

# Writing successfully for everyone

Including accessibility in your documentation



# Communicator

The Institute of Scientific and Technical Communicators  
Spring 2011

Reviewing Adobe  
RoboHelp version 9

Understanding  
effective page layout

Working with MadCap  
Flare version 7

Learning to use  
more pictures





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# Communicator

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**cover** Woman reading a manual © Phil Stokes 2011







Welcome to the Spring issue of *Communicator*.

It's been a busy quarter and I'm so pleased to have a team of extremely keen and enthusiastic contributors for this issue, and the next. So, *Communicator* is thriving.

Before I start discussing the contents of this issue, I must give special thanks to Nick Robson copyeditor, for his additional help with this issue, I really appreciate it.

#### In this issue

As you can see from this issue, several new software versions have recently been released and we have reviews of Adobe RoboHelp version 9, MadCap Flare version 7 and PerfectIt. Further software reviews include an article about using Flare and Lingo, revisiting DocBook and inexpensive content

## Editorial

management systems for FrameMaker.

As there's more to technical communication than software, there's an article definitely worth reading about accessibility, which is a subject supported by the regular International Standards column. There are two articles that will hopefully inspire you to think about incorporating more graphics in your work. And, there's an interesting article about how your brain perceives layout.

There are two articles about Microsoft Word: the Editing column talks about the spelling and grammar checker, while another discusses creating macros to automate repetitive tasks.

The ISTC Council have been busy and there's the latest Education news as well as a summary of the recent ISTC survey.

If you'd like to be recognised for your work as a technical communicator, why not enter the UK Technical Communication Awards 2011? For more information, see page 55.

And, for those of you working in translation, there's an interview with Andrzej Zydron about translation server technology.

#### Feedback

We all appreciate receiving feedback about our work, especially if it's positive feedback. Each issue of *Communicator* contains articles that the contributors have worked hard to ensure that they're interesting, readable and clear. Why not get in touch with the contributor or myself

and say what you like about an article, how a related subject could be covered in the future or something else that's relevant to technical communication?

#### Events

The ISTC keeps in touch with worldwide technical communication events in two ways. We distribute copies of *Communicator* at worldwide events and we help promote events by carrying adverts. There are several advertised in this issue, most notably Technical Communication UK in September 2011, which I'll be going to and I hope to see you there. Happening a bit sooner is TCEurope in April and in June there's UAEurope. Conferences are a good way to keep up-to-date with our profession and learn new skills or network with like-minded people.

#### Finally

Technical communication is not just about tools. *Communicator* is always looking for relevant articles on other subjects. Maybe you're interested in publishing, localisation, indexing, e-learning, scientific communication, research or are working on an interesting project and would like to share it with the readers. If so, get in touch. I'm happy to hear ideas, suggestions and contributions.

Enjoy the Spring 2011 issue. **C**

**Katherine Judge MISTC**

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# Letters

## What kind of assistance do users need?

*Richard Truscott FISTC compliments the authors.*

I congratulate Matthew Ellison and James Windebank on a very useful and interesting article on User Assistance in the Winter issue. I was particularly interested in the Confirmation class of assistance questions and the suggestions they make (Guided help) for giving assistance. Their suggestions of a simulated environment could easily be done with a Captivate demo (show me). Providing confirmation can be done in tasks/procedures (tell me) if they are fully illustrated with screen captures.

However, both of these approaches seem a bit 'clunky' and have (as pointed out for demos) disadvantages. Lots of screen captures are time consuming to produce and take up lots of space in printed material, though of course they can be reduced to thumbnails or links in help.

I wonder if a system could be devised that provided the hints and tips that the novice user requires and can be turned off for the expert? Would Matthew and/or James be able to write a follow-up article with some practical advice on how to achieve guided help?

The article was a great contribution to *Communicator*, thanks for getting it published.

### *Response from Matthew Ellison*

The kind of Guided Help that Richard describes has been an interest of mine for a while now, and I have investigated

a number of alternative software tools that aim to provide such a facility.

For some reason, none of them seem to have caught on in a big way, which surprises me. I covered some of them in a conference presentation that I delivered a couple of years ago:

- [www.uatraining.eu/downloads/Guided\\_Help\\_AODC.pdf](http://www.uatraining.eu/downloads/Guided_Help_AODC.pdf)

I'd be happy to revisit this topic for a future *Communicator* article.

## Common Grammatical Errors

*Phil Stokes discusses articles and Asian speakers.*

As a long-time ESL (English as a Second Language) teacher in Asia, I'd like to suggest that there are two reasons why Asian speakers find articles difficult:

- they don't have articles in their own languages
- the rules for articles have multiple exceptions.

For example, there are exceptions to the rule mentioned in the Winter issue:

"the' functions to name a definite/known/specific noun". Think of

A: 'Where are you going?'

B: 'I'm going to the post office.'

In this case, the noun after the definite article need not refer to any particular post office. Also notice the absence of articles in expressions like:

- 'Let's have dinner.'
- and compare with:
- 'Let's go for a drive.'

Why is 'a drive' countable, but not a meal?

And yet, add a modifier to 'dinner',

and the article will reappear:

- 'Let's have an early dinner.'

There are no rules by which ESL learners can capture the difference between these uses. They have to learn the exceptions on a case-by-case basis.

As pointed out in the Winter issue, editors do need to be aware that articles present difficulties for non-native English speakers. However, in my experience, many Asian writers of technical English are highly competent and problems with articles — intuitively easy for the native speaker to edit — should not deter editors from commissioning them.

## Is it easy to find information in a manual?

*Steve Thompson MISTC discusses indexes.*

I enjoyed this article in the Winter 2010 issue. I wondered if the author has read Peter Schorer's book, *Zero-Search Time Computer Documentation* ([www.zsthelphelp.com](http://www.zsthelphelp.com)). He's keen on measurement and he loves indexes.

I often use synonyms in my indexes, because I feel they are a valuable learning aid. Especially as each company has its own jargon. My company "cleaned a virus". A rival company "disinfected a virus".

In my indexes, I include synonyms like this:

- disinfecting, see cleaning .... 99

I feel my entries provide a simple way to educate readers who were familiar with one term but have to re-learn new names for the same concepts. **C**



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## Presidential address

### Reasons to be cheerful: part 3

At a time when many in our profession are uncertain about their future, being flippant about our prospects is not helpful. On two previous occasions in recent years (hence 'part 3'), I have presented my view that overall our prospects are good: I believe we are (still) working in exciting times and that technical communicators have plenty to be cheerful about.

### Why the reprise?

Two recent projects that my colleagues and I have been working on might help to illustrate why the assertion is still relevant: compiling operation and maintenance manuals for security fencing, and transforming the way a large data provider supports its customers. Two enquiries from two organisations that couldn't be more different. Both operating in highly competitive and regulated markets and neither with an existing technical communicator. They were both doing it themselves (badly) and they could see that it was just going to get worse. They described what was wrong in different ways, with their own jargon, their own sense of 'we are special, our world is complex, how could you possibly understand?' It gave me so much pleasure to say to both (in effect) "Don't worry, stand back, let me through, I'm a technical author".

### More of the same, and then some

The encouraging sign I see, and I don't know why I am still surprised by it, is that many of the same things

that drove the need for technical communication expertise 10 years ago are still there. But there are also new trends that give us reason to cheer. As I write the list now, some look counter-intuitive and even contradictory:

- Products are becoming both simpler to use and more complex to maintain
- Regulation is increasing and affecting more industries
- Producers and users are getting further apart: complex supply chains
- Producers and users are getting closer: simple supply chains
- English is still the world language
- Using local language is increasingly important
- Customers expect better information about what they buy

There is not the space here to delve into why each of these helps our prospects, but I invite you to challenge me in person on any one of them. I also admit that some of these are more progressive than others – the prospect of your future career being driven by the need for manuals that meet health and safety regulations may fill you with dread – but technical communication exists as a response to specific needs. Some of those needs have been around for a while and some of them are new.

### Fortune favours the brave

If, as I suggest, technical communication exists as a response to specific needs, how do we avoid the risk of waiting for someone to tell us that they need us, and then no one does? Even worse, we wait for someone who used to need us to tell us they don't need us any more.

I take the view that there are more changes that are helping us than changes that are not. But to take advantage of them, we need to make the connection between what people need and what we can do to deliver it for them. But what that is may not be in your current job spec. It may not be using the toolset you have used for the previous five years. It may not be in the same industry you have been writing about since you were 20. It might need to be in 15 languages, or it might mean that others do the actual writing.

There are more and more reasons for people to need what we can do for them. If we can see the connections and adapt, we can continue to have plenty of reasons to be cheerful. **C**

**Paul Ballard MISTC**

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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 020 8253 4506 or [istc@istc.org.uk](mailto:istc@istc.org.uk).

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# Major Changes to ISTC Education Policy

In the Autumn 2010 issue of *Communicator*, I announced that the Institute was planning to introduce new guidelines for our ISTC Open Learning courses, including new rules for tutors and students, time limits for study, a revised syllabus, and a re-evaluation of accreditation for our courses. The general assumption behind my remarks at that time was that the Institute would continue to offer our Open Learning Courses more or less in the format in which they had been offered in the previous years.

Since I made that announcement, I have been involved in intensive discussions with other members of the ISTC Council, with course tutors and with our support staff from ASL. Our conclusions were that over the past four years:

- the number enrolling on the courses has remained lower than expected
  - the drop-out rate has been high
  - it has been difficult to recruit and retain tutors
- and, most significant of all,
- both the syllabus and the teaching methods are increasingly seen as outdated, and we have relied on the experience and expertise of our tutors to make the content relevant to our students in their working environment.

The ISTC Council has agreed a new and radically different approach to our educational offerings, which we now view as an integral part of our *Professional Development and Recognition* policy. We have decided that it is vital to offer opportunities for professional growth, not only to new entrants to the field but also to experienced practitioners. To this end, the ISTC plans to introduce a new modular education syllabus during 2011 and 2012.

A modular syllabus will allow individuals to choose from a variety of courses and build up 'education credits' that will, at a basic level, be no less valuable than the Open Learning qualifications, and that would also be the foundation for further achievement. We are also investigating the possibility of allowing members to create their own online portfolio as enduring evidence of their professional skills.

As well as developing our own modules based on material from the Open Learning courses, we hope to partner with other providers of training and education in our field to offer a range of development opportunities to all our members. We are still at a very early stage and have only recently begun discussions with possible education partners. (We would welcome expressions of interest from other potential partners who we may not yet have had the opportunity to approach.)

This is an ambitious policy but we believe it offers the best formula for making education and professional development relevant and valuable for all our members in the coming years. I am quite sure that many members may have insights and experience in training and education which they would be willing to share with us. I look forward to receiving comments and suggestions from members and as always, offers of help would be welcomed.

In the short term, we have already closed our Open Learning Courses to new students and have announced to our existing students that we will be holding the last exam sessions for our current syllabus in May and October 2011. Tutorial support for all students will end on 30th September 2011.

## Questions and Answers about the changes in ISTC Education Policy

**Question:** Why has the ISTC taken the decision to withdraw the Open Learning Course?

**Answer:** The ISTC wants to reform its educational provision, to ensure it remains relevant to technical communicators in the 21st century. Moving away from the existing Open Learning courses (based on a City & Guilds syllabus developed before the dawn of the 'Information Age') will enable us to provide the required level of flexibility, using engaging and relevant materials.

**Question:** When is it anticipated that the new courses will be up and running?

**Answer:** We hope to introduce the first of our new modular courses during 2011 and to have a full programme of offerings available by the end of 2012.


**Question:** Will the new syllabus be compatible with the old courses, that is, could someone take course 01 of the current course and course 02 of the revised course?

**Answer:** There will not be a direct parallel with the old courses. Students who have completed Course 01 will be given appropriate 'education credits' so they can continue to build up their skills with the new modular courses.

**Question:** Will the ISTC be offering courses for experienced members as well as for newcomers to the field?

**Answer:** One of our intentions with our new *Professional Development and Recognition* policy is to provide educational opportunities and continuing professional development (CPD) for *all* our members, not just for people who are new to our profession. This may take time to achieve, but this policy is a key element in achieving the strategic goal of making the ISTC the home of technical communication excellence in the UK.

**Question:** Where can I get more information?

**Answer:** We will make further announcements about the courses under our *Professional Development and Recognition* policy as they become available, in *Communicator*, the InfoPlus+ newsletter, and on the ISTC website. 

**David Farbey, MA FISTC**

ISTC Council Member for Education

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# Online groups

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## User guides for mobile devices

A member wants to publish a user guide suitable for mobile devices. He wants to know about the ePub format ([www.idpf.org/specs.htm](http://www.idpf.org/specs.htm)). One colleague downloaded an ePub file to an iPhone® mobile device, and the file rendered well. Another colleague used an HTC (a smartphone manufacturer) mobile phone, which did not read the ePub file. The content must be available on all mobile devices. Is a PDF file designed for small screens a good alternative to the ePub format?

Different HTC mobile phones use different operating systems. Probably, users will need to install a third-party e-reader for ePub, which are available for mobile phones that use Android™ and Windows® 7.

The Amazon Kindle™ e-reader is popular, but does not support the ePub format.

Usually (in Europe), a PDF document has an A4 page size. A PDF document that is re-sized to fit on a mobile device can be difficult to read, because text is small, and you must scroll left and right. If a PDF document has tags, the document can display satisfactorily on mobile devices. A tagged document improves accessibility, and lets text flow to fit the screen. However, tags increase the file size.

Because the support for mobile devices is not always good, create the PDF document with a small page size such as A5 and increase the font size to give a more usable document.

Different devices have different aspect ratios. Therefore, design the graphics carefully. To decrease the file size, decrease the number of pixels in the image.

Members suggest the following:

- <http://blogs.adobe.com/techcomm/tag/epub> (RoboHelp® from Adobe can generate the ePub format)
- <http://tinyurl.com/5uhxcbd>
- <http://tinyurl.com/64a8mnf>
- <http://tinyurl.com/285qor2>

## New system for authoring

A technical communicator uses FrameMaker®. She wants a new system that she can use to create different types of documents. Is single sourcing

the best option? How easy is it to create brochures, website content, help, and user manuals that have shared text? The documents have different audiences. Therefore, how useful is single sourcing?

Possibly, a combination of FrameMaker and a content management system (CMS) is sufficient. The forum on [www.FrameUsers.com](http://www.FrameUsers.com) is useful, because many people have experience of similar problems.

Single sourcing can decrease costs. However, not all documentation systems benefit from single sourcing.

An unusual idea is to write the content in Scrivener ([www.literatureandlatte.com](http://www.literatureandlatte.com)). Then, export the content as plain text:

- For PDF files, export to InDesign®.
- For websites, export to a CMS.

## Page-turning effects

Flip Builder uses Flash to give a page-turning effect to a standard PDF file ([www.flipbuilder.com](http://www.flipbuilder.com)). A member is developing a PDF e-book for a client. The client thinks that the page-turning feature encourages people to read the information.

However, if people do not read a document because the document is not applicable or has errors, then an animated page does not help.

Some members think that a page-turning effect is irritating. If someone does not use Flash, then possibly, the e-book cannot be viewed, and so accessibility could be a problem.

Flash is not permitted on Apple's mobile devices ([www.apple.com/hotnews/thoughts-on-flash](http://www.apple.com/hotnews/thoughts-on-flash)).

A website developer says that the use of Flash is decreasing. An alternative to Flash is jQuery (<http://jquery.com>). The Booklet plug-in for jQuery gives a page-turning effect. A demonstration is on <http://builtbywill.com/code/booklet>

'20 things I learned about browsers and the web' from Google has page-turning effects ([www.20thingsilearned.com](http://www.20thingsilearned.com)). The page-turning effects are created with HTML5, not with Flash. **C**

**Mike Unwalla FISTC**

E: [mike@techscribe.co.uk](mailto:mike@techscribe.co.uk)

# Member news

## New Members

### Member

Jacquelyn Archibald	Knutsford
David Barber	Leicestershire
David Borthwick	Cambridge
Ian Boulton	Flintshire
Mark Emson	Lincolnshire
Ann Gautier	Denmark
Anthony Maries	Somerset
Claudia Roland	Cambridge
Thomas Ryan	London
Richard Ward	Huntingdon
Tim Weight	Bolton

### Junior Member

Daniel Crudge	London
Tim Glasgow	Belfast
David Maddocks	Warwickshire
Bridget Walsh	Ireland

### Associate

David Black	London
Julie Bowen	Stowmarket
Henry Brooks	London
Stephen Burden	London
Rob Falla	London
Anna Fisher	London
Jonathan Harrington	Ireland
Eithne Keely	London
Martin King	London
David Lyall	Caithness
Philip Neal	London
Valentine Ogier-Galland	London
Seun Okewole	London
Chris O'Shea	London
Richard Potter	London
Graeme Price	London
Paul Ross	London
Greg Sewell	London
Robert Shaffer	London
Michel Szarindar	London
Prashanth Vasanthakumar	London
Eleanor Weavers	London

### Student

Gary Appleton	Berkshire
Lisa Brady	Belfast
Michael Flaherty	Saudi Arabia
Joseph Sellman	Southsea

### Transfers

#### Fellow

Ian Ampleford	Nottinghamshire
Paul Ballard	Surrey
Theresa Cameron	France
Peter Jones	Cambridge
John Martin	West Midlands
John Nicholson	Monmouthshire
Adrian Shaw	Bolton

### Member

Josephine Wooding	Essex
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### Rejoiners

#### Member

Matthew Courtley	Aberdeen
Richard Lee	Bristol
David Milligan	Northamptonshire

### Associate

Karen Lewis	Middlesex
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# The ISTC 2011 Survey

In this article, **Emma Bayne** gives some background to the ISTC surveys and summarises the results of the 2011 survey.

January 2011 saw the re-emergence of the ISTC survey. Although often referred to as 'salary surveys', these surveys often include questions on education and training, experience, job role and location, among other things.

In 2004, the last hardcopy-based ISTC salary survey was carried out. Since then, the responsibility for surveys has shifted on Council. The format of the survey has also altered.

## The history of ISTC surveys

Surveys are nothing new to the ISTC. There are records to indicate that as early as 1965–1970, a survey may have been carried out by one of the organisations (the Presentation of Technical Information (PTI), the Technical Publications Association (TPA), the Institute of Technical Publicity and Publications (ITPP)) that were later to amalgamate and become the ISTC. This salary survey was probably the earliest of its kind in the world among technical communication professional organisations.

In 1997, Peter Fountain (the current ISTC Treasurer) assumed the responsibility for the salary surveys, and his survey in 1997 was followed by annual surveys in 1998–2000 and 2002–2004.

In 2009, the responsibility for ISTC surveys was shifted in the ISTC Council and Emma Bayne took over the responsibility for the surveys.

## Introducing electronic surveys

Until 2004, surveys were produced in hardcopy format and posted out to members by mail services.

However, times have changed and the 2011 survey was the first electronic survey on salary, training and experience carried out by the ISTC.

Using an electronic format for surveys saves costs in terms of postal fees and stationary. But since answering the survey only requires a series of clicks on the keyboard, the electronic format hopefully also increases the scope of potential respondents. The link to the survey can be distributed by various channels such as digital media (for example, LinkedIn and email). It also simplifies the collating of responses.

The 2011 ISTC survey reached potential respondents via email and a LinkedIn link. A total of 218 people answered the survey. Although this is not a record for an ISTC survey (the largest response rate since 1997 was 271 people in the 2000 survey), it is still a good result.

## Education and employment

The first question of the survey dealt with the highest academic qualification of respondents. The most common qualification among those answering the survey is a bachelor's degree (35.3%), while the second most common qualification is a master's degree (22%). And 11% of those answering the survey named their highest academic qualification as *Other*, a category that included, for example, the City and Guilds Certificate.

The subject of the respondents' highest qualification varies considerably. While many have studied different types of engineering, there are also degrees in other subjects such as languages and linguistics, psychology, history and business administration. A total of 20 respondents gave technical communication as the subject of their highest qualification.

While 44.5% of those answering the survey reported they last attended a training course more than two years ago, 28.4% said they had taken a course in the last six months and 27.1% took their last training course in the last two years.

The majority of those answering the survey reported they were either in full-time employment (60.6%), part-time employment (4.6%), self-employed (13.3%) or contractors (14.7%). Meanwhile, 2.8% were seeking work and 3.2% were retired.

Work experience is considerable among those answering the survey: 33.9% said they have 20 years or more experience as a technical communicator, while 19.3% responded 15–19 years and 18.3% said 10–14 years. The number

30.9% work in the IT sector









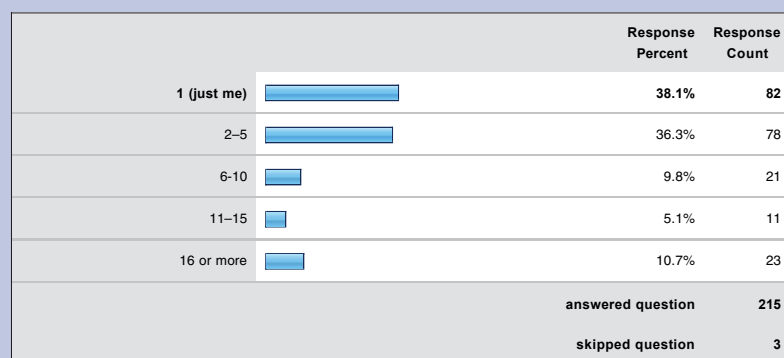
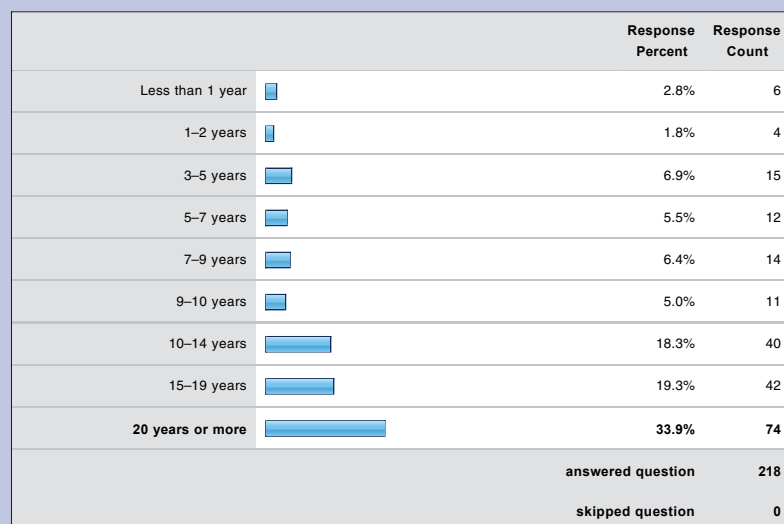
		Response Percent	Response Count
Full time employee		60.6%	132
Part time employee		4.6%	10
Self employed (mainly work for clients directly)		13.3%	29
Contractor (mainly work through agencies or companies)		14.7%	32
Student		0.5%	1
Job seeker		2.8%	6
Retired		3.2%	7
Other		0.5%	1
answered question			218
skipped question			0

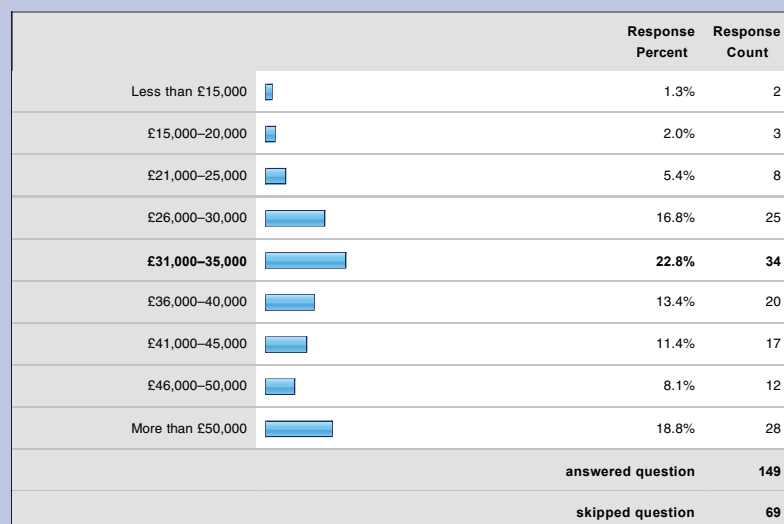
Figure 1. Employment status of respondents



**Figure 2. Number of technical communicators in the respondent's organisation**



**Figure 3. Number of years working as a technical communicator**



**Figure 4. Employees annual gross salary**

of years then fell to between 5 and 6 years for those having worked between 3-5, 5-7, 7-9 and 9-10 respectively.

#### What type of work

Over the years, there have been regular discussions of what technical communicators should call themselves, and what exactly should

go into the concept of technical communication. However, nearly half of those answering the survey, 49.5%, gave *technical writer/author/communicator* as their job title.

Managers made up 11.1% of respondents of the survey, while the category *Other* included many diverse titles such as translator, support engineer, buyer and consultant.

Technical communication departments are often modest in staff count. 38.1% of those answering the survey said they work alone with technical communication in their organisation. And 36.3% said they were working in teams of between two and five technical communicators in their organisation.

The type of work done by those answering the survey varies greatly but documentation, online and paper based is, (not unexpectedly) the most common activity, with editing taking third place. Training material and online help are also common activities. The category *Other* covers such diverse activities as content databasing, usability, committee work, business analysis, wikis and bid writing.

As many as 30.9% of those answering the survey work in the IT sector. This is not surprising, and some people associate technical communication specifically with the IT sector. The second largest sector named by those answering the survey was the engineering sector where 10.6% of respondents work. The remaining respondents are spread quite evenly across all other sectors, except for the press, broadcast and public sectors.

In terms of geography, respondents are concentrated in one area: London (37%). But it seems that a fair proportion of those answering the survey were in fact living abroad (13%).

#### Remuneration

For those respondents in employment, the most common salary level was around £31,000-£35,000. Most of those in employment (86.6%) are not paid for overtime worked.

Meanwhile, the most common hourly rates for contractors/self-employed technical communicators taking the survey were £26-£30, £31-£35 or £36-£40 per hour.

Most people answering the survey (85.4%) have not changed jobs in the last 12 months, and as many as 68.8% of those answering the survey have had a pay rise in the last 12 months. This may be a good sign, given the tough conditions in the work market since the economic downturn in October 2008.

#### Background variables and membership

Of the people answering the survey, two-thirds (68.8%) are male. This may come as a surprise to those of us who work in relatively mixed-gender environments.

The most common age group among those answering the survey is 50-59 years



(40.8%), although people in their 30s and 40s were also fairly well represented (17.9% and 27.5% respectively). However, only 0.9% of respondents were in their twenties.

### The average technical communicator

So looking at the results of the survey, what is the average respondent?

It is a man in his fifties, he is a member of the ISTC, but not of any other technical communication organisation. He works in London, in the IT sector and he works alone on technical communication in his organisation. He is a full-time employee, has not changed jobs in the last year, but he has had a pay rise in that same period. He has 20 years or more of experience as a technical communicator, and yes, he calls himself just that: technical communicator.

For the rest of us (women, working somewhere else, doing something else), although we may not be the average respondent, we have at least helped to contribute to important data on technical communications. **C**

**Emma Bayne [FISTC]** is a technical communicator working in Sweden and is also a member of the ISTC Council. She is responsible for the ISTC history and ISTC surveys.

E: emma.bayne@telia.com

		Response Percent	Response Count
Less than £15		4.6%	3
£15-20		3.1%	2
£21-25		9.2%	6
£26-30		21.5%	14
£31-35		21.5%	14
£36-40		21.5%	14
£41-45		7.7%	5
£46-50		6.2%	4
£51-55		0.0%	0
£56-60		0.0%	0
More than £60		4.6%	3
answered question			65
skipped question			153

Figure 5. Contractors/self-employed average hourly rate in the past 3 months

You can receive the results of the ISTC 2011 survey in full, by contacting the ISTC office: via email at [istc@istc.org.uk](mailto:istc@istc.org.uk), by telephone: +44 (0) 20 8253 4506.

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# Streamlining your workflow with Flare 7

**Eddie VanArsdall** explains how the latest version of MadCap Flare supports the complete information development cycle.

Since its introduction in early 2006, MadCap Flare™ has maintained a steady course of evolution. Flare users have helped foster this evolution through proactive feedback.

MadCap obviously listens. Each new version of Flare has shown that the organisation understands its users, and Flare 7 is no exception. Packed with impressive new features and enhancements, Flare 7 provides full support for information development teams and their workflows.

## Setting up your infrastructure

A typical information development project requires setting up an infrastructure for organising, managing and sharing project files. Flare 7 provides three new features that support resource sharing and team collaboration.

### External Resources pane

While Flare 7 continues to support one-way linking to source files, the new **External Resources** pane dramatically extends file linking capability. You can connect to local and network folders outside of your project and create mappings to files in those folders. As long as you maintain the connections, you can then access the files and folders from any project.

You can also establish *bi-directional synchronization* between a file in your project and an external file. This is useful if you are the 'keeper' of a specific master file and need to ensure that everyone has the latest version.

The **External Resources** pane also launches a **Synchronize Files** window, where you can synchronise, import and export files. You can also manage file mappings (Figure 1).

### SharePoint Explorer pane

If your team uses Microsoft SharePoint for file management and source control, you can integrate Flare 7 into your SharePoint workflow. The new **SharePoint Explorer** enables you to connect to a SharePoint server and use check-in and check-out commands to work on topics. As an alternative, you can copy a file to your project and use the same bi-directional mappings supported by the **External Resources** pane.

### Subversion integration

Apache Subversion (SVN) is a popular, open-source solution for managing file libraries. Flare 7 has native support for Subversion. You can bind a new project to Subversion during creation, or you can bind an existing project using the **Project Properties** window. No third-party plug-ins are required.

## Developing your content

With your infrastructure in place, you're ready to concentrate on writing. The Flare 7 XHTML Editor provides a streamlined authoring environment with several useful new features.

### Editing toolbar enhancements

The editing toolbar has two new, notable additions:

- **Preview button:** This button has been enhanced to display a drop-down list of all output types (called *targets*) in your project. You can easily preview the current topic as HTML or PDF without changing the primary target.
- **Insert Snippet and Insert Variable buttons:** These two buttons enable you to quickly insert snippets and variables (reusable text blocks and text strings). This facilitates faster editing than using the equivalent menu commands.

### Auto Suggestion

Flare 7 replaces the former IntelliSense feature with an optional but much smarter feature called *Auto Suggestion*. This new feature analyses what you type and offers suggestions for completion. Those suggestions come from system variables such as *Long Date*, as well as from your custom variables and snippets. Suggestions appear in a pop-up window, and

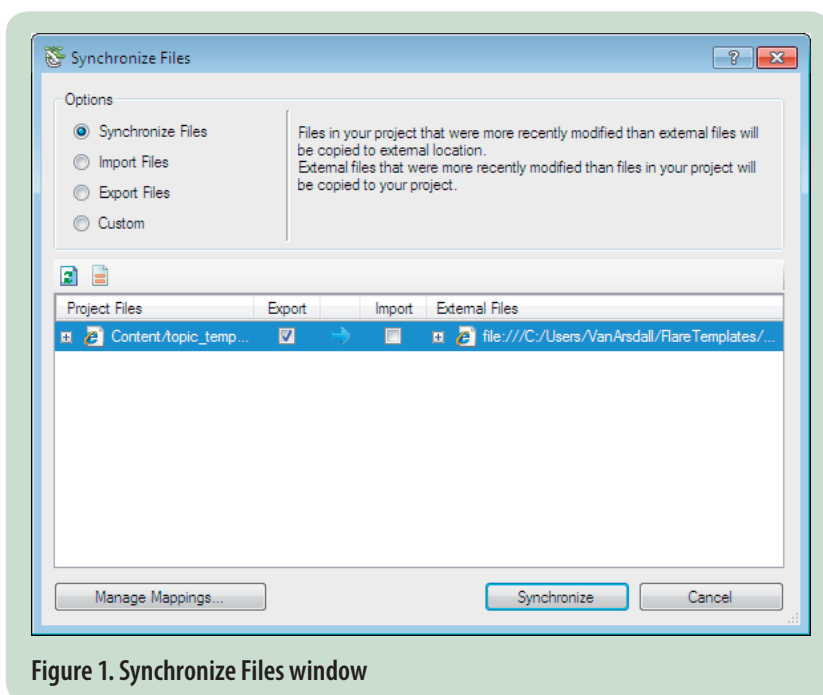


Figure 1. Synchronize Files window



you can use the keyboard to select and accept an entry.

Auto Suggestion gives you more control over automating text entry than its predecessor. You can add a custom Auto Suggestion file to your project and use the file to build a preferred list of frequently used words and phrases. This 'trains' Auto Suggestion to recognise text that you frequently type.

#### Structure Bars with modified design

The Structure Bars in the Flare editor provide a visual representation of the XHTML structure used in a topic. In previous versions of Flare, the bars represented text and table formatting separately.

In Flare 7, the separate Structure Bars for tables are no longer present. Table structure has been integrated into the main Structure Bars. In addition, the bars provide a more granular view of the table markup. You can drill down to the cell level and see the interior tags (such as lists) that are applied to cell content. This useful enhancement gives the editor a much cleaner, less cluttered appearance (Figure 2).

#### New paste options

Pasting text into Flare from another source has sometimes been unpredictable. Flare 7 replaces the rather intimidating **Paste Text** window with a new, powerful Paste icon.

Flare's Paste icon resembles that of Microsoft Word, but the pop-up menu in the Flare version

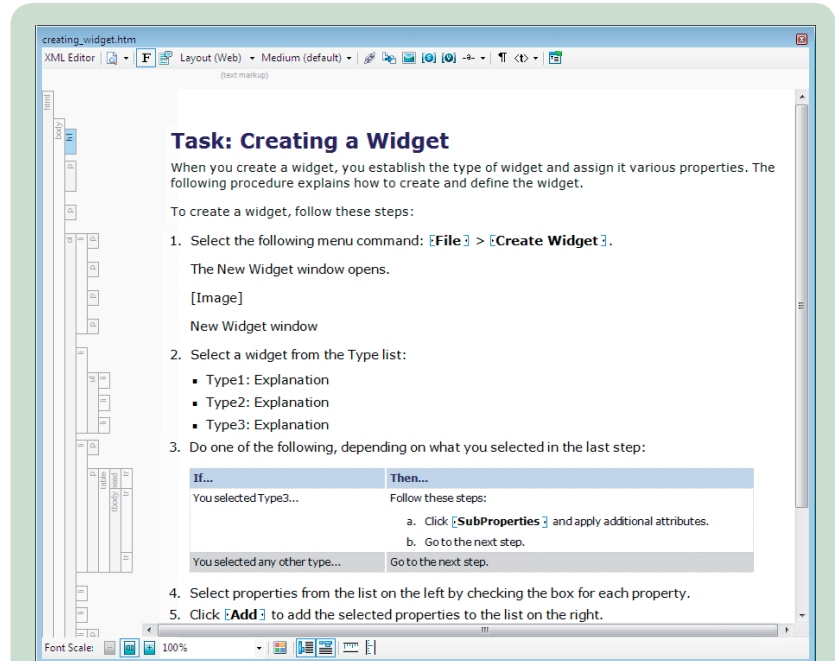


Figure 2. Flare editor with structure bars on the left

gives you more options: paragraph, paragraph block, inline text, table, or list. I find the inline text option especially useful for integrating pasted text into the destination text without having to clean up formatting.

When you paste tables or table text, the Paste icon's dynamic pop-up menu shows commands for table formatting. The menu changes



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**Patrick Hofmann, User Experience Designer at Google and visual information specialist**



From his start as a technical writer and illustrator in 1993 to travelling the world as a visual information specialist, Patrick Hofmann has been labelled the 'man of few words'. This vibrant Canadian has helped clients worldwide overcome the usability challenges associated with internationalisation and localisation -- usually by eliminating the text in their online, printed, and interface information, and using graphics, symbols, and icons.

### Specialist stream

"Anything but text"

[www.technicalcommunicationuk.com](http://www.technicalcommunicationuk.com)

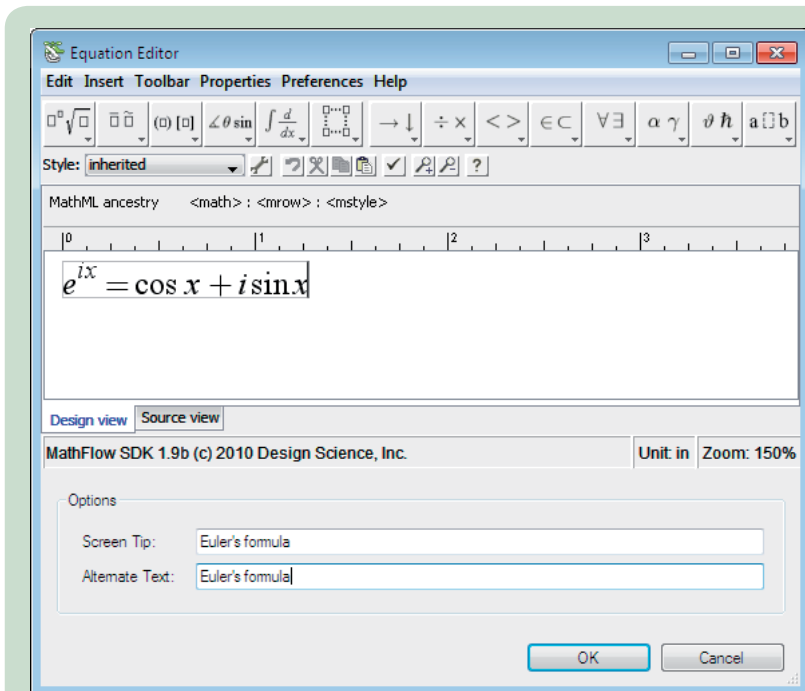


Figure 3. Flare 7 Equation Editor

according to whether you are converting a table to text, cutting columns, cutting rows, or merging tables. This article further discusses Flare 7 table enhancements in a later section.

#### Equation Editor

Flare 7 supports the Mathematical Markup Language, or MathML. Along with this capability, MadCap has added a new Equation Editor to enable writers to build equations and insert them into topics.

The **Insert > Equation** menu command launches the new editor (Figure 3), which offers templates for various types of equations. You can view equations in either of two views: *Design* or *Source*. The latter view shows the MathML markup.

When building output, Flare converts equations into images. XHTML output renders them as raster images, and PDF output renders them as vector images. For optimal accessibility, the Equation Editor provides options for adding a screen tip and alternate text (alt text) attribute to the equation properties.

#### Enhanced support for table insertion and editing

Options for inserting and editing tables are significantly enhanced in Flare 7:

- **Insert Table button:** This new button appears on Flare's Text Formatting toolbar. Similar to the equivalent button used in Microsoft Word, clicking the button displays a drop-down grid on which you can drag down and to the right to select the desired number of rows and columns.
- **Convert table to text:** As an example, if you select a nine-cell table and select the Convert to Text command, Flare creates nine paragraphs. The dynamic Paste icon remains available,

enabling you to try other paste options.

- **Convert text to table:** You can accomplish this task by simply selecting the text, then using Flare's Table menu command (**Table > Insert > Table**) to set up the table structure.
- **Sort rows:** You can sort table rows in ascending or descending order.
- **Merge tables:** If you have two differently styled tables separated by an empty paragraph, you can determine which style takes precedence when you delete the paragraph and merge the tables.
- **Reset Local Cell Formatting:** Unlike previous versions of Flare, this command affects only selected cells, rather than the entire table.

#### Enhanced support for table styles

The Flare 7 Table Style Editor looks similar to the previous editor, but it includes many improvements. It also gives you much more control over table properties and style usage. Using the new editor, you can:

- Specify that certain properties such as padding be different in specific areas of a table
- Exert more control over row and column patterns, including their names and their behaviour
- Create a custom pattern type for rows or columns and use it to override other patterns in specific instances of styled tables
- Use a new Medium drop-down list inside the editor to specify different settings for different style sheet media (online and print) in one place
- Use a new **Apply Style** command to apply a table style to selected files, folders, or to all topics in a project. This is a significant and welcome improvement.

#### Quick Response (QR) codes

Flare 7 enables you to insert Quick Response (QR) codes into topics. A QR code is a type of barcode designed to be read by devices such as smartphones. QR codes can encode text, a URL, an e-mail address, a contact card (vCard), or SMS message text. To read a QR code, your phone must have a special reader application. Several readers are available at no cost.

In describing one use case for QR codes, MadCap suggests that you could provide a code for employees who are doing field work and need access to your online help. If you design for this use case, I recommend that you use Flare's Mobile skin (introduced in Flare 6) to design your help for viewing on a mobile device.

#### Support for new vector image formats

Flare 7 supports three new vector image formats:

- Scalable Vector Graphics (SVG), an XML-based format
- PostScript (PS)
- Encapsulated PostScript (EPS).

These file types primarily serve to provide better image clarity in printed output. If the

images are used in WebHelp output, Flare converts them to .png files.

### Conducting editorial reviews

Because Flare is a topic-based writing tool, you can send individual topics for review at any point in the information development cycle. I find that clients often prefer this approach, as they don't like to be overwhelmed by reviewing a large help system or PDF guide all in one go, especially if they are seeing the content for the first time. When your completed work is ready for production, clients can then view topics that they have already read in the context of the full product.

Previous versions of Flare supported author annotations, topic reviews, and contributions by outside authors. Flare 7 extends all of these capabilities with enhanced review features. Some features are designed to work with MadCap's new *Contributor* product, which consolidates the former X-Edit product family. This review discusses only the features that are native to Flare 7.

The menu bar now includes a **Review** menu. This menu and the equivalent Review toolbar now include a Track Changes feature. You can set options for Track Changes using the **Review Options** tab, accessible from the Review menu. For example, you can specify your user name and initials. You can also specify how changes appear in your files.

The Track Changes feature follows industry-standard conventions. You can show or hide changes, navigate through changes, and accept or reject them.

Annotations (author comments), which previously appeared in a separate pane, now appear in the XHTML Editor (Figure 4).

### Building, analysing, and refining

As you develop content, you typically build output in designated formats such as WebHelp and PDF. As you build output, the Flare compiler displays messages to notify you of any issues that you need to address. One of those issues is accessibility compliance.

#### Accessibility features and enhancements

While Flare has always included features to support web accessibility requirements and standards, Flare 7 takes accessibility to a new level.

All Flare targets (output configuration files) for WebHelp and PDF now include a Warnings tab for accessibility checking (Figure 5). If you turn on the warnings, the Flare compiler will check for accessibility problems during a project build.

The compiler identifies and reports the following types of problems:

- Images, equations, and QR codes that are missing an alt text attribute
- Tables that have no caption or summary
- Tables without a header row

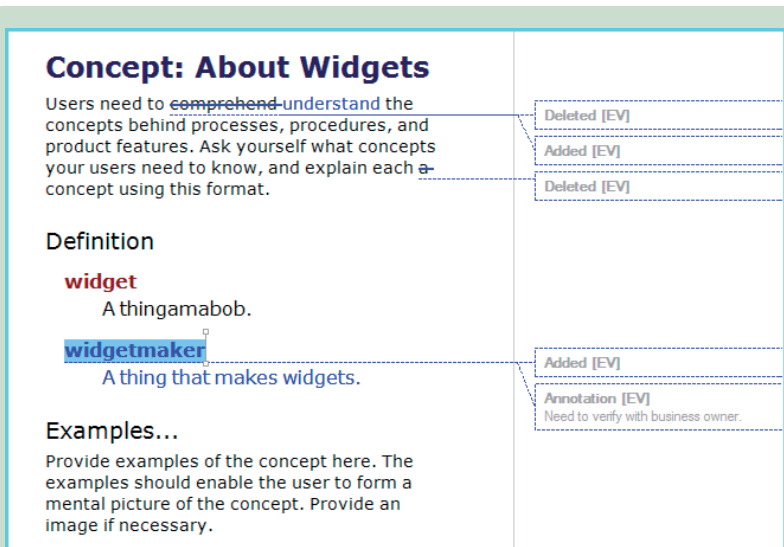


Figure 4. Tracked changes and annotations

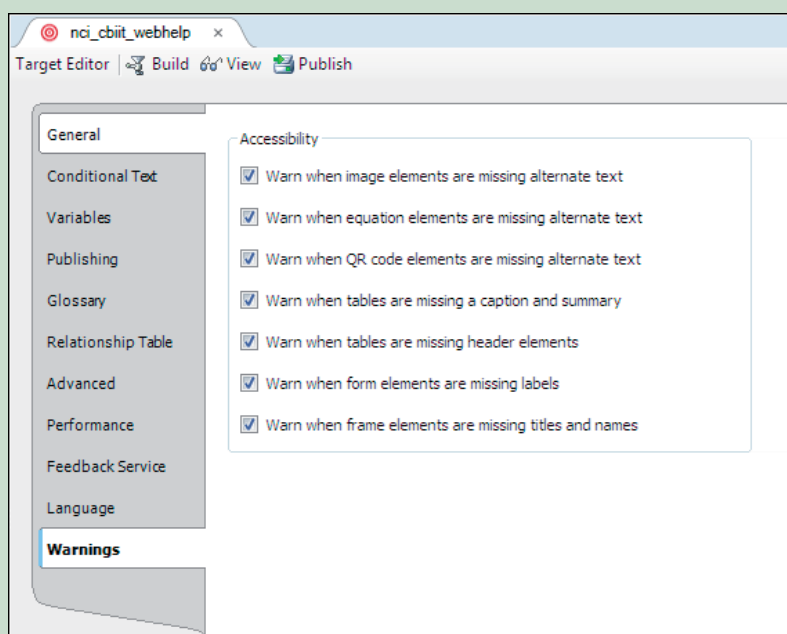


Figure 5. WebHelp Warnings tab

- Form elements with missing labels
  - Frame elements without a title or name.
- You can click the compiler's **Save Log** button to save a date-stamped log to the Reports folder in your Flare project. With the log file open, you can double-click on any row to open the corresponding file that produced the message.
- Missing alt text attributes are a common accessibility issue. Unless you have added alt text to an imported image before inserting the image into multiple topics, some instances of the image may not include the attribute. Fortunately, the **Edit Picture** window in Flare 7 includes a time-saving check box labelled 'Apply the alternate text and screen tip to all image references'. After adding the attributes for one instance of the image, you can check this box to update all of the remaining instances.
- During PDF compilation, Flare automates the following conversions for accessibility:



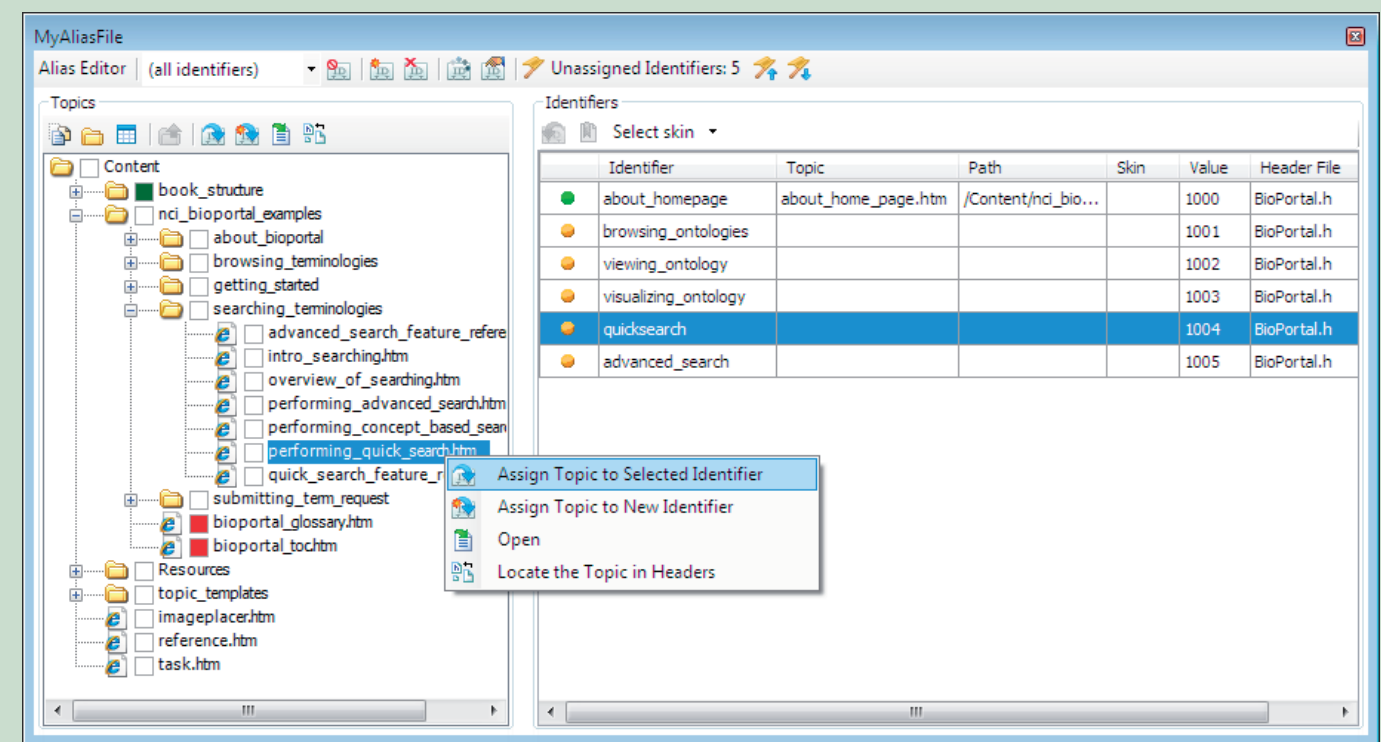


Figure 6. Flare 7 Alias Editor

- Converts each alt text attribute to its PDF equivalent so that a screen reader can properly describe each image.
- Converts XML *lang* attributes to their PDF equivalent for the entire PDF file and for any languages that may be applied to specific XHTML elements.
- Converts table structures to their PDF equivalent so that screen readers can properly read them.

The PDF target includes a PDF Options tab, with some options that duplicate certain settings found in Adobe Distiller and Acrobat (such as Image Compression and Initial View). You will also find a **Generate tagged PDF** setting, which enables you to generate the PDF build with structured tagging. The tagging is similar to the structure of the source XHTML files in your project. Although PDF tagging increases the file size, it is required for making a PDF file accessible to screen readers. If you have ever post-processed a PDF file to add tagging, you will appreciate the automation that Flare now offers.

#### New Reports

To further analyse your project output, you can add a new report file, select what you want to include in the report, and then generate the report. Flare 7 adds a number of useful report options for analysis.

One of the available report categories is Context-sensitive help (CSH). Let's say that you have generated a report to analyse your CSH setup. The report lists several topics under the category 'Topics Not Linked By Map ID'. You can quickly map those topics using Flare's Alias Editor.

#### Redesigned Alias Editor

New help authors often find setting up context-sensitive help a bit daunting. The interplay between alias (.ali) files and header (.h) files can be confusing.

The redesigned, elegant Alias Editor in Flare 7 simplifies the process of mapping topics to identifiers and building a header file. The editor has a clean layout, with a Content tree structure on the left, and an Identifiers table on the right (Figure 6). The first column in the table marks unassigned identifiers with an orange icon. Assigned identifiers have a green icon.


The Alias Editor enables you to add identifiers to single files, selected multiple files, or the entire project. You can associate a header file with the alias file and generate its contents.

Assigning topics to identifiers is easy:

1. Select an unassigned identifier in the Identifiers table.
2. Right-click a file in the folder tree on the left.
3. Select **Assign topic to selected identifier**. The Identifier table adds the file name and the path.

As you assign identifiers and set up your context-sensitive help, Flare builds a header file that you can give to your software development team.

#### Summary

MadCap Flare has always provided a comprehensive feature set for single-sourcing and content management. Flare 7 extends these capabilities to cover the entire spectrum of information development. Download a trial of Flare 7 at [www.madcapsoftware.com/downloads](http://www.madcapsoftware.com/downloads) 

**Eddie VanArsdall** is a consultant specialising in technical writing and editing, learning solutions, user assistance, and content strategy. An employee of Ironworks Consulting, he currently serves as Managing Editor of [ebenefts.va.gov](http://ebenefts.va.gov), a joint project between the US Department of Veterans Affairs and the Department of Defense. E: [evanarsdall@gmail.com](mailto:evanarsdall@gmail.com)  
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- ▶ And Much More...



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# A 'Flare' for translation

Scott Bass explains how technical communicators can best exert their power over the challenging task of translation using MadCap's Flare and Lingo.

Technical communicators wield real power. (I forgive you for reading that twice.) Yes, you wield real power. This may contradict your perception of your position in the corporate food chain. However, as the provider of translation services, from where I sit, you are truly powerful and can make the lives of numerous translators, project managers and desktop publishing (DTP) specialists blissful or hellish.

Your ability to not merely influence translation service providers but to truly shape our professional well-being is multifaceted. First there is the content that you write. When it is well written, a calm descends across all involved in translation; clarity is achieved, and from the perspective of individual translators, all is right with the world. The number of questions that translators must ask is greatly diminished when the answers spring forth from the text. Devoid of ambiguities, translators can move unencumbered through the text and efficiently go about their task.

Content is of course the primary concern; it is why we are all here: technical communicators creating it and language service providers translating it. However, the electronic format within which the content is disseminated increasingly continues to be a factor that can make or break a successful translation project. Therefore, as the veritable masters of the translators' universe, you must give equal care to both the content and format of what you write.

Choosing the right authoring tools not only makes you more efficient, but it should also make the translation process faster and cheaper. Even if at this moment none of the content you or your organisation is creating is being translated, you should always assume that someday it will be, and choose tools that will support efficient publishing in a wide variety of languages and publishing formats.

## Criteria for the right tool

The factors that go into selecting the best authoring tool for you and your organisation are complex and well beyond the scope of this article. However, in choosing the right software that will meet the needs of most technical communication departments and easily support the translation process, consider applications that:

- Use standards-based technology for storing and formatting content.
- Allow for the easy transport of content

into and out of commonly used translation memory (TM) environments.

- Support all the languages you require.
- Have the ability to create documents for print, the Web, desktop and mobile environments.
- Do not require direct programming knowledge of CSS, XML, XSLT, and so on. in order to publish.
- Integrate with image editing and capturing software.
- Make the update and republishing tasks as efficient as possible.
- Work 'out of the box' without requiring development of workarounds or middleware to accomplish the publishing task.

Conventional applications such as FrameMaker, RoboHelp, Microsoft Word, InDesign, and Quark Xpress each meet some of these criteria, but not all. FrameMaker, while it has improved its multilingual support, still uses proprietary technology to create and format content. It can work with topic-based authoring such as DITA, but requires special support. Microsoft Word has been multilingual for a long time, but it is not very flexible when it comes to publishable output formats other than .doc, .docx or .pdf. InDesign is being pushed to support XML-based formats, but it still requires extensive work to make content flow between the .indd format and more open technologies, such as DITA and other types of XML.

## Choosing the right toolset

Based on 17 years of empirical evidence accrued through hundreds of translation projects in myriad file formats (for example, Quark Xpress, PageMaker, FrameMaker, InDesign, Microsoft Word, as well as .CHM, .HLP), we have concluded that MadCap Flare is, objectively, the best choice for authoring, translating and publishing technical documents across a wide variety of output types and languages.

It meets or exceeds expectations for each of the criteria listed above.

Flare stores content in XHTML format along with ancillary files in XML format (although Flare does use proprietary file name extensions for XML files, for example, \*.flglo for glossary data). CSS technology is used extensively to manage formatting at a high level in a Flare project.

Content can be easily transported in and out of the Flare environment and into translation either with or without the MadCap Lingo TM tool, which integrates with Flare. Most translation providers can set up filters for



Flare's XHTML files and ancillary files for table of contents and indexes.

Flare currently supports over 39 languages. All of these languages are standard for international business. Support for right-to-left reading languages such as Arabic and Hebrew is still pending. However, none of the other mainstream DTP packages support them well either, at least not without special support or specialised versions of the application.

With the ability to define specific target output types in Flare that include print, Web, desktop and mobile formats—again, out of the box—Flare offers the best flexibility with the least amount of specialised technical knowledge.

Flare's companion applications, Capture and Mimic, work in synergy with Flare and allow for easy access to translatable text via external XML files. This is far more efficient than having to translate text embedded in a Photoshop file or to have to manually extract text from third-party screen capturing tools.

MadCap Lingo allows for efficient 'diffing' of files in order to see what has been modified or added in a Flare project, thus making updates and revisions across multiple languages easier. Lingo enables you to compare a newer version of a Flare project to an older version and it will report changes to all topics and images, so that you and your translation provider can easily identify where changes have been made. Plus you have the option of highlighting content in Flare in order to identify spot updates to be inserted into translated versions.

You can start working with Flare and publishing useful content with minimal training. Basic knowledge of CSS and XML technologies is, of course, very helpful, but the lack thereof is not an impediment to using the tool. Knowledge of the underlying technologies that Flare uses will just enable you to do more sooner with the software.

### Flare projects for translation

Choosing to work with Flare can yield excellent results for authoring and downstream processes such as translation. The key to success is how you use the tools that Flare makes available to you. Snippets, variables and targets are three innovations that make Flare a powerful tool.

Snippets enable you to cleverly reuse text that may repeat throughout your documents.

Variables let you dynamically substitute text such as model, brand or feature labels, depending on context and target type.

Targets enable you to create different versions of your content according to user requirements—for print, PDF, desktop, the Web and mobile.

How you setup your original Flare project (for example, in English) must be done carefully and with translation in mind, otherwise you may end up creating work for your translation provider instead of minimizing it.

Softver prikazuje poruku kada unesete već upotrijebljeni ID pacijenta. Ako se

1. Provjerite da mogućnost `[Pokaži samo pacijente koji su na današnjem rasporedu]` `[AdminApp: aplikacija Admin]` Prikazat će se svi zapisi o pacijentima. U okviru `[Odabir pacijenta]` da biste očistili sve filtre.
2. Kliknite `[naslov stupca ID-a]` da biste zapise o pacijentu sortirali prema ID

Figure 1. Snippet (highlighted) is placed using the nominative case, which is incorrect for this context.

Softver prikazuje poruku kada unesete već upotrijebljeni ID pacijenta. Ako se

1. Provjerite da mogućnost `[Pokaži samo pacijente koji su na današnjem rasporedu]` `[AdminApp: aplikacija Admin]` Prikazat će se svi zapisi o pacijentima. U okviru `[Odabir pacijenta]` da
2. Kliknite `[naslov stupca ID-a]` ☒ Select
3. Utipkajte ID pacijenta u po
4. Kliknite `[Pojediniosti]` da bis
5. Provjerite je li se radi o zap

`[pacijenta]` .

`<MadCap:snippetText>`

Copy

Delete

Convert to text

Select New Snippet...

Open Link

Open Snippet File With

Conditions...

Figure 2. The snippet needs to be converted to text so that the correct grammatical form can be inserted.

Softver prikazuje poruku kada unesete već upotrijebljeni ID pacijenta

1. Provjerite da mogućnost `[Pokaži samo pacijente koji su na današnjem ra` aplikacije `[Admin]` Prikazat će se svi zapisi o pacijentima. U `[Odabir pacijenta]` da biste očistili sve filtre.
2. Kliknite `[naslov stupca ID-a]` da biste zapise o pacijentu sortirali

Figure 3. The manually corrected form 'aplikacije' now appears as normal text and is no longer part of the snippet.

For example, snippets have become one of Flare's most popular features. Writers just love not having to repeat themselves, so many have taken to heavily 'snippetising' (yes, I have actually heard this word used by technical communicators!) their Flare projects. Overuse of snippets, however, can have a detrimental effect on translation.

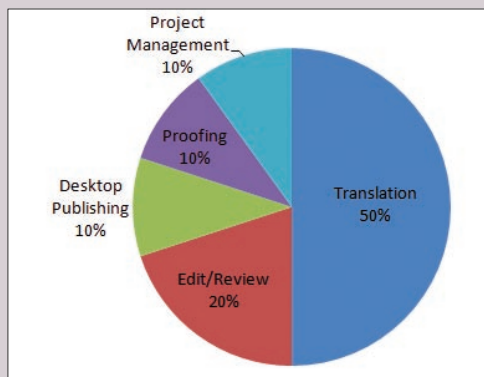
Here is an example for what can go wrong with snippets in other languages:

English: Check that the **Show Only Today's Scheduled Patients** option is not selected in the Admin application **Select Event** dialog box.

Croatian: Provjerite da mogućnost **Pokaži samo pacijente koji su na današnjem rasporedu** nije odabrana u dijaloškom okviru **Odabir pacijenta** aplikacije Admin.

Note that in this context, the Croatian word for 'application' is 'aplikacije', which ends in 'e' and not 'a' (see Figure 1).

The snippet is the underlined text 'Admin application,' and in Croatian the nominative



**Figure 4. Distribution of costs in a typical document translation project.**

form is aplikacija Admin, which is highlighted in red in Figure 1. In isolation, the phrase would by default be translated into the nominative case, which is what virtually every translator regardless of language would do.

To correct this issue, you need to manually convert the snippet to text and change the ending. See Figure 2.

The final, correct version appears in Figure 3.

Snippets cannot dynamically account for such grammatical variations, so in the translation the snippet had to be removed and reverted to normal text. Translators who know Flare well will look for such potential problems prior to starting translation. Doing this kind of internationalisation is critical, especially for projects involving multiple languages. It makes more sense to address problems once in English than to fix the same problem repeatedly in five, eight or ten translated versions.

### Lingo: a bridge to translation

One of Flare's greatest benefits is its companion tool Lingo. Lingo is a TM application that can be used by translators to translate content created in Flare, Microsoft Word, PowerPoint, DITA, simple text files and .Net resource files. For technical communicators Lingo is an excellent addition to your toolset:

- It gives you the ability to manage your TM databases as well as terminology databases—both important assets that should be created and maintained for every translation project.
- Lingo gives you the ability to easily prepare Flare content for translation, using the Translation Project Packager function.
- Thanks to Lingo's common interface design with Flare it is easy to learn and works seamlessly with Flare.
- You can easily manage revisions and updates using Lingo's Update Project feature.
- Lingo is one of the most affordable TM tools on the market.

Lingo may not have all the features found in competitors' TM products, but it does do the most important thing—capturing content

for later reuse—easily and reliably. Also, its integration with Flare makes a cumbersome process—the movement of content to and from translation—much more efficient.

### Where the costs hide

Anyone who has dealt with translation projects before knows that considerable time, care and, therefore, cost is required to produce high-quality translations. In addition to translation, there are also costs related to publishing—as there are in English. The goal is to minimize publishing costs and work to ensure that the process used to output all languages is efficient and consistent.

On average, the distribution of costs for a typical document translation project are as shown in Figure 4 and has been derived from real projects carried out by our organisation:

From a process perspective, desktop publishing (DTP) typically offers the best possibilities to reduce and control costs. Also DTP is the one area in which cost has the highest rate of re-incurrence when documents are revised or updated. This is because recycling text using translation memory technology has become highly efficient, while desktop publishing must often be reworked from scratch after a large volume of text has been reused.

When working with Flare, DTP costs can be less than 10%. This is due to the high level of control Flare offers when designing your documents and by using style sheets for as much of the content as possible. Occasionally, styles may need to be tweaked to enable them to work optimally in the translation, but this is far cheaper than having to apply formatting manually to each translated version of your documents.

Production costs related to DTP in Flare stem from:

- Setup and preparation of the Flare projects prior to translation
- Tidy-up of content post-translation
- Remediation of textual issues that may arise due to idiosyncrasies of a particular language
- General Flare operation.

As with any tool, what can be produced is only as good as the skills of the tool user. In our experience, a well-planned and executed Flare project that takes translation into account can drastically reduce the costs and time of translation, when compared to traditional layout tools. Frankly, even those Flare projects that are not well created are still easier to work with and can yield better results compared to using a toolset that has changed little since 1997 (sorry, FrameMaker and Microsoft Word!). In the end, it is the management of both content and form that makes Flare and its companion tools so effective for authoring and translation. **C**

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# Explanation by Pattern


Explaining complex logic in text can be difficult. **Richard Truscott** explains a technique using tables that makes it easier.

Who has not tied themselves in knots trying to use words to explain a complex piece of logic? A diagram can help but may not readily convey all of the meaning. Some time ago, I discovered Explanations by Pattern. They go by a number of different names:

- FLIPP Explainers or FLIPP diagrams. FLIPP stands for **F**ormat for **L**ogical **I**nformation **P**lanning and **P**resentation.
- Nassi-Shneiderman Diagrams. These are very similar.

They use a simple principle based on showing the logic in a table. Starting at the top left-hand side of the table, the logic flows down the rows of the table and to the right. To follow the logic, answer each question in turn, then follow the answers down the table. You must not cross the vertical lines.

## Example

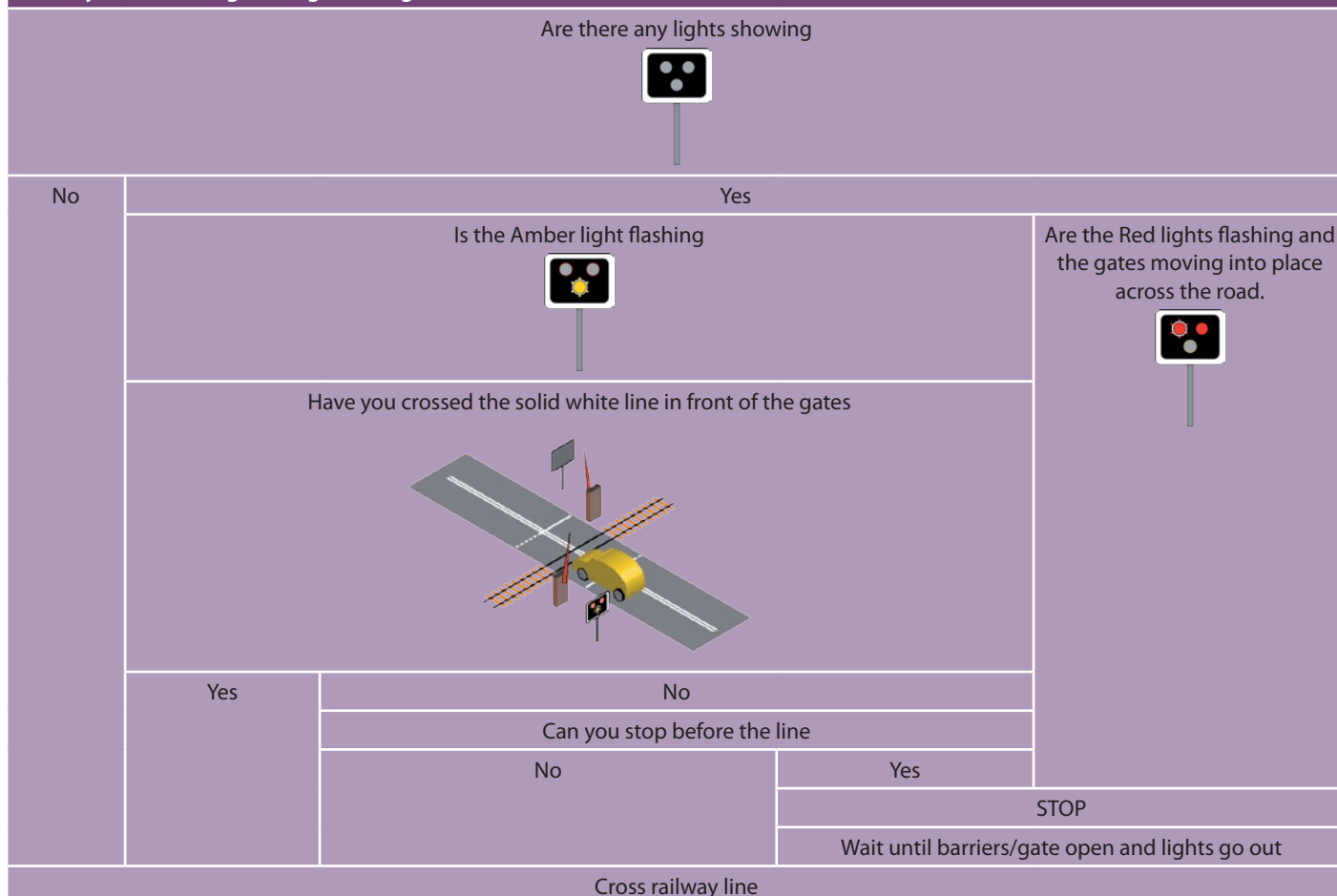
This is best explained using the example of a railway level crossing with lights and gates. 

## References

You can find information about FLIPPs at the following sites:

- Cox, David, 'Explanation by pattern means massive simplification' [online book] [www.flipp-explainers.org](http://www.flipp-explainers.org), accessed January 2011.
- Wikipedia, 'Nassi-Shneiderman Diagram', [http://en.wikipedia.org/wiki/Nassi-Shneiderman\\_diagram](http://en.wikipedia.org/wiki/Nassi-Shneiderman_diagram), accessed January 2011.
- Sowa, John F, 'FLIPP Diagrams', [www.jfsowa.com/logic/flipp.htm](http://www.jfsowa.com/logic/flipp.htm), accessed January 2011.
- Network Rail, 'Types of level crossing' [www.networkrail.co.uk/aspx/5269.aspx](http://www.networkrail.co.uk/aspx/5269.aspx), accessed January 2011.
- UK Government 'Highway Code, Road works, level crossings and tramways (288-307)' [www.direct.gov.uk/en/TravelAndTransport/Highwaycode/DG\\_069864](http://www.direct.gov.uk/en/TravelAndTransport/Highwaycode/DG_069864), accessed January 2011.

### Railway level crossing with lights and gates



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# Learning about accessibility — and why

Here are some tips about accessibility that **Karen Mardahl** recommends be added to any technical communicator's toolkit.

How should a technical communicator begin to learn about accessibility, and most importantly, why? I have frequently encountered this question in social networks, so this article is my answer to the curious.

In this article, I give my definition of accessibility and explore ways for technical communicators to start learning about accessibility, as well as implementing these lessons in their work. There are many resources available for learning about accessibility. Here I highlight a few to focus mainly on the reasons for working with accessibility. Look for references at the end of this article.

## What is accessibility?

Most definitions of accessibility involve disabilities. Tim Berners-Lee, inventor of the World Wide Web, is famously quoted as saying that everyone regardless of disability should have access to the Web. Another definition from W3C's Web Accessibility Initiative (WAI) is 'Web accessibility means that people with disabilities can use the Web.'

The word accessibility is tricky, as are the terms accessible and access. You cannot access a website when you forget your password. A screen reader cannot access a site when the site is incorrectly coded. Forgetting a password or being completely shut out of a site are not equivalent issues of access, yet the same term is used. I think this leads to oversights and confusion about the types of barriers.

The information available on the web and in print should be readily available to everyone, even if they have a disability involving vision, hearing, motor skills, or cognition.

With the technology we have today, technical communicators should be able to produce documents or web content that is fully accessible. One major reason why this is not happening is ignorance. People are either unaware of the need for accessible material, or they make the material accessible to one group, but overlook other's needs. This article is evangelistic: it is part of my personal effort to raise awareness and teach technical communicators to consider accessibility issues in all their work. Technical communicators can write, or educate developers and policy-makers about accessibility.

My definition of accessibility involves three words:

- respect
- courtesy
- consideration

When we write we may have a particular

audience in mind. These three words help motivate your technical communication work for any audience and will work with any kind of documentation. They relate directly to the technical communication mantra.

## Know thy audience

The 'know thy audience' mantra means that you need to know what impact various disabilities have in enabling readers to interact with your material. How do blind people read your glossy, illustrated brochure? How do deaf people follow your instructional videos? How does someone with cerebral palsy operate your interactive website? How does someone with a learning disability navigate around your highly technical instruction guide?

You may overlook these questions if you have not met anyone with these disabilities. People can also have multiple disabilities, which adds a layer of complexity.

How do you get to know this unfamiliar audience? Does your workplace have a usability team that includes people with disabilities in their usability testing? (Hint: they should.) Maybe there is someone in your circle of friends and family who has a disability? Be aware that the World Health Organisation (WHO) now defines disability as 'a contextual variable' that is a 'universal human experience'. Learning how people with various disabilities use computers is something every technical communicator should do. You will gain new perspectives that can only benefit your work. My experience has been – once you start thinking about accessibility issues, you cannot stop.

Let's explore two ways to expand your knowledge of your potential audience.

## Lessons from ageing

Grandparents or an older relative may be your closest resource for learning about accessibility. Observe how they read (or squint) or try to find information.

These are some of my observations:

- Reading is linear. One gentleman assumed he had to read everything and politely did not jump around the page. He read *everything!* This emphasizes the need for minimalist writing. Get to the point!
- Politeness reduces questions and increases frustrations. One 85-year-old woman was very polite in her computer classes. She never told the teacher she didn't understand because she didn't want to offend him. The teacher never asked the right questions to ensure that his pupils truly understood their lesson.
- Senses combine to cause trouble. One man

*Everyone regardless of disability should have access to the Web*

**Karen Mardahl** is a technical writer working in Denmark. Her volunteer work in the AccessAbility SIG of STC has brought her into contact with leading accessibility experts. Meeting them is the equivalent of an education in accessibility.  
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Twitter: @kmdk and @stcaccess

had good motor skills, but poor vision. He had difficulties seeing the tiny control that he needed to click. He blamed his motor skills! The opposite is just as bad. Easily seeing a tiny control, but not being able to control your hand to guide the mouse, is just as frustrating.

- Watch your language. I was told about one sad lady who left an internet training class to go home. She had asked the instructor how to return to the main page of the website, and the instructor responded, 'go home.'

One of the delightful things about older people is their love of storytelling. Their tales can reveal many valuable insights to the technical communicator who listens.

Older is another tricky word. It doesn't mean that all old people have trouble with computers. As we age, our eyesight weakens, our motor skills change, our hearing decreases, and so on. Someone who is 70 can be very good at using the computer, but biological changes reveal new barriers.

I could have titled this section 'Older People', but 'Ageing' is a better term. Ageing covers the changes to vision, hearing, and mobility that can effectively raise barriers against full use. If someone thinks there is no need for accessibility in your product because no one with such-and-such a disability will use it, remind them of ageing. Most of us will live to an age where our eyesight, hearing, and body fail us. We need to agitate for accessibility now if we want to continue to surf the web in our nursing homes!

### People with disabilities

Money talks. A recent article indicates that the 10 million people in the UK with disabilities provide a potential market worth an annual £80 billion.

If you have a disability, use it for deliberate testing of your product and for teaching others about your particular requirements for interacting with the product. Consider contacting local branches of organisations like the Royal National Institute for Deaf People (RNID) or the Royal National Institute of the Blind (RNIB) for more information. Perhaps you could arrange a local ISTC event where you can discuss how technical communicators can improve technology for that group's particular needs. Learn more by volunteering in a local organisation that focuses on a disability; you could teach basic internet use to adults with cognition disabilities, for example.

Watching how someone with different needs than your own interacts with computers is quite a learning experience. When meeting face-to-face is not an option, turn to books and articles. One outstanding book is *'Seeing Voices'* by Oliver Sacks. Sacks writes about deaf culture as an outsider and a scientist. The book fascinated me.

There are also excellent articles and other resources from the Education and Outreach Working Group in the W3C's WAI.


### Watch for legal issues

Perhaps simple respect doesn't sell accessibility in your company or with your customer.

Consider the legal aspects. Staying aware of legislation about accessibility can save your company from a lawsuit! People with disabilities are fighting back! (Just google 'accessibility lawsuits' and learn.)

- The United Nations Convention on Rights of Persons with Disabilities entered into force on 8 May 2008. It was ratified by the European Union on 23 December 2010.
- The new British Standard BS 8878 Web Accessibility Code of Practice launched on 7 December 2010. Will it enter or influence your workplace?
- Monitor Outlaw.com, a good resource for legal issues pertaining to accessibility and many other issues relevant for technical communicators.

### Conclusion

This article is an appetiser, easily digestible for you or the person you share it with. There is a strong community of people on the internet working for accessibility. Please join us! 

### W3C's WAI resources and personas

WAI's Education and Outreach Group has put together several documents that are an excellent starting point for someone new to accessibility.

Their Getting Started section covers an excellent (must-read) introduction to accessibility. It covers the value of accessibility and how you can be a part of making the web more accessible to all people.

The Essentials section illustrates how technical communication plays a role in accessibility: authoring tools create content, and people use some sort of agent like a browser or assistive technology to interact with that content. Authoring tools include HTML editors, desktop publishing products, and blogging tools.

These documents have the personas of people with disabilities that can help you understand their particular needs. As a relevant aside, the AEGIS project has excellent personas of people with disabilities (see the Reference section).

### References and resources

- AEGIS Project Personas. <http://tinyurl.com/63e4zya>
- British Standard BS 8878 Web Accessibility Code of Practice [www.access8878.co.uk](http://www.access8878.co.uk)
- DCMP Keys to Captioning and Descriptions [www.dcmp.org/keystoaccess](http://www.dcmp.org/keystoaccess)
- Disability market 'worth £80 billion' annually <http://tinyurl.com/67nej8b>
- How People with Disabilities Use the Web <http://tinyurl.com/o8doc8>
- World Health Organisation, International Classification of Functioning, Disability and Health (ICF) [www.who.int/classifications/icf/en](http://www.who.int/classifications/icf/en)
- Royal National Institute of Blind People, RNIB. [www.rnib.org.uk](http://www.rnib.org.uk)
- Royal National Institute for Deaf People, RNID. [www.rnid.org.uk](http://www.rnid.org.uk)
- Technical Communication and Inclusion <http://tinyurl.com/6733xw5>
- UN Convention on Rights of Persons with Disabilities [www.un.org/disabilities](http://www.un.org/disabilities)
- W3C's WAI (World Wide Web Consortium's Web Accessibility Initiative) [www.w3.org/WAI](http://www.w3.org/WAI)
- WAI Resources on Introducing Web Accessibility, Getting Started [www.w3.org/WAI/gettingstarted](http://www.w3.org/WAI/gettingstarted)
- Web Accessibility and Older People: Meeting the Needs of Ageing Web Users [www.w3.org/WAI/older-users/Overview.php](http://www.w3.org/WAI/older-users/Overview.php)

# PerfectIt — a step in the right direction

**Theresa Cameron** reviews a new tool for copyediting that identifies and fixes inconsistencies in documents.

How many times have you been asked to update a document and found basic copy errors in the original document? Or, working with other teams, found inconsistencies between your text and that of others? Certainly I, for one, have sighed and started the tedious task of going through bullet lists, for example, to add or remove punctuation. Now there's a tool that can speed up these processes significantly, PerfectIt.

## About PerfectIt

PerfectIt from Intelligent Editing, a UK company, was originally devised to correct inconsistencies in consultants' proposals and reports produced in Microsoft Word, especially documents with contributions from more than one person. The types of inconsistencies that PerfectIt picks up include:

- use of hyphenation and capitalisation
- definitions of abbreviations
- capitalisation in headings
- punctuation in lists
- variations in spellings

It can also generate tables of abbreviations, update cross-references and tables of contents, and convert two spaces into one.

It runs on most Windows platforms from 2000 onwards, and Intel Mac systems that have a Bootcamp partition. It can be used for documents in Word 2000, 2002, 2003, 2007 and 2010 (32-bit). The tool, once installed, is added to the Add-Ins menu option in Word.

There are 27 tests for inconsistencies, which can be run individually or in a batch. A simple drop-down checklist allows you to select or deselect the tests you wish to run.

## Using PerfectIt

To test the tool, I chose several telecommunications manuals that had been created in Chinese and translated into English by non-native speakers. The documents, ranging from 48 to 995 pages, were in Word 97–2003 compatibility mode and I used Word 2007 on Windows XP for testing the tool. As most of the selected documents had been translated by up to four different translators, I expected to find inconsistencies.

Running the checker is simple. All that is required to launch the application is a click on the PerfectIt icon in the open document. In the Settings section of the pop-up, you select (or deselect) the tests to run, then click **Start**. A progress bar is displayed during the initial check and once this is complete, the first inconsistencies are shown in the PerfectIt window. Usually there are two options, for

example, a hyphenated and a non-hyphenated word, with the discrepancies in context given in the pane below. PerfectIt does not state which version of a word is correct, for example, 're-analyse' or 'reanalyse'; it gives the number of instances of each spelling. By clicking on the radio button, you can select your preference for the word and then go through the list of inconsistent spellings. Each highlighted instance is located simultaneously in the document. To correct the inconsistency, a click on the **Fix** button updates the document immediately with your preference. A handy **Fix All** button is also available, as is an **Undo** button.

The tool works equally well with the Word review option **Track Changes**. Here, the changes are marked up in the same way as for any change to the original document.

The options in the menu bar allow you to skip to the next test, repeat a test, or select a specific test from the list. Style sheets can also be imported and the tests can be customised, so that specific phrases, for example, are ignored by the checker.

The comprehensive Help covers use of the tool and descriptions of the tests.

## PerfectIt strengths

The tool is very easy to use and each 'fix' is instantaneous. It finds all kinds of typing errors and inconsistencies, for example: a comma instead of a full-stop in a bullet list, and instances of different spellings for the same word. It is also extremely useful for abbreviations – finding instances where the abbreviation appears before the definition, or is given in full more than once. One of its best features is that it can compile a table of abbreviations in an instant, which for me has previously been a time-consuming task.

Fixes for bullet lists too, such as the use of capitalisation and punctuation, are very useful, and the test for table headings inadvertently picked up deviations from the style template.

## PerfectIt for technical documentation

There are a few shortcomings when using PerfectIt for technical documentation. The rule about capitalisation in phrases, for example, demanded extra time as certain words appeared in lowercase and uppercase, sometimes in text and sometimes as a parameter or window title in steps. PerfectIt does not recognise the conventional variety of typefaces and fonts in technical manuals; the list of inconsistencies is displayed in plain text. Conscience demands



that any discrepancies are checked but when in my test documents, the word is 'System' (usually in bold) and 'system' (in bold and normal typefaces or Courier font) and the latter appears 289 times, the user would probably be forgiven for skipping to the next test. Software documentation that has words in capitals, as sometimes displayed on a screen interface, generates another inconsistency, which surprisingly for me at first, is described as an abbreviation. The rule about numerals in text might also be skipped or defined as exceptions in manuals that contain instructions such as 'Repeat step 3' or 'Go to step 9'.

Care needs to be taken if any inconsistencies appear in hyperlinks. When I used **Fix** to correct capitalisation in a heading that was hyperlinked, the formatting disappeared in my sample documents and could only be restored manually.

Other reservations, for me, were in the tool's interface. The progress bar indicates the percentage of completed tests but not the total number of inconsistencies. However, some tests may find no errors whereas others may have many discrepancies. When one inconsistency rule has, for example, 28 different instances, the user has no idea if this rule equals two percent of the total inconsistencies, or 50 percent.

The pop-up with the progress bar when the initial check is launched contains the message: 'Always check PerfectIt's suggestions. As with a spelling checker, review each change carefully.' As there are no suggestions (inconsistencies) available at this stage, the statement seems perhaps superfluous for a professional editor. PerfectIt states that the initial check will take a specific time. When testing the tool on two different machines, none of the document checks was completed in the time stated. This is further misleading as the same pop-up is visible, even though the initial check is complete and the tool is running individual rule checks. The inconsistency window only appears when inconsistencies are found – which incidentally are referred to as 'Errors' and not 'inconsistencies' or 'discrepancies'.

I also found it curious that the **Next** button changes colour when all instances are fixed, although the button is active at any time. I imagine that the colour change is a visual indication that all inconsistencies are cleared so the user should proceed to the next check, but in technical documentation, the complete list of identified inconsistencies cannot always be 'fixed', so the emotional factor that some users attach to a user interface might be one of disappointment.

A final shortcoming, for me, is that the tool window is completely static. It cannot be minimised and the size cannot be enlarged or adapted in any way. As a consequence, the pane displaying the inconsistencies is limited to four

locations at a time, which for many technical manuals may be too small, and requires a lot of scrolling with the mouse. Keyboard strokes, such as arrow keys, and keyboard shortcuts are not available.

Of course, other users may have different experiences, and might not share my reservations.

## Conclusions

A technical editor or writer will undoubtedly benefit from PerfectIt. It is a low-cost, powerful aid for checking and correcting inconsistencies in longer Word documents, not only those which have been worked on by different authors. It certainly has a big advantage over Word's 'Find and Replace' feature, which requires the user to identify each potential type of error first.

There is however, room for improvement. As an editor, I, for example, would like a report or summary of the inconsistencies that I could then pass back to the writers or translators for future reference. Having a report with details such as the number of inconsistencies in each rule would also help to assess the time required to 'fix' a document.

While it would be difficult to have versions of PerfectIt for all the authoring tools available, more technical authors or editors may be able to benefit from PerfectIt's use if it was available for PDF documents. PDF is a common output for review and publication of documents and would be a good place to catch the inconsistencies in documents, irrespective of the source authoring tool.

Apart from the current shortcomings for technical documentation requirements, I can recommend PerfectIt as a very useful tool for anyone working in Word. It is certainly worth trying out. A free 30-day trial is available from the website: [www.intelligentediting.com](http://www.intelligentediting.com)

PerfectIt is not (yet) perfect and it won't resolve all the issues that a technical editor must address but for the copyediting aspect, it is a significant step in the right direction. **C**

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# What and where?

Chris Atherton explains how your brain perceives objects and how technical communicators can exploit this in their documentation.

Producing clear, unambiguous software and documentation often depends on choosing just the right terminology. But before the user even reads the words on the page or screen, they will already have drawn a number of inferences about the information shown there. While scientists are still investigating the finer points of human visual processing, some of the best ideas about how we see and make sense of our environment have existed, largely unchanged, for over a hundred years.

The Gestalt psychologists of the late 19th and early 20th centuries proposed a number of principles by which the brain organises perceptual information (Metzger, 1936). The Gestaltists relied largely on their own intuition and holistic thinking — yet incredibly, a century later, it has been impossible to disprove their ideas about how early visual processes are organised. We now know that at least two of those organising principles share an interesting parallel with how the brain locates and identifies objects.

Among the Gestaltists' many proposals was the idea that we group the objects we see according to how close they are to each other, and by how similar they are: these are the laws of proximity and similarity. Figure 1 illustrates

the influence of proximity on whether we perceive objects as being arranged in rows or columns: items that are closer together appear to belong together.

Placement of objects, and control over the negative space between them, will dictate how the eye travels across the page or screen — and this simple principle has many potential applications for technical communicators. For example, allowing ample line spacing makes text easier to read, because the eye is not distracted by the letters of the rows above and below. Assembly

instructions that continue across a sequence of panels may require careful use of the negative space between panels, as this will dictate whether the reader follows the sequence correctly, by rows or by columns. And since the brain tends to assume that proximal objects are mutually related, subsets of items (such as instructions or icons) might usefully be organised with more negative space around rather than between them, to distinguish them from other such subsets.

Figure 2 shows how quickly and easily the visual system segregates information based on visual similarity alone. Oddball objects elicit a 'pop-out' effect, whereby our attention is quickly drawn to the exception. Technical communicators will understand the benefits of using bold or contrasting typeface to signal important information, as well as the use of colour to link related items. Incidentally, the effect of apparent continuity between discrete identical objects (the percent symbols in Figure 2, which we perceive as a consistent texture) is a common theme in Gestalt psychology — and one that touches on the Gestalt property of 'reification', our tendency to construct a whole that is greater than the component parts (or, in common parlance, to make things up that aren't really there).

What the Gestalt psychologists did *not* know when they formalised their rules of perception is that when we calculate objects' proximity and similarity, we are using two very different pathways in the brain to do so. The dorsal pathway calculates how far away objects are, and works out how to grasp them. Meanwhile, the ventral pathway is unconcerned with objects' size and location, but instead encodes information about the objects' qualities: whether they are alike, whether they share the same colour or texture, and so on. The dorsal and ventral routes (Figure 3) have been dubbed the 'what' and 'where' pathways, respectively (Ungerleider & Mishkin, 1982) — though a more recent re-framing suggests that these might be better considered as 'vision for action' and 'vision for perception' (Goodale & Milner, 1992). Research on patients with brain injuries shows that it is possible to suffer damage to one pathway while the other remains intact. That is, brain-damaged patients who are unable to correctly reach for and grasp objects often have no problem telling subtly similar objects apart, just as there are patients with intact reaching and grasping who struggle to recognise the objects they

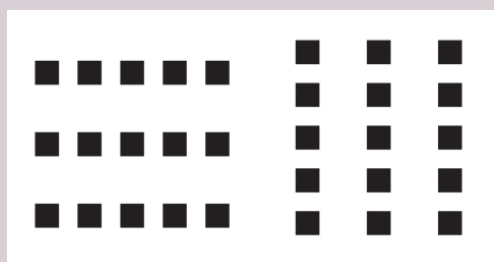


Figure 1. Proximity between objects dictates how we group them in our mind's eye




Figure 2. Oddball objects appear to 'pop out' from amid an array of similar items

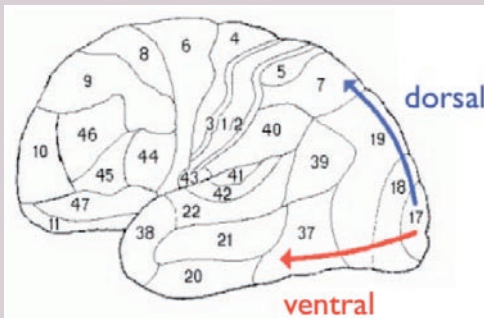
are reaching for (Turnbull, Carey & McCarthy, 1997). Furthermore, electrophysiological study of normal subjects reveals that the act of grouping objects by proximity does appear to recruit the 'where' pathway, while grouping them according to similarity seems to engage the 'what' pathway (Han et al., 2001). In other words, as well as performing different functions, the mechanisms that allow us to recognise objects' proximity and similarity traverse different parts of the brain's visual regions.

I like to imagine that the Gestalt psychologists would have been fascinated to learn that the simple acts of grouping objects by proximity and similarity actually underpin two of the brain's most fundamental perceptual pathways. They might also have been intrigued by the finding that the dorsal 'where' pathway processes information much faster than the ventral 'what' pathway. That is, we generally process objects' spatial distribution before we evaluate qualitative elements like colour and texture (Quinlan & Wilton, 1998). For the technical communicator then, it might be sensible to ensure that the principal elements of the document (or screen) are signalled using spatial location, leaving colour, typeface, etc., to indicate less fundamental distinctions.

As a final illustration of the power of proximity, similarity and reification, consider the nine dot problem shown in Figure 4. Can you draw four straight lines that travel through all nine dots without removing your pen from the paper? The solution, and why the Gestalt laws might make it harder to achieve, is left as an exercise for the reader.

By the standards of modern behavioural science, the Gestalt laws are very old indeed. However, they are supported by contemporary research, which suggests that the human visual system does appear to operate according to similar rules; the Gestalt principles thus continue to offer immense value to anyone interested in clear visual communication. Neuroimaging technology allows us to measure the relative importance of such principles when parsing our visual environment, and may one day yield more ways in which technical communicators might further optimise the end user experience.

Cognitive science in general continues to produce a wealth of research that can inform and inspire technical communicators about the end user's relationship with software and documentation. The interested reader is invited to follow up the references, and to make use of services such as Google Scholar (<http://scholar.google.com/>) to help bridge the gap between 'pure' science and its application to technical communication, user experience design, and related fields. 



**Figure 3. The brain's dorsal and ventral pathways process an object's location and qualities**



**Figure 4. The nine dot problem illustrates the Gestalt principles of proximity, similarity, and reification**

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# Review of Adobe RoboHelp 9

Following the recent software release, **Matthew Ellison** takes a look at the new features.

Adobe RoboHelp 9 is a major new release of the popular Help Authoring Tool that is, as I write, approaching its twentieth birthday celebrations. Since its original creation by Blue Sky Software Corporation, it has benefited from countless additional features and enhancements, and has also pioneered a number of new Help delivery methods such as WebHelp, FlashHelp, and Adobe AIR Help. Some of these, in particular WebHelp, have been extremely influential in shaping the model and design for today's software user-assistance systems. The arrival of version 9 coincides with the release of FrameMaker 10 and the Adobe Technical Communication Suite 3 (TCS 3), of which RoboHelp 9 and FrameMaker 10 are key components.

One of the things I have enjoyed about following RoboHelp through the years is that, even though its feature set has expanded steadily, the principles of its operation and its basic interface have remained reassuringly constant. Indeed, there are many icons, dialog boxes and commands that have remained almost unchanged, apart from cosmetic improvements, for ten years or more. As a result, users of the product are able to benefit from new features at each release without being forced to familiarise themselves with a completely new interface, or to relearn the standard procedures that they have become accustomed to.

This sense of continuity is maintained in RoboHelp 9, and at first glance you may fail to notice any significant difference between the

main screens of RoboHelp versions 8 and 9. However, when you look a little more carefully and start exploring the interface in more detail, you will start to discover a range of new and innovative features.

Two areas of RoboHelp that relate to other Adobe tools and technology have been significantly enhanced in version 9. These are FrameMaker integration (enabling a smooth publishing workflow from FrameMaker 10 to RoboHelp 9 if you have purchased these products within TCS 3) and the capability to generate the Help output as an Adobe AIR application. I'll talk in more detail about these enhancements within their own sections below. Even if you are not exploiting these Adobe technologies (perhaps you are authoring your content within RoboHelp's own HTML Editor and publishing it to your web site as WebHelp) there are a number of other usability improvements and new features that offer highly significant benefits. My favourite amongst these are the revamped Resource Manager (which now truly lives up to its name), the review and collaboration features, and the ability to add special search keywords that link to external content.

## First impressions

If you're an existing RoboHelp user, I've already mentioned that the RoboHelp 9 interface will look very familiar to you (see Figure 1). You may notice the new Workspace drop-down control in the top right-hand corner, which enables you to save and load specific configurations of RoboHelp's multi-pod interface to suit particular tasks and preferences. Although it was possible to do this in RoboHelp 8, the controls for doing so were not well exposed, and as a result the feature was under-used. The Workspace control makes this useful feature far more obvious and intuitive. Look again and you may spot the brand-new Review menu that introduces a very welcome set of features for tracking changes and gathering comments and amendments from reviewers: more about this important new feature later.

I suspect that newcomers to RoboHelp may be somewhat overwhelmed by the user interface at first sight: this is, after all, an extremely powerful and extensive product, and it has numerous pods and dialog boxes. What's pleasing is that there is an array of links to various web-based resources such as the RoboHelp Support Center, Adobe TV (providing access to a collection of instructor videos),

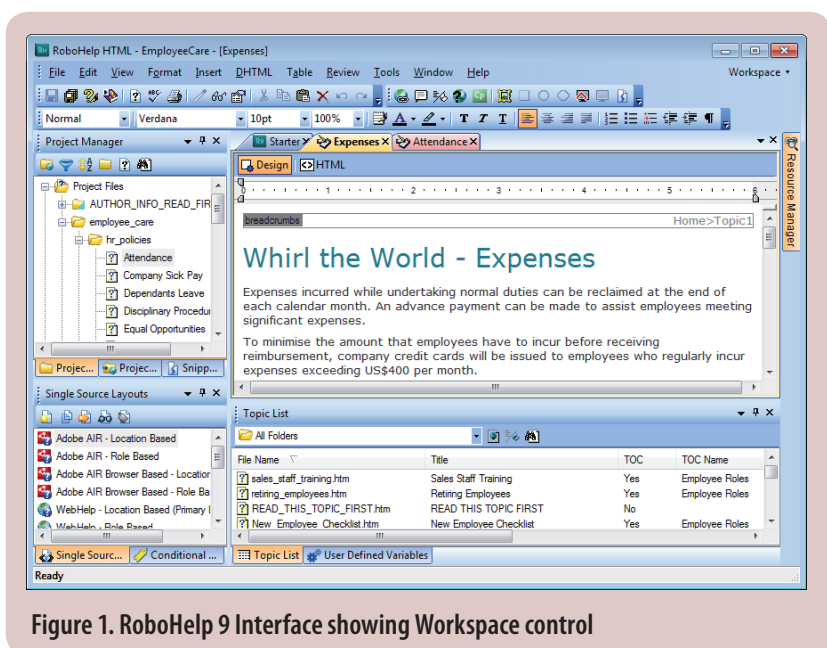


Figure 1. RoboHelp 9 Interface showing Workspace control

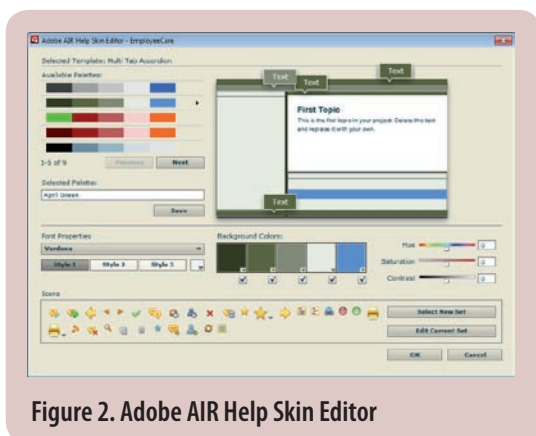


Figure 2. Adobe AIR Help Skin Editor

and Knowledge Base Articles. While the extent of available information is to be applauded, I do feel that it could have been a little more structured and better organised for novice users. The “Getting Started” tutorials that were built into earlier versions of RoboHelp are no longer present, and the promising looking link entitled “Quick Tour of RoboHelp” actually takes you to a set of tutorials covering a somewhat random collection of techniques that are (as I write) currently based on RoboHelp 8. However, I expect this set of resources to grow over the coming months, and hope that there may be more “Getting Started” information aimed at new RoboHelp users.

### Adobe AIR Help enhancements

AIR Help is Adobe’s new Help format that is based on the Adobe® AIR® 2 runtime. It is the format on which Adobe’s own “Adobe Community Help” viewer is based, and it is available as an output type that you can generate from RoboHelp. Some of the advantages of AIR Help over Microsoft’s HTML Help format are that it has a more customisable and full-featured interface, and that it enables users to download and install incremental updates to the Help when they become available. It also offers the potential for enabling users to rate and comment on Help topics using the AIR Help interface.

Even though RoboHelp 8 had the capability to generate Adobe AIR help, there were some serious restrictions. For example, although a gallery of standard AIR Help skins was available, it was not possible to customise these skins to match your own corporate style. In RoboHelp 9, we now have an Adobe Air Help Skin Editor (see Figure 2) that enables you to customise any of the three basic types of template (Classic Help, Multi Tab Accordion, and Uni Pane) by choosing your own colour scheme, font, and icons. Note that you cannot change the structure of the AIR Help viewer, as this is determined by the template type on which your skin is based.

Another more serious weakness of RoboHelp 8’s support for Adobe AIR Help was that the ability to comment on Help was limited to those

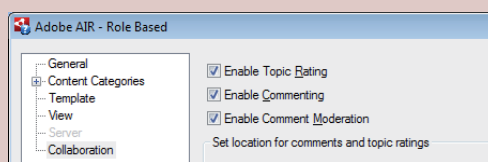


Figure 3. Collaboration options in the Adobe AIR single source layout

users who had local access to a shared drive specified by the Help author, which meant that commenting was effectively only useful as a way of gathering feedback and amendments from in-house subject matter experts during the development phase of a Help project. RoboHelp 9, on the other hand, now supports user collaboration (topic rating and commenting) via the Web. In the context of the current popularity of social networking and user interaction, this an extremely important and interesting new feature, in my view.

The collaboration capability is provided through the related Adobe product RoboHelp Server, which you will need to purchase and configure on one of your public servers if you want to enable your external end users to provide feedback on your Help. When you set up your Adobe AIR single-source layout in RoboHelp, you have the option of moderating comments (see Figure 3) so that they are made available to other users within the AIR Help comments pane only after you have authorised them. You can also choose whether or not you allow comments to be made anonymously. Note that the collaboration features are only available when you generate Adobe AIR Help to be installed on users’ desktops: it is not supported by the browser-based form of AIR Help.

### Adobe FrameMaker integration

Since RoboHelp 8, you have been able to link RoboHelp projects to FrameMaker documents, and use this as a way of publishing to any of the output types available from RoboHelp from source content that you edit and maintain within FrameMaker.

In RoboHelp 9, this capability is further refined, giving you much greater control over the way that Paragraph and Character Formats defined within FrameMaker are transformed and mapped as they are imported into RoboHelp. For example, previously, you could only modify an incoming FrameMaker format by mapping it to a RoboHelp style. In RoboHelp 9, you now have the option of preserving the base FrameMaker format and adding specific overrides such as a change of background colour or font. There are also improvements to the import of lists and tables from FrameMaker. The interface for setting up the options and mappings for a linked FrameMaker document, which I criticised in a review of Adobe RoboHelp

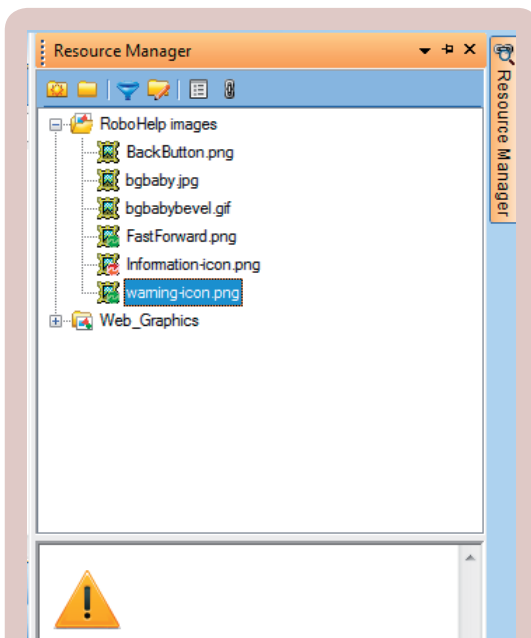


Figure 4. The Resource Manager in RoboHelp 9

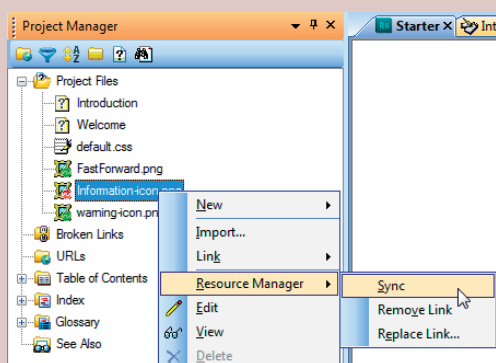


Figure 5. Synchronising a project item

8 for the WritersUA website, remains basically unchanged apart from the enhancements described in this paragraph.

Those authors who create content in DITA format will benefit from the new support in RoboHelp 9 for importing or linking DITA Maps and their associated topics. This effectively means that RoboHelp now offers a sophisticated publishing engine for transforming DITA-based content to a range of online formats including WebHelp, AIR Help, and ePub.

### Resource Manager

The Resource Manager is a powerful and long overdue feature that will truly revolutionise the way in which common assets such as icons, screenshots, snippets, and style sheets are shared between multiple RoboHelp

projects. The basic principle is that you store these common assets in a Shared Location, and whenever you use one of the items in a specific project, RoboHelp retains a link between the item in the project and the corresponding item in the Shared Location. This means that if you edit the item in the Shared Location, all of the corresponding instances in the projects that use it can be synchronised automatically. You can specify more than one Shared Location, and these are all managed within the Resource Manager (see Figure 4).

In the Project Manager, the icon for any project file that is linked to a Shared Location is displayed with a small green arrow (rather too small perhaps for those without 20-20 eyesight) superimposed on top of it. This arrow turns red if the corresponding item in the Shared Location is modified, indicating that the project item is not synchronised. You then have the option to synchronise it by right-clicking on it and selecting the appropriate option (see Figure 5).

The Resource Manager is one instance of

when continuity in the user interface between RoboHelp 8 and 9 may actually be a drawback: RoboHelp 8 also had the Resource Manager pod, and it looked more or less the same as it does now. However, it only enabled resources to be copied into a project, and it did not provide the powerful linking and synchronisation capability now available in RoboHelp 9. I hope that any authors who dismissed the Resource Manager as being pretty feeble in version 8 will realise its new-found powers when they upgrade to version 9.

### Review and collaboration

Review and collaboration are vital parts of the content development process for many Help authors, and RoboHelp's new features in this area are extremely welcome. In a nutshell, the new features provide the capability to:

- Add review comments within RoboHelp's own HTML editor
- Track changes within RoboHelp's own HTML editor, in much the same way as you can track changes in Microsoft Word
- Export topic text to a PDF document for review and amendments (using Acrobat Reader 9 or higher)
- Import a PDF document with review comments and amendments back into RoboHelp, where you can accept or reject changes.

I particularly like the fact that my reviewers can now make comments and amendments to my text without requiring anything more than the free Adobe Acrobat Reader. One issue you need to be aware of, however, is that you should not make any amendments to your RoboHelp project between creating the PDF for review and importing the amended PDF back into RoboHelp. This may require you to impose rather tighter deadlines and a greater sense of urgency on your reviewers than previously!

After importing an amended PDF back into RoboHelp, or after making Tracked Changes within RoboHelp, all comments and changes are displayed within RoboHelp's new Review Pane (see Figure 6). You can accept or reject each change as required.

### External Content Search

This new feature enables you to link search keywords that you anticipate your users may enter to Web-based content that is available outside of your Help system. The idea is to provide the most comprehensive and relevant set of results in response to a user's search query, but without duplicating within the Help system information that is already available elsewhere.

This reminds me slightly of the WebSearch button that was available in much earlier versions of RoboHelp, but I'm pleased to say that it is much better thought out. WebSearch



simply searched the entire Internet for any information that matched the index keywords of the current topic, giving extremely unpredictable and often unhelpful results. External Content Search, on the other hand, enables you to target specific URLs on the web in response to each search keyword. It opens up the possibility of Help becoming a search-based portal to a wide range of useful web-based resources, which hopefully will encourage users to make more use of the Help systems that the technical communication community provides. Please note, however, that External Content Search is not available for the Microsoft HTML Help output type.

You set up the keywords and corresponding URLs using the External Content Search dialog box shown in Figure 7. The risk of this approach is that some URLs may become invalid or out-of-date over time, and you will need to be careful to continue monitoring and testing your External Content Search entries throughout the lifetime of the Help system. To avoid this issue, you can choose to insert a URL that simply passes the search keyword to an external search engine such as Google or Bing and returns the current results (see Figure 7).

### Dynamic user-centric content

One of the most common questions I have received from RoboHelp users over the years is whether it is possible to customise the content of a Help system based on user role or geographic location, while still generating and deploying the Help to a single common URL. Up until now the answer has been “no, you will have to generate separate Help systems (albeit from the same source project, using Conditional Build tags) for each audience group.” However, with the introduction of Content Categories in RoboHelp 9 my answer is now a qualified “yes”.

Content Categories enable you to cater for multiple audience groups within a single-source layout. You can do this for the WebHelp and Adobe AIR content types. For each of the Content Categories, you can specify a Conditional Build Expression that filters out certain topics, and you can also choose a specific TOC, Index, Glossary, and Browse Sequence file that you have defined within the project (see Figure 8).

Thus, each Content Category is effectively a different Help system tailored to the needs of a particular audience group. When you generate the Help, a separate subdirectory containing all the required topic and navigation files is created for each Content Category, but they are all accessed from a single Start Page. When users open the Help, they are able to select the appropriate Content Category from a drop-down (see Figure 9).

The reason for my qualified affirmative is that there is no way to prevent users from selecting

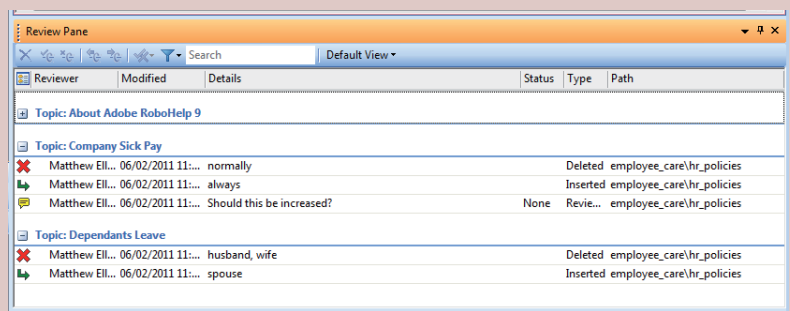


Figure 6. The Resource Manager in RoboHelp 9

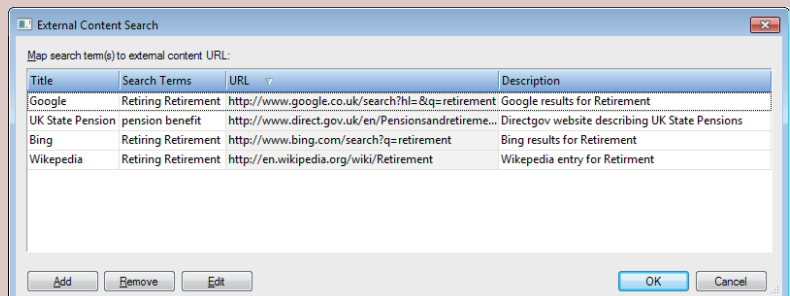


Figure 7. The External Content Search dialog box

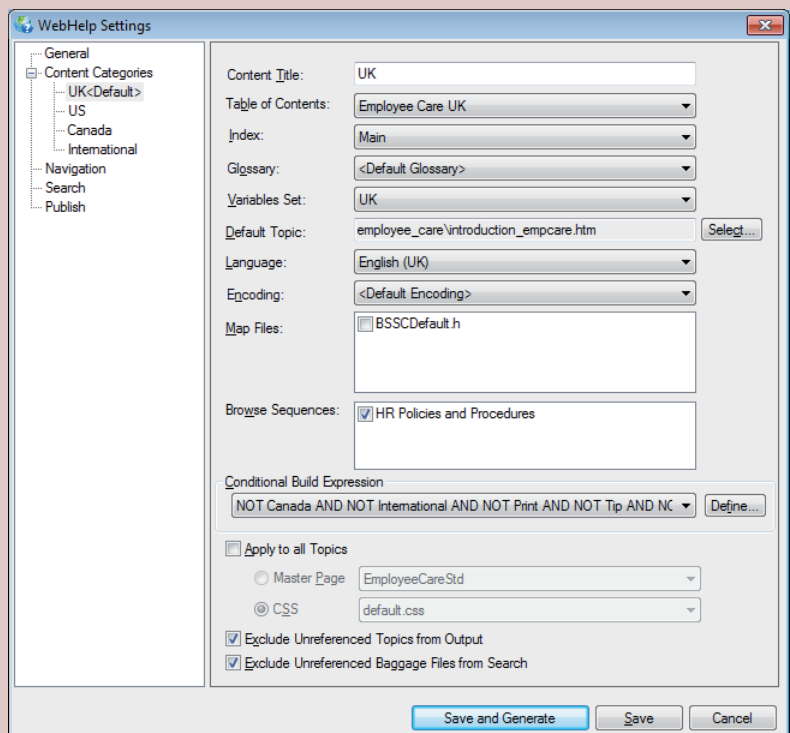


Figure 8. Setting up a Content Category for WebHelp

Content Categories that aren't appropriate to them, so you can't use this feature to restrict access by particular users to sensitive or confidential information.

### Other enhancements and new features

Although I have focused this review on my own particular favourites, there are a number of other new enhancements and features throughout the RoboHelp 9 interface. One small point worth mentioning is the inclusion

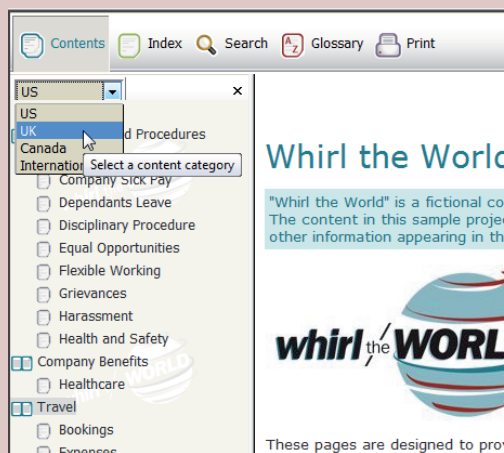


Figure 9. User selects a Content Category

of two different buttons labelled “Save and Generate” and “Save” on every Single Source Layout Option dialog box. This means that you can now double-click a single-source layout such as WebHelp and make a change to the settings without being required to go ahead and generate the output (which could take several minutes for a very large project). That is

the kind of small usability tweak that can save much frustration and time-wasting.

Other enhancements worth a passing mention that you may wish to investigate further are dynamic editing of context-sensitive topics (currently only available for context-sensitive links to C++ applications), the ability to organise Snippets and User-defined Variables into categories, and support for pasting rich HTML content from the clipboard.

#### Conclusion

RoboHelp 9 provides a range of new and enhanced features without breaking away from

its tried and tested workflow and user interface. Some of the most interesting and innovative features become available when you use RoboHelp in conjunction with other Adobe products. For example, end-user commenting via the Internet requires RoboHelp Server, and integration with FrameMaker 10 is only available within TCS 3. But there is a range of other major enhancements and some unique features available even within the standalone version of RoboHelp 9, of which my favourite is the powerful new incarnation of the Resource Manager. Overall, this new version of RoboHelp maintains and reinforces RoboHelp’s position as one of the leading Help authoring tools of the current generation. **C**

#### Further reading

Matthew Ellison’s review of Adobe RoboHelp 8 for the WritersUA web site: <http://tinyurl.com/675kz88>

Kevin Siegel’s review of Adobe RoboHelp 9 for the WritersUA web site: <http://tinyurl.com/6c63bfb>

Adobe Technical Communication Blog: <http://blogs.adobe.com/techcomm/>

All about Adobe’s Community Help service:

<http://blogs.adobe.com/communityhelp/>  
Peter Grainge’s explanation of Adobe AIR Help:

<http://tinyurl.com/5rono7q>  
Help Authoring Tool (HAT) Comparison Matrix:

<http://hat-matrix.com/>

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# More pictures, fewer words

**Martin Block**, writes about taking a more graphical approach to software documentation.

## Introduction

I've been with my present employer for a number of years now. However, when I presented my first piece of work to my superiors, the feedback was less than encouraging and included that most damning of words: 'disappointing'. It seems that they wanted to see a more graphical approach to software documentation. At first, I was disheartened but then I looked again at what I'd submitted and had to admit that their feedback was fair: it was a sea of text, interspersed with images added almost out of a sense of duty and which did little to support the narrative. Bluntly, it was boring to look at, boring to read and (if I dare say it) boring to produce. Things had to change or else I would be out of a job, having either been given the boot or quit through dissatisfaction with software documentation as a whole. So from that day forth, I've tried to use images to replace text wherever possible in my software documentation. I now really enjoy working in this way and confess that the artistic demands it places on me satisfy a creative need.

## Designs

I hope that the following eight designs will be of use to you, either directly or by stimulating ideas of your own.

### General advice

Before you start creating designs here's some general advice. Wherever possible, present dialog boxes completed with practical, sensible entries that strengthen the narrative (a useful trick is to use any optional free-format fields to your advantage). Be sure

to remove personal details such as real-world names, IP addresses, domain names and so on, even if this requires you to edit the image after capture (for example to replace your machine name with something generic). Anchor text boxes to the image and adjust their size and position so that they remain within the vertical confines of the image (this stops the text boxes 'escaping'). If you want to use arrows, then red is a good colour because it shows up strongly on-screen and in both colour and black-and-white printouts. A tidier, more controlled alternative to arrows, especially if the dialog box begins to look like an archery target, is to use coloured bars drawn vertically and horizontally onto the image, with each bar given a thin white border to help it stand out from the underlying dialog box.

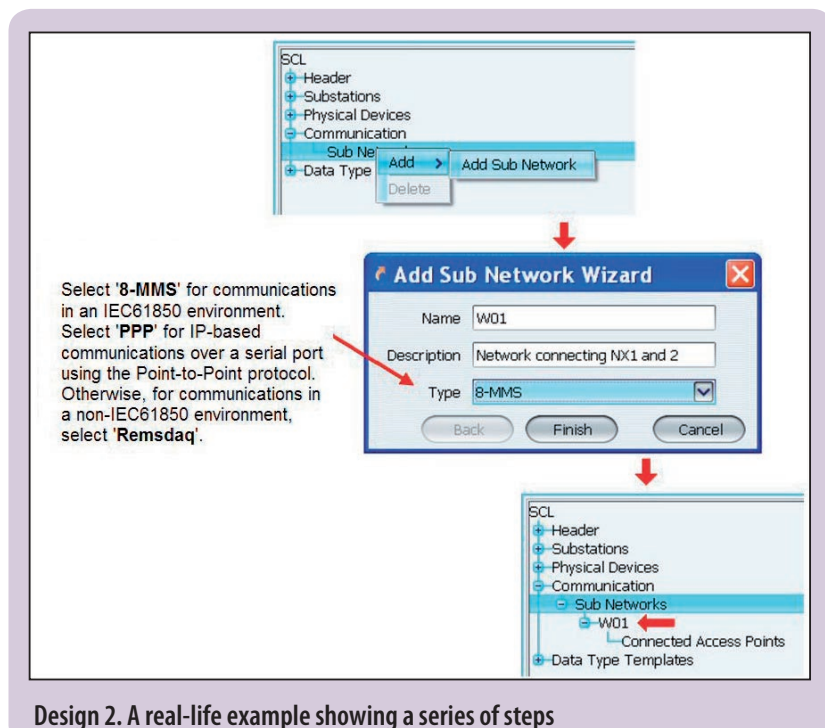
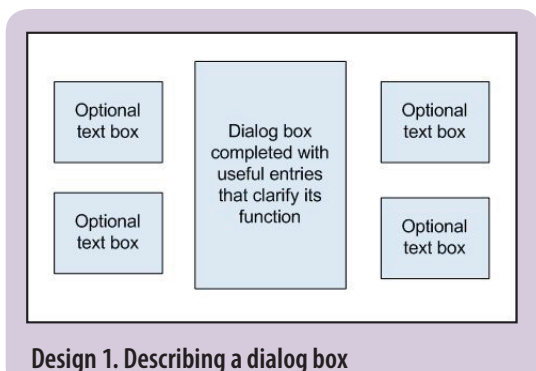
### Design 1

This is a very basic design, showing a reader (a) that he or she is still on course in a procedure having arrived at a specified dialog box and (b) how to complete this dialog box.

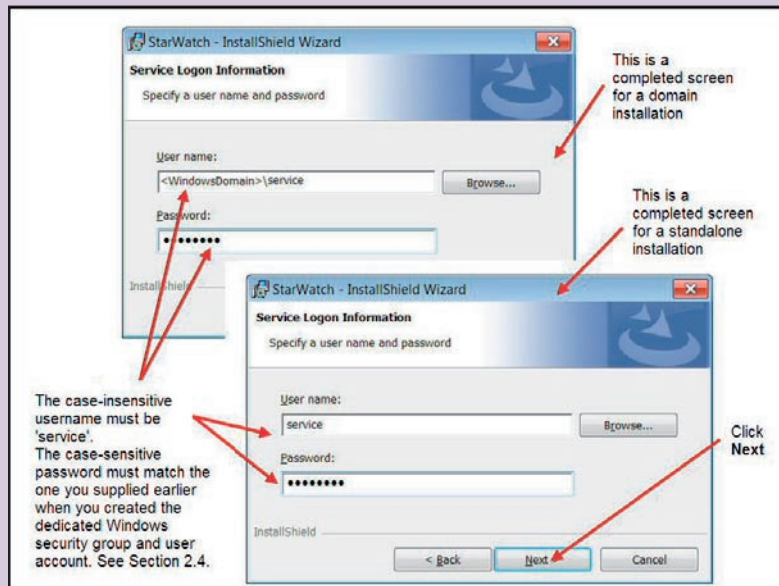
### Design 2

This design portrays, in a single image, the following set of steps:

1. Right click an entry in the tree structure.
2. Select an option from the presented pop-up menu.
3. Complete the dialog box that appears.







**Design 3.** A real-life example comparing two sets of settings from the same dialog box

4. Check the tree structure to see that a new entry has been added.

As a general rule, image width is a greater constraint than height. Consequently, you may end up doing some horizontal cropping to dialog boxes, which is most easily done if your operating system presents windows with constant horizontal colour gradation in their headers. The example just shown was created on a machine running Windows XP with the windows style set to 'Windows XP Style'. With Windows Vista, you could use the style 'Windows Vista' and with Windows 7, 'Windows 7 Basic' works well.

#### Design 3

This design compares two sets of settings for the same dialog box.

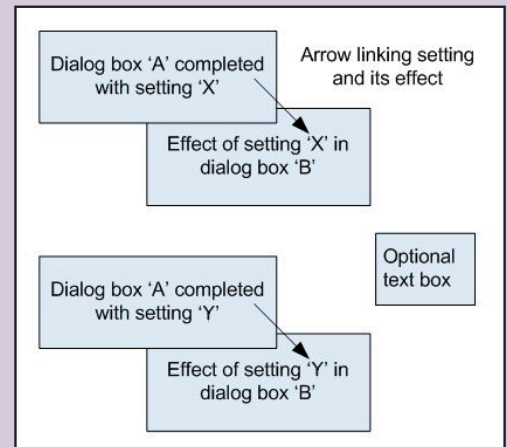
Using repetition like this is also a way to convey a sense of progression. The slight overlaying of the component elements gives them a sense of connection. The off-setting used in this design is a deliberate ploy to avoid vertical or horizontal alignment of elements. By doing this, your readers will not be tempted to concentrate on slight misalignments of elements in the manner of a sloping picture on a living room wall. Off-setting also creates graphically appealing white space that can be filled with text boxes as required.

#### Design 4

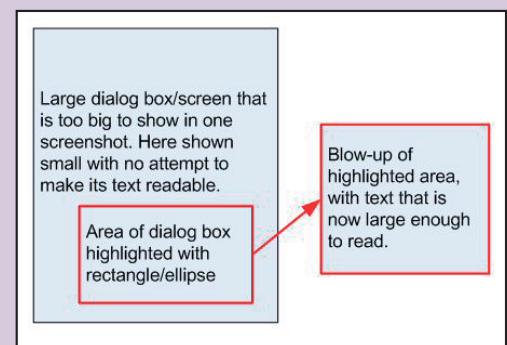
This design compares and contrasts the effect of different settings in the same dialog box.

#### Design 5

This design is a way of coping with over-sized dialog boxes which, when shrunk sufficiently to fit onto a page or screen, are too small to read.



**Design 4.** Compares and contrasts the different settings in a dialog box



**Design 5.** Highlighting a section of a dialog box

#### Design 6

This design includes, in one image, the topology of a network setup, plus information on the component machines such as their role and required operating systems.

#### Design 7

This shows a way to present a 'warm-up' overview of a complicated procedure.

It isolates the main and sub-tasks, presenting the main tasks going downwards and the sub-tasks going across. The design shown here is based on a fictional table of contents, with the heading level 2 entries (main tasks) going down and the heading level 3 entries (sub-tasks) going across.

#### Design 8

This design serves a similar purpose to Design 7, but in this case for procedures involving a variety of tasks on different machines in a setup.

In the fictional example shown here, the small thumbnails in the right-hand column emphasize the machines where you need to perform each task.

#### Tools and processes

A discussion of tools and processes is worth an article in itself, which I would feel poorly

qualified to write. My main work tools are Microsoft® Paint (my prime and favourite), Jasc® Paint Shop Pro®, and Microsoft Visio®; my favoured file format is bitmaps because they give me the quality that I want and compress well when imported into the Microsoft Word documents I produce.


Please note that I am not advocating that my ways are best practice (far from it!) but they work well for me.

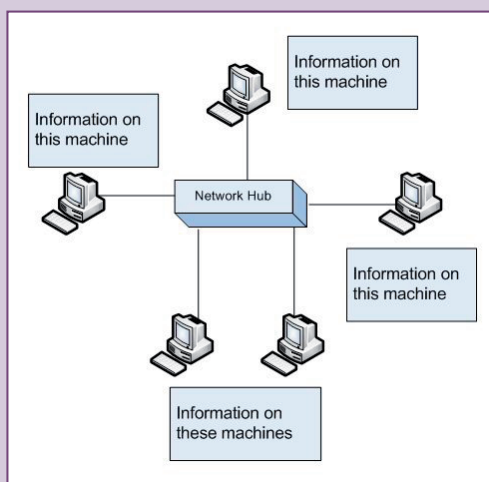
My advice is to use tools that you are familiar with, which are appropriate to your release media, and adopt processes that you feel comfortable with.

### Advantages of using images

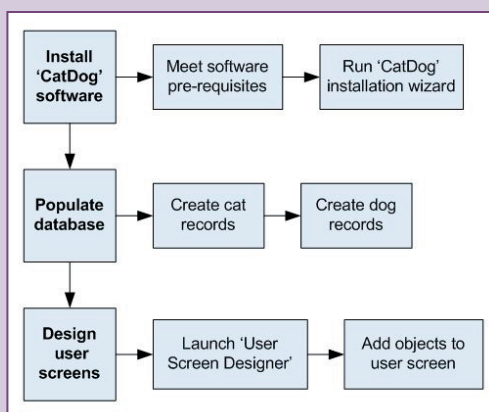
The advantages of using images in place of words are well-known enough: the speedy conveyance of information; the visually appealing and unthreatening look-and-feel; the better experience for the reader (in my opinion); and so on. However, it is only fair to point out some disadvantages, such as the increased production effort, the increased file size of the end document, and the tendency for the document to age faster. Also, as I have noticed in myself, you can forget that sometimes words would actually be more appropriate than an image.

### Conclusion

In conclusion, I'd like to advocate the use of images wherever possible in software documentation, even if it means more work, because I think it benefits the reader and gives us technical communicators refreshment and stimulation in the sometimes arid world of software documentation. And isn't one of the plus points of being a technical communicator that our work demands not just technical knowledge, but also artistic flair? 



Design 6. Topology



Design 7. Initial overview of a complicated procedure

Task	Description	Machines Involved
Task 1	Install the server software	
Task 2	Install 'CheckForCrash'	

Design 8. Tasks in a complicated procedure

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# Revisiting DocBook

Given the continued scepticism surrounding DITA, **Andrew Owen** argues that DocBook deserves a second chance.

## Overview

DITA and DocBook are two XML-based authoring frameworks that have both been around for some time, but many technical communicators are put off using XML-based authoring solutions because of their perceived complexity.

Using XML is no longer a headache, and even in the last two years the tools have become much easier to use. There is however, a time and resources cost associated with using DITA; DocBook on the other hand, gives almost all of its benefits at a much lower entry point.

## An introduction to DITA

This Spring marks the tenth anniversary of the public launch of DITA (or the Darwin Information Typing Architecture). It was introduced by IBM as a simplified XML-based replacement for its internal SGML-based document markup language.

OASIS (the Organisation for the Advancement of Structured Information Standards) defines DITA as both a 'set of document types for authoring and organising topic-oriented information' and 'a set of mechanisms for extending, and constraining document types'.

The Darwin part, a reference to the famous naturalist, represents the idea of inheritance. Specialised elements inherit the properties of base elements. This concept should be familiar to anyone who has any experience with object-oriented programming languages. In fact, DITA can be seen as the embodiment of object-oriented authoring. The information typing part refers to topic-based authoring. DITA gives you three topic types to start with; concept, task, and reference. And that's about it. DITA is a framework that enables you to build a solution and if you go the DITA route you should expect to spend many months building a system before you can start using it to write documents.

For companies with tens of thousands of employees and hundreds of writers this makes sense. For everyone else, there's DocBook.

## About DocBook

In contrast with DITA, DocBook has been in development for 20 years and has reached a level of maturity to which DITA can only aspire. DocBook is implemented as an XML schema. It originated at O'Reilly & Associates, publishers of the ubiquitous computer books with covers featuring animal woodcuts. Although it was designed around the need to document computer systems, in practice DocBook is flexible enough to deal with any subject matter. For example, a prominent British book publisher uses a DocBook-based system to deliver electronic versions of its most popular print titles, including everything from cookbooks to guidebooks.

OASIS also manages the DocBook standard and has the following to say about its purpose:

'Almost all computer hardware and software developed around the world needs some documentation. For the most part, this documentation has a similar structure and a large core of common idioms. The community benefits from having a standard, open, interchangeable vocabulary in which to write this documentation. DocBook has been, and will continue to be, designed to satisfy this requirement.'

## From SGML to XML

XML has evolved from earlier standards; for example SGML (Standard Generalised Markup Language) which technical communicators may be familiar with. SGML was introduced to solve a number of documentation problems, but its main feature is the separation of content and style. This is achieved by using tags, descriptive terms in angle brackets, that surround plain text. These tags are interpreted by an application that creates a formatted version of

```
<div class="event closed expand_block">
  <div class="headline">
    <h3 class="h4 tPadding0 bPadding0 summary"><span class="expand_section">Call for
Review: XQuery Update Facility 1.0 Proposed Recommendation</span></h3>
    <p class="date"><span class="published dtstart" title="2011-01-25T17:34:07-05:00">25
January 2011</span>
    | <a title="Archived: Call for Review: XQuery Update Facility 1.0 Proposed
Recommendation" href="/News/2011#entry-9003">Archive</a>
    </p>
  </div>
```

Figure 1. Extract from World Wide Web Consortium's homepage (www.w3.org)



the document. The most common use of these tags is in HTML (H = Hypertext), a markup language closely related to SGML, that describes most of the content of the World Wide Web (see Figure 1).

The tags used are 'div' (a divider), 'h3' (heading level 3), 'p' (paragraph), 'span' (a style setting that applies across a section of text) and 'a' (anchor; a hyperlink). Closing tags are the same as opening tags, but start include a slash (/). Tags can also be nested as shown in Figure 1.

XML (eXtensible Markup Language) can be thought of as a simplification of SGML. It is also stricter, particularly in the requirement that documents are 'well formed'. The following syntax that is valid in HTML, is not valid in XHTML (an XML compliant version of HTML):

```
<p>Hello world
```

XML requires a closing tag for every opening tag, and tags must be properly nested. The purpose is to make it easier to process the data, but this means that you could end up spending more time getting the markup right than you do on creating the content. A compliant version would be:

```
<p>Hello world</p>
```

This is the reason why graphical HTML editing tools were created shortly after the introduction of HTML, and probably why XHTML has been abandoned in favour of HTML5.

### Graphical editors

In the days before WYSIWYG XML editors, typing in tags and getting them right was an annoyance. DocBook has always supported SGML, but now that such editors are available there's really no reason not to use XML. Its structured nature makes it easier to process and means that your source will remain portable far into the future, regardless of whether the tools you are using today still exist or not.

There is now a wide range of XML editors to choose from that are aimed at writers rather than programmers. These include XMLmind's XML Editor (XXE), JustSystems' XMetal, and SyncRO Soft's <oXygen/>. These feature WYSIWYG modes which give the writer something approaching the environment they are used to from Microsoft Word. The main advantage of this kind of editor is that the writer never has to type a tag.

### Output formats

One of the nice things about XMLmind is that it's platform agnostic. The Java version will run on Microsoft Windows, GNU/Linux, MacOS X, and any other operating system with a Java virtual machine. However, if you need to produce CHM files you will have to use Windows.

All modern editors support a range of help formats including everything from plain HTML pages to JavaHelp. They also support PDF

output using XSL-FO (extensible Stylesheet Language:Formatting Objects). Typically this is implemented using the Apache FOP (Formatting Objects Processor) software. For many tasks this is perfectly adequate, but the quality is not the same as you would get from FrameMaker or a combination of Microsoft Word and Adobe Acrobat. However, there are alternatives such as RenderX. You can even buy an integrated tool chain incorporating <oXygen/> and RenderX, but the FOP module also works with other editors.

Editing XML style sheets used to be tedious as there are inevitably a large number of tags. However, this is no longer the case with graphical style sheet editors such as Altova Stylevision and Arbortext Styler, although these do not always integrate easily with software from other vendors.

### Graphical style sheet editors

Graphical style sheet editors support working with DocBook and DITA style sheets. However, with DocBook's extensive collection of style sheets a lot of the hard work has been done for you already.

### Single sourcing and other buzzwords

An in-depth discussion of XML is beyond the scope of this article, but one feature that is worth a mention is XInclude. In relative terms this is a recent addition to XML (for further information see XML in a Nutshell 3rd Edition). According to the W3C, XInclude is 'a processing model and syntax for general purpose inclusion. Inclusion is accomplished by merging a number of XML information sets into a single composite infoset. Specification of the XML documents (infosets) to be merged and control over the merging process is expressed in XML-friendly syntax (elements, attributes, URI references).'

What this actually means is that your document can re-use pieces of XML, for example copyright boilerplate. So providing you have a centrally accessible location for all your writers,

### Try before you buy

There are completely free Open Source tool chains for DITA and DocBook, but if you're interested in using the software for non-profit purposes (such as contributing to the Linux documentation project) you can obtain personal editions of many of the available packages. Time limited trials are also available for corporate use.

### Case study

When a friend of mine called Chris Smith was looking for some software to help him prepare a book about his research into a particular model of the Ferranti ULA, I immediately suggested DocBook and recommended a WYSIWYG editor. I went on to edit his book (The ZX Spectrum ULA) and we developed a simple process where he would send me draft chapters (each a standalone XML document) and I would send them back with XML comments. This drastically reduced the time it took to get from first draft to publication.

When we started, DocBook 5 was still relatively new, so we stuck with DocBook 4.5. This is no longer the case and DocBook 5 now includes support for the biggest selling point of DITA; topic-based authoring. Chris used the XMLmind XML editor to write and edit each chapter as a separate XML file. These files were converted into a single XML document using xmlint. Conversion to PDF and index generation was carried out with OpenJade using Norman Walsh's DocBook DSSSL (Document Style Semantics and Specification Language) style sheets, overridden to produce the desired layout.

## Terminology


<b>CHM</b>	Compiled HTML
<b>DITA</b>	Darwin Information Typing Architecture
<b>FOP</b>	Formatting Objects Processor
<b>HTML</b>	HyperText Markup Language
<b>OASIS</b>	Organisation for the Advancement of Structure Information Standards
<b>SGML</b>	Standard Generalised Markup language
<b>ULA</b>	Uncommitted Logic Array. It is a custom logic chip that was the forerunner of the field programmable gate array (FPGA). ULAs were used in most British 8-bit microcomputers to reduce the chip count and associated production costs
<b>URI</b>	Uniform Resource Identifier
<b>WYSIWYG</b>	literally this means 'what you see is what you get'. The term was coined to describe desktop publishing systems where the printed page was what you saw on screen. In XML editors the final output is based on the style sheets. Here WYSIWYG is generally used to mean 'is more writer-friendly than a plain text editor', and implies that the writer doesn't need to type XML tags
<b>XHTML</b>	eXtensible HyperText Markup Language
<b>XLS</b>	Extensible Stylesheet Language
<b>XLS-FO</b>	XSL Formatting Objects
<b>XML</b>	eXtensible Markup Language

you can maintain a single boilerplate and every time a new document is produced it will automatically get the latest version. You can also selectively include content, thus enabling single-sourcing as well as content reuse.

For an example of the other important features for a modern documentation system (internationalisation, localisation and collaborative authoring), Borges is a free Document Management System based on DocBook. The final piece in the jigsaw puzzle, and the strongest selling point of DITA, is its ability to support topic-based authoring. As of V5.12b (released in July 2010), DocBook now directly supports topic-based authoring with the 'topic' element and support for 'assemblies'.

We could have used DITA for single-sourcing. But if we had we would first have had to re-implement the rich tag set of DocBook, and then create the style sheets from a much more rudimentary starting point.

## Conclusion

If your current toolset meets your needs then you should probably avoid the pain of moving to DITA. If on the other hand you are thinking about moving to DITA but you do not have unlimited resources to throw at getting it right, then you should seriously consider DocBook. Unless you are looking at creating a bespoke system from the outset, DocBook will enable you to achieve the same outcomes as DITA over a shorter timescale, at a significantly lower cost. 

## References

[www.docbook.org](http://www.docbook.org)

### WYSIWYG editors

<oXygen/> <http://www.oxygenxml.com/>  
XMetal <http://na.justsystems.com/>  
XXE <http://www.xmlmind.com/xmleditor/>

### PDF rendering

Apache FOP <http://xmlgraphics.apache.org/fop>  
RenderX <http://www.renderx.com/>  
Adobe Acrobat <http://www.adobe.com/products/acrobat.html>

### Misc

Borges <http://borges-dms.sourceforge.net/>  
OpoenJade <http://openjade.sourceforge.net/>  
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ISBN 0956507107

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# Word macros to help wordsmiths

**Paul Beverley** tells how his passion for words and love of programming have enabled him to create a wide range of tools for fellow Word users.

For over 30 years I have enjoyed working with words, wrestling with them until they convey the right meaning — simply, clearly and effectively — and for many years I've also enjoyed programming. However, it was only four years ago that I started using Microsoft Word and discovered its associated programming language, Visual Basic for Applications (VBA); I soon realised what a powerful tool it could be for a wordsmith such as myself.

## Life with words and programs

But let me begin at the beginning. As a young physics teacher in the late 1970s I used my self-taught programming skills to speed up the process of report-writing, but handling text in the then very rudimentary Basic language was hard going. The arrival of a package called Wordwise Plus on the BBC Microcomputer in the early 1980s really set me going. It was a word processor, but it also had a Basic-like programming language, specifically geared towards manipulating text. I was in my element and could 'play' with words to my heart's content.

By that stage, I had moved over to teaching electronics in a further education college, and I was writing many magazine articles about how to control things using the BBC Micro — again involving lots of relatively simple programming. By then I was being asked to write so much that I decided to leave teaching and become a freelance self-publishing author. Then with the coming of the Acorn Archimedes, I set up a

monthly magazine which I edited and published for 20 years, charting the ups, downs and eventual extinction of Acorn Computers Ltd.

Needing some other way to earn a living, five years ago I started doing first freelance proofreading and then editing. As I moved towards on-screen editing I discovered that Word had its own words-based programming language (VBA) and once again I was in my element. Not only was VBA massively more powerful than good old Wordwise Plus, but I now had a specific focus, to use macros to increase my speed as an editor, and to use the computer's thoroughness to enable me to produce a more consistent output.

I had used my own wordsmith tools on Acorns and missed them terribly when I moved to Word, but once I got to grips with VBA, my wordsmith tools soon far outstripped their Acorn predecessors in number, power and flexibility. The result was that, within two years, by choosing fixed-fee tasks and working at a higher speed, I had increased my earnings-per-hour by over 20 per cent.

## Macros for free

Early in 2010, having developed over a hundred macros, I decided that it might be good to make these tools available to other people. Thankfully, by that stage my proofreading and editing work was earning enough for me to live on, so I decided to make my macros freely available over the internet in the form of an electronic (Word file) book. The result has been most gratifying: I have made contacts with interesting and enthusiastic people all over the world and have been invited to run training courses on using Word macros across the UK — from Plymouth to Glasgow — and my book now has over 250 macros, thanks to input from other editors.

But what, I hear you ask, has all this got to do with ISTC members? Although my book was at first called *Word macros for editors*, I have more recently changed it to *Word macros for writers and editors* because I feel that the macros can be of help to any Word-using writer. I would contend that every good writer also has to be an editor: once you have written your text you still have to read it through and polish it, and that is editing.

## The problem with macros

I have to confess that although my macros are free, I sometimes have difficulty convincing people to start using them. There seem to be two main reasons.



Figure 1. BBC Microcomputer

1. Learning to use macros takes time. Most of us are busy people, and while we might believe that macros will save us time in the long run, we just don't seem to have the time to get started.
  2. There are so many macros that it's difficult to know which ones will be helpful. The trouble is that we all like to work in different ways, and so the macros that help one person won't necessarily help another, so it takes time to find the right macros.
- So let me try to address these two issues.

### No time for macros?

I know that there is always some in-built resistance to investing time to save time, but the investment is not as big you might think. To benefit from macros, you don't need to learn how to record your own macros, and you certainly don't need to learn how to program in VBA. You only have to learn how to (a) load a macro and (b) assign it to a keystroke; both of these activities are explained in my book.

Note that I didn't say 'assign it to an icon'. You might prefer using icons to using keystrokes, but if we're talking about speed editing, it has to be keystrokes, I'm afraid. In any case, if you start to use macros more widely, you will soon be using far too many for icons to be practicable.

### Which macros?

If someone asks me 'What tasks can Word macros do?' the simple answer is 'almost anything to do with text'. But I also say that it's like trying to answer the question, 'What tasks can woodworking tools do?' A woodworking tool could be a screwdriver, a chisel, a box comb jointer, a circular saw — maybe even a chainsaw — and there's an even wider range of tasks that macros can do. All I can really do here is to give you a flavour of the sorts of things I use them for and see if I can whet your appetite.

- **Navigation** — macros allow me to find my way around a text at high speed, and if I'm working on two versions of the same document I can instantaneously jump from one file to exactly the same place in the other file.
- **Speed editing** — when reading through your text and making changes to it, there are many things you find yourself doing repeatedly, so decide what you do most often, use a macro for that, and it will improve your productivity.
- **File handling** — if you're working on a multi-file document, macros can allow you to make changes across every single document in a folder. Or you could create a single file of all the text (with or without the figures/tables) which you can search to find various things; or pull out all the figures into a separate file, leaving behind 'call-outs', for example: '<Figure 3.4 here>'. These are all tasks that can be done 'at the press of a button'.

- **Footnotes/endnotes** — there are various ways in which you might need to manipulate notes; macros can do the repetitive bits quickly and easily.
- **Highlighting** — this is useful for drawing attention to all sorts of things, so I have a range of macros for applying and removing highlighting of various colours. For example, if I highlight, say, a non-breaking space (or a tab, or a degree symbol or ...), and run the *HighlightSame* macro, then all the non-breaking spaces (or tabs or ...) will have the same colour of highlighting applied. I can then see them without having to use Word's own facility to show all the formatting (Ctrl-Shift-8), which I find far too distracting.
- **Reference checking** — I have a macro that checks references against citations, but there are commercial ones available, and I don't claim that mine is any better. Although mine is free.
- **Textual analysis** — whilst an editor might do this at the beginning of a job, an author would probably do it as a final check. It reveals inconsistencies in the text: errors of spelling, hyphenation, capitalisation, word usage and punctuation. Editors find these tools very useful, but it's a brave author who uses them when she or he thinks a job is finished.

### New generation tools

What would happen if we reversed the current TV trend and brought a Victorian or Edwardian carpenter-joiner into a 21st-century wood shop? With some of the power tools he could do exactly the same things as before but just do them more quickly. However, to get the benefit of some of the tools, he'd probably have to change his way of working.

I have developed some tools which may at first seem a bit weird, but if you're willing to wrestle with them and find ways of applying them to your particular work patterns, you might find them making you even more effective. I simply couldn't imagine working without them. Their power is partly in the fact that each of these macros can be used in many different ways by providing the macro with a different data file, which specifies the actual job it has to do. (But please bear with me because I do find them quite difficult to explain!)

- **Scripted text change** — the idea is that you have a list of pairs of words or phrases held in a Word file. If you put the cursor in a word in your document and run *MultiSwitch*, the macro goes through the list and looks for the current word-at-the-cursor and, if it finds one, it swaps it for the alternative word/phrase from your list. Amongst other things, I use this to expand my abbreviations (like the Autocorrect facility, but I find it more flexible). So, for example, I type just 'hi' and press Alt-A (the keystroke I use for

```
pf@proofreading
pr@proofreader
qs@quantity surveyor
sa@straight away
se@sentence
sf@straightforward
tr@training
likely@probably
as@because
if@whether
that@which
which@that
like@such as
such as@as with
```

Figure 2. Part of a MultiSwitch list

```
| Double space to single space
^32^32|^32

| double return to single return
^p^p|^p

| spaced hyphen to spaced en dash
^32-^32|^32^=^32

| wildcard search for number ranges: hyphen to en dash
~([0-9])-([0-9])|1^=\2
```

Figure 3. A very simple FRedit script

*MultiSwitch*) and it becomes 'highlight'. As an editor, I use *MultiSwitch* a great deal — see Figure 2.

You might wonder why I would want to make some of these changes, but that's not the point. It's *my* list; you would set up your own list, with whichever words *you* find yourself changing often.

**Note:** There are also two related macros, *WordSwitch* and *CharacterSwitch*, which I won't describe here, but they add further flexibility.

- **Scripted global find and replace (F&R)** — this is an even more powerful tool but, as with a chainsaw, it has to be handled with very great care! The idea of *FRedit* (the name comes from 'F&R edit') is that you create a list of the global F&Rs that you want it to do. You then run *FRedit* and it goes through your list (and you can have different lists for different tasks) and does each of the F&Rs in turn, highlighting each change in whatever colour you choose, so that you can see all the changes it has made. This is usually for 'tidying up' a text — say removing double spaces, changing spaced hyphens to spaced dashes, changing standard misspellings, etc, but once you get used to using it, you'll find that there are lots of different uses. The

*FRedit* documentation includes a huge library of applications that people have contributed.

#### *FRedit* example

To give you an example, recently, someone said that he had to italicise the word 'see' when used in 'see Chapter 3' or 'see Figure 3', but how could he avoid 'seeking', 'seeming' etc? So I suggested that he used *FRedit* with the following three F&Rs:


```
see Chapter|zczc Chapter
see Figure|zczc Figure
zczc|see
```

I'm sure that you can work out what it does, but just to say that the third F&R, is in italic and forces every 'zczc' to become 'see' in italic. So he created this list in a Word file, ran *FRedit*, and all 137 occurrences were changed in seconds. And if he saves this list he can use it for the next job for this same publisher. Indeed, he can include it in his 'tidy-up' list, so that these changes are made without even having to think about it.

Here is another example: for plain English tasks, I create a list of words and phrases, some not to be used at all, and others only occasionally. So, as part of my 'clean-up', *FRedit* highlights the text in two different colours, forbidden and 'don't overuse', so that they are brought to my attention and I can deal with them accordingly.

#### Lots more where these came from

I hope these few suggestions fire your imagination and encourage you to look at the rest of the macros. By picking the ones that best suit your way of working, you can save yourself a lot of time; also, they will hopefully enable you to produce a more consistent output.

If you can't find a macro that does what you want, do ask me, please, because there might be other people wanting to do the same as you. If I write a macro for you (no charge!) then others can use it too. 

**Paul Beverley LCGI**, of Archive Publications, is a freelance technical editor (and sometime technical author) who has developed a large number of Word macros, and runs training courses in the use of macros. The macros are available in a free, 280-page electronic book from: [www.archivepub.co.uk/TheBook](http://www.archivepub.co.uk/TheBook)  
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# Translation server technology part 1: XTM

Rob Sexstone talks to Andrzej Zydron about the concept of web-based translation server technology.

## Introduction

This article introduces the concept of web-based translation server technology and provides an insight into the design and strategy behind XTM.

## Rationale for evaluating and piloting a translation server

In late 2009, my company 3di, embarked on an evaluation and pilot project in order to select a translation server and workflow solution. The project was driven by a client requirement to manage the translation, review and delivery of DITA XML source content into 14 languages. After a pre-qualification phase with various commercial and one open-source solution, we decided to evaluate XTM and rolled the system out to our translation team and to the client review team. The pilot project lasted three months and after this period we decided to invest further in XTM, based on the following key benefits:

- Centralised translation memory (TM) databases that can be accessed and updated online 24/7, thus eliminating the overhead of managing traditional desktop TM databases (for example, Trados workbench) that have to be maintained in-house and physically transferred between the language service providers (LSP) and remote staff.
- Much lower licensing and technical support overheads. The ownership of client access licences has shifted from the individual translators to the LSP and as such, configuration management, training and maintenance patching of the applications themselves becomes the responsibility of the LSP too.
- Offsite application hosting in data centres reduces both risk and IT management overheads by guaranteeing a high level of service availability, very good connectivity bandwidth and disaster/data recovery as part of the solution.

## A summary of our experiences with XTM

XTM is a translation workflow and production management solution developed by XML-International, headquartered in the UK with a research and development centre in Poland.

The reasons we purchased XTM were:

1. Highly intuitive, web-based interface for project managers, translators and engineers
2. Cloud-hosted offering or internally hosted service from your own on-site servers.
3. Platform- and database-independent highly

functional and modular enterprise CAT (computer aided translation) tool built using web services with Java with a database layer of abstraction allowing multiple choices of database backend (for example, PostgreSQL, Oracle, My SQL, Microsoft SQL Server etc.).

4. Architecture built to provide support around OASIS, LISA and W3C standards for XML data storage and interchange (for example, XLIFF, TMX).
5. Up-to-date file filters for most common publishing tools and XML schemas specific to multilingual publishing
6. Highly customisable tools for writing custom XML parsers.
7. Project management, billing and supply chain management tools.

## Challenges faced and overcome

As a result of our pilot, we suggested several product feature enhancements. These were taken on board by the XTM support and development team and addressed immediately or scheduled into the XTM development roadmap, according to our classification as either critical or nice to have. Translator training and adoption of XTM was painless due to the intuitive web interface and flexibility XTM provides to work both online or offline. The remaining challenge we face is to improve the workflow for client reviewers who are used to annotating PDF documents with basic layout. There was a fair amount of resistance from this user group because the XTM environment is designed specifically for translators and editors and did not initially provide the functionality to preview DITA topics in their final output format. DITA preview has now been implemented and further enhancements are being added to streamline the reviewer workflow.

## An interview with Andrzej Zydron

We are very lucky to have had the opportunity to interview Andrzej Zydron, the founding partner and chief technical architect behind XTM. Thank you Andrzej for making the time to talk to us during your very busy schedule and to explain some of your philosophies to the UK technical communication community:

**Rob Sexstone:** The translation tools marketplace is a very exciting place to be competing in right now, particularly as SDL Trados is facing serious competition yet again. What drives you in particular?

**Andrzej Zydrón:** Good question! It is something that my wife keeps asking me. I suppose it is the culmination of a vision that has developed over the 20 plus years that I have been involved with the Localisation industry. I could see the inefficiencies that were inherent in the traditional way of doing things and also the hopelessness of desktop-based solutions in what should be a highly collaborative environment. The other thing was a complete lack of standards in the key areas which lead to a wide range of proprietary solutions.

**RS:** Andrzej, how did your vision of XTM evolve and what were the events that led to the first commercial prototype?

**AZ:** My primary vision was based on my experience in helping set up and manage the high-volume translation environment at Xerox Language services and then at Ford of Europe. From my extensive experience in SGML and XML I had a vision way back in 1999 that all translation data would sooner or later be XML based, and if not, then that it could be easily imported and exported from XML. Utilising one data format allowed for a more efficient and data-driven architecture for the whole translation process. I also sincerely believed that the browser was the platform for the future, replacing the little islands of disjointed PC-based solutions with the nightmare of project management and coordination that this entailed. The first commercial prototype was a straight integration with a XML CMS system for DocZone.com, in 2003/4.

**RS:** Your team develop the core components of XTM using Java and you recommend deployment on Open Source operating systems; what were the decision-making factors behind this architecture rather than using Microsoft technology?

**AZ:** A pet topic of mine! One of the design goals of XTM was to be platform independent, hence the choice of Java and a highly sophisticated database abstraction layer. Around 40% of our customers actually run XTM on Microsoft Windows Server. For XTM Cloud though we chose Linux. The reason for this is that Linux offers a more flexible and economic solution. We have a great development and system admin team and they make the most of what Linux has to offer as an enterprise solution.

**RS:** Andrzej, one of the compelling requirements for our community is a tool with strong support for DITA localisation workflows; how does XTM compare with competitor solutions for DITA support?

**AZ:** I am a great DITA fan, having worked with component-based XML publishing systems from 2000 onwards. XTM and DITA are a natural fit, as one of the prime aims of XTM was to provide superb support for this type of environment, along with an extensive and open API for tight integration with CMS systems. The outstanding feature of XTM in this respect is that XTM was designed with an intimate understanding of the issues involved in translating XML component-based

documents. The very first implementation of XTM was in fact in this arena for DocZone.com.

**RS:** You recently announced a Cloud-based service for your customers; please can you elaborate on the key benefits of this versus a company that chooses to host XTM internally.

**AZ:** Very simple: XTM brings enterprise features to small and medium translation companies and to individual translators. In the past it was unthinkable for such organisations to use a tool such as XTM. Buying your own server, hiring systems admin and support staff and being beholden more often than not to a major competitor who was supplying the software, not to mention forced upgrades and the frequent removal of support from previous versions of the software. With XTM Cloud all you have to do is pay a very reasonable monthly fee: everything else is taken care for you. The running of the servers, backups support and frequent new releases are all available for the small monthly outlay. XTM International also prides itself on a fanatical level of support. From the cash-flow perspective this type of solution is also very attractive: there is no major one-off outlay for hardware and software, you pay by the month and you can vary your licences according to demand. We also have completely transparent pricing in Euros, US Dollars and Pounds Sterling.

**RS:** The XTM development roadmap is widely acknowledged to be one of the most progressive in the industry, with rollout of seamless quarterly product upgrades and enhancements for all customers. What new features can we expect from the XTM team in 2011?

**AZ:** Very shortly you will see important improvements to the editor: users will be able to select between 10, 20, 50, 100 and 200 segments per page, along with improvements in performance. We will also be introducing productivity tools for project managers,

### Terminology and References

<b>API</b>	Application Programming Interface.
<b>CAT</b>	Computer Aided Translation.
<b>Cloud computing</b>	Refers to remotely hosted, scalable and virtualised services for data and applications accessed over the web, avoiding the traditional management and cost overheads associated with server-based system implementations.
<b>CMS</b>	Content Management System.
<b>LISA</b>	Localization Industry Standards Association. <a href="http://www.lisa.org">www.lisa.org</a>
<b>Localization</b>	is an internationally agreed term that uses an international spelling convention using 'z' in place of the UK standard 's'.
<b>OASIS</b>	A not-for-profit consortium that drives the development, convergence and adoption of open standards for the global information society. <a href="http://www.oasis-open.org">www.oasis-open.org</a>
<b>TMX</b>	Translation Memory eXchange <a href="http://www.lisa.org/standards/tmx">www.lisa.org/standards/tmx</a>
<b>XLIFF</b>	XML Localisation Interchange File Format.
<b>XML</b>	eXtensible Markup Language.
<b>W3C</b>	World Wide Web Consortium, <a href="http://www.w3.org">www.w3.org</a>



such as templates and the ability to base a new project on a previous one. There will be better control of user access rights and much improved reporting. Project managers will also be able to modify the workflow once the project has been created.

In the medium term we will be introducing a major overhaul of the editor to provide even better performance and offline capabilities. There will also be some new and far-reaching improvements for the review/proofing process.

**RS:** Finally, XTM aside, what technologies do you predict will have the biggest impact and influence change for the localisation industry over the next two years?

**AZ:** Interesting topic! I have been (modesty aside) right on the button with my predictions over the past 20 years. I could write a whole article on this one topic, but I will spare you this time and concentrate on the main points. I predict that we will soon discover that there are limits to what can be achieved with statistical machine translation (SMT) even given near infinite resources, language is just too human to provide an effective solution: the gisting will get slightly better over time but will never be a substitute. Nevertheless, I think that we will see a significant amount of 'de-skilling' in the translator community, with younger, less experienced translators using SMT to displace older more experienced ones. I am already seeing this happen. As sad as it may seem it is inevitable. On the IT side, the emergence of HTML 5 and the like will replace the PC as we know it today. The browser will be the operating system in a constantly connected world: 10 years ago, I was using a 64k ISDN line, this year I will have an FTTC connection providing 40Mbps. This trend will continue and it will have a significant impact on how we work, cooperate and communicate. On the server side things are already incredible with a 48-core 128Gb RAM server costing around £6000. Solid State Drive (SSD) technology will provide unimaginable disk performance for a fraction of the price that these drives cost today.

The advent of Cloud technology such as XTM will have a significant impact on the Localisation market place, reducing the barriers to competition and allowing small, nimble companies to out-compete the current large incumbents for a negligible outlay. Translation will become better and cheaper: this can only be a good thing for everyone! **C**

#### Editor's note

In keeping with the British standards of English used in *Communicator*, this article uses the British spelling of Localisation even though the author uses the international spelling.

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**Andrzej Zydron** is CTO and founding owner of XML International Ltd. He sits or has sat on the following Open Standard Technical Committees:

1. LISA OSCAR GMX
2. LISA OSCAR xml:tm
3. LISA OSCAR TBX
4. W3C ITS
5. OASIS XLIFF
6. OASIS Translation Web Services
7. OASIS DITA Translation
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# Budget FrameMaker file management

Caught between Windows folders or an expensive CMS?

**Andy Lewis** examines some cheap but effective alternatives.

FrameMaker file management can be made substantially easier without the expense incurred by full-blown content management systems (CMSs). This article illustrates the functionality offered by an inexpensive FrameMaker plugin and two FrameScripts that are available at no cost at all: Archive, BookMover and BookReport.

## Archive

Archive is a plugin that copies a FrameMaker book and all files, referenced graphics and text insets for the book into a single folder.

Archive is developed and sold by Bruce Foster. It is available via <http://home.comcast.net/~bruce.foster/Archive.htm> for 25USD, and is compatible with FrameMaker 7.x to 9.0 for Windows.

After installation, Archive creates a new entry under the **File > Utilities** menu, as shown in Figure 1.

Importantly, Archive performs its operations without breaking references. This is because

references in an archived book are relative and point to documents, graphics and text insets under the archive folder. Archive renames any graphics and documents with the same name by adding a sequential number to the existing file name.

By default, Archive saves files in a folder with the same name as the book or document on which it runs. Within this folder, Archive generates a **Text** folder that holds any text insets used by the target, and a **Graphics** folder for any graphics imported by reference. Where there are no text insets or referenced graphics, these folders are still generated but remain empty.

You can modify the names of the subfolders for referenced graphics and text insets by editing the lines *GraphicsDir=Graphics* and *InsetsDir=Text*, contained in the *Archive.ini* file located in the **fminit > Plugins** folder inside your FrameMaker installation folder.

The *Archive.ini* file looks like this:

```
[Directories]
ArchiveDir=C:\Project\
GraphicsDir=Graphics
InsetsDir=Inset
[Book]
StripSuffix=True
[Document]
StripSuffix=True
```

To instruct Archive not to create a subfolder, delete the value for the appropriate folder. In such cases, referenced files are copied to the same folder as the book and document files.

To instruct Archive to maintain the suffix of the book file or document when generating the archive folder, locate the *StripSuffix=* entry in the *Archive.ini* file and change its value from "True" to "False".

Note that Archive does not copy any OLE (object linking and embedding) objects (such as Visio files) included in documents.

## BookMover

BookMover is a FrameScript available free of charge from GolehTek via <http://golehtek.com/BookMover.html>. It is compatible with FrameMaker 7.x and above, running in unstructured or structured mode, and requires FrameScript 4.1 or later. FrameScript itself is available from [www.framescript.com](http://www.framescript.com).

After installation, BookMover creates a new **GolehTek** menu, as shown in Figure 2.

BookMover archives all FrameMaker books or individual files located in a specified folder and any subfolders. Its real strength, however,

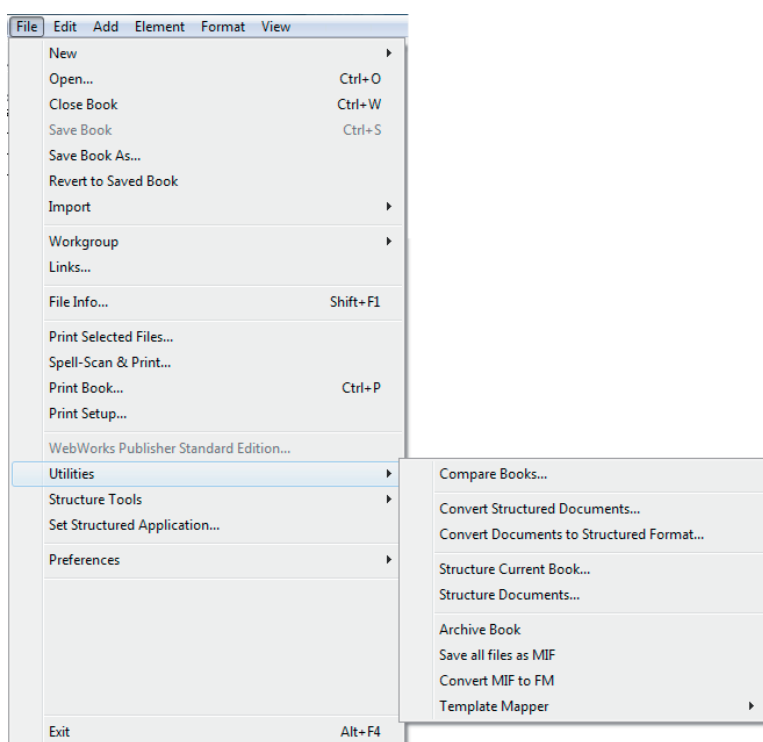


Figure 1. Archive menu

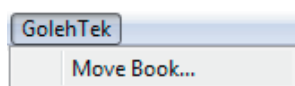


Figure 2. BookMover menu



lies in its flexible processing of graphic files imported by reference into target FrameMaker files. BookMover can place all graphics files into a single folder determined by the user, or it can collect all imported graphics into a common graphics folder, with subfolders organised by chapter name. Furthermore, there is an option to rename graphics with duplicate file names.

All of these options are shown in Figure 3.

In all cases, BookMover automatically updates links so that referenced graphics and cross-references between files remain resolved. Note, however, that BookMover does not work with text insets, in contrast to Archive.

### BookReport

BookReport is another FrameScript from GolehTek. It is also available free of charge and can be downloaded from <http://golehtek.com/BookReport.html>. As with BookMover, BookReport is compatible with FrameMaker 7.x and above, running in unstructured or structured mode, and requires FrameScript 4.1 or later.

After installation, BookReport creates a new **GolehTek** menu, as shown in Figure 4.

BookReport performs searches within a specified folder and any sub-folders and generates a series of reports based on the use of FrameMaker books, FrameMaker documents and text insets.

Reports can be generated either as FrameMaker files or as tab-delimited text files that can be opened with Microsoft Excel, for example. Figure 4 shows the BookReport interface.

For FrameMaker books, BookReport lists the name of all FrameMaker book files found at the specified location, the book path, creation and modification dates, and lists all files included in each book. The location of each file is also listed. Figure 5 shows a sample FrameMaker book report.

For FrameMaker documents, BookReport lists the document path, creation and modification dates, the books in which each file is used, and the path to the books in question. Figure 7 shows a sample FrameMaker document report.

BookReport also provides a useful treatment of text insets by providing both a list of documents containing one or more insets, together with a further list of insets and the files that contain them. As before, additional information such as all relevant paths and creation/modification dates are also included. Figure 8 shows sample text inset reports.

Two other useful lists are generated: one listing all unused files, and the other displaying potential duplicate documents, which are defined as files found in more than one folder that may or may not be different versions of the same document.

Other features of BookReport include the

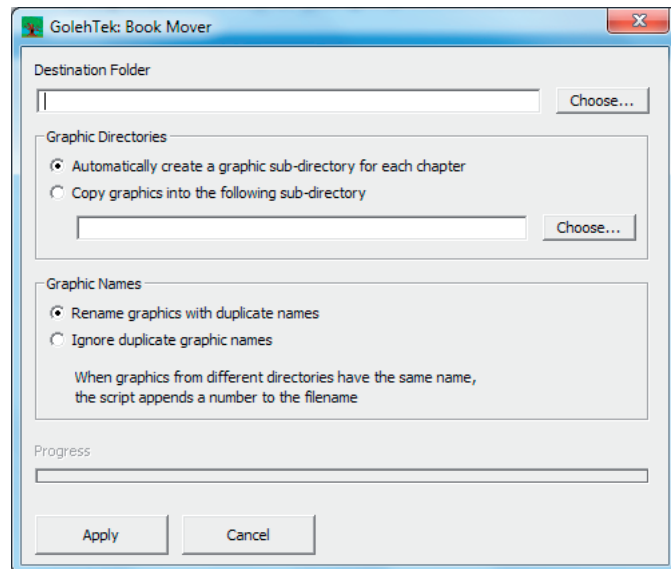


Figure 3. BookMover's interface

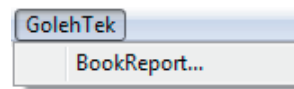


Figure 4. BookReport's menu

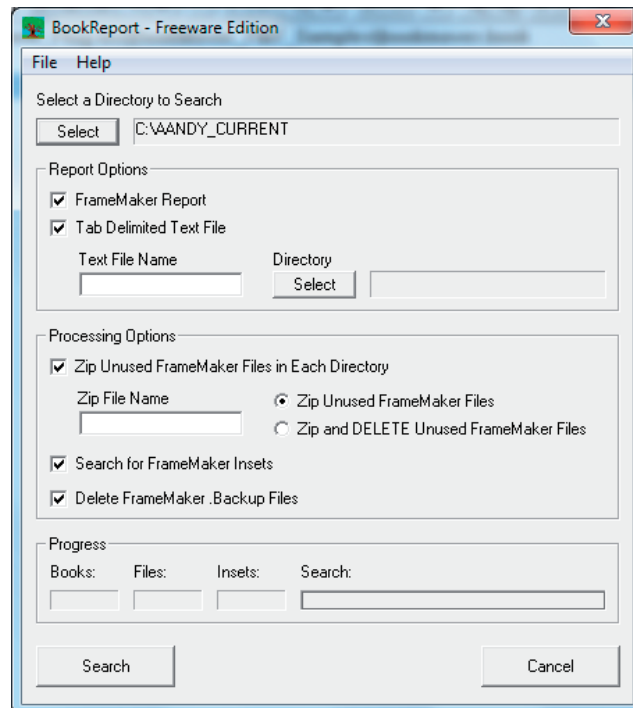


Figure 5. BookReport's interface

#### FrameMaker Books

Book Name	Book Path:	File Paths:
bookreport.book	C:\AANDY_CURRENT\Presentations\Framemaker_File_Management_Plugin\BookReport_EM7_Samples	
	Creation Date:	7/26/2010 8:11:34 PM
	Modification Date:	7/26/2010 8:11:34 PM
	File Names:	
	overview.fm	C:\AANDY_CURRENT\Presentations\Framemaker_File_Management_Plugin\BookReport_EM7_Samples
	installation.fm	C:\AANDY_CURRENT\Presentations\Framemaker_File_Management_Plugin\BookReport_EM7_Samples
	configuration.fm	C:\AANDY_CURRENT\Presentations\Framemaker_File_Management_Plugin\BookReport_EM7_Samples

Figure 6. FrameMaker book report

FrameMaker Documents

Document Name	Document Path:	
configuration.fm		C:\AANDY_CURRENT\Presentation\FrameMaker_File_Management_Plugin\BookReport_FM7_Samples
	File Type:	Document
	Creation Date:	7/26/2010 7:33:51 PM
	Modification Date:	7/26/2010 8:11:39 PM
	Used In Book:	bookreport.book
	Book Path:	C:\AANDY_CURRENT\Presentation\FrameMaker_File_Management_Plugin\BookReport_FM7_Samples
installation.fm		C:\AANDY_CURRENT\Presentation\FrameMaker_File_Management_Plugin\BookReport_FM7_Samples
	File Type:	Document
	Creation Date:	7/26/2010 7:33:51 PM
	Modification Date:	7/26/2010 8:11:39 PM
	Used In Book:	bookreport.book
	Book Path:	C:\AANDY_CURRENT\Presentation\FrameMaker_File_Management_Plugin\BookReport_FM7_Samples
overview.fm		C:\AANDY_CURRENT\Presentation\FrameMaker_File_Management_Plugin\BookReport_FM7_Samples
	File Type:	Document
	Creation Date:	7/26/2010 7:33:51 PM
	Modification Date:	7/26/2010 8:11:39 PM
	Used In Book:	bookreport.book
	Book Path:	C:\AANDY_CURRENT\Presentation\FrameMaker_File_Management_Plugin\BookReport_FM7_Samples

Figure 7. FrameMaker document report

FrameMaker Documents Containing One or More Insets

Document Name	Document Path:	
installation.fm		C:\AANDY_CURRENT\Presentation\FrameMaker_File_Management_Plugin\BookReport_FM7_Samples
	Creation Date:	7/26/2010 7:33:51 PM
	Modification Date:	7/26/2010 8:11:39 PM
	Inset Names:	Inset Paths:
inset.fm		C:\AANDY_CURRENT\Presentation\FrameMaker_File_Management_Plugin\BookReport_FM7_Samples

FrameMaker Insets

Inset Name	Inset Path:	
inset.fm		C:\AANDY_CURRENT\Presentation\FrameMaker_File_Management_Plugin\BookReport_FM7_Samples
	Creation Date:	7/26/2010 7:34:34 PM
	Modification Date:	7/26/2010 7:36:15 PM
	Used In File:	installation.fm
	File Path:	C:\AANDY_CURRENT\Presentation\FrameMaker_File_Management_Plugin\BookReport_FM7_Samples

Figure 8. Text inset reports

ability to zip and/or delete unused files, and to delete FrameMaker backup files.

Conclusion

Using the plugin and scripts described here, tracking the use of FrameMaker files, graphics and text insets across a documentation suite can be achieved at little expense.

Furthermore, implementing version control and link management need not require the cost of a CMS. Add this to the time spent on implementation and training, and the combination of tools discussed in this article offers a workflow worth serious consideration. **C**

**Andy Lewis** is the owner of iG5 Authoring Tools ([www.ig5authoringtools.com](http://www.ig5authoringtools.com)), a one-stop shop for both technical communicators and developers of FrameMaker plugins and FrameScripts. The company creates and distributes utilities that automate FrameMaker workflows and facilitate authoring and publishing processes. Andy is a Certified Adobe Expert in FrameMaker and a regular contributor to Communicator. He is a long-time user of many FrameMaker plugins in both structured and unstructured environments, and has presented and written extensively about his experiences.  
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# Checking spelling and grammar checker

**Caroline Morris** explains why she prefers not to use Microsoft Word's spelling and grammar checker.

There are those who think that this facility is incredibly useful and those, like me, who find it extremely irritating. No sooner has one put pen to paper, or rather, fingers to keyboard do one have little squiggly red lines appear. Or not. You will notice the glaring error in my previous sentence. Did the spelling and grammar checker pop up and point out my (deliberate) error? It did not; it did, however, pick out my two word sentence 'or not', above, as a fragment. Maybe it is, but I have used it for emphasis and allowing for style is no part of the spellchecker's resource.

There was a poem that was passed around between some of my proofreading colleagues a couple of years ago, which, for me, summed this utility up perfectly:

## *Eye Halve a Spelling Chequer*

Eye halve a spelling chequer  
It came with my pea sea  
It plainly marques four my revue  
Miss steaks eye kin knot sea.

Eye strike a quay and type a word  
And weight four it two say  
Weather eye am wrong oar write  
It shows me strait a weigh.

As soon as a mist ache is maid  
It nose bee fore two long  
And eye can put the error rite  
Its really ever wrong.

Eye have run this poem threw it  
I am shore your pleased two no  
Its letter perfect in it's weigh  
My chequer tolled me sew.

Running the checker over this little ode does pick up some errors, though not the ones you may expect it to, and certainly not enough to make any sense of it.

From a professional point of view, I find the spellchecker literally worse than useless and, as far as it's possible to do so, I have it switched off when I'm working on Word documents. The sheer irritation of the squiggles that appear below a technical word – or a surname that isn't in its dictionary; the

offering of 'grammar' suggestions that are frankly wrong is enough to send me into orbit, but there are some people who use it to their advantage.

My son-in-law, for example, is a Chartered Civil Engineer who works for a worldwide company in California. Earlier this year he was diagnosed as dyslexic, something my daughter and I have suspected since we've known him. Anything handwritten by him is virtually untranslatable but put him in front of a computer, his fingers fly, he runs the spellchecker and apart from the occasional 'form' for 'from', beech for beach or similar, his e-mails, reports and instructions are all perfectly clear and professional.

A colleague, who has a PhD in Physics, recalled with horror waking up in the middle of the night having submitted an edited set of proofs to the publisher – all ready to be typeset and printed. The subject of the book was nuclear physics. When he woke he could see, quite clearly in his mind, the flyleaf. It said – Unclear Physics. Absolutely no problem for the spellchecker, 'unclear' is a perfectly acceptable word! Fortunately, his early morning phone call to the publisher was in time to stop the print run and save his reputation.

Another friend tells me that when she first started training as a copy-editor, the MD of a large publishing company told her that they had recently published a book proudly entitled *The Second Word War*: that, unfortunately, was emblazoned on both spine and cover. Perfectly acceptable to our friend the spellchecker, though sadly extremely expensive for the publisher who had to pulp the print run.

And what about punctuation, can that be dealt with satisfactorily? Consider the following letters. The words are the same; the punctuation, however, is totally different and therefore the meanings are poles apart. Run the grammar/spellchecker over these and the only point it will make is that 'Yours, Gloria' is a fragment and should be revised.

*Dear John,*

*I want a man who knows what love is all about. You are generous, kind, thoughtful. People who are not like you admit to being useless and inferior. You have ruined me for other men. I yearn for you. I have no feelings whatsoever when we're apart. I can be forever happy – will you let me be yours? Gloria.*

OR:

*Dear John,*

*I want a man who knows what love is. All about you are generous, kind, thoughtful people, who are not like you. Admit to being useless and inferior. You have ruined me. For other men I yearn. For you, I have no feelings whatsoever. When we're apart, I can be forever happy. Will you let me be? Yours, Gloria. C*

**Caroline Morris** is a freelance proofreader – on hard copy and online – and a member of the SfEP. She is also an occasional writer, a fanatical cricket supporter (of both England and her home team Glamorgan) and a member of NADFAS.

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morriscar@btinternet.com

## Note:

This is just one point of view. I am sure that there are writers who make good use of the spelling and grammar checker facilities. If you are one of these people, I would be interested in hearing from you with the possibility of writing another article on the positive aspects of these facilities.

**Jean Rollinson**

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# Real-life dilemmas

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

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

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

## Protecting sensitive information

### The background

The sound of the call centre staff on their phones was a soft hum in the background. The hall was filled with rows of desks, stretching as far as the eye could see. Up and down the hall, call centre staff, sitting four to a desk, were wearing headsets and engaging in conversations with customers.

Sam had recently been hired as a technical communicator for a large company and worked in their call centre department. His job was to document the call centre systems, draft customer service messages and send important email communications to customers.

It was Sam's third week, and he had settled in well. He was working on a draft when he felt a tap on his shoulder and turned to see Ellen smiling at him. Ellen was another technical communicator in the team. In the absence of any proper management, she had taken on some of the responsibilities of a line manager.

'How's it going?' She asked. 'How are you finding the work?'

'It's going well,' Sam responded, raising his voice — one had to talk a little louder to be heard above the din of the call centre. 'I really enjoy the hustle and bustle and the fact that what we do is actually on the front line.' He told her. 'It's not like your typical technical communicator job; here I actually get to communicate directly with customers.'

Their workloads increased the next week, as one of the other technical

communicators was on vacation.

Unfortunately, Ellen's computer then broke down and she had to send it to the IT department for repairs.

'What am I supposed to do without a computer!' She complained loudly, throwing up her arms in frustration.

Sam sighed. In his experience IT departments were not always the most proactive department and Ellen might be without a PC for the entire week!

Meanwhile, there was urgent work that needed doing, and Sam didn't see why Ellen should have to wait for the IT department to return her PC.

'Never mind Ellen,' he said, 'You can use my computer when I'm in meetings and during my lunch break. Let me write down my password for you.'

Sam hastily scribbled his password onto a piece of paper and passed it over to her.

'Please don't show my password to anyone,' he asked her, 'we're not really supposed to be doing this.'

Ellen squinted at the hastily scrawled password. 'Is that a 2 or an S?' she asked.

'It's *sam2011*. Now I really have to run to my meeting.'

Later that week, he received a call from Ellen. 'Hi Sam, I am working from home today. Would you be a dear and please send me over the customer list? I have an urgent communication that needs to go out today. I would really appreciate it. Thank you.'

The technical communications team had remote access to the bulk mailing system for sending out customer communications. They were strictly supposed to be doing this from a secure work computer, but their team manager tended to turn a blind eye when these communications were occasionally sent from a home PC. As Ellen's computer was in the IT department for repairs, nobody would notice if she sent the email from her home PC, would they?

Sam hesitated for a moment. He was busy and didn't really have the time for this, but he wanted to help Ellen and he didn't want to offend her.

'Ellen, didn't you copy the customer file onto your flash drive?'

This was also a common practice amongst the technical communicators.

They would copy email drafts and customer lists onto flash drives, to work on later when they were at home.

'I did,' Ellen responded, 'but I don't think I have the latest customer data.'

The customer list quickly became dated, as customers were constantly being added and removed from the list.

Sam sighed, 'Okay Ellen, I'll send this to you as soon as I have a spare moment.'

Later that morning he downloaded the customer file and sent it across to Ellen's hotmail account.

### Sam's dilemma

The next week Ellen sobbingly told Sam that she had received a formal disciplinary proceedings notification, for having sent out a customer communication from her home PC, in violation of company policy.

She would be interviewed by a senior Human Resources manager, who would also be evaluating some of their other work practises around handling customer data.

What should Sam do? Would he be in trouble for having sent Ellen the customer file at her request? She hadn't told them yet about how she had received the customer file from Sam. Should he do or say anything to support Ellen, or keep quiet about his involvement? **C**

### Over to you

Write to [dilemma@istc.org.uk](mailto:dilemma@istc.org.uk)

Tell us how you think Sam 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:** All names and places have been fictionalised to protect the identity (and reputations) of real people.

**Warren Singer MISTC**  
E: [dilemma@istc.org.uk](mailto:dilemma@istc.org.uk)

# Real-life responses

Readers' letters in response to Joe's dilemma, described in the Winter 2010 issue of *Communicator*.

## Summary of Joe's dilemma

Joe was debating whether he wanted to work for a Tobacco company, which sold a product that he personally found distasteful and which had been indirectly responsible for the deaths of thousands of people from smoking-related cancers.

Joe really needed the money from this well-paid contract, but was this really a company that he wanted to work for or would be happy to display on his CV?

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

## Nick Kenney MISTC

If I was in Joe's situation, I would accept the contract at the tobacco company.

The most ethical position Joe can afford at the present time is to accept a role that allows him to support his family. If Joe was a single and unattached person, he may be able to absorb the financial cost of his convictions; however, he has more important responsibilities. The pros of working for the tobacco company, at this stage, appear to outweigh the cons; the money is good, the position offers long term financial security and some flexibility that could allow Joe to spend

more time with his family.

Would Joe prefer to work as a technical communicator within the healthcare industry; has he applied, and has he been offered a position?

Joe is an experienced technical communicator and, although his personal beliefs are worthy of respect, he should put them aside for the time being and concentrate on completing the contract to a high standard regardless of the distaste he feels for the client's product.

If Joe feels strongly about the health risks involved through smoking, then he could take comfort by accepting that people have freedom of choice to decide whether they consume tobacco products, and that there is much reliable information available in the public domain warning of the dangers.

If Joe cannot accept this, then he could write a blog and publish it as an anonymous author warning others from his personal experience of a close family member's death caused by excessive smoking. Providing Joe does not divulge any client details, confidential or otherwise; use client resources, time or physical assets; or allow it to interfere in any other way with the work he is performing for the client, then he could not be accused of displaying a conflict of interest.

## Roger Kirkham

I don't see the harm in Joe accepting the job. It's not as though he were doing anything illegal.

## Mary

I believe this is a clear moral choice. Either Joe can sell his soul to the devil and take the money, or walk away with his conscience clean. If Joe compromises on this, then what would he not be prepared to compromise on? Where would his limits be? Would it be working for a weapons manufacturer? A drug company? An animal testing laboratory? **C**

## Editor's note

Ethical choices such as these are highly personal. Joe will need to make a decision that he is comfortable with based on his life values and belief system, and what he believes to be in his long-term best interests.

## UK Technical Communication Awards 2011

**Each year the ISTC grants prestigious awards to honour clear, concise, and effective information products. Does your work deserve recognition?**

You can submit your own work, or that of your managers, colleagues or direct reports. Entering is very simple, and all the information is located on the ISTC website: [www.istc.org.uk/About\\_the\\_ISTC/uk\\_tech\\_comm\\_awards.html](http://www.istc.org.uk/About_the_ISTC/uk_tech_comm_awards.html)

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Need more information to decide? Contact Galyna Key at [awards@istc.org.uk](mailto:awards@istc.org.uk)

**Entry Deadline: 30 June 2011**



### Do you work in the field of technical communication?

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- Graphic
- Tabular

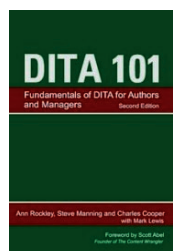
Award classes are open to websites, podcasts and technical communication of all kinds, not just 'user documentation'. This is an excellent opportunity to showcase your talents to the UK technical communicator community.

# Learning more about DITA

## DITA 101: Fundamentals of DITA for Authors and Managers, Second Edition

By Ann Rockley, Steve Manning and Charles Manning, with Mark Lewis

ISBN 978-0-557-69600-0, available at [lulu.com](http://lulu.com) as paperback (US\$ 24.95) or PDF (US\$ 9.99), 160pp. Reviewed by Kai Weber.



*DITA 101*, second edition, by Ann Rockley and others, is one of the best tool-independent books about DITA. For technical communicators and their managers, it's a good primer to learn about DITA in a couple of hours.

### Strong context

The book excels in firmly embedding DITA's technologies and workflows in the larger context of structured writing and topic-based authoring. I attribute this to the authors' years of solid experience in these areas, which comes through, especially in the earlier chapters.

'The value of structure in content', the second chapter, illustrates structured writing with the obvious example of cooking recipes. Then it goes on to show you how to deduce a common structure from three different recipes – which I haven't seen done in such a clear and concise way.

'Reuse: Today's best practice,' the third chapter, takes a high-level perspective. First, it acknowledges organisational habits and beliefs that often prevent reuse. Then it presents good business reasons and ROI (return-on-investment) measures that show why reuse makes sense.

### Comprehensive, solid coverage

In subsequent chapters, Rockley and her co-authors describe DITA and its elements very well from various angles:

'Topics and maps – the basic building blocks of DITA' expands on the DITA specification with clear comments and helpful examples.

'A day in the life of a DITA author' is very valuable for writers who are part of a DITA project. Writing DITA topics and maps is fundamentally different from writing manuals, and this chapter highlights the essential changes in the authoring workflow.

'Planning for DITA' outlines the elements and roles in a DITA implementation project for the project manager. Don't let the rather brief

discussion fool you: Without analyzing content and reuse opportunities, without a content strategy and without covering all the project roles, you expose your DITA project to unnecessary risk.

'Calculating ROI for your DITA project' has been added for the second edition. It's by co-author Mark Lewis, based on his earlier white papers: 'DITA Metrics: Cost Metrics' and 'DITA Metrics: Similarities and Savings for Conrefs and Translation'. It expands on the ROI discussion of the third chapter.

'Metadata' first introduces the topic and its benefits in general and at length. Then it describes the types and usefulness of metadata in DITA. This might seem a little pedestrian, but it's actually helpful for more conventional writers and for managers. It ensures they fully understand this part of DITA, which drives much of its efficiencies and workflows.

'DITA and technology' explains elements and features to consider when you select a DITA tool, content management system or publishing system. This is always tricky to do in a book as much depends on your processes, organisation and budget. While the chapter cannot be a substitute for good consulting, it manages to point out what you get yourself into and what to look out for.

'The advanced stuff' and 'What's new in DITA 1.2' continue the helpful elucidation of the DITA specification, with comments and examples, that was begun in the 'Topics and maps' chapter.

### Mediocre organisation, formal errors

For all its useful contents, the book deserves better, clearer organisation! Redundancies and minor inconsistencies occur as concepts are defined and discussed in several places. For example, topics are defined on pages 4, 24 and 46. While the newly added ROI chapter complements the ROI section in Chapter 3, neither has cross-references to the other. The index doesn't always help you to connect all the occurrences and navigate the text.

Chapters are not numbered, yet


numbering of figures in each chapter starts at 1. This is not a big problem, because references to figures always refer to the 'nearest' number; it's just irritating.

The book contains several errors, which add to the impression of poor production values. They don't hurt the overall message or comprehensibility, but they are annoying anyway. The illustrations on pages 72 and 73 have been mixed up. Obnoxious errors such as 'sometmes' (page 1), 'execeptions' (16), 'a author' (20), and 'its' instead of 'it's' (52) could easily have been caught.

### Uniquely recommendable

One reason why *DITA 101* is one of the best books on the subject is that there simply aren't many others! *Practical DITA* by Julio Vazquez is a serious contender – and the perfect next step. Rockley and her fellow writers set out the strategy for you and make you familiar with the lie of the land at large. Vazquez helps you with the tactics down in the trenches, when you get up to your elbows in a DITA implementation. He first sets the stage with task orientation and topic-based authoring and topic reuse and then guides you from the bottom up with several examples.

In the end, the claim of *DITA 101* on the back cover is valid: 'If you're in the process of implementing DITA, or expect to do so in the future, or just want to learn more about it without having to wade through technical specifications, this is the book for you.'

I recommend *DITA 101* to anyone who is involved in a project to implement DITA, writing or translating documentation in a DITA environment or managing technical communicators. 

You can find more information at [www.rockley.com/DITA101/index.html](http://www.rockley.com/DITA101/index.html) including the table of contents and a PDF preview of the introduction and Chapter 3, 'Reuse: Today's best practice'.

# More about standards...

**Richard Hodgkinson**, reports on the latest developments in standards of interest to technical communicators.

There are a number of other documentation activities underway for international and European standards, in addition to ISO/IEC JTC 1/SC 7/WG 2 (Software & Systems Documentation). Here is the latest news...

## PDF universal accessibility

In Spring 2010, I reported on the development of ISO 14289-1 – *Document management applications – Electronic document file format enhancement for accessibility – Part 1: Use of ISO 32000-1 (PDF/UA-1)*.

The development of this standard is almost complete with the Public Enquiry ballot closing on 22 May. The draft is available until 30 April 2011: <http://drafts.bsigroup.com/Home/Details/672>. For further details or to get involved, please contact Rob Turpin, secretary of BSI committee IDT/1/2 (Robert.Turpin@bsigroup.com). Current UK expertise on the UK committee includes Government, web accessibility organisations, IT research consultants and developers of electronic document and printing software. Publication of ISO 14289-1 is anticipated in late 2012.

Here is standard's Introduction section:

"PDF is a digital format for representing documents. PDF files may be created natively in PDF form, converted from other electronic formats, or digitised from paper. Businesses, governments, libraries, archives, and other institutions and individuals around the world use PDF to represent considerable bodies of important information. These PDF files should be made accessible to users with disabilities.

The accessibility of a document is dependent on the inclusion of a variety of semantic information in a document such as (but not limited to) machine-recoverable text presented in a declared language, logical structure of content, and organisation of that content in pages, sections, and paragraphs. Semantic information can also contain a variety of descriptive metadata, such as alternative text for images. The primary purpose of ISO 14289,

known as PDF/UA, is to define how to represent electronic documents in the PDF format in a manner that allows the file to be accessible. This is accomplished by identifying the set of PDF components that may be used and the restrictions on the form of their use. PDF/UA is intended as a companion standard; to be used in conjunction with ISO 32000, ISO 19005, ISO 15930, and other standards as may apply for the purpose of achieving accessibility or as mandated by this international standard. In order for PDF/UA conforming files to be truly accessible, requirements on conforming readers and conforming assistive technology are also stipulated herein. By itself, PDF/UA does not necessarily ensure that the visual appearance of the content accurately reflects any original source material used to create the conforming file. For example, the process used to create a conforming file might substitute fonts, reflow text, downsample images, or use lossy compression. Organisations that need to ensure that a conforming file is an accurate representation of original source material may need to impose additional requirements on the processes that generate the conforming file beyond those imposed by this International Standard. In addition, it is important for those organisations to implement policies and practices regarding the inspection of conforming files for correct placement of accessibility information."

## EC Mandate 376 Phase 2

In the Spring 2008 *Communicator* I reported on Phase 1 of EC Mandate 376 – *European Accessibility Requirements for Public Procurement of Products and Services in the ICT Domain*. This work culminated in reports and proposals on how Europe could implement accessibility requirements in the purchasing of ICT along similar lines of the North American 'Section 508' requirements. This work has now been reviewed and a new programme of standardisation agreed.

Phase 2 is now underway, and (as before) the work will be carried out by the European Telecommunications

Standards Institute (ETSI) and the European Committee for Standardisation (CEN)/European Committee for Electrotechnical Standardisation (CENELEC).

ETSI and CEN/CENELEC are preparing:

- A single European Standard (EN) that specifies accessibility requirements for ICT products and services, harmonised with Section 508 Refresh,
  - A report listing the sources (ie, published standards) of those requirements,
  - Guidelines on accessibility award criteria that can be used in the purchase of ICT products and services,
  - Guidance and support material for public procurement, and
  - An online, accessible toolkit for public procurers. For example: <http://www.universaldesign.ie/useandapply/ict/itprocurementtoolkit>
- This work will be open to public review and comment as it progresses.

## Why is this important?


If EC Mandate 376 is harmonised with Section 508, then the requirements will make it necessary for documentation:

- To be understandable...written in simple language,
- To be accessible...able to be read by a 'screen reader',
- To contain text alternatives to pictures and graphics.

## The future

We should expect to see the introduction of EC Directives and national legislation that will make it mandatory for EU government organisations to purchase only accessible ICT products, services and supporting documentation. Non-accessible products and services are unlikely to be able to enter the bidding process for government contracts.

## ...and more

Preparatory work is underway in ISO/TC 159 (Ergonomics) to develop a standard for *Electronic paperless displays*. I plan to report more on this as work progresses. 

**Richard Hodgkinson FISTC**

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## Kai Weber reports on a typical day where writing takes a backseat to collaboration and communications

It's an ordinary spring day, and I wake up in Frankfurt, Germany. When I'm lucky, the sun shines into my apartment to greet me. My morning routine is woefully brief, and I take a train to Bad Homburg shortly before 8am. The commute is pleasant since I live in the city, but work in the suburbs.

I'm a Senior Technical Writer for SimCorp, a Danish company that develops and markets the investment management system SimCorp Dimension to banks, insurance and fund companies.

I arrive at the office around 8:30am. I'm the only full-time writer in the German office, though a tester across the hall writes part-time. Ten writers are based in Copenhagen and Kiev.

I start up the PC and get a cup of tea. I receive an email from a colleague who has found an error in the online help. I check with the developer; my colleague is right. I check it against the Release Notes. This is embarrassing, they contain the same mistake, nobody had caught it. The Release Notes have gone out already, but at least I can correct the online help for the next release.

Next, I check the Solutions database, which is what we call our FAQ collection. We technical writers are responsible for editing the entries and aligning them with our documentation. A consultant has created an entry with a workaround. That's odd: the

Solutions entry does the trick, but we should really just fix that exception! I consult with the developer who will fix the bug. We will publish the Solutions entry for the time being and delete it in the next release.

It's 9:30am, and my testing colleague asks for my opinion. She is about to finish her first manual and has created a list of index terms and wants my opinion on them. Also, the Word template for manuals has become corrupted somehow, so we need to fix the page headers, which are supposed to show chapter numbers, chapter headings and page numbers. Her index looks good, so we agree on it very quickly. Then we wrestle with Word for a while.

At 10am, it's time for a video conference with the Copenhagen headquarters. I'm one of four people developing the future documentation strategy. We've already sketched out the processes on how we want to work in the future to implement structured and topic-based authoring.

Today, we discuss a design for an information model that I've drafted. I've basically taken a subset of DITA 1.1 and mapped its topic types and elements to our documentation contents. My colleagues have been reviewing it before the meeting, and they point out some parts that are inconsistent or confusing. Also, our model is still missing a couple of metatags, which means that my task until our next meeting will be to clarify some sections and to add the metatags. The video conference ends at noon, so I can catch my German colleagues as they head down to the cafeteria for lunch.

After lunch, I find an email by a colleague writer. I've agreed to review his manual, and here it is. The review is tricky since I don't know a lot about the module he describes. SimCorp Dimension is a fairly large and complex wall-to-wall system, so not every writer knows all modules in detail.

We had agreed that he'll need another reviewer for the actual contents, but I can still help him with the chunking of topics and the manual structure. I propose to change the nesting of topics in a couple of places. Also, the topic headings aren't fully consistent yet. I hope he will find my suggestions helpful.

Reviewing the manual reminds me that I still need to find reviewers for

my own manual that is just about finished. I can always count on the product manager (if he can find the time), but I like to have one of the implementation consultants review it as well. They know our customers and their workflows best from implementing the product on site, so their reality checks are invaluable.

At the same time, it's often tricky to find someone who can spend one or two days away from a project. It helps that they find the manuals generally useful. I approach the team leader and tell him when the manual will be ready and that it will take 6 to 8 hours to review. He has a couple of colleagues in mind, but needs to check their schedules. He will get back to me.

It's 3pm, and I start to actually write documentation. I continue to write Release Notes for the upcoming release. That means I go through all the development efforts in the tracking system and briefly document the enhancements and their benefits.

In between, I come across one enhancement where it is not clear yet whether it will actually be included in the upcoming release. I contact product management and, indeed, it's not been decided yet. That makes me nervous: in the previous release, some of these decisions came awfully late and required some last-minute editing.

Though I started writing rather late, I make some good progress. Around 5pm, I call it a day and take the train home. When I'm lucky, I can see Frankfurt's skyscrapers shimmer silver in the setting spring sun. **C**

**Kai Weber** is Senior Technical Writer for SimCorp GmbH in Germany. He has been writing, editing and translating software documentation since 1988. He has designed and implemented single-sourced documentation for corporate applications such as investment management systems, financial terminals, APIs and system architectures. He's a coach, trainer and mentor to technical authors.  
B: <http://kaiweber.wordpress.com/>

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# Oui Translate.

## **Imagine the scenario.**

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