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Chaucer’s astrolabe (see pages 12–14) © Trustees of the British Museum
Welcome to the Autumn issue of Communicator and my first issue as Editor. I’m excited! This issue has been hard work for me, though it has been a real learning experience; it’s also been incredibly rewarding, interesting and challenging. I’m enjoying my new role.

So what have I been doing? I’ve approached people to write articles and commissioned others. I’ve read, given feedback and edited articles; worked closely with contributors, copyeditors, the typesetter, proofreaders, the advertising agent and the printer to create what I hope is an interesting issue. Along the way, I’ve had lots of help and I really appreciate it all.

In this issue
This issue includes articles on history, methods, project profile, translation, localisation, tools and publishing. Hopefully, there’s something of interest for all our readers.

There’s an article on Chaucer’s instruction manual, which links in with the historical article written about a Babylonian manual in the Spring issue. Two of the articles complement each other about creating and developing a content strategy. New tools available include Author-it Assist, a tool for creating context-sensitive help, and the existing FrameMaker series of articles continues with attribute based filtering.

For translation, there is an article about improving the initial content and a localisation article discusses preparing DTP files.

APEX Award of Excellence

Technical Communication UK
I look forward to meeting those who are able to attend Technical Communication UK 2010 in September. www.technicalcommunicationuk.com

And finally…
I would like to thank Marian Newell for her hard work in making Communicator the success it is today, as well as helping me make a smooth transition into the role of Commissioning Editor.

I would also like to thank the editorial team for their continuing dedication to getting Communicator out the door, on time.

I hope you enjoy this issue, and if you’d like to contribute to a future one, please contact me. Communicator always welcomes suggestions for articles from all readers.

Katherine Judge MISTC
E: commissioning.editor@istc.org.uk
We were interested to read in Communicator (Summer 2010) about the online discussion on plain English and technical communication. Many plain-language practitioners, and certainly those here at Plain Language Commission, would disagree with Mike Unwalla and the discussants on two important points:

1. Mike mentions that the plain-English organisations ‘have a simple message: business documents are more effective if you use well-known words, short sentences and correct punctuation’. This is a common misunderstanding. In fact, plain-English guidelines on style and language cover far more than just these points, since content, structure, layout and design are also vital to clarity.

   In a recent paper in Corporate Communications, Dr Roslyn Petelin mentions one possible reason for the misunderstanding: ‘Balmford [president of Clarity, an international organisation promoting plain legal language] ... argues that the term “plain language” is inaccurate because it places too much emphasis on words and sentences.’

   Martin Cutts’s definition of ‘plain English’ in the Oxford Guide to Plain English (OUP, 2009) mentions the ‘setting out’ as well as the writing of information. His book also includes chapters on planning effectively, using reader-centred structure, and layout and design basics.

2. Plain English does apply to formal and technical documents, because it is about tailoring the text to the audience (which may just as easily be internal and expert as public and lay). Moreover, we are in favour of retaining technical jargon in most cases: see Sarah Carr’s article about this on our website, www.clearest.co.uk, and her book, Tackling NHS Jargon: Getting the message across (Radcliffe Medical Press, 2002).

   We believe plain-English practitioners have much common ground with technical communicators. It’s possible for them to work together for the advantage of all, not least the readers.

   It’s a pity Mike didn’t name which of the three plain-English companies he listed had been trotting out the simplistic mantras of which he rightly disapproved, which meant that all three were tarred with the same brush.

Visitors to the Articles section of our website will find we are much less coy in naming names!

Note from the Editor:
The amount of space available for each discussion is limited, which means that not everything can be dealt with in full. The online groups page summarised the discussion and generalised all plain-English organisations instead of a particular plain-English organisation.

Thank you for bringing to our attention Sarah Carr’s article on jargon. We were unaware of this and could have used it as a counter-argument.
Goodbye…
This will be my last address for Communicator as President of the ISTC. I have decided to step down as President at this year’s AGM. I had originally been persuaded to remain for a further year, but pressure of work has made it difficult for me to devote the time necessary to fulfil the duties of President as I would wish them to be performed. I will also not be seeking re-election to Council for the same reason. It has not been an easy decision; I have enjoyed my time as President very much and I hope I have made some small contribution to the success of the ISTC. There is a lot more I wanted to achieve but simply did not have the time. I will be continuing as a member of the ISTC, I just won’t be directly involved in its running.

I am very pleased to announce that Paul Ballard has accepted the Council’s nomination as President and he will take up the post at the AGM. I am sure that Paul is well known to you all from his role in Marketing the ISTC. During Marian’s time at the helm, it has become a highly regarded publication. Its quality was recently acknowledged by receiving an Award of Excellence in Class 11 of APEX 2010, the 22nd Annual Awards for Publication Excellence sponsored by Communication Concepts, Inc. Very well done to all concerned!

In appointing Katherine, Council feels sure that she will maintain the high standard and to further develop the journal for the future. I wish her every success.

Awards 2010
I must thank those of you who have responded to my call for nominations for the ISTC awards. We have had several nominations for the Horace Hockley award and Council will be deciding on a suitable winner shortly.

Council has received two nominations for the Mike Austin Award, both for the same person! The popular nominee was Marian Newell. Although I agree with the sentiments, Marian was the recipient of the award in 2008 for her long and dedicated service to the ISTC. I am not sure the rules allow for anyone to get the award twice! The Mike Austin award is a periodic award and doesn’t have to be given every year. So, unless Council identifies an outstanding candidate (who has not previously won it), the award will not be given this year.

As usual, all awards will be presented at the Conference in September.

And finally…
I would like to thank each and every one of those who have helped and supported me during my time as President. It has been an honour for me to have been at the helm of the ISTC for the past three years. I think we are a much more professional body than we were. Our Conference has grown and expanded its scope; we have a professional Association Management company providing all our administration requirements; and we have plans to improve the benefits we offer to you, our members, and to support you in your careers.

Thank you.

Simon Butler FISTC
E: president@istc.org.uk

The Institute
The Institute of Scientific and Technical Communicators is the UK’s leading body for people engaged in technical communication. It provides a forum for members to exchange views and represents the profession in dealings with other professional bodies and with the government. It was formed in 1972 from the amalgamation of three existing associations.

To join the ISTC or change your grade, contact the ISTC Office on 020 8253 4506, at 1stc@istc.org.uk or at Airport House, Purley Way, Croydon, CR0 0XZ.

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About four years ago, the ISTC started running its own Open Learning Course in Technical Communication, designed for people starting out in our profession. This replaced an earlier course previously offered by City & Guilds. I took up the role of ISTC Council Member for Education earlier this year, and my first task has been to review the administrative arrangements for our course. We plan to introduce a clearer set of guidelines for students and tutors early in 2011. These guidelines will include:

- guidance on language standards for students for whom English is not their first language
- the introduction of time limits for study, which we hope will improve the educational impact of the course, and be more reasonable for our tutors.

There will be transitional arrangements for our existing students who signed up to the course on the understanding that there were no time limits.

Looking ahead, I would like to see our syllabus revised to make sure that the course remains relevant for technical communicators in the 21st century. This would be a significant undertaking, and I would be delighted to hear from members of the Institute with relevant expertise who might be interested in helping with this effort. We may also be able, over time to introduce technological enhancements and make use of the Internet for teaching and learning.

Many members will be aware that back in 1999, the ISTC invested much time and effort (and money) in developing a National Occupational Standard (NOS) for Technical Communicators. At the time, we were not able to progress with developing an NVQ course based on the NOS, although it has always been our hope that we might do so at some point. In the intervening years, the regulatory framework for the accreditation of educational courses has changed completely, and new accreditation bodies such as OFQUAL and UKCES have been set up. The ISTC Council has recently agreed that we should look at this subject again, from a slightly different angle, and investigate whether we might be able to achieve accreditation for our Open Learning course. While the name of the ISTC is well respected in some industry circles, external accreditation would add much more. I hope to be able to report back to Council and members on this at some point in the coming year.

Education, of course, covers a wider area than just the Open Learning course, and I hope that the ISTC will be able to offer other educational activities, such as continuous professional development (CPD) courses and events for established practitioners as well. Again, I would be happy to hear from members who may have ideas in this area or who may be able to help.

David Farbey MA FISTC
ISTC Council Member for Education
E: david@farbey.co.uk

Resources
ISTC Open Learning Course
www.istc.org.uk/Training/open_learning.html
National Vocational Qualifications (NVQ)
http://www.direct.gov.uk/en/EducationAndLearning/QualificationsExplained/DG_10039029
Office of Qualifications and Examinations Regulation (OFQUAL)
www.ofqual.gov.uk
UK Commission for Employment and Skills (UKCES)
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Communicator Autumn 2010
Local area groups

Introduction
The ISTC local area groups are an opportunity for technical communicators to network, share knowledge and expertise.

Two local area groups have written summaries of their activities this year.

North west area group
The north west group meets regularly on the last Monday of most months in the centre of Manchester at MadLab (http://madlab.org.uk/).

For the first six months of the year we have had a varied programme of social networking, tool demos and talks from Dr Chris Atherton on Visual Attention, and Jill Fifoot on Translation. After a summer break we will be continuing in the same vein, with more tool demos, more networking (there is an excellent bar opposite MadLab), and more talks. For the talks we already have Professor Alistair Sutcliffe of Manchester University confirmed to come and speak to us on UI design and interaction, and about how documentation and training can play a part. Additionally, we hope to have talks on DITA and Dynamic content delivery.

These events are a great way of meeting fellow professionals and keeping up to date on the latest trends in our profession; above all they are free, so all you have to do is turn up.

Cambridge area group
The Cambridge group is doing well. We have a good number of participants at our monthly meetings held in central Cambridge, either for an informal get together or a more formal talk or visit. Recently, we have had Ellis Pratt talking about the future, Neil Turner talking about usability, Dr Chris Atherton talking about visual attention and a visit to Marshall’s Aerospace (one of Cambridge’s largest and oldest technology companies).

Our informal meetings sometimes have a theme, sometimes not, but the main purpose is to network, discuss working practices and the general state of the technical communication world; all valuable stuff.

It's not hard work to organise the event, the hard part is coming up with the ideas. The formal talks often rely on the hospitality of Cambridge Silicon Radio or Red-Gate, to provide the venue and refreshments (thanks Jacquie, Rachel, Roger and James).

All of our events can be found on: Google group, a LinkedIn group and on the ISTC discussion list. Our Google group has a mailing list of nearly 40 people. InfoPlus+ also carries notice of meetings and we can usually provide a report of the meeting for inclusion on InfoPlus+.

For some, the best part is the networking, getting to see what other people do and how they deal with problems, this is especially useful for lone authors. But even if you have co-workers you can always learn something from others. If there is a group near you, and you haven’t been yet, do make the effort; you won’t regret it!

Organiser (North West): David Jones
E: northwesternengland_areagroup@istc.org.uk
Organisers (Cambridge): Richard Truscott and Jeff Bronks
E: Cambridge_areagroup@istc.org.uk

New edition published
September 2010
Including S1000D

This revised and updated second edition now includes a section about S1000D, the international specification for the production of technical publications that is widely used in the aerospace and defence industries. Other additions include more information about how XML facilitates common technical communication tasks and more material about DocBook.

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  Discounted price for above three courses (5 consecutive days’ training): £1,195 + VAT.
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Online groups

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

Document reviews
A comment about ‘the paperless office’ started a discussion about the problems of on-screen reviews of documents.

One member has established a PDF review process with Adobe® Acrobat®. All the reviewers could see all the comments from the other reviewers. The member had sent a 176-page manual for review. One customer did not use the system for six weeks. Then, a package arrived. The package contained a printed copy of the manual. Comments from reviewers were written on the printed manual. Other members told similar stories, and asked why people do not adapt to on-screen reviews of documents.

With an on-screen review, you can get only a small amount of information on the screen. No software effectively simulates many sheets of paper that are organised and tagged for quick reference.

One member knows many technical communicators who can find errors more easily on paper than on screen. He says, “We present information in formats that facilitate ease of reading and better understanding. ... So why do we expect people to change their behaviour in the face of overwhelming evidence that they relate better to printed documents, when in every other case we adapt our behaviour or presentation to the needs of our readers?”

When one member visited end-users, he learnt that they do not know what online help is or what PDF files are. He recommended the use of paper manuals and quick-reference cards.

“The end users were much happier not reading their paper manuals than they were not reading the online materials.”

New work from websites
A freelance technical communicator received an enquiry through his website. He was “quite excited,” because this was the first time that someone contacted him through his website. He asked whether other technical communicators get work through their websites.

In 12 years, one member got three contracts through his website. However, another member gets approximately 50% of her business because of her website. She invests much time updating it.

One member’s website attracts the wrong type of business. Someone from New Zealand wanted cheap technical communication. Someone from Canada continued to ask for “just one more addition” on a small initial contract. The member decided not to continue to work with that client. One local organisation did not pay for the member’s work. The member went to court, and the customer had to pay the invoice and the member’s court costs. The member thinks that a website is useful only to add to his usual marketing to local businesses. A website and a related e-mail address looks professional.

Documentation for quality management
In one software organisation, a quality-management audit showed that the documentation needed to be improved. Each function of the software must contain a statement about what occurs when the function is done. How do you produce suitable documentation?

Before an organisation can have quality control, it must define ‘quality’. Typically, an organisation maintains quality by establishing procedures for all its activities, by monitoring conformity with those procedures, and by regularly reviewing and updating the procedures to conform to best practices. Quality control documents are similar to process and procedure documents.

Quality does not mean quantity. Frequently, an organisation that has a new quality-management system (QMS) puts too much detail in the documentation. Too much detail causes the following problems:

• The QMS does not show changes in procedures.
• The QMS is expensive to maintain.
• The QMS adds to the work but does not improve quality.

The amount of necessary documentation is dependent on the knowledge, the skills, and the experience of the people who use the documentation. If people are trained sufficiently to do a function, then documentation of the procedure can be small (to show the ability of the staff, training records are necessary).

A QMS is about consistency, not about quality. If people obey the procedures, an organisation can pass a quality-management audit. However, the quality of the product can still be low.

Document what you do, not what you think is necessary. Many organisations fail their first quality-management audit because they document the procedures that they want, not the procedures that they do.

Member news

New members
Member
Peter Burdett Bristol
Carole Child Stroud
Ville Kuusisto Finland
Tom Dunic Guildford
Azaer Hussain Nottingham
Zsuzsanna Nagy Waterbeach
Derek Pegman Wiltshire
Davide Rizzo Spain
Alan Cook Wolverhampton

Junior member
Julie Rumsby Wokingham

Associate
Josephine Wooding London
Richard Savage Kinross
Erika Norton Staines
Diane Mawson Berkshire
George Krawczyk Ireland

Student
Sally Wicken Leeds
Christopher Barker Middlesex
Rashida Rahim Switzerland
Jose Santiago Switzerland

Transfers
Junior member
Alan Henderson Glasgow

Rejoiner
Associate
Franklin Bouguep Middlesex

Business Affiliates
Bronze
I V Solutions Broughton
Triview UK Lichfield

Correction: In the summer review, I changed a member’s comment about one particular plain-English organisation to become a comment about all plain-English organisations. Sorry. See the letter from Plain Language Commission on page 5.

Mike Unwalla FISTC
E: mike@techscribe.co.uk
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Introduction
Technical communication is widely associated with technical writing and illustrations in industrial and post-industrial societies. However, the limited technical complexity and the relatively unchanged and unchanging nature of most of the tools, instruments and machines that were used in 14th century pre-industrial Britain meant that learning how to use them predominately took place without access to, or the need for, technical writing or illustrations. The spinning wheel is possibly the best-known example of this type of technical knowledge dissemination. It had been introduced into Britain during the previous century and its operation remained simple enough that knowledge of how to use it successfully passed from parent to child, or master to apprentice, through watching, imitating and doing.

This does not, however, mean that there were no instructional texts on how to use any of the available tools, instruments or machines. In fact, early precursors of modern English language instruction manuals can be traced as far back as fourteenth-century Britain. This article examines one of these early English language instruction manuals for a technical instrument called an astrolabe.

The astrolabe
The word ‘astrolabe’ comes from the Greek words ‘astro’ meaning star and ‘labio’ meaning finder. The astrolabe is an instrument that was widely used until the mid-seventeenth century to, among other things, find the position of the stars to determine the time. Tom Wujec, an international speaker on technology innovation, introduced the astrolabe at a presentation at TEDGlobal 2009 in Oxford by stating “imagine we are just outside this theatre at the founding of Oxford University some 600 years ago. How would we tell time then? We would use this — an astrolabe. The astrolabe is almost unheard of today, but in the 14th century it was the gadget of its [sic] day — the western world’s first practical computer”. Figure 1 shows an example of this fourteenth-century ‘computer’ from the collection of the British Museum in London. The astrolabe is dated 1326 and is typical of medieval British astrolabes in that it is made of brass and is about 155mm in diameter.

It is labelled ‘The Chaucer Astrolabe’ and the accompanying description states that “The English poet and courtier Geoffrey Chaucer (about 1343–1400) describes an astrolabe similar to this one in a treatise written in 1391”. This is a reference to Chaucer’s A Treatise on the Astrolabe.

A Treatise on the Astrolabe
Chaucer wrote A Treatise on the Astrolabe in 1391, which makes it one of the — if not the — oldest surviving English language instruction manuals on an astrolabe. Its purpose and content are introduced in the prologue:

I purpose to teche thee a certayn nombre of conclusions pertayning to this same instrument … The firste partye of this tretyse shal shewe the figures and the membres of thyn astrolabe, bicause that thou shalte have the greter knowinge of thyn owne instrument … The seconde partye shal teche thee to werken the verray practike of the forsayde conclusions. ([1391] 1870, pp. 19–20)

The first sentence indicates that its purpose is instructional. The next two sentences indicate that it is organised in two parts, with the first part providing a description of the components of the astrolabe and the second part providing...
instructions on how to use it. Chaucer, in fact, states in the prologue that he will divide the treatise into five parts ([1391] 1870, p. 19); however, only two parts were completed. The first part is ten pages long and the second part is forty-one pages, so most of the completed parts are given over to providing instructional information for using this early technical instrument.

The language in any instruction manual is a means to an end; that is, it enables the readers to learn how to do or use something. The language should, therefore, be appropriate for the intended readership. Chaucer's intended readership was primarily a ten-year-old child who is referred to as "lytel Lowys". It is widely suggested in the literature that lytel Lowys was the ten-year-old son of Chaucer's friend Sir Lewis Clifford. Clifford's son died unexpectedly in 1391, thus providing a possible reason for the incomplete nature of this work.

Chaucer acknowledges in the prologue that many texts on the operation of the astrolabe were available in Britain during the latter half of the fourteenth century. However, he argues that, despite the availability of these instructional texts, few people in Britain knew how to fully use the astrolabe at this time or "alle the conclusions that have ben founden, or elles possibyl be founde in so noble an instrument as is the astrolabe, ben unknowne perfitly to any mortal man in this region" ([1391] 1870, p. 19). In addition, he criticises existing instructional texts for providing inaccurate instructions and for using overly difficult language or "in any tretyse of the astrolaye that I have y-sene there ben some conclusions that wol not in alle thinges perfourne ther heaste; and some of hem ben too harde to thy tender age of ten yere to conceyve" ([1391] 1870, p. 19).

Chaucer employs several methods to ensure that the language in A Treatise on the Astrolabe is appropriate for his primary intended reader. First, he uses English rather than Latin. To put this into context, English was regarded at this time as, in the words of Hager & Nelson, one of the "vulgar tongues of the common folk" (1993, p. 88). Chaucer explains this choice by stating that "I shewe thee in my lyth englysh as trewe conclusions touchinge this matyr, and not only as trewe but as manye and as subtyle conclusions, as ben yshewed in latyn in any comune tretise of the astrolaye" ([1391] 1870, p. 20). This is a clear defence of the suitability of the vernacular English when Latin — along with Arabic, Greek and Hebrew — was the language of writing and consequently the language of many of the fourteenth-century instructional texts on the astrolabe.

Second, he uses a simplified grammar and vocabulary or "I shewe thee undyr lighte reules and nakyd wordes" ([1391] 1870, p. 19). Third, he uses simplified sentence structures because "hard sentens is ful heavy at onys for suche a childe" ([1391] 1870, p. 20).

Chaucer is clearly simplifying the language to make it understandable for his fourteenth-century reader. However, a further measure of his success is found in Basquin's observation that his technical writing can be understood approximately 600 years later "with only a little effort by any educated reader of English" (1981, p. 22).

Readers and writers of modern instruction manuals will, in fact, find much that is familiar in Chaucer's six-century-old work. For example, it was noted earlier in this article that the second part provides instructions on how to use the astrolabe. A closer examination of this part reveals that the instructional information is broken down into short, task-oriented chunks. There are 42 task-oriented chunks, with each chunk providing instructions for completing a specific task with the astrolabe. In addition, 30, or 71%, of these chunks (I–IV, VI–XII, XIV–XIX, XXI–XXIV, XXIX–XXXII, XXXIV–XXXVI, XL and XLI) have a task-oriented heading.

The following extracts are taken from two of the chunks:

To knowe the altitude of the sonne, eyther of celestiale bodies.

Sette the rynge of thyne astrolabie upon thy ryghte thombe and tourne thy lyfte syde again the light of the sonne and remewe thy rewle up and downe till the streme of the sonne shyne through bothe holes of the rewle: loke then how many degrees this rewle is aresised fro the little crosse upon the Est lyne and take there the altitude of thy sonne

To knowe the degre of the sonne by the rete for a maner curyosyte.

Seke busely with thy rule the highest of the sonne in myddes of the daye; tourne than thyn astrolabie, and with a prycke of ynk marke the nombre of the same altitude in the lyne meridionale. ([1391] 1870, pp. 33 & 42)

The headings "To knowe the altitude of the sonne, eyther of celestiale bodies" and "To knowe the degre of the sonne by the rete for a maner curyosyte" are task-oriented and parallel in construction. The use of task-oriented headings enables the reader to quickly and easily determine the content of the chunks of instructional content. The use of parallel construction means that the reader need only decode the structural meaning of the parallel headings once. In addition, it increases the predictability, and thus the comprehensibility, of the headings.

The sentences containing instructions are in the active voice and the imperative mood. The use of the active voice makes the reader the subject of the sentence, thus personalising the reading experience and helping make the instructional sentences easier to comprehend.
In addition, the imperative was used in the fourteenth century, as now, to tell people to do something, thus making it particularly appropriate for the sentences containing instructions on using the astrolabe.

The commonalities between *A Treatise on the Astrolabe* and modern instruction manuals are not limited to the language. It is common for the text in modern instruction manuals to be supported by illustrations. The text is the main medium of instruction in *A Treatise on the Astrolabe*. However, Chaucer also provides simple, black-and-white line illustrations. Figure 2 shows an illustration of the front of an astrolabe. It is labelled as “THE RETE or ZODIAKE”, which is the Y-shaped component of the astrolabe shown in Figure 1.

The illustration has a simple, clear and uncluttered appearance and explanatory notes are provided to aid its comprehensibility. However, the operation of the rete is described in the text as “thou maiest tourne up and doune as thiself liketh” ([1391] 1870, p. 29). There is no indication of this up-and-down movement in the illustration. Nevertheless, limitations such as this do not preclude the usefulness of Chaucer’s illustrations as simple blueprints for the construction of an astrolabe. Eagleton in fact suggests that several astrolabes were constructed to the same design as described in Chaucer’s instruction manual and concludes with the suggestion that “Chaucer’s name on a book could sell it, so also a Chaucerian astrolabe would have held a certain prestige” (2007, p. 324).

**Conclusion**

The popularity of *A Treatise on the Astrolabe* is evidenced by the fact that there are more surviving manuscripts than any other of Chaucer’s works except *The Canterbury Tales* (Hager & Nelson, 1993, p. 87; Eagleton, 2007, p. 303).

Chaucer adapted the language to the intended readership, arranged the instructional information into task-oriented chunks, used task-oriented headings, used parallel construction in headings, used the active voice and the imperative mood in instructional sentences and used illustrations to support the text. These have all become standard elements of English language instruction manuals six centuries later. Chaucer is widely regarded as the father of English literature for *The Canterbury Tales*. He may also be justifiably considered as a — if not the — father of English language instruction manuals for *A Treatise on the Astrolabe*.

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**References**


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The evolution of Arbortext APP

Dynamic publishing consultant, Chris Western, reviews the evolution of what was once referred to as ‘the best kept secret in publishing’.

Introduction

Arbortext Advanced Print Publisher (APP), formerly known as the 3B2 Publishing System, has been driving solutions for complex publishing requirements since it was first released back in 1986. Since then APP has grown extensively from the original WYSIWYG desktop product. It now includes a desktop version, server version, scalable enterprise options and support for a host of publishing standards. It remains one of the most capable systems available for tackling complex publishing challenges.

What is APP?

APP was developed as a publishing operating system; in other words, a powerful desktop publishing toolbox that can be customised to fulfil almost any kind of publishing challenge. It was originally developed with native handling of the new SGML mark-up conventions as well as the ability to run on different platforms such as Unix using its own GUI, the basis of which still exists today (Figure 1).

APP is suited to conventional as well as highly customised configurations as solutions can be designed to suit individual requirements. The APP Desktop version (or direct JavaScript code) is used to create templates that use features from the extensive range of built-in tools and customisation methods available. These tools cover areas such as:

- Text formatting
- Page layout
- Content structure testing
- Testing of the formatting environment

![Figure 1. APP Desktop GUI example.](image-url)
Automation of manual tasks
- Output generation
- Content manipulation and creation
- UI customisation and interaction.

Along with generic tools such as these, APP includes features designed for specific publishing verticals markets, a few examples of which include:
- Synoptic alignment (the ability to align multiple content streams at the same vertical position on the page); added for multi-language, multi-content stream documents. It is a requirement of some governments and for publishing bibles, from where it takes its name.
- Table sub column decimal alignments; used extensively in financial documents.
- TeX and MathML support; featured in many STM journals.
- Unicode CJK capabilities for multi-lingual documents.

Past and present
3B2 was originally developed by Advent Publishing Systems in the UK with the aim to deliver functionality and operability far beyond that of all other market offerings. It has since been used all over the world in many different publishing applications.

In 2005, Arbortext acquired the product and the following year Arbortext became part of Parametric Technology Corporation (PTC). As with any change of ownership, products go through a period of realignment and need to find their feet again in the larger product line. 3B2 was renamed APP and further developed to integrate with the core products from the Arbortext line. The aim was to position APP as the default pagination engine and supersede the FOSI stylesheet technology which had been used in Arbortext solutions for many years.

The release of APP version 10 in 2009 brought the long anticipated integration with Arbortext Publishing Engine and Arbortext
Styler. Publishing Engine is a server-based, single system which handles multi channel publishing requirements of which APP capabilities are a part. Styler provides a means to use APP inside the Arbortext Publishing Engine without needing to create conventional APP templates from scratch. However, users can also add APP code to their Styler stylesheets in order to access more of APP's formatting capabilities. This can be done either through source code edits in the Styler environment, or by associating an APP template with their stylesheet. Templates exported from Styler, or specifically created, can also be used within Arbortext Publishing Engine.

APP Version 10 also brought the new developers coding interface option based on JavaScript and a Formatting Object Model or FOM. This new development language provides a method of developing APP solutions with a more commonly accessible skill set, in combination with traditional APP coding, or as standalone JavaScript code.

In the workflow
The position of APP in any workflow depends on how the user works and wishes to use the product, whether it is in its desktop version, enterprise server version or a mixture of both (to use the post composition editing ability).

APP is available in two main standalone versions outside of the Arbortext Styler and Publishing Engine environment.

- APP Desktop; used in template development, for manual composition and post auto composition edits.
- APP Enterprise; is a server-based, unattended and scalable APP composition service with automatic failure detection.

Figure 2, is a simple illustration of what you might see in a common single-source workflow and the position of APP within it.

Getting started
APP could never really be considered as a ‘shrink-wrapped’ or ‘off the shelf’ product. One of its biggest benefits is the ability to customise the product and tailor it to a solution, which can take it beyond the capabilities of other more mainstream products.

The way a customer wishes to use APP will determine how the template development should be approached as well as the required depth of product knowledge. For example, a template used for desktop typesetting will be configured differently to one used purely for enterprise ‘black-box’ composition. The tools used for many core areas such as text formatting and page handling, would commonly remain the same. The differences would be in the tool application methods, template architecture and the interaction setup.

What is a publishing vertical market?
Publishing vertical ‘market’, describes a particular type of publishing that APP has been involved in. Each one has its specialist requirements outside of the standard composition capabilities. For example; TechDoc, STM, Financial, Directories, Aerospace all need publishing but the documents they produce are all quite different and some need specialist tools to be able to do what they need.
When a template is being developed prior to being used in production, APP could be considered a programming environment in which the composition solutions are designed and implemented. As with many programming environments, developers are free to design solutions and code as they wish. This can prove to be a great advantage for some and a disadvantage for others. It depends greatly on the knowledge of the technologies involved and how to apply them, whilst maintaining the solution architecture, and following best coding practices. Good support and knowledge transfer during these stages is an important factor in helping to achieve the best outcome, especially if a new user is embarking on a more advanced project.

**Who and why**

APP has been in use around the world for over 24 years and in that time the product has evolved to suit many different applications. Its markets include: aerospace, publishing, automotive, STM, financials, catalogues, directories, legislative and regulatory bodies, amongst others.

When APP first started it was seen as a more technically capable, code driven competitor to desktop applications of the day like Quark and PageMaker. APP is now focused on automation capabilities and superior XML handling with DTP coming second, while applications such as Quark and InDesign are primarily DTP focused with automation coming second. As APP initially grew more into automation the competitor list also grew to include products like FrameMaker, Datalogics and XPP.

There are advantages and disadvantages to every product; these are normally subjective depending on the user’s requirements. These requirements commonly depend on factors such as how a customer wishes to use the product and the industry sector they are in. Of all the solutions and products that have been implemented to deliver dynamic automated publishing, it is extremely rare for any two requirement specifications to be exactly the same. This gives highly customisable products an advantage in being able to quickly deliver a solution without compromise.

Companies who choose APP over other products are generally looking for specific capabilities or want to push their overall system to provide 100% automation of challenging layouts and workflows (Figure 3). The diversity of applications capable with APP is wide and is illustrated by its extensive list of customers past and present.

**Future**

The next major version of APP is due for release in early 2011 and will see enhancements to a number of key areas including further expansion of the FOM. In addition, version 11 will be the focus of the next APP dedicated international users meeting, to be held in May 2011.

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DTP source improvements

Roman Civin and Jan Musil discuss how to improve source using DTP when localising print and online publications.

When localising print and online publications, one key aspect is the cost and efficiency of desktop publishing (DTP) work required, on both the source and target levels. Let’s assume your authoring environment, yearly volumes, content and publication types do not justify going to a topic-based structured authoring process or other change of paradigm, and instead you need a fast and simple solution. In this respect, DITA is a double-edged sword — a solution which, while robust, can also take a considerable amount of time and money to implement.

In this article, we will look at a few basic steps to instantly develop a standard localisation-optimised DTP source document, cutting the localisation DTP effort in half. We will use a recent InDesign project as a sample, but the same principles would apply for any standard DTP authoring tool, such as FrameMaker, QuarkXPress, or even Word. The sample InDesign project is a 16-page marketing catalogue which we needed translated into 20 languages.

Specifically, we will demonstrate:
- How to double productivity of localisation DTP efforts by the use of simple optimisation steps
- How to save 38% on the publication localisation DTP of just one 16-page document
- Recommended changes in the way source documents are created
- How to identify and save time on routine tasks.

The source

There are many constraints during source creation. To name a few:

- Content is provided inconsistently by different groups or divisions
- Text is not provided in time
- Publication layout exists before the content — size limitation
- Each DTP author works differently — no template.

Needless to say, problems at the source level will be encountered later, during the localisation stage, when localisation DTP effort is multiplied by the number of languages. Localisation DTP means working on every .indd (InDesign Document) file where translated text and graphics replace the original text and graphics (export .inx (InDesign Interchange), translate, import .inx). (Refer to the Summer 2010 issue of Communicator for aspects of graphics translation.) Using our example, you will need to DTP for each language; this means 20 .indd localised files that replicate the layout of the original English .indd. A single issue will need to be fixed 20 times.

Optimisation approach

It is relatively easy to verify if a source document is well-prepared for translation. For example you can do a quick round trip of your .indd/.inx through a translation management system and use its pseudo-translate function to perform a simulated translation. Imported to .indd, the result will simulate the worst case translation text lengths. Then you can proceed as shown in Figure 1.

Principles for a well-prepared source document

A well-prepared source document will need just a few minor changes after localisation. These are the six principles we will describe (in a logical sequence):

- Allow extra space for more extensive translation
- Prearrange text frame size
- Minimise the number of objects
- Group objects logically
- Use templates and styles
- Define formatting rules

Extra space for more extensive translation

Most languages require more text than the equivalent English version. It is good practice to leave about 30% space free to allow for longer translations. The typical range is 20–50% and in this example we recommend 30%. For text with many shortcuts and technical terms more space should be left. For example, shortcuts may be translated with...
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the original shortcut in brackets; technical terms may also be translated with the original term in brackets. Allowing for extra space minimises follow-up DTP work on translated documents.

Prearranged text frame size

In addition to leaving surrounding blank space, enlarging text frames in the source in advance for longer translations is also a time-saver.

Table 1. Recommended formatting rules

<table>
<thead>
<tr>
<th>Font/paragraph</th>
<th>Modification allowed</th>
<th>Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>Character spacing (spread)</td>
<td>Yes</td>
<td>2</td>
</tr>
<tr>
<td>Space before/after paragraph</td>
<td>Yes</td>
<td>3</td>
</tr>
<tr>
<td>Line spacing (leading)</td>
<td>Yes</td>
<td>4</td>
</tr>
<tr>
<td>Font size</td>
<td>Yes</td>
<td>7</td>
</tr>
<tr>
<td>Font stretch (horizontal scale)</td>
<td>No</td>
<td>–</td>
</tr>
<tr>
<td>Hyphenation</td>
<td>No</td>
<td>–</td>
</tr>
</tbody>
</table>

Text boxes/frames

| Resizing                        | Yes                  | 1        |
| Moving (positioning)            | Yes                  | 5        |
| Table editing rules             | Overall size should be preserved, but individual size of columns and rows can be modified | – |

Graphic objects/frames

| Moving (positioning)            | Yes                  | 6        |
| Resizing                        | No                   | –        |

It is easier to do it once for all rather than repeat multiple times in every localised file. See Figure 2.

Minimise the number of objects

Reducing the number of objects (text/graphic frames, lines, etc.) eliminates disorderly and routine manipulation and broken alignments. Replacing several text frames (one for heading, another for body text, yet another for border, etc.) into one text frame can minimise formatting effort and also — with well defined styles — preserve the relative position between them. Potentially longer translations will now overflow just at the end of a single text frame. See Figures 3 and 4.

Logical grouping of objects

Grouping graphics allows for easier manipulation. It also prevents individual elements from being inadvertently moved, thus ensuring a well-arranged layout.

Using templates and styles

Using a template with predefined, consistent styles allows documents to be created much more easily than from scratch.

By defining paragraph and other styles, you can keep the formatting consistent (font, text size, spacing, colours, rules, etc.). Moreover, it allows you to simply perform any change at the level of style and apply it instantly across the whole document (for instance, making all captions smaller, or decrease body text spacing by the same amount). It is good to define frequently used styles and apply them consistently as opposed to defining every unique string as a style.

Individual documents (chapters/sections) can be managed in a book (for example .indb) and their styles, colour settings, numbering, etc. allow for easy post-localisation adjustments across many files.

Dos and don’ts: defining priority formatting rules

With the above recommendations in mind, some formatting changes on source or target are less feasible than others. We recommend setting up and sharing general rules on how to work with layout and text with the team of DTP authors. Recommended rules and their priorities for layout can be seen in Table 1.

Practically this means:

• If formatting changes are needed, start with resizing text frames (if there is enough free space). If this does not help or there is no space, go to priority 2 and change the character spacing. Finally, change spaces before and after paragraphs, etc.

• Changes of font stretch are not recommended (some fonts fare poorly when stretched).

• Hyphenation is turned off due to additional cost for language review.
Pictures should not be resized. If you do allow for resizing, there are two ways in general — to crop some part of picture which is not essential, such as part of the background, or to resize/scale the whole picture. But be careful...

In addition to the above optimisation steps (and depending on target languages’ character sets and direction), it is considered good practice to run through a QA checklist on the source documents, focusing on the ease of localisation in layout, image use, headers and footers, tables, sorting requirements, indexes, source language consistency, etc.

**Conclusion**

Simple enough, right? Would you believe that this approach saved 38% of effort and considerable turn-around time when releasing a 16 page catalogue in 20 languages?
Not only did we save effort and money (see Figure 5), but the work was much cleaner. Authors of source may need to change their approach slightly, but their reward comes in the form of a cleaner source, which, arguably, can be produced faster as well. Furthermore, since the baseline template is reused every year, standardisation will streamline subsequent edits and future releases.

Do the conventions discussed above seem to be simple common sense? You are ahead of the game. As a matter of fact, you may still be in the minority. The world is full of source documents and DTP localisation approaches that could benefit considerably from the basic improvement practices we have described.

Further Reading
Rigby, Sue and Abbott, Elaine, Creating graphics with localisation in mind, ISTC Communicator, Summer 2010

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Richard Truscott describes the challenge of developing a documentation strategy where none existed.

Established over 100 years ago and an early adopter of IT, the not-for-profit organisation I work for has a large portfolio of back office IT applications. Its public facing organisations use these IT services to operate with its customers around the globe.

However, (until 2009) it had never employed a Technical Communicator to support the IT portfolio. This, together with the organisation's long-standing history meant there was a backlog of work and the need for a cultural change within the organisation.

I work in the IT Support & Development department; my main tasks are:
- Provide documentation for the IT support staff.
- Provide end user documentation.

The name of the organisation is irrelevant as the challenges it faces are similar to those of a great many older institutions that are in the process of discovering what a Technical Communicator can do for them.

This is the first of a series of articles explaining how the work progressed. It covers the period from the start of work, to the achievement of the first goal of a proof of concept trial. This article is a review of the work done between January 2009 and June 2010. I hope to write other articles about future progress.

Producing the strategy runs alongside my day-to-day job of producing technical documentation. This means that progress is often slow.

What is the overall plan?

By the nature of the organisation and in its current state of flux the plan has to be flexible and be allowed to evolve to meet the known circumstances. At the beginning the plan was to:

1. Carry out a preliminary investigation into how IT support staff find and acquire the knowledge they need to do their work.
2. Use a consultancy company to look at the organisation’s content needs.
3. Produce a report on the way forward.
4. Carry out a proof of concept trial.

Preliminary investigations

‘I often say that when you can measure what you are speaking about, and express it in numbers, you know something about it…’

Lord Kelvin.

The first thing to do was to talk to people to find out what they knew and how they knew it.

It became clear that there were a number of different systems for storing knowledge used to support IT systems. Because of the way the organisation is structured, each team had produced its own solution.

Information sources survey

I designed an 'Information sources survey' to find out:
- What information sources the support and development staff used.
- How often they used these sources.
- How often the source gave them what they wanted.
- How difficult it was to find specific information.

I used Adobe LiveCycle Designer to create a survey form for distribution to the recipients by e-mail. When the recipient had completed the form, they returned it by e-mail, which I received as an XML file. I used LiveCycle to import the returned surveys into an Excel spreadsheet for analysis.

Used sources

The respondents said that the most used sources were:
- Their own notes.
- Wiki contributions by themselves and colleagues.
- The original design document.

The respondents said that the least used sources were:
- Sources stored using SharePoint™.
- Service delivery documents.
- Test plans.

Useful sources

The respondents said that the most useful sources were:
- Their own notes.
- Wiki contributions.
- Project meetings.

The respondents said the least useful sources were:
- Service delivery documents.
- Sources stored on SharePoint.
- Test plans.

Easy to use sources

The respondents said that the easiest to use sources were:
- Their own notes.
- Wiki contributions.
- Project meetings.

The respondents said that the least easy to use sources were:
Documents stored on the networked disc drives.
Documents stored on SharePoint.
Service delivery documents.

Having carried out the sources survey and published its results, I had some idea of the problems and could propose some solutions and recommendations.

**Delivering the documentation report**

At this stage, I concentrated on how IT Support used information sources although a wider remit could have looked at how the whole business used its information. Due to internal boundaries and time constraints, the report was limited to IT Support. This report contained a SWOT analysis.

**Strengths:**
- Lots of the documentation needed by Support is available.
- The Wiki has lots of useful information resulting in it being widely used.
- The organisation has a Technical Communicator to work on the support documentation.
- The organisation has invested in Microsoft Word.
- SharePoint is available.

**Weaknesses**
- Although the documentation is there, it is not easily found.
- There are ‘privately’ held sources of documentation (information that is not on the Wiki, networked disc drives or SharePoint).
- Some key applications are undocumented.
- Some Wiki information is out of date; it stays out of date because there is no procedure for reviewing the Wiki.
- Word is an unsuitable word processor because it will not allow:
  - Single sourcing.
  - Conditional text (however, there are plug-ins for this).
  - Structured authoring.

**Opportunities**
- Develop metadata to classify the available documentation.
- Update, complete and correct the documentation.
- Using the structured nature of DITA to ensure the collection of all necessary information.
- Use the Wiki as both a source and a repository for any future technical communication solution. Content must be interchangeable between the solution and the Wiki.
- For GUI driven applications, produce HTML help or context sensitive help.
- For non-GUI applications, produce PDF manuals.

**Threats**
- It is difficult to know if documentation is out of date.
- Some information needed by support is not available.

**Recommendations**

The principal recommendation to come out of the first report was that the Information sources survey should be verified using another source.

**Mekon Content Strategy Audit™**

At this time, Mekon (www.mekon.com) approached me about conducting a Content Strategy Audit (CSA). The Senior Management Team decided to verify our information sources survey by asking Mekon to do the first stage of their Consulting and Implementation Process, the Mekon Content Strategy Audit.

**Carrying out the CSA**

Mekon’s Consultant visited two of the organisation’s sites to carry out the CSA. I set up the interviews between the consultant and a cross section of the organisation’s technical people including: software design leads, quality assurance, operations and software test staff.

It was a full day and included a visit to my organisation’s Data Centre. Please see the article on pages 27–30 for further details.

**The CSA report**

The CSA report recommended:
- A more in-depth survey of content types and sources, because the survey had only covered some of the IT department. For example, training had not been included for any of the public-facing organisations.
- Adopting structured authoring using DITA and XML.
- Adopting a Component Content Management System (CCMS).
- Making documentation a deliverable in all projects.
- Monitoring and measuring costs and business metrics at each stage of the roll out, if the recommendations of the CSA were adopted.

Mekon also provided a review of the currently available CCMSs.

**Knowledge Management report**

Having analysed the CSA and carried out more research, the report re-focused on the need for Knowledge Management. The Mekon
CSA was very helpful in confirming that my ideas were on the right track. I was now able to expand the report with information on technology and create an implementation plan.

What the report said
The report’s main proposals were that:
- The Software Development, Support and Business Community be allowed to generate content in any format.
- The Technical Communicator should generate support content and acts as editor/moderator for community-generated content.
- The Technical Communicator should generate customer-facing content.
- Structured authoring and DITA (XML) should be adopted as a standard for documentation.
- A Help Centre should be established.
- A CCMS for managing content should be obtained.

Selling the idea
A major part of the organisation’s restructuring was now complete and the moment was right to sell the idea. A new process improvement team has a remit to look at the overall efficiency of the organisation by taking control of the processes and procedures that the business follows.

By this time, I had started to describe what I wanted to achieve as ‘Knowledge Management’.

The main arguments used to sell the strategy were:
1. Current documentation methods produce static content that means that re-use of information and presentation to different audiences is inefficient.
2. There is no centralised management of documents and versions. Quality of documents will improve because content versions are controlled.
3. The organisation must deliver managed knowledge that gathers all the knowledge in one location, where it is easy to access and is easily found.
4. The organisation must overcome the backlog of undocumented products. To do this by conventional methods would mean employing a number of Technical Communicators to service the backlog and future demands. The only way to overcome the backlog is to engage subject matter experts as content providers for internal documentation. This will free me to concentrate on customer-facing documentation (see Figure 2). Internal and external users will benefit because products will be documented.
5. Re-use and re-purposing of content that will reduce the time taken to produce documentation and allow sharing of content.
6. Adopting DITA and XML will provide structured documents that guide the authors’ content enabling them to concentrate on content rather than presentation.
7. The need to enable the rapid clearance of support tasks by providing the information that IT Support needs to resolve problems.

Fortunately the main principles of the Knowledge Management Strategy were quickly adopted and after several meetings and presentations there was a consensus that this was the way the organisation should go.

Where is the strategy now?
At the time of writing (June 2010), I am preparing a proof of concept trial as suggested by the process improvement team, to establish:
1. Metrics for the trial.
2. Expected outcomes that will prove the concept.
3. The cost benefits of adopting the Knowledge Management strategy.
4. Engagement of my organisation’s web design team and usability team to find out what the Help Centre might look like.
5. More detailed evaluation of the software candidates and establishing the costs of plug-ins and interfaces.
6. Application for a budget for the proof of concept trial.

There is synergy with other projects that means Technical Documentation can use a CCMS they are adopting.

Things that hindered
The organisation I work for has been going through a great deal of change in recent months, with more changes to come in the future. This has meant movements of senior staff and placement of interim managers to replace them. Temporary or interim
managers are not there to make long-term plans and commitments; this delayed the process of getting the strategy developed and published.

**Things that helped**

Being the only Technical Communicator in an organisation can be a very isolated work life, with no one to ‘bounce’ ideas off. However, the ISTC discussion group has been a useful sounding board with plenty of free help and experience to draw on. The same is true of networking at Technical Communication UK 09 with other Technical Communicators. Membership of my ISTC Local Group has also provided a source of good ideas and encouragement.

A number of technical documentation companies such as Just Systems, Stilo, Quark, and Mekon have all freely contributed ideas and given demonstrations or trial software.

Now that the organisational changes have started to be resolved, an organisation is in place that is prepared to champion a proof of concept trial.

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Developing a content strategy

Noz Urbina, Senior Consultant at Mekon, discusses developing a holistic content strategy and auditing the documentation of organisations.

Richard Truscott’s article regarding his content journey (see developing a documentation strategy — pages 23–26) discusses a methodical approach to revising and updating his organisation’s content strategy. Along the way he encountered many familiar pitfalls and hurdles, like the cultural impact of content process change, the departmental boundaries that may need to be crossed and a large number of tools and technologies requiring review in a reasonable amount of time.

He also found, as individuals in many other organisations do, that there are assets and useful best practices available in the content industry that he could learn and apply in his work. Richard looked at and used several available options:

- DITA content — paired with a component content management system (CCMS).
- A metadata classification system (also known as taxonomy).
- The Mekon Content Strategy Audit™ (CSA).
- A cross-departmental, knowledge-oriented workflow utilising subject matter experts (SMEs).

This article aims to address what a content strategy is, and how you can start creating it. Like any process change, the departmental boundaries may need to be crossed and a large number of tools and technologies requiring review in a reasonable amount of time.

What is content strategy?

Content strategy is a term that touches upon every aspect of content. Organisations often have more content than they actually know what to do with. Nevertheless, they can still struggle to deliver the content that they would like or need. This is where strategy comes in.

At its simplest, a strategy is an idea that, if executed, will deliver you a specific gain. It will get you from point A to point B, assuming point B is the better one. Content strategy is therefore a collection of ideas — a content-related methodology — that will deliver gain. Like any strategy in an organisation, it should uphold overall corporate strategy and brand.

Wikipedia still makes a strong link between content strategy and web development, but although web-based delivery circles are where the term gained initial popularity, the need for content strategy is not determined by the publishing channel, but by the business model and business context. ‘Holistic Content Strategy’ is an approach that takes into account the entire content lifecycle and the various audiences and stakeholders that are touched by content along the way.

Content and knowledge

In practical terms, for an organisation that makes a product or delivers a service, content encapsulates knowledge, making it transferable and accessible. As in Richard Truscott’s case, content strategy and management initiatives often develop into knowledge management initiatives involving not just specialised technical communication resources, but also SMEs. SMEs are the source of raw content for repurposing/rewriting. These days, technology is enabling workflows where annotations, additions or corrections can be added easily after content goes live, extending the SME influence.

Typically, when you buy a product you will receive a manual on how to use that product, and possibly some training that implies its own associated materials. Someone else will receive a repair/service manual to support the product, some more training, and maybe a parts manual to identify spares. Marketing will describe the product online, and support may share descriptions and how-to information with technical communications and training. Development content flows through all of these points, and has impact throughout the content lifecycle. For example, the product feature list refined in development may go on to appear in various publications as seen in Figure 1.

Ideally, these departments are keeping shared information up-to-date and sharing content, metadata and organisational/navigational models where possible. If these are not shared, users are given the disparate resources they need and are expected to make sense of these themselves. Sometimes this data is even contradictory, for example when groups have not kept their updates synchronised. In Figure 2, we see an example of sharing a single resource.

If you are the developer of the product or service, the users may be internal staff in teams or departments such as services and support. Poor information can affect profitability directly through inefficient staff costs and can impact customers as various points of contact are hindered by a lack of good resources.

Each contact with the customer builds the brand and encourages long, fruitful relationships. Therefore, if an organisation wants to consistently deliver a quality customer experience, then a holistic content strategy needs to be established. Content storage and delivery underpins the vendor’s ability to provide the knowledge and service that
enhances the ease with which customers are able to use the product or service.

This is one of the reasons that knowledge management without content management rarely delivers the full functional and business benefits available. Without a methodology for delivering and refining captured knowledge into targeted content deliverables, you cannot spread the knowledge very far. A targeted deliverable is one that is fit for a specific audience, context and purpose.

Therefore, streamlining and inter-relating the content of the various knowledge sources within the organisation is a key strategic activity for the staff responsible for managing content to support overall corporate strategy.

Content/Knowledge sources that need to be taken into account in a content inventory include:
- Product Managers
- Engineers
- Trainers
- Technical Services / Support

Staff that are generally responsible for managing and delivering content include:
- Technical Communications
- Marketing
- IT

The distinction between content managers and sources is that content managers are responsible for managing more information than they originally generated. Technical communications and marketing take content from the SME departments and extend, add value to, re-write, and re-structure it to optimise it for use by content consumers.

**Key components for implementing a content strategy**

In order to have a strategy you must first have:
- A clear understanding of your current situation
- A mission or goal defined for your future situation.

**Reviewing the current situation**

As we will see in the case studies later, it is only with a holistic understanding of the current situation that an organisation or team can build strategy appropriately and plan for its feasible execution.

It makes business sense to make an up-front investment of some of the time and budget allocated to a project to make sure the other, much larger, percentage is spent properly. By aligning with other departments’ goals, a technical communications-based initiative increases the overall mass of its business case, giving economies of scale.

We have found when customers do not take into account cross-departmental perspectives, vital details get missed that have a detrimental effect on the project. Many organisations’ content strategies fail because they think that they can keep to their departmental boundaries when thinking about content, yet still provide the best customer experience.

A customer is not interested in the source department of their answer. Numerous studies and our own project experience have shown that customers want the information that comes with their product to work and make sense together, and be presented such that they can actually find what they are looking for when executing a task. In an organisation, all departments are discussing the product(s) or service(s) the organisation sells. This means opportunities for reuse are frequent, but it is often only through analysis and departmental communication that these opportunities reveal themselves (see Figure 3).
Analysis of your current situation and strategy for change must take into account:

- User profiles, workflows and requirements — both internal and external.
- Process — creation, management, translation, delivery and maintenance of information.
- People and skills — who do you have? Who do you need? How will you apply them?
- Content and its models — both current and planned.
- Technology — the tools and/or products to make all the above feasible.
- Change itself — how will you manage the migration of all of the above?
- Business case — your justification for change. Richard covered some of these in his 'Information sources survey'. As in Richard’s case, a SWOT analysis is often a useful tool for understanding your current situation.

Analysing the content

The subject of content analysis is complex, but to help you get started, here are some quick, widely applicable questions you can ask yourselves. The answers will help feed your implementation task list:

- Utilise user research and personas to decide what content is needed. Answer the question, ‘Who cares’? If you cannot think of a user scenario where someone really needs to know this information, leave it out and see what happens. Leave in a link to a web page and see if anyone goes there. If you are documenting labelled items in the UI, leave them out. Is documenting a field always necessary? For example: 'Database ID Form Field: Enter the Database ID in this field.' Add value, not volume!
- How mature is your current content process? Organisations can only move so far, so fast. Be aware of the cultural context of your organisation.
- Do you have an inventory of information sources? Are the managers of all these sources participating in a shared content strategy? Are they in a single repository, or if not are the various repositories sharing metadata and search capabilities?
- Have you reviewed the table of contents lists, structures, and terminology across all the information sources and performed a consistency analysis?
- Does your content have to be delivered to multiple audiences with different needs? Are you just delivering one big deliverable because you do not have time to separate into tailored ones?
- Do you frequently have to resort to cross-references because reuse is unfeasible? Would it be better for the users if they did not have to switch between documents or go to another website?
- Do you have an easy feedback loop to facilitate updates of field knowledge into your documents from internal and external experts and users?
- Does your content get published through modern web-based channels and formats? Does it need to be? For example, Wiki, Communities, Twitter and so on, can be either a great opportunity or time wasted.

Case studies

It was difficult to narrow down a list of case studies, but here are a few of my favourites.

Example — Richard Truscott

Richard Truscott quickly noted that he was in an organisation that had a long cultural history with notable lack of focused professional attention on technical communications. This contributed to SMEs using their own sources and notes as primary sources as there was no central shared knowledge or content repository or administrator.

He used the CSA to validate and extend an initial analysis to ensure that vital points were covered. Leading onto knowledge management from content management was a natural progression for him. His revised content strategy using SMEs as content sources to feed into a formalisation workflow made good use of limited technical communications assets.

Example — Medical devices manufacturer unites the clans

This organisation had a long list of content problems, causing impacts on external customers directly and indirectly via hundreds of service, training and support staff. Similar to Richard’s experience, the organisation was suffering from too much content, without a corporate policy or system for governing or sharing it. Maintenance, training and support staff using documentation were not given a unified, up-to-date source of data, and so collected their own local or departmental ‘cheat sheets’.

The content was on personal machines in a ‘laptop library’ or network folders, meaning that content went out of date quickly and any personal knowledge and notes stored were not easily transferred to other users.

Support and service staff were repurposing or re-writing content from manuals or official sources to avoid having to find it again for their own future use, or to send to a customer to answer recurring requests. This indicated a desire to be able to quickly retrieve smaller pieces of information that can be directly recalled when required (essentially the ability to store favourites and annotate content), as well as the option of taking sections of official content and repurposing it in a new context. It also implied that navigation of current content offerings was not optimised and searching should be consolidated.

The executive body unanimously approved our project proposal to set global content
strategy standards and implement a central DITA-based content management system. A progressive implementation across international business groups is now in progress.

Example — Large defence manufacturer gets it right
This is an interesting example that illustrates the importance of meaningful information and the changing market. Rather than simply supplying a product, in this case an aircraft, the client chose to buy a full service level agreement. This committed the supplier to ensure a minimum number of aircraft would be operational 24/7/365. The quality, usability and accessibility of the maintenance documentation suddenly had a direct impact on the supplier’s bottom line costs.

The result of analysing their repairs and spare overhaul statistics and engineer usability feedback suggested a small enrichment to the procedure for Power Shaft inspection would help engineers make decisions. Using photographs to illustrate acceptable and unacceptable damage limits resulted in a reduction in the number of units being sent for repair.

Overhaul orders reduced by four per month resulting in annual savings of over £280,000.

Conclusion — the impact
Inconsistent information between departments is visible when content is published. If your information processes do not unite knowledge sources and how they flow into deliverables (web pages, help packages, training materials, manuals, and so on). When customers go to websites or read documentation they find inconsistency. Many technical communications teams tell us that they want more user and task orientation in their documents. Meanwhile, the user- and task-oriented content they wish they had the time to develop is being developed, sometimes even delivered publicly, but there is no internal collaboration to facilitate this or take advantage of the reuse and sharing opportunities. Remember:

Establish metrics: Using surveys and ROI case studies allows you to establish the problem and potential in numerical terms. Measure before change, then compare later.

Think long term, scope for the short term: ‘Delivery’ is not a singular or static process, no matter what the medium — organisations deliver, gather new information from multiple sources, then update and re-deliver, endlessly. Content strategy improvements are also ongoing.

Content strategy is business strategy: Content strategy should be aligning user experience with both the goals of the organisation, and the expectations of users. When both buyer and seller are happy, you have a mutually beneficial recipe for repeat business and growth.

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Before working with Mekon, Noz worked in the XMetaL team as Partner Manager, facilitating the growth and cross-pollination of a pan-European partner network of Content Solutions and Tool providers. He has held a number of business development, technical services, and sales positions where he was able to develop his expertise in a cutting-edge, efficiency-driven, business context.

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Figure 3. A departmental content overlap model. Ideally, content will be reused by a systematic business or technology process. In many cases, however, overlap is either not noticed and new content is written to say the same thing, or is instead handled by duplication (copy, paste, tweak). At best duplication impedes usability, and at worse, contradictory information and user confusion and frustration arise.
Using Author–it Assist

David Jones reviews Author–it Assist a new software tool from ASC that allows you to add your own context-sensitive help links.

Author–it Software Corporation (ASC) are best known for their Author–it Enterprise Authoring Platform. Initially released in 1998 it has become a leader in its field. Author–it Assist, officially launched at the STC conference in May 2010, is a departure from their acknowledged strengths in authoring, and presumably opens new markets for them as they look to grow the company. Assist enables you to create and organise context-sensitive help links for any software application. This gives any organisation the ability to add their own help to any application they are using, despite not having access to the code. The applications of this are likely to be numerous and are particularly evident in large enterprise bespoke software implementations such as SAP where organisations often struggle to train and inform their staff.

You do not have to use Author–it’s authoring platform to use Assist. Therefore, if you are using RoboHelp, Flare or any other authoring tool you can still use it to create help content that can then be used with Assist to create contextual links. These links could even be to lessons in a learning management system.

Assist comes as two modules, one for Windows-based applications and the other for browser-based applications, which are purchased separately. Both have the concept of the album, whereby you create an album of screens, and for each album, you add a link. Additionally, you can also add field-level help. You can also configure each album, such that, when they are distributed they can point to an online album that is constantly added to and if there is no web access a local album. Periodically, the local album can be synchronised with the online album.

The Trial editions I used are branded with Author–it’s logo. I am told that if you do purchase the product they will add your own branding. In fact, they are keen to work closely with software vendors in order to develop the product further. If you are an independent software vendor, then licensing is fairly straightforward. If you want to add contextual links then you need to buy a licence for each person that does so. Distribution of the album and end-user components are royalty free.

Browser based

The browser-based module is two toolbars in Internet Explorer (other browsers are not currently supported), one for building the context links (Figure 2) and the other that shows the links to the user (Figure 1). Due to browser security the user toolbar cannot be automatically installed. However, you can add a script that will prompt the user to install it with a message such as ‘For Premium Level Assistance Install the Assist Plug-in.’

The context builder detects pages, frames and divs in the browser, basically anything that builds a web page. When you a visit page each distinct part is displayed in a drop down list on the toolbar and as you scroll through them each is highlighted in a different colour.

To add a link you choose an album or create one and then click the first camera icon. Advanced options enable you to more precisely define the section of the web page for which you want to add a link. You can add as many links to each screen as you like and once you have added a screen you can start adding field-level help. This is done by clicking the second camera icon. Field-level help can be added as a pop-up with either static text, added via a simple text editor, or a link. There are varieties of pop-up styles you can choose. Adding field-level help is easy, all you have to do is point your mouse at an item (for example a text box).
if the application detects it and can add help it is underlined in green, if it can’t it is underlined in red.

Fine control of the application and the album is provided by clicking the Settings (see Figure 3) and the Album icons and you can finely control the look and feel of the help and links.

In all cases you are not restricted to a help file. You can also link to other web pages such as Wikipedie or even PDF documents. This means that for online applications a support desk could quite quickly, having identified an issue on a page, post a link to a document with the work around or a new link to a page of the help system, without the need to republish the help system. All the support desk would need to do is to update the album and upload it to an online location.

Tighter integration with their other products mean that Author-it have made the whole process of creating and adding content on the fly very easy. Therefore, from a link in a help system created with Author-it, you can open and edit the content directly, if you have permission.

Windows based
The Windows-based module does the same thing but it is for Windows applications (see Figure 4). As it is not a plug-in for a browser, it is far more like a traditional Windows application. When I demonstrated this at the ISTC North West Area Group meeting people thought that this looked a more accomplished piece of software. However, this is probably down to familiarity with using Windows applications as opposed to browser plug-ins.

Functionality between the two modules is identical but achieved in slightly different ways. In the Windows module, you drag and drop the camera icons on to the applications to create the links. It is easy and intuitive to use. The rest of the settings are very similar to those found in the browser module; such as screen position and album management (see Figure 4 and Figure 5).

Distribution
The final product is distributed with your application. When help is present the Assist Me icon is displayed. Click on the icon and a list of help topics. Field-level help is identified by an underline for the browser module, click the line and field-level help is opened. The Windows module field-level help is displayed by hovering over a field. If help is present, a box is displayed, which when clicked field-level help is opened (see Figure 6).

Competition
So, what about the competition? Well there is not really much out there and what there is I have not used so it is difficult to make any comparisons. RoboHelp Linker was a short-lived product that was released by eHelp several years ago but was quietly withdrawn. There is Affixion’s LinKit that has been around for some time now. This has evolved over the years into a tool that now has similar aspirations to that of Assist, namely elearning and linking corporate
knowledge bases to business applications. There are also some other applications, which I believe ASC see as competition, that have aspirations around this area, such as RWD uPerform and Oracle On Demand, but these seem to have a narrower focus.

Conclusion
Is Assist a useful tool? Well it is a useful two tools; both do identical things but for completely different types of application, browser based and traditional Windows based. Both are relatively easy to use and you can quite rapidly build your context-sensitive links. The attractions here are the cost savings in not involving, or depending, on developers to add the links. Customers will also benefit, as they will get up-to-date user assistance down to field level.

I can see a multitude of applications for it far beyond that of the traditional context-sensitive help links in a Windows application. This departure from the traditional will be particularly evident with the browser module, where I can see it being used widely for internal training on organisation intranets and additional support for enterprise-level software.

I do have reservations with the current release though. The initial release has no Windows 7 support or support for non-Microsoft browsers. You will have to wait a couple of months for Windows 7 support and until early 2011 for non-Microsoft browsers. So many organisations will not have a use for it, just yet. However, when the support is available for the product, I for one am looking forward to using it.

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Regulatory approval for life sciences

Peter Li and Dhruv Raheja describe effective communication and collaboration in a global regulatory environment.

Securing timely approval from regulators is a critical aspect of going to market for life sciences organisations. The process is characterised by a two-way interaction between regulators (or ‘agencies’) and the organisation (or ‘sponsor’). It includes multiple exchanges of content at various stages of product development spread over several years, and could involve teams from around the world where the product is being launched. With several products in the market, this becomes an inherently complex communication process to execute and manage. We have helped several organisations to achieve significantly higher levels of efficiency and productivity by optimising their processes for both internal and external consumption using a combination of products.

The following sections are aimed at helping organisations make intelligent choices when determining the most appropriate technology tools and processes for the regulatory communication process, from creation and publishing of content for different audiences, managing the interaction with agencies to tracking/communicating product registration information post-launch.

Content creation

Traditionally, life sciences organisations have relied on proprietary authoring tools that were rapidly adopted given their ease of deployment and use as well as compatibility with existing Windows-based environments. However, they are at odds with the need to meet structured submission mandates that are increasingly becoming the norm. Here are some alternative authoring strategies to consider instead:

1. Structured authoring. Using XML-based authoring tools is a proven way to balance the rigor expected by today’s regulatory mandates with ease of use expected by end users.

2. Re-usable, componentised process. These methods have been proven to increase efficiency and reduce redundancy and, therefore, information overload.

3. Plug-ins to unstructured authoring environments. Sometimes this is the only alternative as users become very attached to their preferred method of creating content.

XML applications

XML-specific applications for life sciences include:

- Master Batch Records (MBR)
- Structured Product Label (SPL)
- Product Information Management (PIM)
- Regulated Product Submission (RPS)
- Electronic Common Technical Document (eCTD)
- Clinical Data Interchange Standards Consortium Standards (CDISC)
- Trial Master File (TMF)

Content management

Organisations are increasingly automating the management of information, from its creation to eventual submission for registration approval. The following are considerations to keep in mind when choosing such a system:

1. Project management capabilities. A Content Management System (CMS) with project management capabilities ensures tight alignment of the business process with the content being created to support it. Project managers can not only monitor the lifecycle of the content but also have the ability to define tasks and critical milestones, allocate resources and communicate program completeness.

2. ‘Automated’ collaboration. The system should natively support the need for collaboration and communication as the content progresses through its lifecycle. Capabilities include automatic creation of PDF renditions, workflows to notify users to review/approve content and flexibility in defining different user roles and permissions.

3. ‘Where-used’ capability. The best CMS platforms enable contributors to create content in one place and link it to all locations where it needs to be re-purposed. Then, when the time comes for making a change, the system provides a ‘where-used’ capability for a contributor to quickly view
all the submissions where the content is being used so they can assess the impact of the change.


5. Configurable, not customised. A system that is more configurable than customisable makes it inherently less costly to maintain and can easily be adapted to changes in business processes.

Figure 2 depicts the Mission3 GlobalTrack CMS. The left-hand side shows the project hierarchy and the associated documents within a given node. The top view has visuals to depict key project metrics for evaluating progress (note the barometer on the left that indicates the project is behind schedule with a red colour):

**Content publishing**

The following publishing best practices are critical for ensuring the publication of error-free submission dossiers for agency consumption:

1. **Link management.** A publishing system that can automate the validation of cross-references within and across documents eliminates the need for a manual, reactive process carried out after dossiers are created and are ready for external distribution.

2. **Dynamic dossier assembly.** The most effective publishing tools in the markets rely on the use of well-structured assembly templates that conform to specific regulatory formats and can be readily configured for additional formats as necessary. Moreover, the templates are linked to the source content in the CMS such that any updates to the content filter through to the submissions they are linked to, with no manual intervention.

Figure 3 depicts Mission3 GlobalTrack’s Dossier Assembly tool (with the assembly structure on the left):

4. **Formatting templates.** Akin to authoring and assembly templates, re-usable formatting templates help define the necessary parameters for the output (for example: page properties, headers/footers, bookmarks and table of contents). By making them re-usable across submissions, the instructions can be created once and re-purposed wherever necessary.

Figure 4 depicts a formatting template in Mission3 GlobalTrack. The diagram shows an interactive screen for setting various page properties:

5. **Communication of publishing status.** Just as with content management, a mandatory feature of a collaborative publishing system...
is the ability to indicate the progress of a submission as it evolves through its lifecycle. The system should also be able to associate different users with each stage of the lifecycle using configurable workflows.

Management of regulatory interactions
Most organisations use multiple channels to communicate with regulatory agencies: documents, emails, phone calls, in-person meetings, and so on. However, most lack a central repository for storing and tracking these different exchanges that take place simultaneously around the world. This makes it extremely hard to monitor the progress of interactions and be proactive in responding to agency feedback.

A worthwhile investment for organisations, therefore, would be a regulatory correspondence management tool that enables them to record interactions (and any supporting documents) in a ‘calendar-type’ application that also enables certain events (for example, renewal) to be associated with specific dates. Such a tool will not only keep help keep track of existing interactions, it will also notify relevant users of upcoming events that are important for continued registrations.

Figure 5 depicts Mission3 GlobalTrack’s Regulatory Correspondence Application. Note how the correspondences are lined up in a calendar-type view:

Tracking and management of product registrations
Based on conversations we’ve had with customers, very few organisations have an automated solution for tracking and reporting regulatory data from the field to ascertain what product is registered where and with which agency. In most cases, the information is compiled manually from disparate data systems into one-off spreadsheets and the process is repeated for subsequent requests. As a result, regulatory resources are frequently tied up in keeping this information updated instead of focusing on their core regulatory tasks.

Organisations would thus benefit greatly from investing in a tracking system that provides them with the market intelligence they need to have clear visibility into their product portfolio across geographies. Such a system should include the following capabilities:

1. Retrieve the necessary data from existing enterprise systems (for example: ERP, CMS, databases).
2. Provide decision-makers with the ability to generate on-demand reports for various metrics such as registration statuses, submission progress and critical dates, among others.

The information and intelligence compiled and communicated by such a tracking system would eventually influence the timing and nature of regulatory efforts worldwide. Thus in many ways, such a platform would be the capstone of the regulatory process.

Conclusion
Use of technology to support the regulatory process is a potential win-win situation for both the sponsor as well as the agency.

The increase in efficiency and speed for both the agency and sponsor should result in significant reduction of costs for both parties and a shorter time to market for products in the case of the sponsor organisations. Conversely, by not taking advantage of higher efficiencies, organisations risk missing a great opportunity to improve and continuing to operate at a sub-optimal level.

These important benefits help make a compelling case for the use of technology, especially in light of today’s cost-restrictive environment.

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About Mission3 and Simonsoft
Mission3, Inc. provides content management and publishing solutions for Life Sciences. Their flagship product, GlobalTrack helps manage and track regulatory information and interactions worldwide.
Simonsoft is Mission3’s representative in Europe and has expertise in implementing technology solutions based on XML to support an organisation’s particular publishing requirements and challenges.
Why quality, not quantity?
We don’t really want more information to consume, do we? In the past 10 years or so as the internet has grown exponentially, we, as information consumers, have become adept at searching for information, understanding what the key information is and using it to make decisions, solve problems or to entertain. But we are becoming increasingly overwhelmed by global information.

Two years ago, the amount of digital information produced was predicted to be 1,200 exabytes. To put this into context, one exabyte (10^18 bytes) is the equivalent of 10 billion copies of *The Economist* (*The Economist* 2010). Also, more than 99% of what people write, say, or generate never leaves the language in which it was created (Common Sense Advisory, 2005).

We are faced with exorbitant amounts of content, especially if we consider all the content that is yet to be transferred onto the internet, the ‘death’ of the traditional paperback or hardback book, and all the content yet to be translated. So, there is lots more to come.

For consumers of information this will mean we will have even less time to find, grasp and understand the information available to us and thrown at us. For global organisations, this means the need for agility, efficiency and more dynamically published content, but also, and maybe more importantly, a drive for better quality content, starting with technical communication. But, what is quality content and what does this mean particularly for technical communication and translation together?

What is quality content?
Those of us involved in creating documentation and translating it often talk of the need for ‘quality’ content and how it is essential for communicating clearly with our customers and maintaining customer satisfaction levels. We also talk about ‘quality at the source’ and trying to think about translation up front when writing documentation, which in turn improves translation quality.

We all know that we need quality but achieving it can involve a multitude of different factors, especially in technical communication. One way of looking at writing good quality documentation can be to follow what we can call the 3 ‘C’s of quality:

- **Clear**
- **Concise**
- **Consistent**

By looking at these rules of quality we can delve deeper into how we can achieve these in practice in technical communication:

**Clear**
Clarity is probably one of the most important factors in creating good quality content because if we are not clear to our customers, we are not going to solve their problems, guide them, instruct them or whatever our intention is with the documentation we are creating. The customer needs to understand clearly what they are reading. To achieve clear content, we should look at:

1. *Simplifying the structure and removing complexities.*

   Limiting complex verb structures, such as passive voice and future tense structures, and using the active voice where possible will help create clearer, more positive-sounding sentences. Other areas we can look at are reducing the number of successive nouns in a sentence or avoiding missing out determiners such as ‘the’, ‘a’, ‘an’ in front of nouns.

2. *Ensuring good grammar and style.*

   This is a key factor in clarity of content. Most organisations will have a style guide of some form, but making sure all writers adhere to it remains a challenge. Ensuring that all writers are following a style guide consistently and adhering to guidelines such as following punctuation rules, avoiding complex abbreviations, limiting the length of sentence, is vital to achieve clear and high quality content.

**Concise**
In a world of information consumption that is becoming dominated by small chunks of content, tweets, blogs and bitesize summaries, we are now accustomed to obtaining key information quickly and concisely. Technical communication needs to adapt to that and with social media beginning to creep into many corners of our organisation as well as our personal lives, it will be fascinating to see how technical communication can interact with platforms such as Twitter. For now, though, we can look at being more concise by the way in which we write content. To achieve concise content, we should look at:

1. *Bitesize content.*

   This relates closely to simplifying the structure of sentences in the first ‘C’, ‘Clear’. Looking at removing unnecessary wordiness (why say ‘have an effect on’ when you can just say ‘affect’?), reducing the length of sentences and reviewing punctuation are all examples of how we can be delivering
more ‘bitesize’ content in technical communication.

2. Using a common vocabulary.
Managing terminology properly by working with the appropriate stakeholders and implementing a solution to manage that terminology centrally, will help your organisation and particularly the technical communication department ensure that it is using the organisation’s common language, or vocabulary.

Consistent
In a typical large organisation, you may have multiple writers creating different types of documents, from help guides, to installation guides, to tutorials. However, in a large, global organisation this may span geographies. Achieving consistency of content across all writers and types of documentation is a real challenge. To achieve consistency, the following guidelines should be followed:

1. Terminology management.
Your organisation is likely to have a vast number of organisation-specific terms that need to be managed and kept consistent across all content. These can be product names, branded words, important legal words, technical terms and generally any words your organisation considers important for their brand, for legal compliance and for clarity. It is essential that organisations manage their current terms as well as the old, deprecated terms so that documentation can stay up to date. By storing these centrally, along with additional information that will help put terminology into context, writers across the organisation will understand more about which terms to use and when to use them.

2. Reusing content that has been written before.
Processes and technology that facilitate reuse of previously written content will generate considerable benefits for technical communication in terms of being consistent with previous content and other existing content. Many are aware of the benefits of component content reuse, where topics and chunks of information are transferable and reusable across publications, but we can also look to sentence-level reuse, which will eliminate the problems created when one sentence is written in many different ways by many different writers. Not only will this improve consistency and customer communication, it will also help reduce your localisation costs.

What else affects the creation of high quality information?
There are many factors that touch technical communication and its ability to create quality information; these include an overwhelming amount of information. A few examples are listed below.

Globally dispersed teams
A recent survey at SDL demonstrates that approximately 52% of global organisations have geographically dispersed writing teams. This is viewed as a result of various factors including offshoring, which may involve R&D or engineering moving to lower cost, highly educated locations such as India. Documentation teams may often follow because of the close relationship with R&D and engineering, but central writers may remain in the core organisation locations. Another reason for this trend can be mergers, acquisitions and outsourcing of technical communication.

With different writers located around the world, but needing to write in the same corporate language, to the same style and using the same brand persona, organisations will face several hurdles to overcome in order to deliver high quality information to their customers globally. How will they ensure that all writers are adhering to their style guide? How do they know that terminology is being shared and used properly? How is content reused between writers that span the globe? Such challenges are commonplace now and global technical communication teams need to consider how they can address them in order to maintain quality of information.

Non-native writers and readers
One of the consequences of offshoring and outsourcing of documentation is non-native writers. Regardless of proficiency in the language in which they are writing and their training and education in technical communication, it is natural that a non-native writer will produce more errors and inconsistencies than perhaps a native speaker would. This certainly inhibits the quality of information produced in terms of clarity and consistency.

Non-native readers are also an interesting customer segment that technical communicators need to consider. Many organisations are yet to translate much of their documentation despite the fact that they may sell their products or services globally. Without translation, the need for information in the core language of the organisation to be understandable by a ‘global’ audience of non-native speakers is something to be addressed. Clarity, consistency and conciseness of information play a vital role in communicating in this way to a global audience and the guidelines discussed earlier in this article are important to follow in this context.

Machine translation: garbage in, garbage out
Another recent survey from SDL demonstrates...
that machine translation is on the up, with 58% of global organisations admitting they are more likely to adopt machine translation in their organisation now, compared with two years ago. However, by the same token, 75% of those organisations indicated that ‘concerns about quality’ were their biggest barrier to adoption of machine translation. But how does this affect technical communication? A total of 62% of these organisations elected technical documentation to be the most appropriate content to translate automatically via machine translation. Therefore, as content begins to be pushed through such translation technology, the need for good quality at the ‘source’, in order to help good quality translation output (think of the phrase ‘garbage in, garbage out’), will become a pressing need in technical communication.

Conclusion
As customers continue to rely on content to make decisions, solve problems and follow guidelines, while at the same time being overwhelmed with the amount of content available to them, the need for quality information will feature highly on the agenda of technical documentation managers.

Within global organisations, adding the translation conundrum into the mix increases the complexity and challenges for technical communication and the ability for organisations to deliver high-quality content to customers worldwide. The advances in machine translation will have everyone in the localisation industry talking about quality and concerned about its impact. If technical communicators can use guidelines and new technologies for writing clear, concise and consistent documentation that not only help them create good-quality content, but also facilitate translation then everyone’s a winner.

Tom Smith works in Product Marketing for SDL Languages Technologies division, managing technology solutions for improving the style, quality and consistency of content. He speaks three languages, holds a degree in French and Spanish Studies, specialising in Linguistics, from the University of Southampton and has a background in international media and advertising.

References
Attribute filtering with FrameMaker

Andy Lewis explains structured FrameMaker’s ability to filter content by attribute value and offers a comparison with the AXCM plugin.

Users of FrameMaker’s conditional text features will be familiar with the difficulties that arise when trying to overlap or combine multiple conditional tags.

This article looks at an alternative to conditional text introduced in FrameMaker 8.0 — attribute-level filtering of elements within structured environments — and at the AXCM plugin from West Street Consulting (www.weststreetconsulting.com/) which preceded it.

A common problem
Suppose we need to produce similar versions of the documentation for two products, and that each product requires both a PDF manual and online help. Figure 1 shows a sample of unfiltered content in our source file.

Our EDD (Element Definition Document), therefore, needs to include attributes dedicated to outputs and products, each with an appropriate set of possible values.

In our example, we create attributes called product and output. For the product attribute we define the values Product1 and Product2. For the output attribute we define the values PDF and OLH (Online Help). Using the FrameMaker Structure View window, we can apply the attributes and configure their values.

We can summarise the combinations of attributes and values required to generate our deliverable set in Table 1.

Building an expression
Here we show how to build the expressions we will need to correctly filter our content.

1. In the Structured FrameMaker interface, select Special > Filter by Attribute.
2. In the Manage Attribute Expressions dialog, select New.
3. In the Expression Tag field, enter Product 1 PDF.
4. In the Attributes list, double-click output.
5. In the Expression panel, change the text to (output=PDF) and click ADD.
6. In the Attributes list, double-click product.
7. In the Expression panel, change the newly added text to (product=Product1) so that the full text is now (output=PDF) AND (product=Product1).
8. Click OK. The Product 1 PDF expression now appears in the Manage Attribute Expressions dialog box and is ready to use.

Now we need to repeat the process to build expressions for the other three deliverables. The required expressions are shown in Table 2. The resulting list of expressions is shown in Figure 3. Note that you can view the expression for any given expression tag by selecting the expression tag. The expression syntax appears in the Selected Expression window.

Applying an expression
Next we show how to apply each of our expressions in turn to generate the required deliverable output. We begin with the Product 1 PDF expression for generating the Product 1 manual.

In the structured FrameMaker interface, select Special > Filter by Attribute.

In the Manage Attribute Expressions dialog box, select Product 1 PDF.

Click Apply. As expected, only the elements with the output attribute set to PDF or “<no value>” and the product attribute set to Product1 or “<no value>” are retained in the output. Figure 4 shows the correct output.
To retrieve the hidden content, display the Manage Attribute Expressions dialog box, select the Show All option and click Apply.

**About AXCM**

AXCM stands for Attribute and XPath-Based Condition Management. Before support for XPath was added, the plugin was called ABCM — Attribute-Based Content Management. (A discussion of XPath is beyond the scope of this article.)

**The AXCM approach**

Instead of expressions, filtering in ACXM is based on schemes. Schemes are sets of rules that you define and then run as a single entity on your content.

Before we can build a scheme, however, we need to add the range of attributes and attribute values that we want to use to the plugin. We do this by accessing the attribute library (in FrameMaker, select AXCM > Main Settings > Attribute Library) and defining attributes and values just as we did when using the native FrameMaker functionality. We create attributes called product and output. For the product attribute we define the values Product1 and Product2. For the output attribute we define the values PDF and OLH.

Now we are ready to build a scheme.

**Building a scheme**

Here we show how to build the schemes we will need to correctly filter the content shown in Figure 1.

As before, we have four deliverables. For each deliverable we need a separate scheme. We will name these schemes with the same strings used for the native FrameMaker expression tags: Product 1 OLH, Product 1 PDF, Product 2 OLH and Product 2 PDF.

1. In the Structured FrameMaker interface, select AXCM > Main Settings > “Classic Schemes”.
2. In the ‘Classic’ Scheme Editor, ensure that the Scheme Type option is set to Filter.
3. Click the New option below the list of default schemes, as shown in Figure 5.
4. Name the scheme Product 1 OLH and click OK.
5. Add the product attribute to the scheme and allow the values "Product1" and "<no value>".
6. Add the output attribute to the scheme and allow the values "OLH" and "<no value>".
7. Click OK. The scheme is now ready for use.

To create schemes for our other three deliverables, we need to repeat this procedure using the scheme names, attributes and attribute values shown in Table 3.

The “Classic” Scheme Editor should now display all four of our schemes, as shown in Figure 6. Note that all default schemes have been removed from this image for simplification.

**Running a filter scheme**

We are now ready to run a filter scheme on our content. In this instance we will run the Product 1 PDF scheme and expect to obtain the same result as that produced by applying the Product 1 PDF expression when using native FrameMaker functionality: our output should contain only paragraphs 2, 6, 7 and 9, as shown in Figure 4.

1. In FrameMaker, select AXCM > Filtering > Filter Document.
2. From the Filter Scheme drop-down list, select Product 1 PDF.
3. Click Filter to run the scheme and generate a correctly filtered version of the content.

---

**Table 1. Required attributes and values**

<table>
<thead>
<tr>
<th>Deliverable</th>
<th>Product attribute value on element</th>
<th>Output attribute value on element</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product 1 manual</td>
<td>Product1 or &lt;no value&gt;</td>
<td>PDF or &lt;no value&gt;</td>
</tr>
<tr>
<td>Product 2 manual</td>
<td>Product2 or &lt;no value&gt;</td>
<td>PDF or &lt;no value&gt;</td>
</tr>
<tr>
<td>Product 1 online help</td>
<td>Product1 or &lt;no value&gt;</td>
<td>OLH or &lt;no value&gt;</td>
</tr>
<tr>
<td>Product 2 online help</td>
<td>Product2 or &lt;no value&gt;</td>
<td>OLH or &lt;no value&gt;</td>
</tr>
</tbody>
</table>

**Table 2. Required expressions**

<table>
<thead>
<tr>
<th>Deliverable</th>
<th>Expression Tag</th>
<th>Expression</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product 1 manual</td>
<td>Product 1 PDF</td>
<td>(output=&quot;PDF&quot;) AND (product=&quot;Product1&quot;)</td>
</tr>
<tr>
<td>Product 2 manual</td>
<td>Product 2 PDF</td>
<td>(output=&quot;PDF&quot;) AND (product=&quot;Product2&quot;)</td>
</tr>
<tr>
<td>Product 1 online help</td>
<td>Product 1 OLH</td>
<td>(output=&quot;OLH&quot;) AND (product=&quot;Product1&quot;)</td>
</tr>
<tr>
<td>Product 2 online help</td>
<td>Product 2 OLH</td>
<td>(output=&quot;OLH&quot;) AND (product=&quot;Product2&quot;)</td>
</tr>
</tbody>
</table>

**Table 3. Scheme names, attributes and attribute values**

<table>
<thead>
<tr>
<th>Deliverable</th>
<th>Scheme name</th>
<th>Product attribute values</th>
<th>Output attribute values</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product 1 manual</td>
<td>Product 1 PDF</td>
<td>Product1 or &lt;no value&gt;</td>
<td>PDF or &lt;no value&gt;</td>
</tr>
<tr>
<td>Product 2 manual</td>
<td>Product 2 PDF</td>
<td>Product2 or &lt;no value&gt;</td>
<td>PDF or &lt;no value&gt;</td>
</tr>
<tr>
<td>Product 2 online help</td>
<td>Product 2 OLH</td>
<td>Product2 or &lt;no value&gt;</td>
<td>OLH or &lt;no value&gt;</td>
</tr>
</tbody>
</table>
Some additional AXCM functionality

So far we have seen that native FrameMaker and AXCM perform essentially the same task. AXCM, however, also incorporates a number of features that go beyond standard FrameMaker operation. Some of these are relevant to this comparison:

- **Colouring.** AXCM schemes support adding colour to text, while FrameMaker expressions do not. Using the “Classic” Scheme Editor, you can define colouring per rule and/or per scheme. You can then run a colouring scheme over your content before you filter the content to display the projected output. For example, you can use this technique to show all content affected by a particular scheme in a specified colour. Figure 7 shows how a colouring scheme can be used to show the effects of applying the Product 1 PDF colouring scheme. Here the text to be retained after filtering is coloured green, while the text to be removed by the filter is coloured red.

- **File duplication.** FrameMaker attribute filtering operates on the source file; AXCM filtering creates an unsaved copy of the source file. Although this option is configurable, it is a default setting. By leaving the default setting unchanged, you can always be certain that your original content remains unaffected by the operations of any scheme.

- **Scheme validation.** AXCM enables you to use any combination of four rules to check the validity of your schemes. The rules can be used to ensure that a scheme uses only values that are contained in the content; to ensure that there are no cases of a parent and child element carrying conflicting values; to disallow empty attributes carrying the “<no value>” specification; or to force all elements to specify all attribute values explicitly.

- **Configuration outside the user interface.** Scheme configuration information is saved to the file AXCM_MainSettings_LocalCopy.fm, located in the WestStreet folder under your FrameMaker installation directory. This is a regular structured FrameMaker file that you can access and edit manually. In some cases this may prove faster and easier than performing configuration operations via the AXCM interface itself. For example, you may wish to duplicate colouring rules in parts of your colouring schemes. Copying the relevant elements directly in the file may be more convenient than manually re-entering information in the interface.

**Conclusion**

Attribute-level filtering of content is a more flexible and accurate means of ‘conditionalising’ your content than using the FrameMaker conditional tagging function. While FrameMaker now offers expression building as an alternative, its functionality is still somewhat limited. AXCM significantly extends attribute-level filtering and is available free of charge.

**Andy Lewis** is a long-time user of AXCM and of many other FrameMaker plugins in both structured and unstructured environments. He has presented and written extensively about his experiences. He has recently joined the WAS Content Development team at Verint Systems in Herzlia, Israel where he is scaring his new colleagues with his plugin freakishness. Andy is also a Certified Adobe Expert in FrameMaker. Feel free to contact him.

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Split infinitives

Can we split an infinitive? Should we split an infinitive?

Jean Rollinson considers both sides of the argument.

Why do so many people insist that you can’t split infinitives in English? Are they right? Does it bother you? Is it something that we even need to consider?

What is a split infinitive?

The infinitive is the un-conjugated, or root, form of the verb — for example, to be, to love, to have, and to want — so splitting an infinitive means putting a word between ‘to’ and the verb. Possibly the most famous example appears at the beginning of Star Trek — ‘To boldly go where no man has gone before’. There is also the self-referential joke: ‘Writers should learn to not split infinitives.’

I’m not going to cover the details of how the rule ‘do not split an infinitive’ may have arisen, as its history is controversial and I don’t have space to cover all the arguments. To find out more, see the comprehensive page on Wikipedia: http://en.wikipedia.org/wiki/Split_infinitive.

For and against

The most prevalent argument against the split infinitive that I hear from authors is that it is so widely perceived as bad English, that authors do not want to be seen as ignorant by their readers by using it. They are, however, quite prepared to write ambiguous or incomprehensible sentences just to avoid a split infinitive. They are also perpetuating an unfounded myth.

I don’t think I can express an objection to this argument better than Bill Bryson, who says,

‘I can think of two very good reasons for not splitting an infinitive.

1. Because you feel that the rules of English ought to conform to the grammatical precepts of a language that died a thousand years ago.
2. Because you wish to cling to a pointless affectation of usage that is without the support of any recognized authority of the last 200 years, even at the cost of composing sentences that are ambiguous, inelegant, and patently contorted.’

Using/not using split infinitives

In most situations, it is a matter of personal preference. But, particularly in formal writing, you should recognise that it annoys some people. You should also consider the rhythm and balance of the sentence when deciding whether to split an infinitive; don’t just do it, or not do it, dogmatically.

It is worth noting that long adverbial phrases between ‘to’ and the verb, such as ‘It has been decided to finally and with immediate effect close the swimming pool’, are usually inelegant and I would expect most experienced writers to avoid them.

On the other hand, you should watch out for sentences that shout ‘Look at me; I’m not splitting an infinitive!’ For example, ‘The council has promised seriously to consider the options’, draws attention to its own structure; ‘The council has promised to seriously consider the options’, is structurally unobtrusive, and allows the reader to concentrate on its meaning.

Sometimes it is almost impossible not to split an infinitive, and it is better to do so than produce a nonsensical sentence. For example, the following sentence contains a split infinitive, but is grammatically correct and well formed: ‘We’ve been asked to more than triple our contribution.’ Moving ‘more than’ to avoid a split infinitive gives a sentence that is ungrammatical and nonsensical: ‘We’ve been asked more than to triple our contribution.’

There is also a risk that moving the splitting word will change the meaning of the sentence. The following example is adapted from one used by R. L. Trask and quoted on the Wikipedia page I gave previously.

Consider the sentence ‘She decided to gradually get rid of the teddy bears she had collected.’ Here ‘gradually’ splits the infinitive ‘to get’; however, if the adverb were moved, where could it go?

Changing the sentence to ‘She decided gradually to get rid of the teddy bears she had collected’ might imply that the decision was gradual.

An alternative might be ‘She decided to get rid of the teddy bears she had collected gradually’, but this implies that the collecting process was gradual.

A third option could be ‘She decided to get gradually rid of the teddy bears she had collected.’ But this sounds awkward, as it splits the phrase ‘get rid of’.

Finally, we could write, ‘She decided to get rid gradually of the teddy bears she had collected.’ But this is almost as clumsy as the previous option.

The sentence can be rewritten to maintain its meaning by using a noun or a different grammatical aspect of the verb, or by losing the informal ‘get rid’:

‘She decided to get rid of her teddy bear collection gradually.’

‘She decided she would gradually get rid of the teddy bears she had collected.’

‘She decided to rid herself gradually of the teddy bears she had collected.’

These rewrites are all perfectly acceptable, but if the original sentence with a split infinitive is clear and unambiguous, why bother with a rewrite?

Final word

I give the final word to Fowler, who says:

‘The English-speaking world may be divided into (1) those who neither know nor care what a split infinitive is; (2) those who do not know, but care very much; (3) those who know and condemn; (4) those who know and approve; and (5) those who know and distinguish.

1. Those who neither know nor care are the vast majority, and are a happy folk, to be envied by most of the minority classes’.

My apologies if you started reading this article as a member of group 1, as if you’ve read this far, you won’t be any more.

References and further reading

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Practical English Usage, Michael Swan, Oxford University Press

‘Split Infinitive’ (online) available at www-users.cs.york.ac.uk/susan/cyc/s/split.htm (accessed July 2010)


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Globish the world over

By Jean-Paul Nerrière and David Hon

English is important for international business, but English is a complex language. Sometimes, people who use English as a second language struggle with it. Globish is a subset of English that has 1500 basic words and a simple grammar. The purpose of Globish is to make English easy for non-native speakers.

Nerrière developed Globish after he saw how non-native speakers of English communicate. Globish products and services are sold by Globish Solutions Inc (www.globish.com).

The name *Globish* helps to show that everyone owns the language. The authors write, “*Globish* has a different name because it is a very different way to solve the problem of learning English.”

Usually, the content of *Globish the world over* is good, but I have two primary criticisms of the book. First, the references are not sufficient. For example, the book mentions Technical English. Possibly, the authors mean ASD-STE100 (www.asd-ste100.org), but they may mean something else. Second, the authors claim that the book uses Globish, but frequently, the text does not conform to Globish guidelines.

I bought the eBook version of *Globish the world over*. (A paperback version is available at $14.95 (US).) The eBook is only a copy-protected PDF file. The eBook is not designed for on-screen viewing. The pages are A4 portrait, which is not the correct size or aspect ratio for on-screen viewing. The eBook does not have hyperlinks.

The idea for Globish started in international meetings of people from America, Britain, continental Europe, Japan, and Korea. Communication between the non-native English speakers (the continental Europeans, the Japanese, and the Koreans) and the native English speakers (the Americans and the British) was not good. However, communication between the non-native English speakers was better than communication between the native English speakers.

The authors think that the good communication between the non-native English speakers was because the non-native English speakers were not afraid to use simple English.

The authors discuss plain English. To communicate effectively, people do not need to know all of English. People need to know sufficient English to give their message clearly. Native English speakers use approximately 3500 words regularly. Globish is a specified subset of English that is sufficient for most communication.

The authors emphasise that Globish is a tool for business. Globish is not a cultural language in the way that French or Chinese or English are cultural languages. For example, Globish is not good for talking about strong feelings. “Globish can achieve what it does because it is useful English without a huge number of words and cultural idioms.”

Other writers agree. For example, in *Global English for global business* (http://ccpress.info/gegb.htm), McAlpine writes that after she returned from a two-year visit to Japan, a friend said, “Your voice has changed. You’ve got that international voice.” McAlpine explains that the ‘international voice’ is a style of English that everyone can understand. People speak slowly and carefully, and they use simple sentences. International speakers do not use phrasal verbs, idioms, or complex sentences.

The second part of *Globish the world over* explains the grammar and the words that are in Globish.

Most of the limits are on the vocabulary, not on the grammar. For example, only the following two tenses are not permitted:
- Past perfect continuous.
- Future perfect continuous.

Example: He had been talking. Ideally, sentences have no more than 15 words. As a maximum, sentences have 26 words. This good guideline helps to prevent a sentence from having many clauses.

However, the authors do not explain why 15 words are better than 13 words or 17 words. To restrict the number of clauses in a sentence, a simple alternative is to specify the maximum number of clauses. For example, EasyEnglish has a maximum of two clauses in a sentence (www.easyenglish.info/about-us/articles/communicator.htm).

Globish has 1500 basic words. In addition, you can use technical words, and the names of people and places. The authors explain that 1500 words is not necessarily the best number of words. However, learning 1500 words is easier than learning 2000 words. The words come from lists of frequently used English words. The Globish list is similar to the Voice of America list (http://www1.voanews.com/learningenglish/home/wordbook/), but the Globish list has fewer words about politics.

The 1500 basic words in Globish can be increased to approximately 5000 related words. For example, you can add a prefix to a word. Another method is to use a preposition with a verb to make a phrasal verb. Examples of phrasal verbs are ‘get over’, ‘take up’, and ‘put off’.

A Globish guideline is to avoid figurative language. For example, do not say, “miss the boat” if you mean, “do something too late.” Many other experts have the same opinion. However, frequently, the meaning of a phrasal verb is figurative. For example, the phrasal verb ‘carry out’ means ‘do’. Nothing is ‘carried’, and nothing is ‘out’. Therefore, I do not understand why Globish uses phrasal verbs.

Ignore the irritating defects of *Globish the world over*, because most of the content is good. The book explains how to solve many of the problems of communicating internationally with English. However, for detailed grammatical guidelines about how to write for an international audience, *The Global English style guide* by Kohl is a better book (www.globalenglishstyle.com).
Real–life dilemmas column

Warren Singer invites your thoughts about true stories of 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.

With power comes responsibility

The background

With great power comes great responsibility.

The words may have come out of a superhero movie, but George had always been told, as a boy, how important it was to exercise responsibility. This was especially the case if one were in a position of authority.

George was the technical publications manager for a large multi-national organisation. He managed a team of ten technical authors, who were engaged on a wide range of projects for both internal and external clients.

The department

The technical publications department had rapidly expanded during the previous two years, as the scope of work and client list had grown.

This growth had created its own pressures, including the rapid hiring of new staff, and shifting roles and responsibilities within the team. One of George’s key tasks was to allocate work and distribute projects evenly across the team to ensure that everyone was kept busy and no-one was overloaded. In the past this had worked smoothly; however, there had been a sharp downturn in demand in recent months, so less work was available. Indeed, for the last few months there had been insufficient work to keep his team fully occupied.

George noticed that the productivity of some of his team members had dropped considerably. John, in particular, seemed to be spending a considerable amount of time in ‘meetings’. George had been carefully keeping an eye on John. He noticed that each time he came around, John would be browsing the Internet and would switch his screen quickly to avoid George seeing what he was doing.

George liked to keep his ear close to the ground with the team. He had good relations with a number of team members. Upon making discrete enquiries, he was told that John appeared to be taking lengthy lunch breaks and spending significant time during work hours on the Internet. Some team members suspected that he was also doing work for someone else, using the company’s equipment and time.

George’s dilemma

For George, his position of authority placed him in a sensitive position.

On the one hand, it was his responsibility to ensure that his team were properly motivated and engaged, and given sufficient work to keep them occupied. On the other hand, the team members also had a responsibility towards their work. He expected a work ethic of diligence, honesty and dedication. If there were problems, or one team member did not have enough to occupy themselves with, he expected them to approach him.

George had a number of choices. He could speak to John and issue him with an official warning, as per company policy and procedure. He could start arrangements to make one headcount redundant, given that the team did not currently have sufficient workload to keep everyone busy. Or he could make sure that John was occupied by giving him sufficient projects to keep him busy and out of mischief.

To George, the issue extended beyond the immediate problem of John to his team as a whole. He could make an example of John, but the future functioning and sustainability of the whole team needed to be considered. Were redundancies in order?

Editor’s comments

Technical communicators, due to the nature of their work, often experience quiet periods, while they are waiting for feedback from reviewers or new projects to start. How they ‘manage’ this free time poses an ethical question. Should they be allowed to spend their time on other pursuits if their company does not have other work for them to do? C

Warren Singer MISTC
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Over to you

Write to dilemma@istc.org.uk

Tell us how you think George 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 reputation) of real people.
Summary of Jane’s dilemma

Jane worked for a bank embarking on a major system upgrade. Jane had been asked to communicate with customers, but withhold important details and provide a positive spin which she felt might be misleading and potentially compromise her professional integrity as a technical communicator.

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

John Seaman MISTC

I think Jane should stop being so precious. When a bank communicates with us, their aim is to convey a message to us in such a way as to get us to do something they want us to do. They don’t set out to convey to us information about the world according to some mythical standard of truth. Simply laying back and passively receiving communications at face value is quite the opposite of ethical behaviour. Our responsibility — yours, mine, Jane’s — is to actively figure out what we are being told, what we are not being told, and why.

The bank’s customers, being businesses themselves, will already know that, so get on with it, Jane! If you want to express your inner truth, you’re in the wrong job. Expressing a given message to achieve a specified end is what we technical communicators are about.

Dr Mike Unwalla, FISTC

Principal Technical Writer, TechScribe

If Jane hides the facts from the customers, Jane is complicit in false advertising. As a responsible technical communicator, Jane needs to give all customers the information that they need to make an informed decision. Business customers know that markets change. If the bank does not want small customers now, the best option is for the bank to help the small customers to find alternative suppliers before the change to the system. The customers possibly will be irritated by the inconvenience, but they will respect the bank for its honesty.

Nick Kenney, MISTC

IT and Financial Services, Queensland, Australia.

As a professional and experienced Senior Technical Communicator in a financial services environment, Jane should be capable of explaining the features and functionality of the system migration project in a clear and unbiased manner. Jane has the opportunity to use her judgement and experience in how she explains the features and functionality of the system in her support documentation. The small business functions that are being dropped from the system should be fully explained using clear and unambiguous language, published — even if it is in amendments to the technical details — and made available to all customers. It is Jane’s responsibility to advise customers via her email communications, that they carefully read the amendments.

If bank management wishes to focus on profitable large business customers and reduce services to less profitable small business customers, Jane should not expect the right to comment as she is not in a position of responsibility for bank policy and business decisions other than communicating them.

Providing that small business customers are given access to the information they need in order to make informed decisions and providing the activities of the bank meet financial services regulatory requirements, it is up to Jane to decide if she wishes to remain an employee of the bank. If she is unhappy about a situation she cannot influence other than by her technical communication skills, she could resign.

Editor’s note: Technical communicators working in the Financial Services industry should refer to the Treating Customers Fairly guidelines published by the Financial Services Authority.
On 24–29 May ISO/IEC JTC 1/SC 7 (Software & Systems Engineering) held its annual Plenary and Working Groups meetings at the Toki Messe Convention Centre in Niigata, Japan. The meeting was hosted by JISC (the Japanese Industrial Standards Committee) and the IPSJ/ITSCJ (Information Processing Society of Japan/Information Technology Standards Commission of Japan). Over 230 experts from 18 SC 7 Working Groups were present, including Working Group 2 which comprised Daryl Colquhoun (Australia/ASTC), Cerys Willoughby (UK/ISTC), Annette Reilly (USA/STC & IEEE Computer Society), Pr. Yoshikazu Yamamoto (Japan/Information Processing Society of Japan) and me (UK/ISTC). During our meeting we were also joined part-time by other delegates from the UK, USA, Japan, the Netherlands and Estonia.

Niigata? Yet another wonderful experience. Niigata is a very modern city, located on the western coast of Japan, home to over 810,000 people and famous for horticulture, mainly vegetables and flowers, especially tulips. Unfortunately, we did not get the opportunity to try Kakinomoto (edible chrysanthemums). Our hosts made sure that we were well looked after and entertained, the climax being a banquet with a traditional drum band on the Wednesday evening. Everywhere we went we were welcomed with smiles and bowing and any gifts we purchased were exquisitely wrapped in the stores.

Lunch (or occasionally Launch!) boxes were provided everyday with some interestingly described content (see Figure 1).

ISO/IEC 26511
Whilst last year’s first CD ballot of this standard (Requirements for managers of user documentation) was successful, the WG 2 experts considered that information on content management would improve the standard. Our plan was for this to be added to the draft and a second CD ballot (necessary due to the change of content) to be initiated earlier this year. Unfortunately, the new information was not available when planned and the second CD ballot is now underway. The results of this ballot will be discussed at our next meeting in November.

ISO/IEC 26512
The FCD ballot of this standard (Requirements for acquirers and suppliers of user documentation)
conducted following our previous meeting was successful. The technical comments received from Japan, the IEEE* and IETF were resolved in Niigata and the FDIS ballot is now underway. The results of this ballot will be discussed at our next meeting.

*Under the agreement with the IEEE Computer Society, ISO/IEC Software & Systems Engineering standards are also balloted and published by the IEEE.

ISO/IEC 26513:2009
This standard (Requirements for testers and reviewers of user documentation), has completed its development and has now been published by ISO.

ISO/IEC 26515
Last year’s New Project (NP) ballot for this standard (Developing user documentation in an Agile environment) was successful and our work is well advanced. At this meeting, the final reviews were carried out and the combined CD and CD Registration ballots are now underway. Again, the results of this ballot will be discussed at our next meeting.

ISO/IEC 15289:2006
Primarily due to changes in companion standards, this standard (Content of systems and software life cycle information products (Documentation)) has had to be revised. The CD ballot earlier this year was successful and the technical comments from the UK, Germany, Japan and the Netherlands were reviewed in Niigata. The FCD ballot is now underway and the results will be discussed at our next meeting.

Software & Systems vocabulary
ISO/IEC 24765 (Systems and software engineering vocabulary), has now been published and WG 22 (Software and Systems Engineering Consolidated Vocabulary) has now been disbanded. The vocabulary database is also freely available at www.computer.org/sevocab.

Recognising the need to maintain the database and regularly update the standard, Special Working Group 22 has been formed together with a Vocabulary Validation Team (VVT).

Where next?
WG 2 has been invited to meet at the National Institute of Standards and Technology (NIST) in Gaithersburg, near Washington DC in the USA in early November. I’ll be providing a report on that meeting in the Winter 2010 Communicator.

Richard Hodgkinson FISTC has participated in the development of ISO, ISO/IEC and European standards addressing icons, symbols, software documentation, pen gestures and ICT accessibility since 1990. His is also an Associate Lecturer to the MA Technical Communications course at the University of Portsmouth.
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Figure 1. Lunch (or Launch!)
A day in the life

Geetha Haridas describes a day mostly spent reviewing the lessons learned from a recently completed project.

Although I’m a working mum who is always falling short of time, my typical day does not start until 7:30am. I hate to forego that extra 10 minutes of sleep. Then I rush to get myself ready for work and my three-year old daughter, Maya, ready for nursery. After a quick breakfast, my husband, Vijay, drops me off half-way to his place of work before he drops Maya off.

I am currently part of a 3di team that provides an outsourced technical documentation service to Thales e-Security. Our team works primarily out of a Thales office near the centre of Cambridge. Some years ago, after experiencing difficulties when developing documentation in-house, Thales went looking for an outsourced documentation service. I played a key role in convincing them that 3di could offer an effective option. Since then, I’ve had the satisfaction of watching our team develop a good reputation for improving the quality of the documentation and working effectively with the development teams. The 3di team tends to vary between three and five authors depending on the workload, and we sometimes involve a technical illustrator as well. We produce quite a wide range of documents—Quick Start Guides, User Guides, Reference materials, and Online Help—primarily from DocBook sources.

Once I reach the office, I catch up with my email. It is a relatively quiet week as a couple of my colleagues are on holiday. A new colleague, who joined our team last week, mentions that she is unable to access her work file in the XML-based authoring system we use. It takes me a little while to analyse the issue, but I manage to restore an earlier version of the file.

I completed a major product release last week, so my next task is to start capturing what I learnt from the experience in a summary report while the work is still fresh on my mind. On that particular project, I worked closely with a California-based development team rather than with one of the Cambridge teams. The development model was very iterative and keeping track of the changes in functionality and scope, while the developers were working far away in a different time zone, wasn’t easy.

As I reflect on what went well and what could have gone better with the project, I feel good about my overall achievements. I moved legacy documentation to a single-sourcing framework to reduce the authoring and reviewing time for all future releases of the product. Additionally, our Documentation team negotiated with the Development and Quality teams to accept our solution for documenting key integrations with third-party products. Our solution of making optimum reuse of third-party documentation, rather than creating separate Integration Guides from scratch, saved the organisation a month’s worth of budget. Although my natural interest is more in the user-focused aspects of our work, we can’t provide a good service unless we bear in mind the financial impact of our activities.

While having lunch at my desk, I browse the library catalogue and request some books from the university library as I prepare for the next module of the MA degree in Technical Communication that I’m studying with Sheffield Hallam University. I find that my studies encourage me to challenge some of the ideas I’ve acquired through years of practical authoring experience.

The rest of the day is spent on finalising the summary report and reviewing the high-level user interface design document and functional specification of the next project that I’ll be working on. The best part of my work is the variety of projects that I get to work on. Each project is unique and provides new learning opportunities, while keeping the risk of monotony at bay.

Once I’m back at home, it’s soon bedtime for Maya. I read her a story of a little boy who goes on a trip abroad for the first time. The word ‘emergency’ appears a few times in the story and she gets fixated on this word. Strangely, for a technical communicator who explains complex concepts related to encryption and cryptography all the time, explaining the meaning of ‘emergency’ to a three-year old doesn’t feel like an easy task. Although not convinced with my explanation, Maya finally goes to sleep. It’s now time for me to relax and catch up with Vijay about his day at work and watch some news on the TV before ending the day.

Geetha Haridas MISTC is a Senior Technical Author at 3di Information Solutions Ltd. She has over eight years of experience in designing and developing product documentation. She lives in Cambridge, where she practices the tricky art of juggling motherhood with a commitment to producing quality technical documentation.

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