner	Bo Mullans	Editor in Chief	3151 W Behrend Dr	Phoenix	United States

Figure 2.The Sage CRM design team created a suite of icons to use in the product videos

The Sage CRM approach

Having first explored the possibility of outsourcing video production, we settled on an in-house approach. The biggest advantage of this was that we would have full control of both the script and the final look and feel of the produced video. However, based on our experiences, there are a number of things that need to be considered before embarking on a project to produce video in-house.

One of the first things you need to evaluate when considering an in-house approach is how much of an effort it would take and whether it can be done without the support of other teams, for example graphic design and localisation.

Another important consideration is the screen capture and, if necessary, graphic design software that is going to be required. We settled on Camtasia as our screen capture software, and our design team produced a suite of icons that conformed to our corporate branding guidelines.

You'll also need appropriate hardware if you are recording a voiceover for your video – at the very least a reasonable microphone and a pop filter to remove extraneous noise. We bought a relatively inexpensive but effective headset with a microphone to record the voiceovers, and used the free tool Audacity for our basic audio production requirements.

Capturing the video

After deciding on your production method, you'll need to establish how you want the final video to look – will it be a full-screen capture, or will you focus on specific parts of the screen at one time and zoom or pan and scan as necessary? We decided on a full-screen approach to avoid the user's eye being taken on a roller coaster ride around the screen.

We found that there was quite a lot of post-production work required to get a professional-looking recording, adding icons and callouts and synching the audio seamlessly with the on-screen activity.

In addition to being quite time consuming, the post-production work did cause some problems when it came to localisation. One of the main problems was the gaps between sentences – the English sentences were much shorter than their localised counterparts, so a lot of the on-screen actions had to be re-synchronised, which proved quite a headache for our localisation partner. It is worth checking before you buy any software whether your localisation partner has any experience with the tool – this can eliminate bottlenecks at localisation time.

Delivery method

The next thing we had to decide upon was the delivery method – would we ship the videos with the product installation pack or host them online and, if so, where – a video streaming site such as YouTube or our company website?

In-product

The main considerations when thinking about shipping the videos with the product are the file size, location, and maintenance.

Online

YouTube is the second most popular search engine after Google, and therefore an obvious – and easy – place to distribute. However, one of the problems with YouTube is that you cannot control the related content – which can mean a competitor's products being highlighted at the end of your video or in the Featured Videos section.

If you choose to deliver your video content using YouTube, you should consider creating your own channel and making the video unlisted – meaning only those with the URL can watch it.

You should only host content on your company website if you have the ability to stream video. The expectation with video is of speed. Users do not want to click to download a video file then click again to play it.

Summary

Video can be an engaging way of explaining complex information in a short period of time. But producing video content can be time-consuming and expensive. So before you begin, you should make sure you have at least considered the following when developing your video strategy:

- What are you going to show – feature overviews, common tasks, customer pain points?
- Do you need to record a voiceover – if so what hardware is required?
- Where are the videos going to be produced – in-house or by an external resource?
- How are the videos going to be produced – what software do you need?
- Where are the videos going to be hosted – online or in-product?

Watch the videos at: http://community.sagecrm.com/p/productvideos.aspx C

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Can you improve search engine rankings?

Are the promises to deliver 'top search engine rankings' real or relevant? Amy Munice finds out.

Perhaps you too receive a dozen or so email solicitations with subject lines promising 'top search engine rankings'? If not, trends coming from the USA (and India, and China, etc.) suggest that you too will be wading through such spam soon.

The senders of this stuff are seemingly unaware that to any serious student of search engines the e-mail title alone is a giveaway that the writer has a severely out-of-date and mistaken notion of how search engines work. Or, these e-mail titles could signal something even worse, namely that the writer does know how the web works but that they do expect the recipient to be seduced by this golden promise. It is time to put this illusion to rest.

Traffic, leads and conversions matter – 'site ranking' does not

To put it bluntly – 'site ranking' is not especially real or relevant. As more and more organisations of all types move towards online communications, when it comes to the mountains of advice as to how to make your information visible on the web, a technical communicator such as yourself needs to know what is real and what is not real, and what is woefully out-of-date.

If you're curious about the impact of a local search on your organisation, with a laptop, search from different locations, different countries and see what difference it makes

Focusing on the mirage of site rankings keeps an organisation from doing the things that are needed for successful web marketing – success being defined as garnering traffic, leads and the desired conversions of these leads into customers for commercial enterprises or equivalent for a non-profit entity. This widespread misunderstanding may also be a factor in the European Union's claim that the likes of Google were or are favouring their advertisers, which seems highly unlikely when one truly considers what the more successful web marketers are doing.

To debunk this notion of 'top search engine rankings', my first question would be '*Where*?' It should be no secret to a Search Engine Optimisation (SEO) professional that all of the world's search engines now have local search algorithms. These algorithms take into account the location of the searcher and most of the time they assume that the searcher wants to know about more local resources for their quest.

Local searching

The local search algorithms can matter a little or a lot. It depends on where your organisation is located vis-à-vis your prospects, the locations of any 'competitors' for top visibility for the same search terms (key phrases), and the nature of your enterprise. Local search algorithms can provide an enormous advantage to a competitor in a locale that your organisation targets and put you at a relative disadvantage in their locale. These 'local search algorithms' are augmented by free services such as 'Google Places', which gives entities with no website a way to come to the top of the search page. If your mission and web marketing efforts are entirely local in geography, the world's search engines have given you a gift – local search algorithms – there for the taking to help you attract local visitors. Your organisation will be favoured towards the top of local searchers' search results page, taking up prime 'real estate' on the page, and perhaps with your local equivalents from afar crowded out from the first three or so pages, i.e. the place where it has been widely reported for years and verified by many organisations' AdWords detailed data, that the average 'Googler' stops reviewing results.

I am well aware that this is not necessarily helpful when your organisational mission is more global in scale. Quite the contrary! I work with many companies that did not heed this new development in search engines perhaps because these changes were concomitant with the first stirrings of the global recession. I would wager that on a worldwide basis many, if not most organisations, have not truly grasped their impact. Local search algorithms create potential benefits to be seized, or obstacles to worldwide sales requiring different approaches to be overcome.

Add to the local search algorithm phenomena that search engines now reportedly factor social networking more heavily into their ever evolving 'secret sauce' to return search results. Since social networks tend to be more local than global, this has a local search amplifier effect.

If you are curious about the impact of local searching on your organisation and do travel a bit with a laptop, make it a point to do repeat searches in different places but *not* searches that you do routinely.

Personalised searching

That brings up the second question I'd ask anyone promising me top search engine rankings – 'Whose search results? Yours or mine or someone else's?'

What I am referring to are personalised search algorithms. Search engines now 'know' you. They know for example if you tend to

select merchandise or services based on price or quality or a particular locale. For the more technically inclined, cleaning your cookies does not really wipe the slate clean. More to the point, even if *you* wipe the slate clean do the people that your website optimisation efforts target do so? All of them? Across the board? May we agree that this is highly unlikely?

That means that you either find a way to deal with personalised search algorithms or they will deal with you. Personalised search means that your page might appear in the number one slot on a search page or somewhere on the bottom of the search listings results, or somewhere in between. The search engines do not shuffle the deck randomly. Rather, they are serving up to the searcher the results they 'think' that particular searcher wants based on their past search behaviour. If you truly grasp this concept you understand very clearly that promises of 'top search engine rankings' are meaningless.

Web Competitive Analysis

That bring us to the third and final question – if site ranking *per se* isn't real or relevant, what does matter and is it anything you can control?

Traffic, leads and conversions matter and it is exceedingly important that you realize your organisation is *always* in a competitive situation. On the web, you may have competitors that in the *real* world are not competitors in any way. Web-wise though, they may have the same golden keywords in mind to help draw in customers and for that reason be a 'competitor' vying for the same top of the search page. An example would be 'leak tester'. Do you mean a 'leak tester' for a gas furnace, a bicycle tyre, a cardiac catheter, an energy conservation company, or for compressed air lines in industrial environments?

Not only is your website in constant competition, but it is doing so in the context of a constantly shifting landscape. Think of the Internet as a constantly evolving database that changes every time someone inputs a search parameter, follows the trail of what that search returns to them and then behaves one way or another as it meanders along. That is precisely what is happening. And, all of the world's search engines are trying to keep up with these changes, dynamically modelling the way in which searchers search. The language that search engines speak is algorithmic – specifically algorithms for natural language processing, a sibling of computational linguistics

If you want to compete and win on the web you need to wield math-powered tools that can dynamically map your unique and ever changing competitive landscape on the web. If an SEO specialist comes to you with a long list of tasks to do – ask them why you should do x, y or z. If they give any explanation other than mathematical tools that have recently mapped the competitive landscape for this page say x, y, and z factors are important in *your* unique situation just ignore their advice. There is no correct 'phrase depth', which is happy news for any *Communicator* reader who, like me, has been tasked with writing web copy. Nor is there a golden rule of the number of links you need. And the reputation of the pages where those links originate may be very important—or have absolutely no bearing whatsoever in your competitive landscape. In short, there is no one-size-fits-all route to website optimisation because an organisation seeking donors to cure cancer has an entirely challenge than a retailer of the latest ladies' fashions.

Mathematics

You may be a writer and not a mathematician but you *do* need to know that it is mathematics that will give your organisation a competitive edge. Better mathematical tools will be able to discern the varying potential of two different keywords with identical global traffic reported – note: a report free to all – by Google. There are a number of such Keyword Effectiveness Indices (KEI) scoring tools, and the better ones use multivariate statistics to identify the best windows of opportunity, essentially by performing a very fine tuned analysis of just how many real-world competitors you have for these terms and how able these competitors are.

There are also mathematical tools that can overcome the aforementioned personalised search algorithms by identifying the various linguistic theme words that when used in conjunction with your top targeted keyword will help get you get to the top of personalised web pages more often.

In my opinion, the most astounding mathematical tools for search engine optimisation are those that not only map your organisation's unique competitive landscape on the web but also find threats and opportunities that the uneven web landscape presents. Because there are hundreds of variables that affect which sites and pages draw traffic. It is not correct to think that the pages you see (albeit with personalised and localised search factored in) near yours as your most able competitors.

The bottom line is: to succeed on the web, good writing is not enough; mathematics is now what makes the difference. C

your website is in constant competition in a constantly shifting landscape

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Advanced formatting with Arbortext Styler

Dynamic publishing specialist Chris Western presents an overview of the advanced Print and PDF formatting capabilities in Arbortext 6.0.

Introduction

The Arbortext product suite has been providing XML authoring and dynamic publishing solutions for many years. The well-known Arbortext Editor is a robust and highly configurable XML editing and authoring tool with word processor-like features, used around the world with a multitude of document types and data models (Figure 1).

It has also been integrated with a number of different content management systems such as Documentum, Acolada and Docufy, as well as Arbortext Content Manager (ACM), which is a publishing-focused implementation of PTC's Windchill product.

About Styler

The Arbortext Styler product is a multi-format stylesheet development and management tool that is used in conjunction with Editor (Figure 2). It enables users to build a single stylesheet that is targeted for one or more of the following output types:

- Editor stylesheets; to control the XML content presentation within the Editor view, as shown in Figure 1.
- Print & PDF; output layouts and styling, including auto-generated text fields, ToC and Indices etc.
- HTML and HTML help.
- Digital Media Publisher (DMP).
- ePub.
- RTF for MS Word (via Arbortext Import/ Export).
- Web.

Formatting engines

Since its inception, the default Print & PDF formatting engine was based on Formatting Output Specification Instance (FOSI) stylesheets and the accompanying XSL-FO engine was added when this W3C standard was released. These have now been joined by Arbortext Advanced Print Publisher (APP), which became the new *default* engine in Arbortext 6.0.

The integration of APP into Styler has provided a more feature-rich composition engine on which to further develop Styler and meet the growing needs of its users. Styler already makes use of APP's multi-lingual support and complex page layout capabilities. As well as becoming the default engine behind the existing interface, many of these newly exposed APP feature sets are also configurable from the Styler GUI.

The APP composition engine is a highly capable Print & PDF solution, used extensively for many years in a standalone desktop and server configuration. The integration now enables Styler and Arbortext Publishing Engine (APE) users to access APP's superior capabilities.

Styler APP specifics

Core features of the APP formatting capabilities have been exposed in the Styler interface to enhance the options available for users. In the following dialogues you can see the some of the new options available, including:

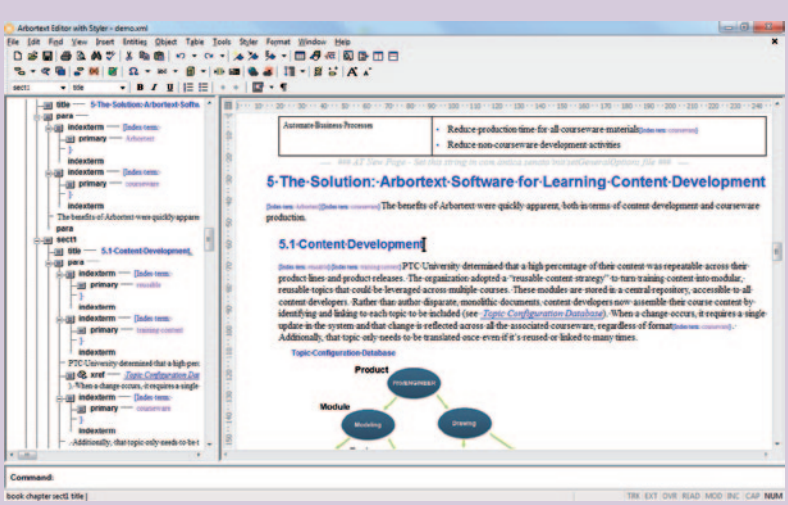


Figure 1. Arbortext Editor sample document standard 'tag-less' view showing: styled content, graphic, table and XML tree navigation.

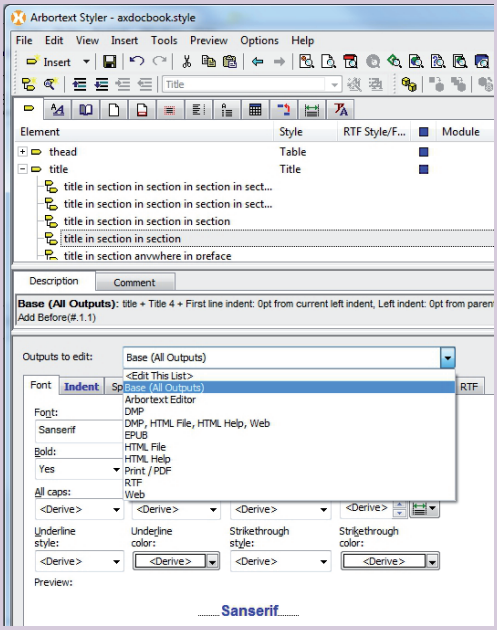
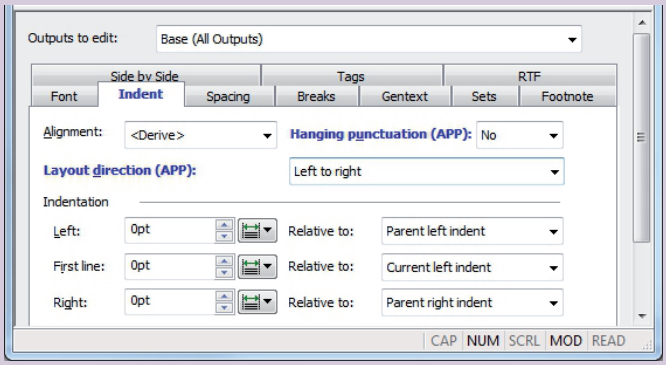
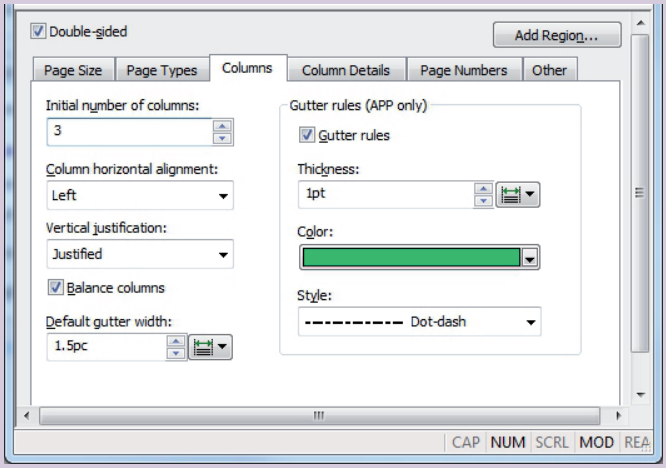


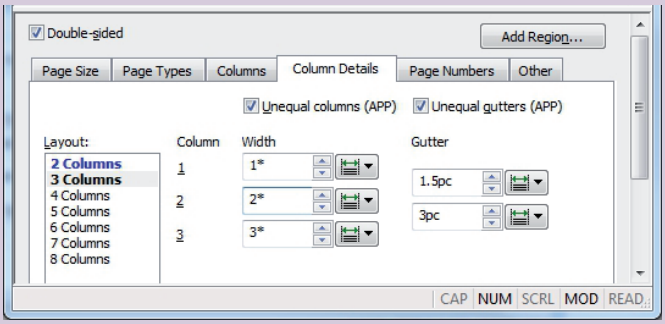
Figure 2. Arbortext Styler GUI example, title element context properties with output types menu.



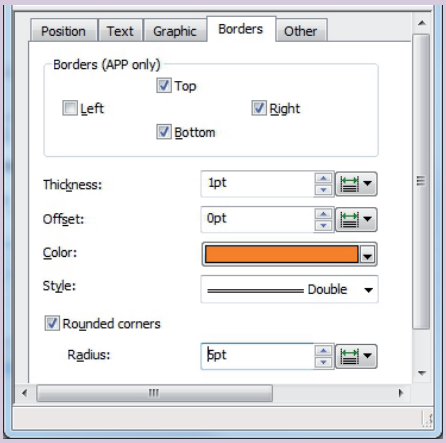
Dialogue 1. Arabic and Hebrew formatting with 'right to left' and Hanging punctuation, using APP kerning tables.



Dialogue 2. Column gutter rules



Dialogue 3. Flexible column & gutter widths.



Dialogue 4. Page region borders.

Figure 3. Styler Interface

1. Right to Left layouts and Hanging punctuation.
2. Column gutter rules.
3. Flexible Column widths and gutters.
4. Page region borders.

Beyond the GUI

If a document type requires more specialist processing and formatting configuration than currently offered through the Styler GUI, then *all* of the APP features can be accessed via additional methods at the code level, for system developers to greatly enhance the formatting and automation potential. An overview and use cases of these methods are described in the following sections.

Source-code edits

Source-code edits give users the ability to directly write custom code snippets to the context level using the APP JavaScript Formatting Object Model (FOM) API. Source code edits can be applied to different stylesheet components with Styler such as elements in context, property sets and page regions. They can be used for anything from simple style processing extensions to running additional APP functions and commands (Figure 4).

Use-case scenario: extended text property controls

If your documents require a higher level of control over your text properties than the

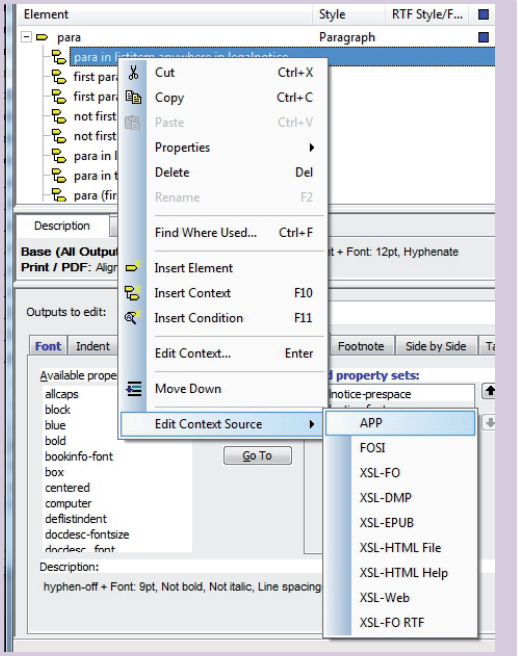


Figure. 4. Stylesheet Source Edit options from an element context.

default settings, then all of APP's other text property controls can be accessed using the source-code edit method.

For example, if you wished to adjust some properties relating to the hyphenation control such as the maximum number of consecutive hyphens and the hyphenation character itself. The source-code edit applied to the element or property set would include the applicable code, referenced from the FOM API reference documentation.

Stylesheet template associations

Users have the ability to associate APP templates created in the desktop version containing anything from custom colour and frame tags to tailored formatting functions called via source code edits (Figure 5).

Use-case scenario: custom colour use

As an example, if a custom gradient fill with Pantone+® colours was required for an area fill, then this option is not currently available in the Styler GUI. This can, however, be defined using regular menu options in APP desktop (Figure 5), then a template with this colour definition can be associated with the Stylesheet and called from a source edit.

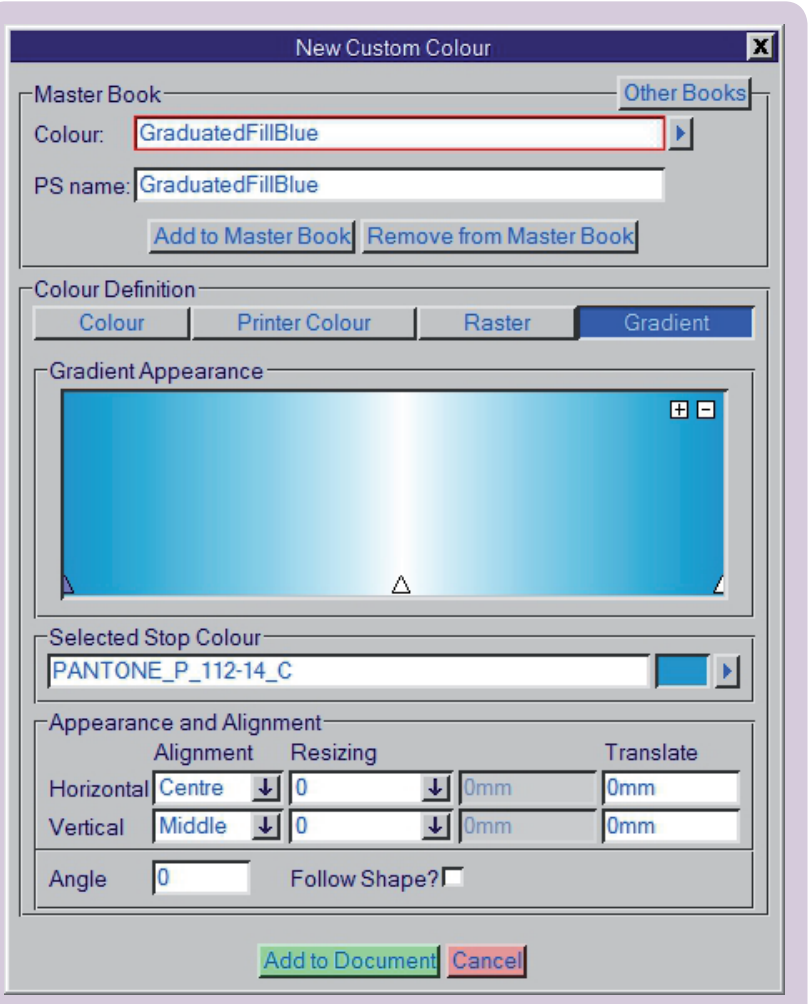


Figure 6. APP Custom colour definition dialogue.

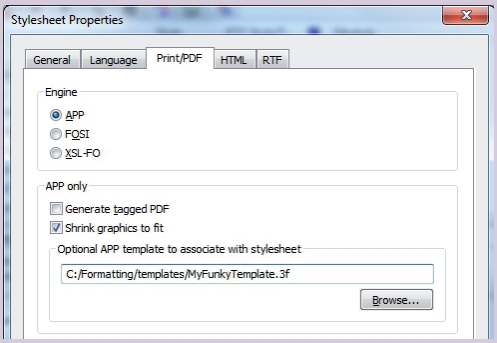


Figure 5. Stylesheet properties dialogue for choosing Print/PDF engine and associating APP templates

In this case, it is a relatively simple custom colour definition, but in essence it can be any APP property or function defined and invoked with this method.

Use-case scenario: tabular ToC conversion

There is a requirement for a custom tabular layout in an auto-generated table of contents, not currently available from the Styler interface options. This solution takes the concept of associated template functions a step further.

Standard table structures including XHTML and CALS are supported directly, so if a CALS structure can be defined for the table of contents and the applicable element content populated in the table, this will give us the required layout control.

In APP you can run XSLT processes and have the ability to augment the XML DOM stream. Using these tools within an associated APP template, an XSLT stylesheet can build the table of contents from the input DOM in a CALS structure and Styler menu functions can take care of the numbering output. This XSLT result is then augmented to the main DOM stream and rendered using the built in CALS library during document formatting.

Use-case scenario: enriched DOM export

There is a requirement for an enriched output of the XML data stream for repurposing and archiving the content. The enriched stream needs to contain all items of generated text; from heading and list numbering to tables of content, Indices and other specific items of formatting information.

During formatting processes when running with Styler and APE, APP uses the XML DOM stream, which can contain much of the standard generated text items that have been configured. This DOM stream can then be captured and exported with configurable properties.

With some additional extensions to capture other live formatting properties, this process will result in an XML data stream following the structure of the original input and enriched with all of the specified generated text and

formatting information. Information which is normally only held in the stylesheet, or in memory during formatting.

Using native APP templates

If you have complex custom layout or processing requirements that lend themselves better to a native APP template solution, or if you have existing APP templates you wish to use within the Styler and APE environment, then these can also be used directly by selecting the appropriate template as the stylesheet when printing. This option also gives users the option of manual finishing on composed files within the APP Desktop.

Future Styler

Integration has brought together the worlds of the classic Arbortext solution and APP functionality giving users a greatly extended composition capability. APP is now the foundation of further Print & PDF enhancements made in Styler and future releases will expose more features starting with table styling, word/letter spacing and hyphenation controls. A free trial of Arbortext Editor with Styler is available upon request from tformat. C

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Terminology

ACM: Arbortext Content Manager

APE: Arbortext Publishing Engine, formerly E3

APP: Arbortext Advanced Print Publisher, formerly 3B2

Arbortext Editor, formerly named Epic and Adept

CALS: CALS table model. For further information, seewww.oasis-open.org/specs/tablemodels.php

DMP: Digital Media Publisher

DOM: Document Object Model

FOSI: Formatting Output Specification Instance

GUI: Graphical User Interface

Import/Export: Arbortext MS Word & FrameMaker Import and export conversion tool

XHTML: eXtensible HyperText Markup Language

XML: eXtensible Markup Language

XSLT: eXtensible Stylesheet Language Transformations

XSLFO: Extensible Stylesheet Language Formatting Objects

W3C – World Wide Web Consortium www.w3.org

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Agile synergy

Anna Haberko discusses optimising cooperation between development, testing, documentation and localisation.

Every year, more and more teams adopt agile methodology and practices to develop software, leaving many technical communicators behind or clumsily dragging them along. Together with testers, designers and localisation experts, technical communicators often struggle to keep abreast of all the features developed, and the communication exchanged in the process.

employees who use agile practices have greater job satisfaction

Agile? Scrum? XP?

Whether you are following agile, lean, Kanban, scrum or XP practices, the basic approach stays the same:

"agility means to strip away as much of the heaviness, commonly associated with the traditional software development methodologies, as possible to promote quick response to changing environment, changes in user requirements, accelerated project deadlines and the like." (Ericksson et al.)

The agile manifesto (http://agilemanifesto.org) comprises four basic rules:

1. Individuals and interactions over processes and tools
2. Working software over comprehensive documentation
3. Customer collaboration over contract negotiation
4. Responding to change over following a plan.

Communication within the project includes various channels. A large part of agile is the interaction that happens in meetings: estimation, planning, daily stand-ups, and retrospective. The focus of agile is on face-to-face communication rather than detailed design specifications.

There are many supporting tools for managing projects: wikis, newsletters, emails, forums and collaboration platforms. A project could even be communicated with the help of project prompts; that is, story cards presented and moved around on whiteboards.

Benefits

The widespread perception of agile is mostly positive, but because of its young nature there exist few studies to support the view. Nevertheless, the following statements have been confirmed. Mannaro *et al.* claim that employees who use agile practices have greater job satisfaction, perceive their work environment as more comfortable, and see their productivity as higher. According to Ilieva *et al.* and Layman *et al.*, there is a 40% increase in productivity. As for customer satisfaction, the customer perceives more control over development processes. (Ilieva *et al.*). For product quality, fewer defects (Ilieva *et al.*), and improved released product quality (Layman *et al.*) are noted.

Organisational context

The examples in this article are based on one of AGFA software products developed using agile methodology. The whole project spans three continents with teams in North America, Asia, and two locations in Europe. The individual teams are responsible for delivering software components, with functionality overlapping at times. For example, the server team works on parts of the workflow functionality, owned by another team. The organisation started with agile over four years ago, adopting it in one of its teams. Now, all teams run in agile mode. Documentation, test and localisation experts are shared resources supporting all teams, thus belonging to multiple scrum teams.

Challenges

So what issues do the non-development team members have?

The challenges have changed over time together with the maturity of the teams. The range of problems is listed in the order in which they occurred:

1. People not part of the team in the first place
2. Marginalised roles on the team
3. Different players on the team having different goals
4. Multiple teams to support.

Resolving issues

The agility of the teams and project management has contributed to solving most of the issues faced by the non-development team members. Problems have been reported during retrospective meetings and discussed on the team forum, which enables product owners to spot and respond to them easily.

The issues and solutions are presented below in a chronological manner – in which they occurred as the maturity of the teams has grown:

Issue 1. People not part of the team in the first place

When setting out into the agile world, teams tend to be limited to development only. The general understanding and basic adoption of agile brings together several developers responsible for the sprint. This approach leaves all shared resources (testers, localisation, documentation etc.) outside of the

communication scope. Not only are they not aware of the small intricacies of the features developed and issues related to them, they also have to support separate progress reporting solutions and processes. Having to understand what goes on in a fairly closed team, and still work based on its deliverables – test, localise and document it – is a big burden. The objective at this point is to get on board. You may experience some reluctance at first. While negotiating your participation with the product owner and scrum master you may suggest a trial period on the team during which you get acquainted with the way people interact, and you can then figure out how cooperation will work.

Issue 2. Marginalised roles on the team

It is not uncommon for the agile team to accept the other team members but ask them to lag behind by one or two sprints. Being part of the team but lagging behind the 'core' team is often a solution used as a transitory stage in adopting agile practices. Testers, localisation experts and writers are part of the team but only theoretically. Whoever relies on the deliverables of development is often asked to perform their job one or two sprints later. This means that a story is developed and demonstrated during one sprint, and testing, localisation and documentation of it only happen in the following sprint. Consequently, the non-development team members perceive a kind of duality: the communication that is pertinent to the job they will be doing during the next sprint is happening in the current sprint. There is no common goal for all the team members, and not all team players can contribute to the current communication and information flow. A solution for such a situation is getting your deliverables into the Definition of Done (DoD). The DoD specifies the tasks that need to be done for the sprint to be considered complete. The fullest DoD would include specifying that a feature/product increment be: developed, tested, localised and documented. A good forum for raising the issue of not being included in the DoD is a retrospective meeting where it will be noted officially and action will be taken in the future.

Issue 3. Different members on the team have different goals

Another common practice in adopting agile is creating parallel stories for various players on the team. Hence, the story is broken up into development, testing, automated testing, localisation and documentation stories. While the developers are able to rapidly complete many stories, testing, localisation and documentation are slowed down and not productive as they are still relying on the deliverables of development that tend to push out stories of their backlog. A good solution to this problem is to have a single story that includes the tasks (such as developing, testing, documenting, and localisation) that need to be completed by all the members of the team. This way, all team members are motivated to finish off as many stories to the very end as possible This may involve taking advantage of everyone's skills and availability. Often, developers can pick up testing tasks, and localisation and documentation experts will support them in simple manual testing that also help them validate their own work (for example, localisation would check the language translations, and documentation would verify the procedure steps).

Issue 4. Multiple teams to support

In large projects, testers, localisation and technical communicators are often shared between many teams. They serve as shared resources and cannot commit to one team exclusively. Therefore, their productivity cannot be traced in one team. They do not perceive themselves as fully fledged team members. This often results in giving too many tasks to the non-development team members. Their involvement is not trackable and the individual task backlog is perceived as overwhelming. The suggested solution here is that all the tasks of all teams are pulled together into a separate backlog; for example, testing, localisation or writing backlog. The product owner is responsible for these backlogs and based on sprint priorities can assign tasks to testers, localisation or documentation experts. In this way, the visibility is improved and the non-development team members can negotiate their work with one single person who is knowledgeable about the product priorities.

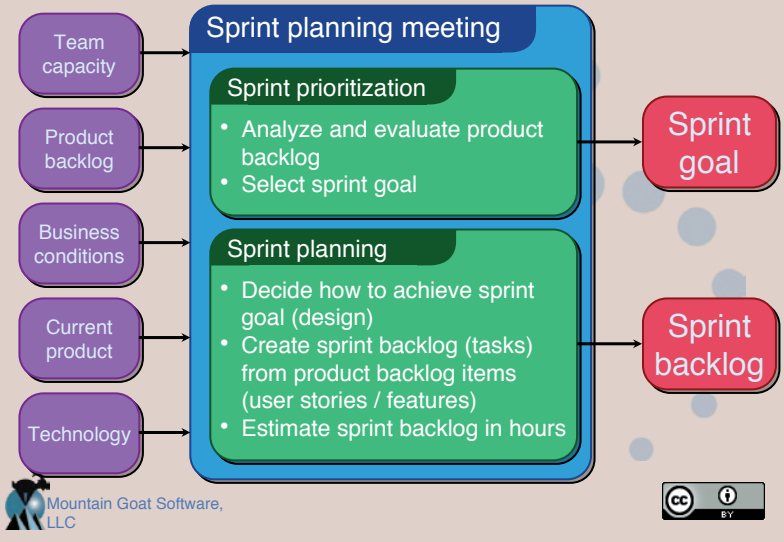

Figure 1. Planning a sprint meeting.
© Mountain Goat Software

Summary

Based on the above examples, I have demonstrated the strength of agile methodology and the agility of implementing it. The methodology can be implemented and adapted in an organisation while the critical point in understanding and working it is to adopt any change that comes into the process. C

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Agile terminology

Definition of Done (DoD). A joint team commitment that the team agrees to deliver at user story, sprint, and release level. This is a list of activities that must be completed for a particular feature to be considered complete, and includes testing, documentation, and localisation.

Iteration. A single development cycle, and for most projects it is between one week and one month long. Iterations and sprints are synonymous: http://en.wikipedia.org/wiki/Scrum_(development)#Sprint

Product backlog. The product backlog contains the list of the customer's requirements, prioritised, typically by business value. The list of features to complete: http://en.wikipedia.org/wiki/Scrum_(development)#Product_backlog

Scrum. The objective of a daily (scrum) meeting is to provide a status and progress update to the rest of the team. These meetings are held daily and should last no more than 15 minutes

Sprint. A set period of time during which specific work has to be completed and made ready for review. Sprint is synonymous with Iteration (see above).

Sprint backlog. The sprint backlog is composed of a set of top priority items chosen from the product backlog by the team. See the link for product backlog.

Story. A story explains how a feature is to be used and gives it context. http://en.wikipedia.org/wiki/User_story

Velocity. In an agile world, velocity is the amount of work that can be done in each iteration. This is based on experience from previous iterations.

Why internationalisation is an opportunity

Rob Sexstone explains how planning for localisation at the outset of your software development can reap benefits.

Introduction

This article describes the important distinction between localisation and internationalisation and argues the case for technical communicators working in a software development team to extend their core skills and influence into localisation management.

The evolving development landscape

As the traditional waterfall approach to software development through analysis, specification and design makes way for 'extreme' and 'agile' practices, more than ever before, *not* having a localisation strategy introduces complexity and risk. Translation and localisation do not naturally fit with agile development, because they traditionally rely on complete contexts and for a product or documentation set to be completed before work begins. Without careful and early consideration in an agile environment, last-minute localisation can lead to overly complex administration and unexpected quality issues.

within your team, appoint a localisation evangelist

Bridging the knowledge and experience gap

Because of the dynamic and fast-growing nature of the UK's localisation industry, there is a very stark shortage of experienced and talented localisation specialists and managers. Development teams usually rely on one individual (if they are lucky) who has had some experience of working with a translation agency at some point in the past. In general, developers have a limited appreciation of the commercial risks associated with sending a string table or UI resource file to a translator, having them translate it and then building a release. The negative impacts of this short-term approach to 'translating' string sets rather than 'localising' typically lead to poor version control, lack of consistency, poor user satisfaction in the target locale leading to unexpected change requests, and unnecessary administrative time spent troubleshooting terminology issues. The key point here is; within your team, appoint a localisation evangelist and encourage them to engage with all functions (for example, marketing, development, tech support) as well as with a reputable localisation service provider, who will provide a blend of tactical and strategic advice, support and experience. As Daljit mentioned in the Autumn 2011 *Communicator "… 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."*

International software design checklist

When engaging with development managers, at 3di, we begin by interviewing them using a standard checklist to assess the localisation readiness of their software product (as well as the team itself!). This often provokes fruitful discussions and highlights risk at

Table 1. 3di's international software design checklist: 30 software engineering considerations

Software engineering considerations	Relevance*	Priority*
1. Design team considers translation and localisation from the beginning of the project.		
2. All international editions are compiled from one set of source files.		
3. Localisable items are stored externally in resource files, or resource bundles.		
4. Code supports Unicode or conversion between Unicode and local codepages.		
5. String buffers are large enough to handle translated words and phrases.		
6. No assumptions are made that one character storage element represents one linguistic character.		
7. Validate databases to ensure that schemas, datatypes and table design are ready for a multi-locale environment.		
8. All language editions can deal with one another's data.		
9. Program takes advantage of generic text layout functions when available.		
10. International laws affecting design and operation are considered.		
11. Code uses generic datatypes and generic function prototypes if available.		
12. Program handles input of international data.		
13. Program contains support for locale-specific hardware if required.		
14. The product runs properly in its base language in all locales.		
15. Program depends on operating or runtime system functions for sorting, character typing and string mapping.		
16. Third-party components and software used in the product are examined for I18N support.		
17. Strings are not assembled by concatenation of fragments.		
18. Source code does not contain hard-coded character constants, numeric constants, screen positions, filenames or pathnames that assume a particular language.		
19. Code is generic enough to handle the required range of character sets.		
20. Code properly handles all characters in the program's character set.		
21. Code processes all character sets correctly regardless of character widths.		
22. Application works correctly on localised editions of the target operating system.		
23. Program meets international testing standards.		
24. Icons, cursors and bitmaps are generic, are culturally independent and do not contain text whenever possible.		
25. Code does not use embedded font names or make assumptions about particular fonts being available.		
26. Displayed and printed text uses appropriate fonts.		
27. Menu and dialog-box keyboard assignments are unique.		
28. If ethnocentric graphics, colours or fonts are used, they can be replaced dynamically using locale-sensitive switch statements.		
29. Sorting and case conversion are culturally correct.		
30. Program handles user keyboard layout changes.		

* High / Medium / Low

Table 2. 3di's international software design checklist: 12 international usability, UI and human factors

International usability, UI and human factors	Relevance*	Priority*
1. Consistent terminology is used in messages.		
2. UI language strings are reviewed for meaning and spelling to reduce user confusion and lessen translation errors.		
3. Menus, dialogs and Web layouts can tolerate text expansion.		
4. Strings are documented using comments to provide context for translators.		
5. Users can type all supported characters into documents, dialog boxes and filenames.		
6. Shortcut-key combinations are accessible on all international keyboards.		
7. Program responds to changes in the user's choice of international settings (for example, UI language can be changed through a straightforward menu option).		
8. Translated text meets requirements of end users who are native speakers.		
9. Dialogs and forms are resized and UI text is aesthetically presented.		
10. Translated dialogs, toolbars, status bars and menus fit on the screen at different resolutions.		
11. User can successfully cut, paste, save and print text regardless of language.		
12. Are there established test plans and tools for the source product, and can they be applied to localised versions?		

* High / Medium / Low

an early stage for us as a localisation service provider. By providing a starting point for discussions, we find that engagement with the right stakeholders in a development project happens much quicker, and the relationship between international design and ongoing cost efficiency for all future localisation work is taken seriously very early on. Localisation process management is a broad topic beyond the scope of this article and it is something we shall explore in the future.

See 3di's International Software Design Checklists in Tables 1 and 2.

Summary

As the roles of developers become more agile and customer-oriented, so in turn do the roles available for us as technical communicators. Myriad opportunities exist for the traditional technical communicator, such as quality assurance, usability, technical support and web marketing. Effective translation and localisation management embraces and links all of these functions within a modern development team and demands a high level of technical communication skills. The international success of your software product will not happen by accident, and as professional communicators we have a responsibility to embrace a more international and pluralist approach to our endeavours. As we all observe Western domestic economies stagnating, internationalisation, localisation and export seem more relevant than they have been for generations. C

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Terminology

Localisation. The translation and adaptation of software or multimedia products for another locale.

Internationalisation. The engineering and design effort behind preparing your software or multimedia product for effective localisation. Internationalisation is a software development activity that benefits from collaboration and planning with a localisation partner or consultant in order to streamline future software localisation processes.

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Savourel, Yves *XML Internationalization and Localization*, SAMS ISBN 0-672-32096-7

Sexstone, R, Hanspal, D (2011) 'Localising e-learning – an overview' *Communicator*, Autumn 2011:48-50

Technical resources for Java and XML developers who are interested in I18N

http://developers.sun.com/techtopics/global/index.html

Pushing FrameMaker: a case study

Steve Rickaby describes the construction of a complex book design and writing environment in structured FrameMaker.

As this is the last article in this long series about Adobe FrameMaker, I thought it would be interesting to look at a real-life case study. I have titled the article *Pushing FrameMaker* because it took the application (and the author!) to several limits, as I hope to show. It also provides a good example of what can be achieved with FrameMaker and, as the pilot once put it after a nasty landing at Gatwick in a thunderstorm, 'courage, skill and determination'. Plus a little help from your friends.

The brief

Thomson Education, as it was then, commissioned an attractive design for a series of university-level textbooks on Java from Design Deluxe of Bath (www.designdeluxe.com). Although I had little contact with the designers, whose work was completed before I became involved with the project, I assume that they would have worked in Quark or InDesign and would have had no knowledge of FrameMaker. Their deliverables were a set of page designs, as PDF files, and a full written typographical specification, which turned out to be immensely useful.

Meanwhile, the author team in Sweden had decided to work in structured FrameMaker as a route to selectively reusing the material. To this end they had created their own version of DocBook and had drafted parts of books using that as their Element Definition Document (EDD). The authors, supported by the publisher, wanted to be able to continue writing in an environment that gave them the closest possible simulacrum of the final book design.

A final requirement was to deliver the writing environment to the publishers in a documented and reusable form. (I use the term 'writing environment' here, as this was the authors' perspective, but strictly speaking this was a FrameMaker *structured application*, with a few extra bells and whistles.)

This article will make more sense if you look at the final design on Amazon using its 'look inside' feature at tinyurl.com/4745l9e, as I will be referring to aspects of the book's design throughout. If the TinyURL link doesn't work, the full Amazon URL for the book is given at the end of this article. Failing both, Google *Java Actually: A Comprehensive Primer in Java Programming*.

Technical challenges

The first and most obvious challenge was to implement a complex design in structured FrameMaker: specifically, to decide whether to specialise an existing EDD such as DocBook, or to create a new EDD 'from the ground up'. In the light of little relevant knowledge at the time, but some good advice, I decided on the latter route. This turned out to be the right choice, but for some quite complex reasons. I discussed this sort of decision in *First steps in structure: EDDs* in the Summer 2007 issue of *Communicator*.

The second challenge was to create a 'point and click' writing environment for the authors. This was to enable them to work with the complex elements that made up the design without having to involve themselves in the intricacies of structured FrameMaker.

Finally, there was a collection of tricky presentational features the designers had included that weren't directly implemented in FrameMaker, such as partially reversed-out headings (the section numbers, figure, program and table titles), graphical rules that do more than just go above or below a paragraph (see Figure 6 later in this article), complex table designs (see 'Best Practice', Figure 7), and the fore-edge tabs, which move down the page edge as the chapters and appendices increment. I described how these tabs were done in *Mastering master pages II* in the Autumn 2006 issue of *Communicator*, so I won't detail them again here: the key was to link the TabSpace font, in which the width of each 'character' is proportional to its ASCII value, to the chapter counter.

I will describe how these three challenges were met in the order I've listed them, although in reality they were tackled in the reverse order; we had first to ensure that all the design features were achievable, in case any had to be dropped and the design revised. In practice, very little fine-tuning of the design proved necessary.

Constructing the EDD

There was one further challenge I've not yet mentioned: this project was my introduction to structured FrameMaker. To some extent this naivety was an advantage, but in other areas, such as constructing list elements, I needed expert help. My first step, therefore, was to buy a training package on EDD design. As I'd been using unstructured FrameMaker for over a decade, structured FrameMaker, although challenging, came as something of a pleasant surprise.

Once I'd opted to create an EDD from scratch, the second decision was how to control formatting. In structured FrameMaker it is possible to include formatting instructions in the EDD, to refer out of the EDD to a document or template's paragraph and character tags, or to use a combination of both. To make the structured

application as easy to understand as possible, I decided to control only structure using the EDD, and to place all formatting in the FrameMaker templates, invoking the required paragraph and character tags from the element definitions. The resulting EDD contained about 115 elements, although most of these were 'under the hood', grouped into the 21 high-level structural elements exposed to the authors (see Figure 1).

The corresponding templates used some 120 paragraph and 26 character tags, all applied under the control of the element definitions in the EDD. The mapping of function to paragraph and character tags was more extensive than might normally be used for a FrameMaker template. This was partly to do with the relative complexity of the design, and partly to achieve a 'clean' mapping of elements to paragraph tags in the EDD with minimum reuse of function and/or style overrides. There were also a number of paragraph and character tags that existed solely to implement parts of the design functionality. I prefixed their names with a tilde '~', both to indicate that they should not be selected by authors and to move them to the bottom of the relevant palettes.

The ability to use container elements to group simpler elements proved to be vital when programming around some of the challenges posed by the book design: see *Reversed headings* and *Complex graphical rules* later in this article.

Point and click writing environment

This proved the easiest part of the project. Some years previously I had discovered the very useful range of FrameMaker plug-ins produced by SiliconPrairie Software (www.siliconprairiesoftware.com). One that I'd never made much use of was Auto-Text: this enables you to define a set of named text or graphical items, which then appear on their own menu and can be inserted into the current document by selecting them. The items are drawn from a (FrameMaker) configuration document that is read when the application starts up. To my surprise and delight, it turned out that Auto-Text could be used just as easily with structured elements as for unstructured content. The resulting configuration document is not, of course, a valid structured document, as it consists only of a sequence of unrelated elements, but that doesn't matter. Nor is the Auto-Text menu context-sensitive, but this turned out not to matter in practice either: the key feature was the ability to insert groups of elements that formed complex structures into a working structured document with a single mouse click (Figure 1).

Detailed design challenges

This section describes some of the detailed presentational challenges and how they were overcome.

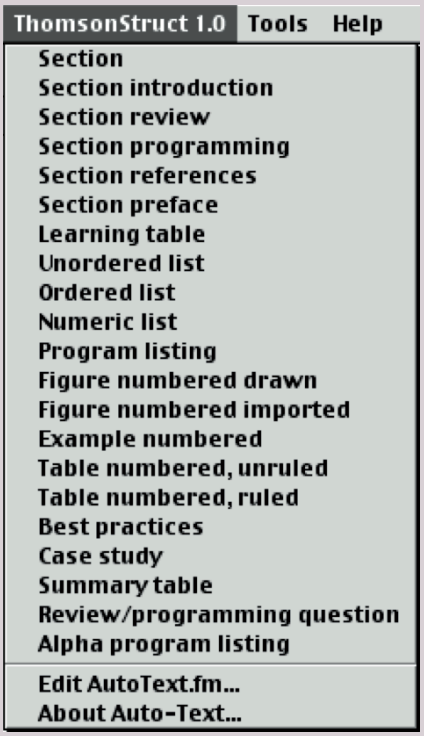

Figure 1. The Auto-Text menu, presenting high-level elements for insertion

Reversed headings

The recent release of Version 10 of FrameMaker now offers coloured backgrounds to text, but this wasn't available to us at the time. A key feature of the design was the use of *partial* white-on-colour headings: see the book's 'look inside' view on Amazon and Figures 4 and 5. Finding a way of creating these caused a great deal of head-scratching, and some ingenious suggestions from FrameMaker gurus such as Bernard Aschwanden of Bright Path Solutions and Hayden 'Document' Jones. The obvious method of using unruled one-row tables ('obvious', as FrameMaker allows table cells to be shaded) posed some nasty table-of-contents issues, and tables are cumbersome in structured FrameMaker. I tried placing the autonumbers in an inline anchored frame within the heading, but this gave problems with cross-references: both methods just required too much manual adjustment to get them to work acceptably.

It was Hayden Jones' idea of placing a graphic from a reference page 'behind' the text using negative leading (vertical spacing) that finally solved the problem. This method has the advantage of combining the autonumber and heading into one: the autonumber (only) is in white, with an opaque graphical 'backdrop'. The only disadvantage of this approach is that the size of the backdrop graphic is fixed and does not scale with the autonumber (and the page has to be manually refreshed if the heading is edited, an old FrameMaker bug). Overall, this seemed the best compromise. I 'solved' the problem of the width of the reference-page graphic not growing

Element (Container): TitleHead
General rule: <EMPTY>

Text format rules

1. **Count ancestors named:** Section
   If level is: 3
   Use paragraph format: ~NullCFlag
   Else, if level is: 2
   Use paragraph format: ~NullBFlag
   Else, if level is: 1
   Use paragraph format: ~NumberFlag
   Else
   1.1. **If context is:** Title < Chapter
   Use paragraph format: ~TitleOffset
2. **If context is:** Title < (SectionProgramming | SectionReview)
   Use paragraph format: ~NumberFlagEoC
3. **If context is:** Title < (SectionReferences | SectionPreface)
   Use paragraph format: ~NullBFlag

Figure 2. The element definition for the TitleHead element

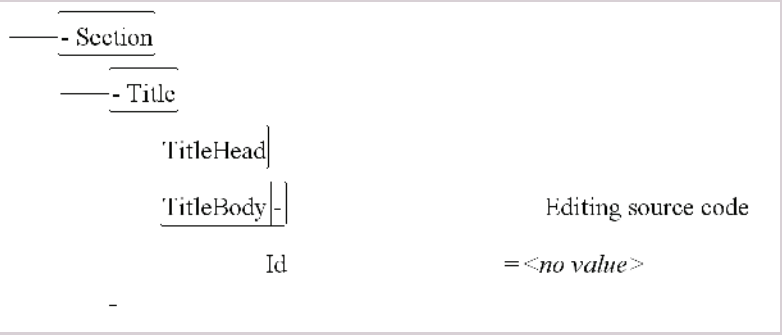

Figure 3. The container element Title, grouping TileHead and TitleBody to form the reversed-out heading

Figure 4. The resulting heading with reversed autonumber

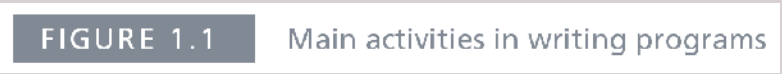

Figure 5. The same technique used for a figure number

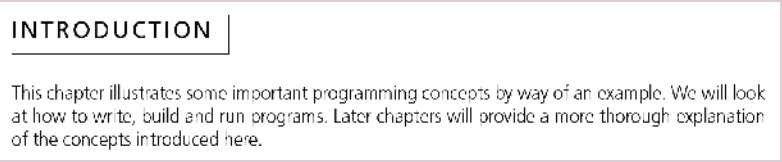

Figure 6. The 'Introduction' section heading

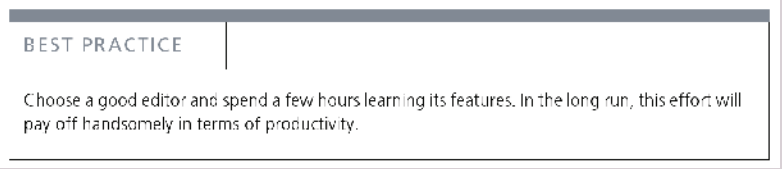

Figure 7. The 'best practice' call-out, a FrameMaker table

with the width of the autonumber by using a separate paragraph tag with a wider graphic for numbers greater than 10 — one of the few manual overrides needed. I could then 'bolt' the reference-page graphic together with the title paragraph using a container element, as shown in Figure 3 for a **Title** element. This element is a container that includes an empty paragraph to hold the graphical backdrop, the **TitleHead** element, plus a paragraph to hold the title itself, the **TitleBody** element.

Figure 2 shows the element definition for **TitleHead**. The important thing here is the invocation of the paragraph tag **~NumberFlag** (highlighted) for the level 1 headings. This 2-point tag, positioned *before* the title paragraph, uses the paragraph 'frame below' feature to insert the background graphic from the reference page, and negative below-paragraph spacing to position it 'behind' the white text. This works in conjunction with the corresponding paragraph tag for the heading itself – applied by the **TitleBody** element – which uses the same negative vertical spacing above the title paragraph. Together these produce the effect shown in Figure 4. Exactly the same technique produced the other reversed headings, such as those for figures (Figure 5).

Complex graphical rules

The book's design called for numerous ruled objects; in all but one case it was possible to implement these using FrameMaker tables, for example the 'Best practice' table shown in Figure 7; these occurred frequently throughout the book. The EDD's definition of this table is too lengthy to include here, but its element structure is shown in Figure 8. The 'BEST PRACTICE' text is inserted using the paragraph tag's autonumber field, the tag itself being inserted using a context rule.

The original design also called for the many examples of program code – using text insets – to be enclosed in ruled frames. This was the only aspect of the design that proved to be impossible to implement cleanly in FrameMaker, the problem being code examples that flowed between pages. In the end we compromised by including rules above and below the code examples using container elements, removing the need for another table element.

The 'all but one case' of ruled objects referred to above was the (unique in this design) presentation of the title of the chapter introductions, as shown in Figure 6. Again, a lot of experimentation was involved in getting this to work: the eventual solution was essentially the same as that used for the reversed text in headings described in the preceding section. However, in this case the 2-point paragraph containing the graphic had to be positioned *after* the title paragraph to get it to display correctly.

Complex table designs

I've touched on one table above in the context of graphical line rules. Custom ruling and shading in tables allow a lot of design flexibility in creating complex objects in FrameMaker. Our book's original design included other call-out objects, such as the chapter summary table shown in Figure 9, as well as a 'case study' table, but these were not used in the final books as the authors didn't need them. They proved to be relatively easy to implement as FrameMaker tables.

The blue table 'border' shown in Figure 9 is actually part of a tinted page background. Each chapter concluded with review material and exercises that were distinguished from the remainder of the material using tinted pages. I implemented these using custom master pages, applied automatically by the StructMasterPageMaps table. This was triggered by the review and exercise section header paragraph tags, although the corresponding elements would have worked just as well.

Documenting the design

The documentation for the writing environment, its associated EDD and FrameMaker template (the components of the structured application) provided detailed instructions for using the application and listed the purpose of each element, paragraph tag and character tag. I grouped it into four major sections: using the templates, a description of the 'presentation layer' (tags), a description of the 'structure layer' (elements), and detailed notes on special features such as the automatic fore-edge tabs. It ran to 44 pages. This also provided a very useful *aide memoire* for me, enabling me to pick up the details quickly after breaks in work. I also provided wrapping tables for the books' generated files (table of contents, list of figures, list of programs, index) so that they could be structured if required.

The only deliverable not yet mentioned was an unstructured version of the application, provided so that the design could be used in books that didn't use structured FrameMaker. This used the FrameMaker template alone, making extensive use of the Paragraph Designer's 'next para tag' feature to ensure that the composite paragraph sequences that were grouped using container elements in the structured application would be inserted in the correct sequence in the unstructured version.

In conclusion

I felt that this would be an interesting case history to end this series, as there were few, if any, of FrameMaker's features that it didn't use, so the title *Pushing FrameMaker* is I hope justified. The benefit for me was that it provided a 'baptism by fire' to structured FrameMaker.

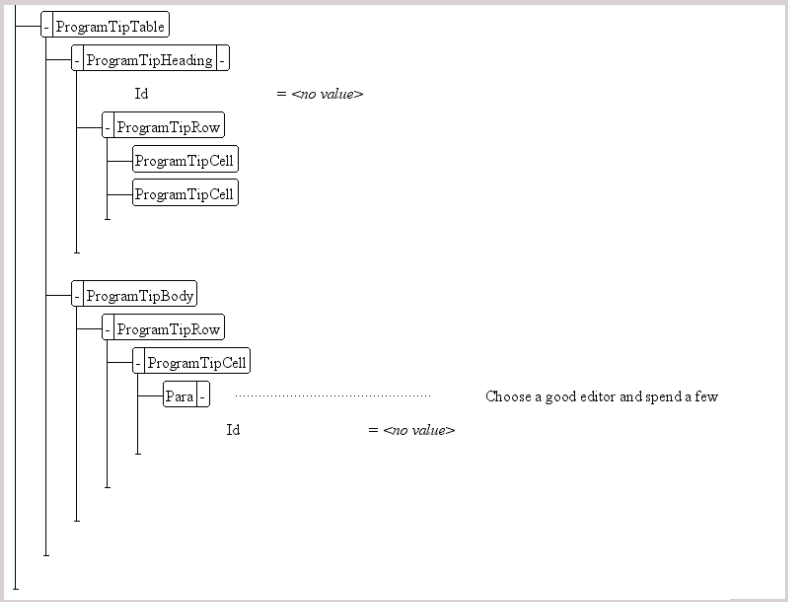

Figure 8. The elements that compose 'best practice' table

Figure 9. The chapter summary table

And finally…

I took over this series, so capably started by Jane Dards, in the Spring 2006 issue of *Communicator* and have been involved with it since then. I would like to thank our many other enthusiastic contributors: Terry Smith, Russ Ward, Tammy van Boening, Lynne A. Price and Andy Lewis, and of course our ever-patient editors, Marian Newell and Katherine Judge: it's been a pleasure working with you all. C

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Reference

To see the final book from the design discussed in this case study, go to tinyurl.com/4745l9e. If that does not work, the full URL is www.amazon.com/Java-Actually-Comprehensive-Primer-Programming/dp/1844809331/ref=sr_1_8?ie=UTF8&s=books&qid=1295539503&sr=1-8.

Communicator: the copyediting process

One of the stages in producing *Communicator* is the copyediting stage, Tony Eyre describes how he copyedits some of the articles that appear in our quarterly journal.

I am one of the two volunteer copyeditors that help Katherine (the Editor) get your quarterly issue of *Communicator* ready for publishing. So what is copyediting and how does it fit into the overall *Communicator* production process? I can only really give you my take on the job, and how I carry it out. I see the role as looking at articles written and submitted to the Editor, and making sure they are written well enough to communicate the writer's message to you, the wider audience. I do this by the obvious process of reading and 'marking up' the piece to clarify/correct/query the text where I feel it needs some help.

How does the process actually work?

A few weeks before *Communicator* is due for issue the Editor alerts me and the other copyeditor, by asking us to confirm our availability during a defined two-week period, usually a couple of weeks to a month ahead.

Provided I am available when requested, articles then begin to arrive, in batches of approximately six, with a week's grace for completing my checks and returning my mark-ups to the Editor. Of the batch of articles I receive I tend to look at the shorter ones first, with the intention of turning them round fairly quickly so that they can be returned as soon as possible to enable the Editor to progress them towards inclusion in the journal, while I tackle the longer (and usually), more time-consuming articles.

Step one

On opening up an article, the first thing I do is check if Word's track changes feature has been left on by a previous reviewer, for anyone not aware of this feature, any changes made are apparent by 'callout' boxes showing what was changed, and sometimes, who made the change. I like to start my part of the process with a clean sheet (so to speak) so I navigate to the Track Changes dialogue menu and select 'Accept All'. This makes the changes permanent and takes off the mark-up comments, leaving the document looking like nothing had ever been done to it. I always do accept all the previous changes as I will be reading through and should, therefore, spot anything I don't agree with as part of that process.

Step two

The next thing I do is make sure Track Changes is switched on (I do this by keying in a small change and checking that Word highlights the change in red, with a call-out identifying what was done), I then carry out a 'Save As' adding my initials to the existing file name to enable both me and the Editor to easily identify the file as one that I have worked on.

Step three

The next step is to have a quick scan down the document to check that the body text font style and size are set to Lucida Bright 8.5. At this stage I also have a look at any illustrations and check they are rendering correctly (that is, I can see them and they are clear and sharp). Sometimes the Editor decides to leave images out as they can be very memory-intensive; in this case, there will usually be an empty frame and title to show where the figure will be positioned in the finished article. Where there are 'proper' images it is the copyeditor's job to check that they are appropriate to the text and are referenced at least once in the body of the article. Other checks that can be carried out at this stage are to scan through and make sure the piece has proper paragraphs, headings and sub-headings, and that one space after a full stop has been applied, all in accordance with the *Communicator* house style guide.

Step four

The next job is to start reading; remember this is with Track Changes switched on so that any changes I do make are easily identifiable, enabling me to re-trace my steps later and amend my amendments if I feel it's necessary, and ensuring that the Editor can see what I have done and accept (or reject) my changes just as I did when I initially received the piece.

My philosophy

My philosophy for copyediting is:

- Check the English is correct but don't re-write too much. I'm not too proud to take advantage of Word's built-in spell and grammar checker and I always consider sections highlighted by the red and green squiggles for correction.
- Insert comments only where absolutely necessary to make suggestions, ask questions or explain what I've done and why.
- Above all, make sure the article being checked communicates to the reader; this means not only through the words but by the appropriate use of figures and tables.

Finished

When I've finished the edit I put the article away for a day or two while I work on something else. I can then approach the piece again after a break with a fresh eye for a final check. Once that's done, it's off to the Editor. C

Tony Eyre MISTC BSc APM(P) lives in Derbyshire and works as a project engineer at Rolls-Royce in Derby. After an early career in the steel fabrication industry, in the mid-1980s he trained at Blackpool and Fylde College and became a technical communicator, working for several companies before joining Rolls-Royce in 1991 where he has been ever since. In 2000 he turned to project management rather than writing. In his spare time he is a motorcycle observer with the IAM (Institute of Advanced Motorists).

The Adobe technical communication Colum(n)

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

The Adobe Technical Communication Suite is more than just a collection of powerful applications aimed at technical communicators. It includes integration between the applications not available to users buying the individual applications. One area of integration is the ability to create an Adobe Captivate movie inside an Adobe RoboHelp topic.

On your marks!

When an Adobe Captivate movie is published, a set of files are output:

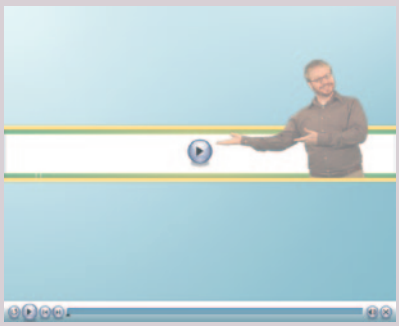
- **.SWF file**: This is the Shockwave Flash file that is opened when viewing the movie.
- **standard.JS**: A JavaScript file required to run all Adobe Captivate movies.
- **.HTM file**: This acts as a container for the .SWF file.

Creating a movie from inside Adobe RoboHelp is as easy as clicking on a toolbar icon. This opens Adobe Captivate allowing you to record your movie. The beauty of this approach is that you don't have to worry about the publish location; this is automatically set to your Adobe RoboHelp project folder. On completion, all the files listed above are automatically imported into your project. If you don't have the Adobe Technical Communications Suite, you can just import the .HTM file into your Adobe RoboHelp project which imports all the other files.

Get set!

When inserting a movie, the default behaviour is for it to start running as soon as the Adobe RoboHelp topic is displayed. Now call me fussy, but I want the user to have control over when, or indeed if, they watch it.

I recently had a conversation with other users on this very topic and we came up with the following options.



Adobe Captivate movie complete with a Start button

Option 1: Easy peasy Lemon squeezy!

First up is a hyperlink to the Adobe Captivate .HTM output file from inside an Adobe RoboHelp topic. I have used this approach in the past, with the link opening in a new window. Such an approach is particularly useful if you use Adobe Captivate's full screen output option.

Although the link idea works, this is a somewhat simplistic and clunky solution. It also means that once the link is activated, the movie starts. In other words you haven't solved the initial problem, just found a way to delay it occurring.

Option 2: Dropping down!

A similar solution is to place the link to the .HTM file inside a DHTML drop down inside your Adobe RoboHelp topic. With this approach the DHTML drop down acts as a link, with the actual link inside it acting as the start button.

Once again this solution works but has similar advantages and disadvantages to the previous option.

Option 3: Clickity click!

Another approach is to add an additional slide at the start of your Adobe Captivate project with a click box. Set the click box to only continue when the user clicks on it.

This solution works well giving the user full control over when they proceed. However, it does mean having to edit the Adobe Captivate project, republish its output and import the amended .HTM output file into your Adobe RoboHelp project.

Option 4: A personal preference!

You'll have noticed I said earlier that Adobe Captivate publishes movies *by default* to start automatically. This can be changed as follows:

- In Adobe Captivate click **Edit** > **Preferences**.
- Click on the **Start and End** preferences.
- Deselect the **Auto Play** option.
- Click **OK**.

With this option deselected, movies are published with a Play button, which must be clicked by the user for the movie to start.

This neat solution gives the user full control in a familiar format. The problem is that the preference applies to all future movies.

Go!

Which option is best? As is normally the case in such matters, it depends on your requirements. My personal favourite is option 4. The only issue is that the preferences need changing if you need to override the default behaviour.

I did uncover a potential fifth option which would work well in such circumstances; however, it seems to only work in some movies. I've yet to nail down exactly why it doesn't always work but for completeness, here it is.

You can manually edit the Adobe Captivate .HTM output file to add the following line to the list of parameters:

```
<param name="play" value="false" />
```

I admit that manually editing a file is not to everyone's taste. If you do try this approach, I'd be interested in hearing your results.

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.
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Tw: @robocolumn

Grammar books

Thinking of buying a grammar book? Jean Rollinson offers some suggestions.

In this pre-Christmas issue, I thought I would give a quick review of the grammar and other reference books that I find useful. Some are serious, others less so, but you might find a useful addition to your Christmas list. The reviews are in no particular order.

A Dictionary of Modern English Usage

H.W. Fowler

This was given to me as a joke Christmas present in my first job as a technical communicator, but actually, it is still a useful reference. However, you need to be careful that the usage is still relevant in the twenty-first century, as some points are now effectively obsolete through the gradual change of the English language.

New Oxford Spelling Dictionary

This is the bible when it comes to word breaks. Probably less relevant than it used to be, before word processors and other software started deciding where words should break. Nonetheless, it is still quite a useful book for checking that what the software does is correct and reasonable.

Oxford Style Manual

This is the UK equivalent of the *Chicago Manual of Style* and covers much the same ground but for the UK. Some sections are aimed at publishing professionals rather than technical communicators, but nonetheless it contains useful information.

Penguin Guides

At some time in the dim and distant past, I acquired some Penguin guides. They include the following:

The Penguin Guide to Punctuation

R.L. Trask

This useful little book begins with the wonderful chapter, 'Why learn to punctuate?' A question that I am sure resonates with my family. Having explained why correct punctuation is important, the book goes on to cover the basic end-of-sentence punctuation: full stop, exclamation mark and question mark. The next chapter is devoted to the comma, which really does deserve a chapter to itself. The book then moves on to the marks that people seem wary of using: colon, semicolon, apostrophes, hyphens, dashes and quotation marks. The book ends with a look at how to punctuate various standard forms of writing.

The Penguin Guide to Plain English

Harry Blamires

This is another useful guide, with plenty of examples of good and bad English to help improve your writing.

The Penguin Dictionary of English Grammar

R.L. Trask

This is probably the most thumbed through of my reference books. As the name suggests, it is an alphabetical guide to English grammar from 'abbreviation' to 'zero determiner' through 'active voice', 'homograph' and 'passive voice'. It is an excellent quick reference, if you know the right term to look up; however, if your grammar education is as minimal as mine is, you may struggle to find the right page.

The New Penguin Dictionary of Abbreviations

Although the Internet makes searching for definitions easy, this dictionary still has its place as a handy reference for abbreviations that you don't know or are not quite sure about. It is also more helpful with context than some Internet searches can be. And if you're anything like me you'll read through several pages just out of interest (and perhaps to expand your general knowledge: you never know when knowing that DMSO stands for dimethylsulphoxide might come in useful).

Practical English Usage

Michael Swan

Even though this book is aimed at non-native English speakers, it has plenty of useful information for native speakers too. It is well laid-out and the information is easy to find and understand.

The Chicago Manual of Style

Particularly useful if you are writing for the US market; it covers everything that writers, editors and publishers need to know. Part 1 is bookmaking, part 2 covers style and part 3 looks at production and printing. Obviously, the style section is of most relevance.

Troublesome Words

Bill Bryson

Currently published as *Bryson's Dictionary of Troublesome Words: A Writer's Guide to Getting It Right.* Another of my well-thumbed books that has taught me so much. For example, before I started editing I wasn't aware of 'principal' versus 'principle'. I am sure there are other commonly confused words that I used to misuse, but this book has set me straight. Three cheers for Bill Bryson!

Who's Whose

Philip Gooden

Another book of easily confused words, but it covers more words that are often confused but are not necessarily homophones.

Write Right!

Jan Venolia

The subtitle is 'A Desk Drawer Digest of Punctuation, Grammar and Style' and, like a familiar advert, it does exactly what it says on the tin. It also has some great cartoons. C

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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 and training cannot 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 get published in the next issue of *Communicator*.

Surrendering the copyright

Paul was excited when he first received the offer to contribute a chapter to a new book about technical communications.

Paul was an experienced technical communicator – he had recently worked abroad on a lengthy and complicated project for an international engineering company. The editors compiling the new book were two well-known university lecturers, looking for contributions that explored real work situations in technical communications from an international perspective. Paul was grateful that his proposal had been accepted. Plus, he would be paid for his efforts.

"There will also be an opportunity for revenue share," Ian, the university lecturer who was compiling the chapters in the book had indicated when sending out his request to one of the online forums, asking for contributions.

During the months that followed, Paul put considerable effort into his chapter, writing and rewriting the drafts, to take into account the comments of the editorial team.

His chapter in the book described his unique experience as a technical author, working on a complicated international engineering project.

The book was to be published by a well-known and reputable publisher in the scientific community. It would be read by students of technical communications, practitioners and academics in this field.

Finally, after several months of working with Ian, Paul's chapter was accepted for inclusion in the final book version.

"We are delighted to be able to include your chapter in our publication," Ian told Paul, "and thanks for all your hard efforts. We are just waiting to send out the contracts from the publisher."

Some time later Ian sent Paul a copy of the contract from the publisher, for Paul to sign.

That night, Paul reviewed the contract and was dismayed when he saw the following clause:

The Contribution shall be considered a work made for hire to the Publisher, and the Publisher shall own the copyright and all of the rights comprised in the copyright. The Contributors hereby transfer the full and exclusive rights comprised in the copyright, including but not limited to the right, by itself or with others, throughout the world, to print, publish, republish, transmit and distribute the Contribution and to prepare, publish, transmit and distribute derivative works based thereon, in all languages and in all media of expression now known or later developed, and to license or permit others to do so.

Paul paused after reading the clause, sighed and asked himself "Does this mean I am being asked to surrender all rights to my own story?"

He read further, and stopped when he came to the following clause:

In full consideration of the rights in the Contribution granted to the Publisher herein, the Contributors shall receive without charge one free copy of the published Work in which the Contribution appears.

Paul was taken aback. There was no mention of the revenue share, alluded to at the start of the project. All he would receive in return for all his efforts and surrendering his rights to the story would be a free copy of the published book!

Paul's dilemma

That night, Paul debated with himself whether to withdraw his contribution to the book.

It was true that he often contributed pieces to various magazines for free, and also did a free blog. But this seemed different.

First of all, he was being asked to give up *all* rights to his own work in exchange for a single copy and no share of the revenue. This didn't seem right to him.

Secondly, the university lecturers would be receiving a revenue share of the profits from sales, which didn't seem fair. They would also be benefiting from the recognition that came with publication, and, they were already receiving a salary from the university for their time and efforts.

The publishers would be making a profit on the sale of the book, and, with all rights included, could reuse his story as they wished in the future.

Finally, surrendering all rights would mean that Paul would be unable to use his own story in the future.

On the other hand, Paul had put considerable effort into the chapter, and it would be a shame if his contribution were not included. Other benefits might arise in the future from publication, even if there was no remuneration at this stage.

Paul wrote back to the editors, explaining his concerns. He was told that this was standard policy with academic books such as these, which did not generate much revenue for the publishers. They had tried to obtain a revenue share for contributors, but the publishers had been unwilling. Most contributors were just grateful to have their work published.

"Most of us are just happy to see our work published and be able to contribute something of benefit to other technical communicators," Ian had written back to explain. "It's the only way we can get books like these published."

What should Paul do? Should he agree to the contract conditions or withdraw his contribution?

Warren Singer MISTC
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Real-life responses

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

Summary of Lilly's dilemma

Lilly had been working here for eight months as the only female in a male-dominated technical publications department. She had been passed over for opportunities for engaging in new projects, which had been assigned to a younger, more junior male writer and had been given many PA duties. Lilly felt she was being unfairly discriminated against because of her gender and her secretarial experience from a previous role. The position was not all she had hoped from her career in technical communications. Should she leave and apply for another position?

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

Editor's note

When you start at a new organisation, you should have a clear understanding of what your role is and what type of tasks you will be expected to do. Your understanding of your role may be based on the job advert or initial interview when you applied for the role – but preferably, you should have a written job description. It is worth noting that many organisations do expect their technical communicators to be able to undertake a wide variety of tasks related to their role – and that some of these tasks may be more administrative in nature.

Secondly, it is important to have a clear career path for yourself within the organisation – so that the expectations as to your career development are clear to both sides. Bear in mind that managers need to balance the individual aspirations of their team members against the needs of their current projects and the availability and skills of the team. However, if you are consistently not being given reasonable opportunities to be involved in new projects – and do the role that is defined in your written job description – you might be justified in querying this.

In the UK, legislation such as the Equality Act 2010 provide regulations as to discrimination in the workplace, based on race, gender or disability. EU legislation prevents discrimination based on country of origin within the EU. This is a complex area, and if you feel you are being discriminated against you are advised to seek legal advice.

John Hooley

To be frank, I don't think that Lilly has a dilemma; Judith is the one with the problem.

By recruiting Lilly as a Junior Author and using her as a PA instead, she has opened herself up to sex discrimination and constructive dismissal charges. What an awful (if not untypical) manager.

Lilly has done the correct thing by approaching the line manager first, but she should have done it as soon as Ben got the new assignment. As she has been fobbed off by Judith, she should go through the company complaints procedure to get it sorted out. In the meantime she should be looking for another position (she will not be able to continue in the department once Judith has been reprimanded or vindicated by her bosses).

Judith's attitude and behaviour show her complete lack of respect for Lilly and her aspirations.

Samantha Katz

It is a problem for Lilly, but it seems to me that there is another side to this story. These types of situation are rarely black and white – I should know, having had a similar experience myself in the past.

Lilly is benefiting from being employed as a technical author – she can put that on her CV. So, perhaps being patient and accepting current conditions in the short term might pay off in the long term, when Lilly starts looking for her next position.

I would also say that there are benefits to doing some of the project co-ordination work described in the story, such as setting up meetings and contacting suppliers – even if it seems mundane and secretarial. These types of task form a good springboard for going into future managerial or team leader positions.

So all in all, although it is easy to be outraged and cry 'discrimination', I would say that it is always better to be pragmatic and have the attitude 'How can I make the most of my current situation?'.

I should conclude that I too went through a period at one company where I felt treated as a glorified secretary. I was much younger then, and over the years have gained experience and am now in a managerial role at a well known company. C

Over to you

Write to dilemma@istc.org.uk

Tell us how you think Paul should solve his 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.

Technical Communication for newcomers

Technical Communication Process and Product

By Sharon J. Gerson and Steven M. Gerson
ISBN 978-0-13-137734-9, Prentice Hall, Seventh Edition (2011), Paperback, 704 pages, £57.99. Reviewed by David Farbey FISTC.

The problem for any UK reviewer of any US technical communication college textbook is that the gap between the US and the UK when it comes to technical communication education is as wide and as deep at the Atlantic Ocean itself. In the US, education in technical communication is regarded as a required course for students of science, engineering, business and many other disciplines. Like similarly titled textbooks on technical communication by authors such as Rebecca E. Burnett or Paul V. Anderson, this book is designed for students on such a course who would typically be in their late teens or early twenties. Sadly, I know of no institution in the UK that regards technical communication as a required subject or which offers any course that might require a book such as *Technical Communication Process and Product*.

The breadth of what is considered to be technical communication may surprise some UK readers. Expected topics such as writing instructions and creating online help are covered, but account for just two of this book's nineteen chapters. Other chapters look at persuasion, using visual aids, getting a job, using social media, and writing both short, informal, and long, formal reports.

The idea that writing is a process is central to the whole of this book, as its subtitle implies. Writing, say the authors, should be seen as a three-stage process, which they refer to as Prewriting, Writing, and Rewriting. (You can think of these stages as researching, drafting, and revising if you find the Gersons' terminology a bit too…well, American.) The writing process therefore gets a chapter of its own and is featured as a significant element in subsequent chapters as well.

To give you an idea of the thoroughness with which the Gersons approach their subject, I will take you through the sections that make up one typical chapter, "Technical Descriptions and Process Analyses". The chapter opens with a case study under the title "Communication at Work". In this instance it describes how a software company representative prepares a detailed proposal to meet the specific needs of a potential client. The body of the chapter continues with textual definitions and examples of technical descriptions and process analyses, supported by references to real examples on the web. The Gersons give directions as to the best way to complete these writing tasks, and also provide a number of real examples in the chapter (some of which extend over several pages) with commentary and callouts showing where their principles are exemplified in the text. The chapter also has a couple of "Spotlight" sections which talk about individuals and how they implement the practices described in the chapter in their jobs. (Each individual in these sections is presented as a real person, but the absence of any reference or acknowledgement leads me to think that they may all be just fictional personas.)

The chapter includes a "Technology Tip" specifically showing how to do something using Microsoft Word 2010 (in this case, how to add a callout to an illustration). No-one can accuse the Gersons of not being up-to-date. There is also a useful checklist which summarises the main points of the chapter, a section on "The Writing Process" which relates the different stages of writing to the subject matter of the chapter, and a list of "Chapter Highlights". This being a textbook for classroom use, the chapter ends with an "Apply Your Knowledge" section that includes suggestions for "Individual or Team Projects", a "Problem-Solving" exercise, a "Web Workshop" and a number of "Quiz Questions" to aid revision.

Clearly, someone who had no prior knowledge and who wanted to gain a broad understanding of technical communication could learn a great deal from this book. But without the support that interaction with other students and with a tutor can give, there is a limit to what can be learnt from this sort of book on its own. However, if you think a textbook might be a useful resource to help you improve or broaden your professional practice, then I would recommend *Technical Communication Process and Product* for its thorough approach and its inclusion of the latest topics of interest. If you're thinking of using this sort of textbook in a class here in the UK, then (wearing my ISTC Education hat!) I want to hear from you right now!

Rating: ★★★★☆ C

About the book's author

Sharon J. and **Steven M. Gerson** are dedicated career professionals who have a combined total of 75 years teaching experience at the college and university level. They have taught technical writing, business writing, professional writing and technical communication to thousands of students, attended and presented at dozens of conferences, written numerous articles and published several textbooks. Both Steve and Sharon have been awarded for teaching excellence and are listed in Who's Who Among America's Teachers.

WG 2 meets in Sydney

Richard Hodgkinson, Convenor of Working Group 2 (Systems & Software Documentation) reports from Australia.

This year's second meeting of ISO/IEC JTC 1/SC 7/WG 2 – Systems & Software Documentation, was hosted by Standards Australia in the heart of Sydney, between 31 October and 2 November. The meeting followed the annual conference of the New South Wales chapter of the Australian Society for Technical Communication where several WG 2 experts provided presentations (report on page 16).

Attending the WG 2 meeting were Daryl Colquhoun (Australia/ASTC), 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).

Spread around the shores of Port Jackson, Sydney is a wonderful, vibrant city with many places to visit: the beaches at Bondi and Manly, the Opera House, Harbour Bridge, Darling Harbour, China Town… the attractions are endless. Spring had arrived, and the Jacaranda trees provided bursts of bright purple blossom through the cityscape and it was strange to see Cockatoos and Parrots flying about.

And so to work!

Since the previous WG 2 meeting in Paris in May 2011, several of our new suite of standards in development have progressed further…

ISO/IEC/IEEE 26511

At the time of writing, the Final Draft International Standard (FDIS) ballot of 26511 (*Requirements for managers of user documentation*) was closing and indications are that it will be approved. We expect it to be published in early 2012.

Sydney

ISO/IEC/IEEE 26515

Similarly, the FDIS ballot of this standard (*Developing user documentation in an Agile environment*) was closing and indications are that it will also be approved. We expect it to be published in early 2012.

ISO/IEC/IEEE 15289:2011

Following the successful FDIS ballot for the revision of this standard (*Content of systems and software life-cycle information products (Documentation)*) it has now been published by ISO.

The 2651X series

With the publication of 26511 and 26515, our suite of revised and new standards developed for specific users will be complete. The other standards in this series are:

- ISO/IEC/IEEE 26512:2011 – *Requirements for acquirers and suppliers of user documentation*,
- ISO/IEC/IEEE 26513:2009 – *Requirements for testers and reviewers of user documentation*, and
- ISO/IEC/IEEE 26514:2008 – *Requirements for designers and developers of user documentation.*

At this meeting, we discussed the revision of this standard, which will be due in 2013. If you have any proposals to improve or update 26514, please contact me.

Future documentation standards

During the meeting we continued our discussions on potential new areas of standardisation related to systems and software documentation:

- Revision of ISO/IEC/IEEE 23026:2006 *Recommended Practice for the Internet-Web Site Engineering, Web Site Management, and Web Site Life Cycle.* This standard was not originally developed by WG 2, and we have been requested to consider taking over the maintenance as its original Working Group has now been disbanded. WG 2 agreed to take on this work and our plan is to revise it and rename it as *Design and management of Web sites for systems, software, and services documentation.*
- *Content management for product life-cycle, user, and service management documentation.* This subject was discussed at length and we now plan to develop a standard, probably as ISO/IEC/IEEE 26531. The scope and structure were drafted and the necessary documentation is being prepared to initiate the development.
- Mobile devices. We discussed documentation for this area and concluded that any specific requirements and recommendations will be incorporated into the 26514 revision (see above).
- Cloud computing. This environment is attracting a great deal of interest at present with the SC 7 Study Group reporting earlier this year. Our discussions concluded that there is not a requirement for a dedicated standard to address documentation in this area.
- A standard that would address embedded User Assistance. One option would be to prepare a technical report that would address this topic. However, the experts agreed that we would incorporate this into the revision of 26514, as an informative annex.

Software & systems vocabulary

ISO/IEC 24765 *(Systems and software engineering vocabulary)* was developed by SC 7/WG 22 and can be purchased in printed form from the BSI, or can be freely accessed at www.computer.org/sevocab.

A mobile phone version is now available from the Apple web site for 99 cents (US).

Where next?

WG 2 next meets on the South Korean island of Jeju in late May 2012. I will be reporting on that meeting in the Summer 2012 issue of the *Communicator.* C

Richard Hodgkinson FISTC
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Home alone: the joys and distractions of being wired for work

It's Saturday, so you'd think this wouldn't be a typical working day, but like a lot of freelancers holding down a regular Monday to Friday job as well, weekends are when the bulk of my writing work gets done.

As usual, it's my kids, six and four, that kick the day into life shortly after 6am. My previously failed attempts to keep the adults as well as children away from my Mac – "it's a tool not a toy!" – were earlier in the week given a boost by the shrewd purchase of one of those inexplicably addictive iPad things. No, I can't explain why a reduced functionality computing device should be so popular, but I have to admit I'm reluctantly as smitten with it as everybody else. The kids have about an hour before my wife insists they swap it for their breakfast. Meanwhile, I take the opportunity to fire up the Mac and browse my e-mail.

I whizz through the ISTC and Techwrl e-mail lists, then get caught up by a discussion in Quarkians – a LinkedIn group for QuarkXP users – on the relative merits of InDesign versus QXP. Surprisingly, given it's a Quark group, there's a lot of negativity about Quark, centred around the market saturation of InDesign. A lot of contributors are asking about the point of investing time and money in learning Quark when employers and clients seem to be universally demanding skills with InDesign. There's a long post on the typographical advantages of QXP that keeps me from getting down to any writing till after breakfast. The post doesn't really address the main complaint, but the group seems to think that InDesign is aimed at those who don't worry about the finer points of typography.

I'm a morning person, so I normally schedule the heaviest work tasks for first thing. However, my main task today is a screencast recording, and that requires the kind of quietude that will only come about by mid-morning, when the rest of the family head out for a shopping trip. I content myself in the meantime with drafting a post for my blog on Apple help and tips. When that's done, I head over to the Sheffield Hallam University e-learning site and catch up with what the other students on my MA Tech Comm course are up to. A lot more than myself, it seems. I have a lot of reading to catch up on, but that's business I'll have to squeeze into a weekday evening.

Eventually, I get down to doing some writing. A large part of my freelance work is producing instructional materials for a small English language school here in Bangkok. I write lessons, texts, exercises and answer keys for the Thai teachers during my Saturday writing sessions and put them into a DropBox folder on my desktop. If I'm lucky, I'll see the file updated later that day with a few questions or suggestions for revision. If I'm not lucky, it'll mean a face-to-face meeting with the school owner later in the week to go over the more difficult learning points. By 11am, I've loaded the Dropbox with a reading text and some comprehension questions. It's been a decent return on a few hours' work, largely because my e-mail has been quiet and the whole family is still marvelling at the novel wonders of tablet computing.

I take a break with a coffee and what should be a quick browse of the Guardian online. Before I know it, the clock is firmly announcing the start of the afternoon: it's 1pm. I console myself that this wasn't a complete waste of time: a news story on the 'Occupy Wall Street' protests looks like it could serve as the basis for a good comprehension text for next weekend's writing. I save the link to Diigo and decide to interpret the whole morning as being 'highly productive'.

With the house to myself, it's time to get the screencasting done. Having captured the video last weekend, my task today is to record the audio and polish the whole thing into a final product. I get the audio done in one take and clean it up in Audacity before importing the track into Camtasia. This is where my problems begin as I start trying to sync the audio to the video. After a while I realise the video needs some extra shots to fit the sound track. I get distracted by an e-mail alert from Amazon trying to sell me some tempting-looking books on data analysis and mining of the social web. I then record the few extra video scenes but in the process accidentally delete part of the audio track, have to redo it, re-edit a clip here and a clip there, then nudge a few things along the timeline to fit everything into place.

Meanwhile, I see a Growl notice notifying me that my Dropbox has been updated. I take a look with fingers crossed. Ahh. It's going to be a midweek meeting then. Oh well.

I return to the screencast and put in the finishing touches. I view the whole thing for what seems like the hundredth time till I decide only a fresh eye can reliably tell me whether any further adjustments are needed. So it's time to export and send to the client for feedback.

I spend the ten minutes it takes to produce the video looking over the day's tweets on #techcomm. As often, I get drawn to an ArsTechnica link and am wholly engrossed for a while until there's an automated "ding" from Camtasia. The sound tells me the video is done, but so is the day: turning to the clock I see it's inexplicably 5pm already. Before I know it, everyone's home and it's time to put the tools and the toys away for another day. C

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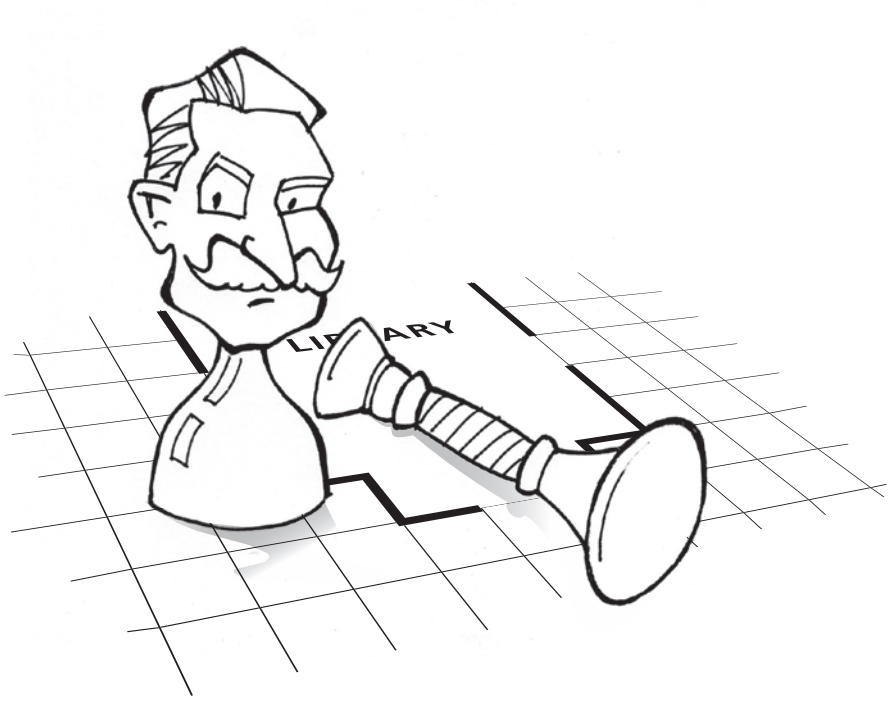

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