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Cover Reyðarfjörður, a fjord on the east coast of Iceland, photographed by Malcolm Beaumont — none of our interviewees on pages 21–23 work this remotely… yet!

Communicator — the quarterly journal of the ISTC

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Spring
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Published 21 September

Winter
Copy by 31 October
Published 21 December
Design changes for 2005
You'll see that we've made some minor design changes to Communicator. The first is the picture of me above. I have to apologise for inflicting that on you but I've succumbed for two reasons:

1. Several people told me I should.
2. People don't always recognise me at events and so I think it's probably good to give the Editor a face.

Another change is the reinstatement of the title and issue details in footers. We removed these in the last redesign, aiming for an uncluttered layout, but I have since discovered that people find it useful when passing on copies or PDFs. The ISTC wants the exposure that secondary copies provide and naturally wants readers to know where the material came from. The original suggestion came from Ake Rullgård, President of FTI (the Swedish technical communication society). I'd like to hear from more of you on the need to show bibliographic data, including the level of detail and method of presentation in different types of documents.

In this issue
As promised, we bring you another article based on a well-received talk at Conference: Dáire Lawlor writes on internationalising electronic content. We also continue our study of careers in our profession: Elisabeth Gräfe reports on a workshop at tekom's Spring 2003 Conference that tried to predict the future of the technical communicator, and then Sandra Postle provides a personal perspective on how her role has changed. Other features range from controlled languages to home-working, continuing our commitment to bring you coverage of all aspects of the business.

This issue also sees the return of the Publishing page, on which I intend to describe the Communicator production process. A contributor suggested this would make an interesting article and I was spurred into action when a student whom I tutor asked what typesetting was. I will explain the stages involved in producing Communicator, which is a typical modern paper publication using largely digital workflows. I hope many readers will find this interesting and that understanding the processes will help contributors to provide content that really shines when output to print.

Improved web archive
Iain Wright's website team have converted the contents pages for past issues of Communicator into HTML so that they are included in the search facility. You should find that relevant articles that have appeared in Communicator since Spring 2001 now appear when you search for a topic.

Also, Ralph Maciejewski is to scan all available back issues of Communicator. Thanks to his kind offer, we hope to be able to access this valuable resource through the online archive.

Media pack 2005
Our advertising agent, Felicity Davie, and I produced an updated media pack for 2005. It contains a readership profile for Communicator, advertising costs, artwork requirements and advance features in brief. Let me know if you'd like a copy for yourself or someone else.

Corrections
I would like to apologise for two errors in the Winter 2004 Communicator:
1. Page 11: the City & Guilds exams for 5360-011 and -012 will be on 13 June, not 13 May.
2. On page 7, we stated that Coventry University had withdrawn its BA in Technical Communication; in fact, although the course title has changed, the content is still relevant (see Sandra Harrison’s letter).

Letters
Coventry course still very much alive!
Sandra Harrison MISTC

At Coventry University we have been alarmed at recent rumours suggesting that the University no longer has a degree in Technical Communication.

It is true that we had to change the name of the course. In Higher Education, we now have to meet targets for student numbers and, because we were unable to recruit sufficient numbers to the title Technical Communication, we had to offer the course under a different name. It has a substantial multimedia component, supported by our excellent new multimedia facilities, and therefore has the title BA (Hons) Multimedia and Communication Design.

Our course offers students an excellent preparation for careers as technical communicators. It includes the writing and design of communication products for specific audiences and purposes, as well as sound experience in multimedia, and the understanding and practice of usability. It is taught by staff that include practitioners with industrial experience in technical communication, information design, multimedia, and usability. We have ongoing links with both traditional and contemporary employers, leading to ‘live’ projects, valuable work placements and talks by practising professionals.

Recruitment continues to be a challenge. Although there is a continuing need for technical communication professionals, it is difficult to get this message across to potential recruits. If anyone from the ISTC is planning to give talks about the profession to teachers, careers officers, sixth-formers, or other interested parties, I would be happy to provide information about our course.

We have an excellent degree course, and we welcome the support of the ISTC. BA (Hons) Multimedia and Communication Design, Coventry University Phone: 024 76 887474 E-mail: sandra.harrison@coventry.ac.uk

Marian Newell FISTC is a freelance technical author working in the Thames Valley. She joined the ISTC in 1985. E-mail: journal.editor@istc.org.uk
Grammar in schools
Ciaran Dodd

In the Autumn 2004 Communicator, Nick Robson suggested that English grammar ‘appears not to be taught formally in most State schools’ (page 46). Last year, I qualified as a primary teacher specialising in English. A key part of the primary curriculum is the National Literacy Strategy, which was implemented in 1998 as part of the Government’s drive to improve literacy in schools. The supporting document, the Framework for Teaching (Ref: DfES 0500/2001), ‘sets out the teaching objectives for Reception to Year 6 to enable pupils to become fully literate’ (page 2).

Children are taught the skills of reading and writing through a variety of different text types. The objectives are divided into three groups:

1. Word Level: phonics, spelling and vocabulary
2. Sentence Level: grammar and punctuation
3. Text Level: comprehension and composition

As children progress, the objectives build on the previous year’s work and become more complex. For example:

- Demarcating sentences: Year 1, Term 1, children must recognise full stops and capital letters and start using the word ‘sentence’. Year 2, Term 3, children should be using capital letters and full stops accurately.
- Understanding verbs: Year 3, Term 1, children learn about the function and tenses of verbs. Year 6, Term 1, children must be able to identify and use the active and passive voice.

In the first example, children have a year to master several complex concepts and move from recognising full stops to using them accurately. As for verbs, I have trained adults for more than ten years, and verbs are a tricky subject for any age! I hope this brief account has shown that English grammar is a core part of State school teaching.

Doc-To-Help Professional 7.2
Rick Webster MISTC

I was interested to read Justin Darley’s review of this product in the Winter 2004 Communicator. I tried a much earlier version at a time when I wanted master information in Help and exported to Word or PDF only for printing. I was reminded of one misgiving by a thread on the ISTC Discussion Group about text between headings and subheadings. Many different views were aired, depending as much on the author’s circumstances, subject matter and audience as on any general design principles.

I found Doc-To-Help’s structure very rigid: every heading required text before another heading could be created. I found this caused me to add meaningless content just for the sake of it. I don’t know if the restriction is still present.

From the Editor: The developers tell me that this restriction was removed when ComponentOne acquired Doc-To-Help from Wextech. Do let us know your experiences if you use the product.

Readers’ tips

This is an idea from Nick Robson, a space in which Communicator readers can exchange useful tips on any aspect of the tools and techniques used in our work. We’re looking for about 75 words on anything that could be useful to other readers. Here are some examples.

File-naming conventions
If your document is large enough to warrant dividing into one file per chapter, avoid naming the files as Chap1, Chap2, Chap3, and so on, as you may need to re-order the files at some point and then the file names will be misleading, if not to you then to whoever may have to maintain them at a later date. It is better practice to assign names that give some idea of the content; for example, Introduction, Data Capture, Printing, and so on.

Folder-naming conventions
When using an alphanumeric naming convention, normalise the numeric part of the name to the largest number expected. This will ensure that the folders are always listed in the correct order. For example:

<table>
<thead>
<tr>
<th>Non-normalised names</th>
<th>Normalised names</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABC1066</td>
<td>ABC0123</td>
</tr>
<tr>
<td>ABC123</td>
<td>ABC0987</td>
</tr>
<tr>
<td>ABC087</td>
<td>ABC1066</td>
</tr>
</tbody>
</table>

Send your tips on any aspect of the job to the usual Letters address.

We welcome letters of up to 200 words but reserve the right to edit as required. Write to journal.editor@istc.org.uk or PO Box 522, Peterborough, PE2 5WX.

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ISTC launches direct debits
I’m pleased to be able to announce that you can now pay ISTC subscriptions by direct debit, either by filling in a form on the website at www.istc.org.uk/dd/securecollection.php or by telephoning Carol in the office on 01733 390141.

Apologies to anyone who has paid their subscriptions recently, but we just couldn’t get the scheme ready in time for this year. Once the system is running, it will reduce administrative time spent on renewals and save you writing a cheque every year. The direct debit facility is being implemented at no extra cost, so you have nothing to lose by signing up.

Survey generates fresh ideas
The training and special interest group survey has now been completed. Thanks to Dave Cooper who compiled it and to everyone who took part. The training section results will be used in planning the ISTC’s conferences and possibly in arranging other training courses in the future. The special interest group results will be shared with our European partners; we hope to launch some of the ideas soon.

I know it’s a long way off but I can’t resist a mention of Conference 2005 (see below). We already have several presentations promised by top international speakers. After the success of the indexing workshop last year, we’re looking into running another workshop on a different subject. We are also talking to a training provider about running a course or two on the Friday of Conference. In response to the continued popularity of the event, we are seeking to enhance and improve it every year — let us know if there’s anything you’d like to see.

Award nominations invited
Every year, we present the Horace Hockley award to someone who has made a considerable contribution to the technical publications industry. If you know of a suitable candidate, drop me an e-mail or speak to Carol. Let us know who and why, and we’ll consider your nomination along with the others. For details of the criteria, see www.istc.org.uk/pages/hockley.php

Gavin Ireland MISTC is a sole technical author in a software development company. He produces printed, PDF and online documentation.
E-mail: president@istc.org.uk

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- Telephone: Ann Little on 020 8422 4689
- Visit: www.istc.org.uk/pages/conference.php

*Book before 30 June 2005
The first Council meeting of 2005, held on a dullish February day, drew two-thirds of Council members. Gavin opened the proceedings on a cheerful note; the bank balance is the best it’s been for a very long time but, and there is always a but, that is with far less than our peak number of members.

Another immediate item of note was that David Cooper has stood down from Council for personal reasons. He was thanked for the sterling work he has done over several years to bring the Newsletter up to its present high standard. John Nicholson will also leave Council, due to work pressures.

**Articles and memorandum**

Revision of these documents is being pushed forward by Caroline Bucklow but there are some vagaries that need to be resolved before they can be offered up for legal approval. Solicitors charge a high price for their opinions and estimates are being obtained to ensure that we get a fair deal.

**International**

Alan Fisk keeps a watching eye on this brief. One snippet is that INTECOM is considering redefining what we call here technical communication, possibly widening it to include most factual communication. Council has concerns about this, wondering if it is desirable to dilute the ‘scientific and technical’ aspects of the business too far.

**Marketing**

Paul Ballard reported on his marketing work and showed a mock-up of a proposed folder and information sheets designed to give the ISTC a new and consistent image. Council intends to send a sample pack to all members in the summer, partly so that you can see it but more importantly so you can pass it on to potential new members.

**Membership**

There are about 200 members who haven’t yet renewed their membership. Are you one of them? If so, please contact Carol immediately. Every year, she has to spend time chasing renewals, time that would be better spent on more productive activities.

Even if all outstanding subscriptions were to be renewed, our membership would still be 300–400 short of our best total. One new initiative aimed at improving retention is the introduction of a direct debit facility to make it easier for people to pay and, perhaps, less easy for them to forget. The possibility of life membership was mooted — let Council know if you think this would be a good idea.

Retired rates are a contentious topic, with some members pointing out that they retire at 60 or even earlier. Council is sympathetic to these arguments but decided to make the qualifying age the same as the age for the state retirement pension (that is, 65 for men and, currently, 60 for women).

Ian Wood, Chair of the Membership Committee, commented on the variable quality of membership applications. If applicants do not give full information, the Committee’s work is more difficult. In future, all applications for corporate membership (Member or Fellow grades) must be accompanied by a full CV.

**Training**

John Young noted developments on the training front. A positive note was that Coventry University is still offering its technical communications degree, although the name has changed. John pointed out that this is a common occurrence intended to attract more students, although the content of the renamed course may not change much. All this is tied up with the way the Government funds educational institutions.

With regard to training information on the ISTC website, course providers are often difficult to contact. If they want courses to be shown, it is up to them to contact us with details.

The recent training survey brought a small number of responses (typical of surveys in general). Respondents’ main interest was in documentation project management. Council hopes to be able to address this in conjunction with the next Conference. In the meantime, a question to be answered is this: if we arranged a short course, how many people would be interested and how much would they be prepared to pay?

**Website**

Work is continuing on the website and we hope that improvements are already apparent. We are looking again at the navigation and accessibility of the site, using the RNIB site as a model. One interesting point was whether a site should be pretty or simply functional. Could it be both?

Les Best FISTC
E-mail: lp@bestpubs.e7even.com
Microsoft applications
Microsoft applications came under fire this quarter, with much attention given to PowerPoint and Word. Being widely available, PowerPoint is subject to misuse; the observation was made that the users are more often at fault than the tool. Other Microsoft applications came under scrutiny, with a comment that the company has some good products but is weak on testing them before releasing. However, another correspondent pointed out that Windows XP Service Pack 2 used an extremely large number of beta testers.

Word headers
Difficulties were reported when images are inserted into Word headers, with large amounts of memory being used. The advice given was to keep images in headers as small as possible.

Darwinian Information Typing Architecture (DITA)
An invitation was issued to an open day about DITA, an XML-based architecture for creating and deploying modular information on varied platforms. For more on DITA, visit:
- http://xml.coverpages.org/dita.html
- www.oasis-open.org/committees/ tc_home.php?wg_abbrev=dita

There are related discussion groups at:
- http://groups.yahoo.com/group/ dita-users
- http://groups.yahoo.com/group/ framemaker-dita

Windows XP
A word of warning to those who remove Windows XP Service Pack 2 from their PCs. This can be done by going to the Control Panel/Add or Remove Programs, where SP2 should be listed. After removing SP2 from the PC, return to the Add or Remove Programs menu and locate the Microsoft Quickfix programs, many of which are SP2 quickfixes indicated by ‘SP2’ in the title). You have to remove each of these SP2 programs, starting from the bottom program and working up. This is time-consuming because most require you to restart the PC.

FrameMaker
FrameMaker’s workgroup functionality is compatible with WebDAV (Web-based Distributed Authoring and Versioning), which is freely available on the Apache site (www.apache.org). It is purely a matter of connecting to WebDAV to check files in and out.

There’s a new discussion group that deals with indexing in FrameMaker (http://finance.groups.yahoo.com/ group/FrameIndexers).

Health and safety issues
The question of whether user documents should be provided to users in the US on paper or on a CD was deliberated. The conclusion was that hardcopy is usually better, as not everyone has access to a PC. A good source for clarification on health and safety issues is Underwriters Laboratories (UL) at www.ul.com. UL is an independent, not-for-profit testing and certification organisation; it has tested products for public safety for more than a century.

Insurance
Insurance for freelance writers can be obtained from McParland Finn Ltd (MFL Professional). The company can be contacted on 0161 236 2532 or at www.m-f-l.co.uk

Anti-virus software
The latest version of Norton anti-virus software has caused some authors problems, but one correspondent using Windows XP had no complaints. A recommended anti-virus tool was PCillin Internet Security 12 from Trend Micro (http://uk.trendmicro-europe.com/ index_consumer.php)

European law and directives
Suggested sources included:
- http://global.lhs.com

Jo Wilson BEd(Hons) PgCTA
E-mail: SilverQueen66898@aol.com
**Member news**

**New members**

**Member**
- Julia Atkinson: Bradford
- Amanda Caley: London
- Valerie Challs: Stockholm, Sweden
- Kevin Chilton: Belfast
- Brian Crockett: Glasgow
- Rachel Johnston: Congleton
- Colin MacAusland: Bath
- Thomas Risi: Zurich, Switzerland
- David Willis: Sandy
- John Wood: Bodmin

**Associate**
- Sonia Cutler: Barnet
- John Neiger: Henley On Thames
- Sally Warrell: Bury St Edmunds
- Tim Jennings: Taunton
- Paul Stimpson: Helensburgh

**Transfers**
- Zoe Beal: Huddersfield
- Alison Peck: Nottingham
- Vivien Mitchell: Wokingham

**Business Affiliates**

**Grade 1**
- Bridge Translation & Publishing Ltd
  [http://bridgetrans.co.uk](http://bridgetrans.co.uk)
- Clifford Sells Ltd
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- Eston Training
  [www.estontrg.com](http://www.estontrg.com)
- Gazelle Training
  [www.gazelletraining.co.uk](http://www.gazelletraining.co.uk)
- University of Portsmouth
  [www.port.ac.uk](http://www.port.ac.uk)

**Qualifications**

MA in Technical Communication
- David Farbey: London
- William Tobin: Macclesfield

**Obituaries**

The ISTC regrets to announce the passing away of two members, Thomas Davies and David Green. Thomas joined the ISTC 1989, at which time he was a section leader for British Aerospace (Military Aircraft) Ltd in Preston. David, a member of the Independent Authors SIG, joined in 2002.

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**Independent Authors SIG**

**http://groups.yahoo.com/group/ISTC_IASIG**

The last Quarter saw a healthy number of postings to the group with a varied and useful range of topics. Encouragingly, quite a few advertised opportunities for freelance authors.  
Most of these opportunities were for direct work, rather than through agencies. The IASIG discussion list is still proving to be a valuable asset to freelance authors and, together with the Quality Authors website, is a positive benefit of ISTC membership.

**Quality Authors website**

Mike Unwalla led an initiative to promote the Quality Authors website with a nationwide press release campaign. Open to all members of the IASIG, this website is a portal for advertising their services. Potential clients looking for a top quality technical author, or professionally qualified communicator, can search a directory. For more information, visit [www.qualityauthors.co.uk](http://www.qualityauthors.co.uk)

Mike was able to mention the Quality Authors website in an article in the Professional Contractors Group (PCG) quarterly news magazine, *Freelance Matters*. The article, as well as advertising Mike’s services, mentioned the value that a professional technical author can bring to a product.

The PCG has a membership of over 14,000 members, all of whom work in IT and other technical fields. *Freelance Matters* is also distributed to potential clients looking for a top quality technical author, or professionally qualified communicator, can search a directory. For more information, visit [www.qualityauthors.co.uk](http://www.qualityauthors.co.uk)

**Can agencies pay sole traders directly?**

This question came from Jean Rollinson. She had just spoken to an agency regarding a four-week contract. They told her that, as she was a sole trader, they would have to pay her through an umbrella company as they are not legally allowed to pay individuals or sole traders directly.

Authors can work as self-employed sole traders if their clients or agents are prepared to engage them on that basis. However, most agencies are reluctant to do this because, if the author’s tax status is challenged, it is the agency that becomes liable for any additional tax and NIC due. Furthermore, the 1998 Income and Corporation Taxes Act (Section 134 ICTA 1988) effectively prevents individuals from being self-employed where an agency is involved, as it obliges the agency to treat the individual as if he or she were an employee by deducting PAYE and NI from the payments due.

Therefore, if authors want to work through an agency, they are invariably forced either to become incorporated or to work through an umbrella company. If an author works directly with a client, then they can probably, and many do, work as self-employed.

**Preferred supplier lists**

Mike Gascoigne wrote, ‘I’d like to hear from anyone who has benefited from being on a list of preferred suppliers. I’d like to know, is there a trend toward preferred supplier lists and, if individual contractors are too small to get onto them, what about Quality Authors? Is it possible for QA to get listed by some of the procurement services?’

Dave Leonard replied, ‘I think that, as freelancers, we are unlikely ever to get on preferred supplier lists. To get accepted as a preferred supplier, you have to be able to demonstrate that you would be able to maintain your supply whatever else happens. Perhaps the Quality Authors website would be a possible way forward on this, but I suspect we would have to show a level of continuity, so that if one author dropped out (for any reason), the others would carry on the work without a hiccup.’

Mike Gascoigne thought that, in some ways, IASIG members are better than a large supplier, because the Quality Authors website is not a company and is not going to go bust.

---

Michael Plant MISTC  
E-mail: mplant@trenethick.com

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Communicator Spring 2005
Group activities: regional and virtual

Quality Authors promote their services more actively
Members of the Independent Authors SIG set up the Quality Authors website several years ago to promote their services. It has since attracted enquiries for many group members.

There has recently been a drive to publicise the site more widely. Andy Smith sent a press release to national press contacts, while five other authors sent out a localised version that was similar to the national one but included a soundbite from the local contact.

Alison Reeves will host the national press release on her website and some other members will host localised versions. The next stage in the publicity process is to host the Quality Authors website on a domain of its own, so that it can be spidered. Jillian Hinds is looking into this. Meanwhile, I have asked all group members to include a link to it from their websites.

Anyone seeking freelance authors for direct contracts can find the site at www.qualityauthors.co.uk.

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

London members meet to hear about translation technology
Jane Nolting, Marketing Manager of ITR International Translation Resources Ltd, spoke to the London Group on this topic in January. She began with ITR’s history and methods, providing context for an interesting exploration of the translation process. She emphasised the importance of writing consistently, using exactly the same terminology when phrases or sections are repeated throughout a document.

For more on the processes involved in computer-aided translation, refer to the article on pages 12-14 of this issue from another ISTC Business Affiliate, Lloyd International Translations Ltd.

Jane also explained how workflows separate structure from text, so that freelance translators can concentrate on creating accurate translations, while production specialists create final output in whatever formats and media are needed by the client. Production is often complicated by increased text length when translating from English into other languages (Chinese, Japanese and Korean being exceptions).

ITR’s Marketing Director, John Fisher, confirmed that controlled languages can provide a good starting point for economical translation. For more on such languages, refer to the articles on pages 28-34 of this issue.

Marian Newell FISTC
E-mail: journal.editor@istc.org.uk

Ycomm Europe automates Translation Quality Control
Ycomm Europe is the Yamagata Printing Group’s centre of excellence for multilingual content management. Ycomm offers a variety of team-based services for handling documentation and localisation projects from A to Z and recently also developed tools that automate the quality control procedures for translations and translation memories. Our customers already benefit from our integrated quality approach, but now we also offer Translation Quality Control as a separate service. Ask for a free quotation or contact us for further information at info@ycomm-europe.com

More info on www.ycomm-europe.com

Irish group finds its feet
The Irish Area Group was formed in 2004 to represent the growing number of technical communicators on the island of Ireland. Its aim is to ensure everyone in industry and government knows the benefits of using experts to produce high quality documentation.

The Group intends to meet several times a year, with a member or guest speaker giving a talk on a relevant subject. Meanwhile, we are encouraging all our members to attend the IEEE/PCS Conference in Limerick in July (see http://ieeepcs.org/limerick).

We are promoting the Group in universities and colleges, and asking members to invite colleagues to join. We will be publishing more information about our plans and activities in future ISTC publications but, for now, please e-mail me at the address below if you would like to be involved.

Adrian Rush MISTC
E-mail: amrush@eircom.net

ISTC Documentation Awards 2005

1: PRINTED DELIVERY
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Internationalisation can be broadly described as the creation of source material for publication with a view to its onward translation into one or more languages.

There is a wide variety of platforms for the delivery of electronic content including websites, knowledge management systems, online Help, PDF documents, rich media, and WAP and 3G content. Websites are the fastest growing area, with content being delivered both statically in HTML and dynamically through database-driven content management systems. The advance of 3G wireless and PDA (personal digital assistant) technologies points to continuing explosive growth in the diversity of content delivery.

While these delivery platforms vary in terms of both the user experience and the skills required to publish information, they have several important factors in common from a localisation perspective.

Localisation can be regarded as the art of separating and managing source content and format with a view to creating translated versions in one or more target languages. To achieve this, content is extracted or filtered from its native format and translated by professional linguists using a range of tools and technologies that aid productivity, protect native formats and ensure consistency in translated terminology and style, particularly where more than one linguist is deployed on a project.

Once translation, editing and proofreading are complete, it is then necessary to reintroduce the translated content into the native format, reassemble, check, fix and publish the translated material. Typically, some degree of format manipulation will be required to accommodate changes in the text due to translation. This may be as simple as repaginating a document to allow for text expansion (for example, Russian typically uses up to 30% more characters than the corresponding English text) to reworking the platform to display double-byte or extended character sets, or to support different numeric or date formats.

So, let’s take a look at some of the tools and processes used to handle the localisation of electronic content.

**Computer Aided Translation**

Computer Aided Translation (CAT) is the term used to describe applications that automate or assist the act of translating text from one language to another.

Apart from machine translation, in which the computer software translates using pre-programmed dictionaries, glossaries and grammar rules, there are two main categories of CAT tools: those that deal with the efficient management of terminology and those that create and apply translation...
memories. Terminology management tools offer particular benefits in a collaborative working environment by acting in the first instance as a central, rapidly accessible store of agreed terminology.

The most visible benefit from the application of translation management technology is the reuse of previously translated terms from a database populated either from earlier related projects or as a consequence of work done to date. This delivers a reduction in translation effort, increased throughputs and, therefore, cost savings.

CAT also offers benefits in ensuring consistency where more than one resource is deployed on a translation project and in presenting a secure environment within which linguists can work freely without damaging the code that surrounds the content.

While various CAT applications are available, all apply similar principles. They divide source content into segments and analyse these against existing target language segments stored in a database (Figure 1).

**Tag handling or filtering**

The vast majority of electronic content delivery systems consist of tagged formats that are either standards recognised and parsed by browsers or defined through style sheets or Document Type Definitions (DTDs). A DTD is a specification document that identifies and ‘explains’ custom tags, enabling a reader or compiler to make sense of the tags and display content accordingly.

The example shown in Figures 2 and 3 uses HTML but the principle applies to any application and coding, wherever tags are used to define how a piece of text is presented. Figure 2 shows how a browser displays a typical HTML page. The formatting includes a heading, italicised text and bold text. Figure 3 shows the code from which the browser page is generated. The tags `<h1>` and `</h1>` define the heading text, `<i>` and `</i>` define the italic text, and `<b>` and `</b>` define the bold text.

A CAT application will filter the code, protecting tags and making them inaccessible to the linguist working on the translation (as shown in Figure 4). The tags for italics and bold can be moved to accommodate the fact that grammatical syntax may dictate that the italic and bold text needs to be placed in a different position in the target text from its position in the source text. These are referred to as internal tags (that is, tags residing within the string that may require placing). External tags such as `<h1>` cannot be moved or changed.

We have used Trados applications for illustrative purposes here but other similar applications such as Déjà Vu, SDLX and Star Transit use a similar approach. When viewed in the translation application, our HTML page is presented to the linguist with a translation memory window (Figure 5). The linguist uses this to enter the translation of the presented segment, populating the translation memory as work proceeds.

As the linguist moves through the document, the program identifies matches. In the example shown, the string 'Example for presentation' has been previously translated, thus the translation memory suggests its reuse in this instance. The linguist can then choose to accept, reject or alter the suggested translation.

In the filtered tag view, both the source and target strings are shown where items have been previously translated. Figure 6 shows how the internal tags are presented to the linguist in the workbench view.

Once the content has been fully processed and the files revert to their normal format, the translated HTML code appears as shown in Figure 7 and the translated page as in Figure 8.

**Emerging standards**

In addition to the standards that define the formats for electronic content
Conference

For example, XML, HTML and SGML, there are also various standards emerging to define the way in which translation memories and terminology management systems operate to ensure that a degree of interoperability is available between competing CAT technologies. These are being developed in conjunction with the main stakeholders under the aegis of Open Standards for Container/Content Allowing Re-use (OSCAR). The main standards under development are:

- XLIFF (XML-based Localization Interchange File Format)
- TMX (Translation Memory Exchange)
- TBX (Term Base Exchange)
- GILT (Globalisation, Internationalisation, Localisation, and Translation) metrics.

XLIFF is an XML-based format that is being developed to provide support to the localisation process. It is intended to offer a common platform for the application of localisation tools and processes with a view to removing the complexities of localising different types of source files.

Also XML-based, TMX is an interchangeable translation memory format that treats translation memories as reusable assets rather than being tool- or vendor-specific. There has been some resistance from tool developers but the standard has some support from the main players in the sector and is gradually rising in profile due to market pressure. TBX basically takes the same approach to terminology management, particularly in relation to glossary formats.

GILT standards are being developed to define the metrics that allow for the unambiguous sizing of a given task. These will fall into two categories:

1. **Verifiable**: these can be strictly verified for a given electronic document (for example, counting words and characters).
2. **Non-verifiable**: these may require a judgement on other metric inputs (for example, counting pages or screens).

For more information on standards, visit www.oasis-open.org and www.lisa.org.

Leading localisation companies and language tools developers are continually developing tools and processes to keep pace with the developments in electronic content and to find ever more efficient ways of localising content.

Figure 7. HTML code of the translation

![HTML code of the translation](image)

Figure 8. Translated HTML page

![Translated HTML page](image)

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*We’re talking your language*
Futures for technical communication

Elisabeth Gräfe considers possible scenarios for the profession during the coming decade.

Only charlatans claim to be able to foresee the future, but everyone would like to know how it might look; not merely out of simple curiosity, but also to be able to react to it promptly in a professional and businesslike way. A workshop at the 2003 Spring Conference of the ISTC’s German sister society, tekom, led by Andreas Steinle of Trendbüro in Hamburg, came up with a set of conjectural future scenarios for technical communication.

Forecasts and scenarios are two different ways of looking into the future. Forecasts can be briefly defined as statistical projections based on today’s data. Forecasts allow a restricted set of options to be obtained, more or less directly, from them. This raises the question, though, of whether the present can really be projected into the future.

Scenarios try for a wider view. They describe possible characteristics of the future, with an emphasis on the underlying factors that influence it. They do not present a single future, but set out a range of varied futures. They aim to prompt reflection on a multitude of options to think about. Work with scenarios goes through five stages:
1. Formulating questions
2. Determining the influencing factors
3. Selecting key influencing factors
4. Setting up the scenarios
5. Deriving strategies for action.

**Formulating questions**

This workshop concentrated on the future of technical communication, but the question of the future must be defined precisely for us to work with it. However, it must not be too narrowly restricted, because scenarios do not deal with questions of detail; they aim to extract and illuminate a relevant overall view. The key questions covered by the tekom workshop were:
- What will users expect in the future?
- Will written documentation still exist?
- What technical developments will occur?
- What status will documentation have in the future?
- A key theme for the scenarios created in the discussion was: What will the market for technical communication look like in 2013? Will we see innovation or stagnation?

**Determining factors**

The next step is to identify the relevant factors for this inquiry. What major trends exist, and what are the influencing factors that drive them?

**Media changes**

Already today 14- to 17-year-olds use the Internet as their main source of information, and so teachers need to reassure examiners that their pupils definitely use other information sources as well. Children no longer grow up regarding interactive media as a new technology that must be learned, but instead take it for granted. These media are becoming available more widely and at all times (for example, 9% of people claim to have sent a marriage proposal by text message).

The change in media brings a flood of information with it, which leads to overload. What this means for technical communication is that the user certainly no longer wants to learn in the traditional sense. In any case, attention spans keep getting shorter, and the demand for infotainment keeps growing.

**Economic changes**

How will the European Union, the European Single Market, develop? Will EU enlargement be a fillip or a drag? Can Europe compete in the global market, or will industrial production vanish into other parts of the world? If that happens, one of the casualties in the loss of technical know-how will be the disappearance of technical communication. What effects will the much-heralded change towards a service-based and knowledge-based economy bring?

**Technological changes**

Even now, many people fail when trying to program their video recorder. The trend towards more complex products continues. This calls for more content-rich documentation, which must be managed by prescribed standards. At the same time, products are more closely tailored to individual requirements. User groups are becoming smaller, and specialisation greater.

**Social changes**

In the meantime, it is quite clear that society itself is changing. In the year 2010, more than half the population of Germany will be aged 50 or older. User safety is receiving ever-increasing emphasis, particularly with regard to the misuse of data.

**Job profile changes**

Technical communicators’ job profiles are changing against the background of these trends. In brief, changes include:
- Documenting non-technical products
- Providing technical communication as a service
- Offering helplines and other services instead of documentation
- Documenting personal information
- Defining our roles more widely: the technical communicator as information developer, the technical communicator as communicator, and the technical communicator as public relations person
- Networking with other technical communicators.

**Selecting key factors**

The next step is to extract two key factors from the multitude of trends, which we shall call the ‘description’. Even if one cannot single out two such factors with absolute confidence, the knowledge dividend from the scenarios depends on correct identification of these factors.

The influencing factors that were derived from the trends are set out in Figure 1. The two selected were:
1. Economic structure factors, with the alternative development trends
of technical products versus service provision

2. Skills of technical communicators, with the alternative development trends of ‘specialists’ versus ‘generalists’. In other words: subsequent reflections are based on the assumption that the economic structure and the skills of technical communicators will determine the future of technical communication. 

Repaired, whole new modules are substituted. Documentation is not a heavy printed book, but is projected onto a visor worn by the service technician. The work is characterised not by describing uses, but by recording solutions. Areas of work for technical communicators are machines, automatic home control, and cars. Documentation does not go to employment will be in the service sector.

New markets appear not only in the service sector. The rising proportion of old and infirm people in society needs to be taken care of: the health sector booms. Policy has recognised that training for economic development is decisive, and the public sector is investing strongly in this area. A comparatively small number of young people are fully employed, and are also entering into the service sector, such as filling up tax returns and in child care.

Documentation goes to all sections of the population, and must be designed for specific target groups. The qualities required are: emotional, lifecycle-oriented, multimedia, personal feedback. Technical communicators are expected to know human nature, psychology, and marketing. Outsourcing is increasing: more technical communicators are certainly needed, but at the same time competing pressure from the advertising trade is increasing. Technical communicators are becoming mediators of emotions.

3. The classic scenario

This scenario is based on technical products and technical communicators as specialists: it is the scenario that most resembles the present, but does not reproduce it exactly.

This scenario is characterised by highly complex technical products, which are produced and documented by a chain of specialists: the documentation unit, the graphics unit, the legal unit, the project management unit and so on. The products are for the business-to-business area, especially mechanical engineering. The documentation goes to the next link in the chain of production, and there is little contact with final customers, who are specialists in other parts of the business. Division of labour has gone even further and is standardised to save cost.

The work of technical communicators corresponds to standards with closely defined documentation systems with optimised processes. Along with skills in communication, above all the technical communicator needs a broad knowledge of standards and tools. The profession needs fewer people overall, who manage their work themselves, while documentation practitioners go into the service industries. The workplace of...
technical communicators is threatened by blurring of boundaries between professions. The technical communicator is becoming a process optimiser.

4. The exotic scenario

This scenario is based on service industries as products, and technical communicators as specialists: specialist expertise will be needed in this scenario.

Highly complex products and work organisations in process chains determine the picture. Areas of opportunity for documentation are safety technologies, document management, and financial services. The users of documentation are experts within companies and administrators.

To solve users’ problems effectively and build their confidence, technical communicators must avoid all jargon. They, therefore, need solid specialist knowledge as well as skills in communication, and to know how to manage projects. The field has fewer practitioners, who are employed in flexible work areas, not only in the traditional technical publications unit. Specialists are called for but they are threatened by the disappearance of their specialist niches. Technical communicators are becoming builders of trust.

**Deriving strategies**

All the scenarios show a continuing need for technical communicators — a greater need in the scenarios in which generalists are the norm — and a trend towards outsourcing.

A workshop lasting a few hours cannot be expected to develop strategies to prepare for the future — or its different variants. One can, though, at least conclude that there is a strong demand to consider the profession and envisage new branches of business. The recommendations are:

- Be willing to expand into other specialisations
- Network with other specialists (self-promotion)
- Continue your education, not only in the technical field
- Be ready to work in new fields (such as service industries)
- Gain further professional recognition.

The ball is, therefore, in the court of societies such as tekom and the ISTC — both as organisations and as individual members.

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**Elisabeth Gräfe** studied German and English at the Technical University of Brunswick in Germany. After some years working as a teacher, she became a self-employed technical communicator in 1998. Her particular interests are scientific publications and publications in the field of technical communication and documentation.

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**Internationalizing Product Information for the Medical Technology Industry**

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In 1991, I joined the headquarters of Audatex Systems GmbH in Zurich Switzerland as a lone technical writer. Audatex provides software solutions for assessing vehicle accident damage and calculating the repair costs. Their main customers are insurers, appraisers and vehicle repairers. Over the past 13 years, the number of staff at headquarters has increased four-fold and the company is now 700 strong, active in 21 countries and part of a large American corporation.

My development from technical writer to my current position as business analyst/product specialist is partly due to the growth of the company, but it is mainly due to the fact that I was never satisfied with being ‘just’ a writer.

**Catalysts for change**

As a native English speaker in Switzerland and a writer, it was natural that, in addition to documentation, I would be asked to create product information and company brochures for international use. I edited a monthly newsflash for employees worldwide and produced a newsletter for a large international project, doing the interviews myself, researching information, writing articles and keeping the information flowing.

But the first real catalyst for change came in 1995 when I started an MA in Technical Authorship at Sheffield Hallam University, which was sponsored by the company. Although I had been a practising technical writer for many years, I had had no formal education in that area except for an initial on-the-job training programme at the start of my career. I remember stating on the application form for the course that I wanted to combine theory and practice before expanding my role into related areas. The MA course introduced me to research in technical communication and to usability testing, enabled me to try out new solutions in the course assignments and, above all, to back up the decisions I made on the job.

I began to put the new learning into practice at Audatex: I improved the traditional printed manuals, started online help and carried out a usability test on an internal manual that had been given bad reviews. As a result of the usability test, I was able to produce a well-accepted manual that is still in use today in later editions. Slowly, the documentation began to gain more respect and some of the customer support people even began to take an active role in helping me to make improvements.

I was interested in repeatable quality and to this end I set up a simple documentation process based on Hackos (1994). It was difficult at first to implement the process in each project, as there was little awareness of audience analysis and formal documentation specifications at that time. However, as the company became interested in introducing a software development process, I was able to show that I was already a step ahead with documentation. Looking back, it was the creation of a documentation process that opened the door to me being taken more seriously. It demonstrated that I was no longer ‘just’ a technical writer but someone who could discuss problems and solutions at a management level.

Another important catalyst for me was Forum 2000 in London two years after completing my MA. Here, for the first time, I became aware of how technical writers could expand their role. Even while writing this article, I was referencing my notes of opportunities that I had written down at the Forum. The year 2000 was also the time when ISTC, STC and Intercom publications began to discuss in earnest possible extensions to the role of the technical writer.

I was already using pre-release versions of the software to write user documentation, mostly online help, and I was passing on usability issues to developers whenever I saw that a simple task needed too much documentation or a concept was complex to explain. As my interest in usability grew and I researched on the Internet I stumbled on an important requirements book by Robertson and Robertson (1999). Suddenly it became clear to me that my rather weak audience analysis was not enough. If we were to serve our users better we would have to combine forces with marketing, requirements, design and support to create a total user experience. Furthermore, someone would have to invest more time in requirements gathering out in the field.
to let go of the documentation, so I was allowed to recruit an associate to help with the writing.

**Transition**
This was the beginning of a hard three years of doing two jobs: documentation and requirements. On the documentation side, I concentrated on project management and strategic planning. I also set up my own training programme for the new associate (who had no previous experience in technical documentation) and coached him through the first projects. At the same time, I insisted on continuing with the documentation process, writing the specifications myself at first, but gradually passing on this responsibility to my associate. As well as writing help for smaller projects I initiated the successful standardisation of user documentation throughout several European countries, and was able to expand the role of my associate to cover translation management for language files.

In addition, I was spending about half of my time on quality assurance and requirements, planning and carrying out usability tests on products, using quality assurance methods such as Failure Mode and Effect Analysis (FMEA) and Quality Function Deployment (QFD), as well as reviewing design documents for the project steering committee.

I decided I needed a qualification to give me credibility in my new role, and selected the British Computer Society’s Requirements Engineering course as a first step. After I gained the certificate, Audatex sponsored me to do the courses for the Business Analysis diploma at a training company in England. It took me 16 months to complete the modules, juggling trips to England for courses and exams with my double role in the company in Zurich.

Immediately, I began to use what I was learning, working in a team of three to compile a catalogue of stakeholders in our business environment, their job responsibilities and business processes — creating a reference work that is still a basis for our business analysis today.

**New role**
After three years in my dual role, the company was restructured in June 2003, one of the main changes being the creation of a new team of product specialists/business analysts. At short notice, I was given the chance to join this team — on condition that I gave up documentation to concentrate fully on my new role.

After 23 years as a technical writer, it was not an easy decision to make. I had identified myself with that role and loved it, but I realised that documentation specifications were no longer the challenge they used to be, and that no matter how good documentation was, it would remain a reaction to the quality of the software. It was also clear to me that if more time was spent on requirements and the software usability increased, the documentation would become less of a challenge to write. A combination of roles was no longer possible within the new structure, and I had gained too much interest in quality and requirements to be able to return to a documentation-only job. I had to make an on-the-spot decision, and decided to go for it, but I must admit I felt as if my right arm had been cut off.

**The view from here**
At first it seemed like a big change, especially being part of a project team instead of working on a project on my own. I missed seeing my work go through all the stages of creation from concept to a published document or online help; I missed being able to say 'I've done that’.

It took time to familiarise myself with the different responsibilities of people in the team and to gain some degree of acceptance, both on the project and in the new business analysis group. However, looking back after six months in the new job, I can now confirm that business analysis really is another aspect of technical communication.

Why do we write documentation? Why do we develop such a passion for it, delving into best practices and research, and striving for respect and recognition? I think it is because we want to produce something of practical use and good quality that supports users in their daily work. We want to contribute to the success of the product and improve the user experience. What more direct way to do that than to be involved in the requirements and product design right from the beginning? This is not to lower the worth of documentation, or to say that documentation will not be needed at any point, but simply to realise its limitations and to address the cause of the problem rather than the symptoms. As Hart (2004) says, 'The ideal solution is to fix the problem rather than trying to work around it in the documentation.'

Welinske (2004) finds that, 'The most unifying attribute of user assistance professionals is an interest in employing language to clarify the methods associated with the software we are charged to support.' I agree that there is a place for those who prefer to spend all or most of their time on supporting the user with their writing and language skills, and I appreciate the support they provide. But there are others who prefer to communicate ideas, to take a more active role in the design and specification of the product, and for them there are many opportunities out there. Business analysis is only one of them.

Technical communicators are in fact well equipped to do business analysis. The emphasis is on analytical skills, research and user advocacy (representing the user’s needs), adapting writing to the audience, paying attention to detail but not losing sight of the whole. A detailed description of
the work of a business or requirements analyst can be found in Wiegens (2003). Even after changing my role I still consider myself to be a professional communicator and I feel that the communication I do now is, in many ways, more of a challenge than user documentation. My readers often used to be far away and had to be coerced to give feedback. But the readers of my requirements, use cases and diagrams are in the same project team or in direct contact with me from outside the company and they tell me immediately if anything is unclear or inconsistent. My writing now is intended to communicate to all those involved what the product needs to do. It is about bridging the divide between business and technical people, between the user and the user’s experience of the product. What more could a technical communicator want? I think there is also an opportunity here for ISTC to welcome more diverse communication practitioners, such as business analysts, requirements engineers and usability experts into the fold — for the sake of cross-fertilisation, exchanging knowledge and experience, and showing technical communicators that they can expand their departments’ responsibilities, and cast their net wider to take on new roles if they want to.

Questions and answers

Would I make the same decision again?
Yes, because I want to play an active role in designing the product rather than ‘just providing user assistance. The user experience as a whole is the ultimate challenge.

Does a change of role provide more chances in the job market?
When I consider the shrinking job market even in the software industry, I think that being able to play more than one role will be a big advantage in the future.

Would I consider a job in traditional documentation again?
Yes, but only if it was combined with a responsible role in some other parts of the user experience such as usability or requirements.

Do I still feel a part of the ISTC?
Absolutely. My interest in user assistance and the role it plays in the product as a whole is as great as ever. And I would still like to make a contribution to best practices and research in both areas.

Advice to others

Improve your presentation techniques and present your ideas to senior management: presentations give you visibility in the company.

Risk doing new things outside your own experience: in a small- to medium-sized company, almost anything is possible.

Don’t relate everything you do to documentation: help other people to see you as a technical communicator in the widest sense.

Take any opportunity to increase the documentation department’s responsibility, such as as taking over the management of language files.

Carry out usability testing on documentation based on test plans: it is a small step from doing usability testing on a document to doing it on a product.

Set up a process for creating documentation, stick to it and advertise it: engineers and managers respect processes.

Key factors in being able to make the transition

- A growing medium-sized company that is just starting to implement processes
- Accessible management
- Willingness of the company to sponsor training
- Private time and possibly money for training
- A desire to try out new things and make suggestions for improvements outside the documentation department
- A keen interest in task and audience analysis
- A strong sense of user advocacy — representing the user’s needs

References


Sandra Postle FISTC started in technical communication 23 years ago. She has an MA Technical Authorship with distinction from Sheffield Hallam University and a British Computer Society diploma in ‘Business Systems Development specialising in Business Analysis’. She is currently product specialist/business analyst at Audatex Systems GmbH in Zurich, Switzerland. E-mail: sandra.postle@audatex.ch
Several ISTC members have made successful careers writing from home, rather than being based in an office on site. They have all decided that the advantages far outweigh any possible problems (which, despite the sporadic attempts by the press to trumpet a teleworking revolution, do still exist).

The authors e-mailed several other home workers to find out what makes them tick. In this article, Lois first concentrates on personal qualities and circumstances, while Tina then considers the technical requirements for becoming a successful teleworker.

**Where do we work?**
Everyone is fortunate to have a separate room in the home now, sometimes combined with a study, but it wasn’t always that way: corners of various rooms and the dining table have been pressed into service in the early years of establishing a career. Being able to shut the door on work makes it much easier to control the balance of life and work!

**What are the problems?**
Isolation was a common theme, especially for short-term freelance contracts with no established lines of communication or need for site visits and calls.

Although it’s easy to keep in touch using e-mails and teleconferencing, not being able to see body language can sometimes lead to misunderstandings or upsets, especially when clients are not used to working with remote staff or contractors.

Membership of the ISTC (and its Independent Authors’ Special Interest Group), the Professional Contractors’ Group and the Trust Group all help to keep us sane and abreast of current developments with e-mails, meetings, and written communications.

Interruptions can be a welcome relief for the lone worker, but Tina says, ‘I had to train friends and family not to ring me during work time for a chat’.

The ease of arranging home visits by tradesmen, mentioned by Iain, is a double-edged sword if supervision or constant cups of tea are required.

Distractions are harder to ignore at home. When work is abundant, we all occasionally have to walk away from reproachful washing up piled in the sink. Jane admits that it needs iron discipline to sit inside at her desk on a glorious sunny day when there is weeding to do. And, as Lois recalls from when her children were small, it’s hard to steel yourself against loud wails of, ‘Why can’t we go in and see Mum now?’

Lack of convenient facilities for exercise, cabin fever and — for employees — being ‘out of sight, out of mind’ were also noted as disadvantages of working off site. Interestingly, no-one mentioned geographical distance as a problem: most of us who are freelance seem to have conditioned our established clients to expect visits as often or rarely as we feel is necessary to do a good job.

**Why do we do it?**
Some people made a conscious choice to work from home, while others did it to make the best of circumstances.

Liz has found that, as technological support for teleworking improves, she has drifted from being almost entirely site-based to being often part-time and sometimes fully home-based for recent projects.

Iain (the only employee in our sample) is one of 9000 BT teleworkers who joined the original trial in the early 90s; he has never looked back since.

Jane and Peter chose self-employed remote working to escape the frustrations of office life and of not being in full control of their work environments.

Lois and Tina found that home-working was the best solution to the demands of working and raising a family. Lois says, ‘Although my children are now grown up, I can’t imagine going back to an office with constant interruptions. I am so much more..."
productive when I can plan my own schedule and spend time on writing, rather than meetings or idle chat."

**What do we need to be like?**

We all agreed that the most important qualities for coping with our work are self-discipline, self-motivation, self-reliance and self-confidence. This may make us sound an intimidating bunch but all it really means is that we can (usually) stop work taking over life and vice versa, and we have sufficient belief in our own abilities to do without moral support from colleagues.

Hand-in-hand with self-discipline goes the work ethic. All freelancers experience peaks and troughs in workload, requiring them to work at weekends or early and late to meet deadlines. Peter tells all his clients that they can contact him anytime. ‘I always respond even if I’m doing other things. They know that if they contact me in an emergency, I’ll always try to help, or tell them when I have time to do so.’

Going the extra mile for a client can lead to long-term and rewarding relationships. Lois’s diligence on behalf of a major client has, from an initial project in Bracknell in the early 90s, led to recommendations and ongoing work from other organisational units in Germany and the US.

The reward for all this effort comes when work is light and the sun’s out or a holiday beckons. Though Jane says ruefully, ‘I can’t take a long holiday, I’d love to take a month off; but, in 12 years of trading, I’ve only rarely stayed mud-free for more than half a day,’ she dreads the widespread use of a premium at home, being able to choose appropriate furniture and equipment is greatly appreciated. Jane says, ‘When I worked in an office, I needed osteopathy to remedy the damage from bad seating, and my sinuses suffered from sinusitis. Now I am comfortable in my seat, the air is breathable, and I have gym equipment just a short walk from the office.’

**Should you do it too?**

Home working doesn’t suit everyone, for all sorts of reasons. Our interviewees had a lot of advice for people considering a move away from office life.

- Hand-in-hand with self-discipline goes the work ethic. All freelancers experience peaks and troughs in workload, requiring them to work at weekends or early and late to meet deadlines. Peter tells all his clients that they can contact him anytime. ‘I always respond even if I’m doing other things. They know that if they contact me in an emergency, I’ll always try to help, or tell them when I have time to do so.’

**Where do we go for support?**

Freelancers emphasise the importance of relying on other professionals for specialist assistance, most notably an accountant to guide you past the pitfalls of IR35, incorporation compared with sole trading, and tax issues including VAT.

- Finally, Lois has a practical suggestion: ‘Have a separate office so you can shut the door at the end of the day, and even if it’s only a cupboard under the stairs. When you start out, being able to switch into “office mode” is good practice and helps to maintain the vital distinction between work and home life.’

**What do we need to work?**

We all seem to mention the same things, namely communication and computers.
We need to communicate with the clients, head office, subject experts and so on. To work remotely, we need to have good interpersonal communications skills and fast, easy access to telephone, fax, e-mail and the Internet.

Communication
Jane and Tina use hand-free phones for telephone meetings and audio conferences, and we all have mobile phones in addition to landlines. Not all have a dedicated business line, although Iain and Lois do.

The most basic form of computer communication is using a modem over an analogue telephone line (dial-up). It is available to all but it is slow (56kbps). Iain and Tina started out this way and Liz is still using this method.

Most of us are now using some form of Broadband (ISDN, Cable or ADSL). Liz reports that she will move over too once she has a job that calls for it. Broadband uses digital transfer methods and so is much faster (typically 128kbps–4Mbps). Lois uses secure ISDN to access a client’s database and points out that, although the client supplied the equipment, it still took a lot of e-mails and telephone calls to set it up.

There are two other means of communication not currently used by any of our interviewees: satellite and a laptop or PDA (Personal Digital Assistant) connected through a mobile phone. Both are currently expensive but costs are falling and these options may become viable in the future.

Because of commercial constraints on service provision in rural areas, choices may be severely restricted there. This is one issue in which urban-dwellers have an advantage over those living in the rural idyll.

Hardware
We all need good equipment but our choice varies quite a lot. Iain and Tina both started out with just a computer, phone line and printer. Now, however, high-specification networked computers and an assortment of printers seems to be the norm.

There is a lot of other equipment that each of us sees as essential.

Iain recommends a laptop, with, if it is your only machine, a docking station including screen, keyboard and mouse. He also reminds us that we should have an ergonomic workspace, including the desk, chair and filing system.

Doing two jobs simultaneously, Tina cannot survive without her PDA to keep track of appointments and deadlines.

Peter needs a digital camera and a graphics tablet, and Lois mentioned a scanner and fax.

‘Lots of space so that I can spread out,’ was Liz’s plea — not exactly a hardware issue but still very important.

Overall, it seems that the equipment that we use is a personal choice but we all seem to agree that it should always be the best possible within our budgetary constraints.

Software
As technical communicators, we all need to have valid licensed software packages. Between us, we have such tools as Adobe Acrobat, FrameMaker, PageMaker and Photoshop; Paint Shop Pro; CorelDRAW; Microsoft Office Professional; Dreamweaver and other web-authoring tools.

Having the product you are documenting available at home is extremely useful. However, this is not always possible and, even when it is, setting it up can be both tricky and potentially expensive if your client is not able to provide the equipment. Peter says, ‘I would say that it is essential to match the technical and software facilities of my clients’.

IT Support
Many of us provide basic hardware support ourselves, calling on computer hardware and IT support specialists when problems get beyond our skills. Lois and Tina can depend on network support from their partners. We can air our problems on the IASIG or other more specialist groups and, usually, they are resolved promptly.

Security
We all noted the importance of both computer and data security. Jane cautions us to have good backup facilities. Tina confesses that she once deleted the entire contents of a computer and, even with recent backups, restoring it took a week’s hard work. One lesson learned the hard way!

References

Useful websites
www.homeworking.com has a forum for discussions with a ‘coffee area’.
www.tca.org.uk — The Telework Association.
www.workingfromhome.co.uk — BT’s new site for people working from home.

To our interviewees: Many thanks to ISTC colleagues Peter Finch, Liz Joynes, Jane Teather and Iain Wright for so generously spending their precious time answering our questions.
PDF: cutting costs not corners

Chris Pearson presents alternatives for creating Portable Document Format without all the bells and whistles.

PDF is a worldwide standard for distributing and displaying documents. Adobe’s Acrobat 7 is a complete PDF environment, providing more PDF functions than most users will probably even investigate, far less use. Users might usefully consider what tools best suit their requirements to create, edit, optimise, display or otherwise exploit the format. This might lead them to use applications other than Adobe’s.

Acrobat for Mac now takes a backseat to the bigger Windows market. Adobe offers only Acrobat Reader to users of Linux and other Unix variants. For these potential PDF file processors who may not be able to choose Acrobat — and for those who may want to select specific tools for specific tasks — many applications are available that support the creation and distribution of PDF files. There are utilities and toolsets that enable PDF files to be opened, edited, consolidated and otherwise processed (including updates of PDF security features).

In the early days of PDF, Adobe provided the only realistic applications for corporate use and for other serious users of the format. Certainly, Acrobat was the first product to demonstrate the reliability and adherence to the format needed to be considered a viable business tool. However, in the intervening years, alternatives have joined it in the mainstream. At the same time, Adobe has raised its own game — along with its end-user prices.

The cost of Acrobat 6 (which is broadly in line with the pricing for the new version 7) was a spur for many organisations to reconsider the deployment of Acrobat. Some opted to stay with Acrobat 5. Other than providing a total PDF environment in a single application, Acrobat is set apart by its ability to download anything from a single web page to an entire website (or more), and by its support for pre-press. Beyond that, there seems little that Acrobat has to offer that is not available in products from other sources, at significantly lower cost.

Anyone already using document processing software, such as FormScape, or an OCR processing package should be alert to its ability to manipulate PDF files as well.

**Processing PDF files**

This article is based on a review undertaken for a medium-sized organisation creating and distributing PDF files. It mentions some products by name and gives web links for further information. The software functionality reviewed included:

- Creating PDF files
- Opening and updating PDF files
- Optimising PDF files
- Manipulating PDF security.

**Creating PDF files**

Microsoft Office users benefit from the tight integration Adobe provide for PDF support. Access to Acrobat Distiller is a long-standing feature accessible at the click of a button added to the toolbars in Word, Excel, PowerPoint and the rest. However, alternatives are available that provide acceptable performance. Three popular ones stand out:

1. **PDF995 Suite** is free. It includes a range of tools for manipulating PDF files, as well as a PDF creator. Creating a PDF file with PDF995 can include assigning digital signatures, encryption and clickable hyperlinks.

2. **Ghostscript PDF Converter** is also free and takes postscript files as its input. Ghostscript is written entirely in C and is available not only for Windows but also for almost every conceivable flavour of Unix. It is available with a GNU General Public Licence and, since at least one PostScript printer driver is provided with most operating systems, it does represent a truly cross-platform solution. (Note: GNU is a recursive acronym for ‘GNU’s Not Unix’.)

3. **Jaws PDF Creator** costs a little over £50 for a single-user licence and probably provides the best functionality of the three products reviewed here. It is available only for Windows and Mac platforms but it can be integrated with other applications or take PostScript or EPS input. It enables full control of PDF configuration settings (and therefore all the options available in Acrobat) and can handle resolutions up to 2540dpi. It also enables PDF parameters (that is, the job options) to be saved in profiles and called back for subsequent use. Scansoft’s PDF Converter is also a useful product for creating PDF files. It too enables PDF files to be opened for editing, as described below.

**Opening and updating PDF files**

With a significant number of files only available in PDF, the requirement for tools that support PDF editing has grown. Usually these tools first convert a PDF file to another, editable format such as rich text format (RTF) or Word document (.doc) format, then pass the converted data to an installed word processor application.

Typical of these is Scansoft PDF Converter for Word; a plug-in that enables Word to open PDF files. This is an ideal solution for anyone needing to edit PDF files that have a high text content and/or fairly basic layout in Word. Like Acrobat, Scansoft’s PDF Converter comes in standard and professional versions but, unlike Acrobat, these versions are £39 and £59 respectively.

Another product for Word users is BCL Technology’s BCL Drake.

PixelPlanet’s PDF Grabber is a solid solution for anyone needing to parse PDF files and render them into other applications. At £60 for a single user licence, it is not cheap but it does provide the capability to export data to Word, Excel and applications that use RTF. The product is also available in multiple user and server licences but only for Windows.

No reliable Unix or Linux solutions are available. The best option, fpdf (a pseudo-PostScript editor), is still in alpha version — this can be reviewed at http://applications.linux.com/article.pl?sid=05/01/06/0612209&tid=49&tid=47 and the developer’s website at www.ecademix.com/JohannesHofmann
For viewing PDF files, there is little choice: Acrobat Reader is available on all platforms, is free and functionally the best. The newest version also supports basic collaboration.

It is sometimes useful to be able to combine PDF files into a single new file. PDF Blender is freeware that works with Ghostscript, as does Free PDF XP, to merge separate PDF files into a single, composite file.

Optimising PDF files
A PDF file is usually optimised for its specific use during creation. Generally, this means changing its settings to produce a file of minimal size, without the reduction being apparent. So, it is likely that a pre-press file will be much larger than a newsletter prepared for e-mail distribution.

There are instances where post-production optimisation is required. For example, a press-ready PDF file might be used as the source for a mailshot sent by e-mail or a print-ready page might be extracted and inserted into a screen-viewed presentation document. Some users always embed every font they have installed into every PDF file they create; again, significant file-size reductions can be achieved if inclusions are optimised. The company Apago describes this process as ‘re-purposing PDFs’.

There are two options available to optimise an existing PDF file:
1. Use a PDF edit converter. Open the PDF file, pass it to a word processor and regenerate the PDF file with new, more appropriate parameters.
2. Use an optimiser like Apago’s PDF Enhancer (Figure 1). This product — available for Windows and Mac platforms — enables PDF objects to be removed or have their properties changed. These objects include metadata, PDF containers and PDF tags, so it is possible to change the rendering of images (for example, by reducing their resolution) and to compress font data. Watermarks can be changed, added or deleted. Since the application parses the PDF file’s metadata, it is also possible to change security settings.

A key use for PDF Enhancer is to secure and enhance PDF files made from scanned TIFFs and — it is claimed — the product can significantly reduce the amount of data storage required for document archiving.

Using security features
PDF files can contain two levels of password protection:
1. If a user password is applied, it is needed to open the file.
2. If a master password is applied, it protects access to document options, including whether the document can only be viewed or may also be printed, and whether the text can be selected and copied.

Whichever application is chosen, adding a password to a PDF file that doesn’t have one is quicker and more straightforward than changing or removing an existing one. Adult PDF Encrypt from ElcomSoft can do either. It has two useful security features:

1. Advanced PDF Password Recovery standard edition can return a user password if the master password is known. The professional edition can be used even when the master password is unknown but uses brute force techniques which, for a six-character password, can take up to four weeks to complete, even on a fast machine.

2. Adult PDF Encrypt is useful for adding security to existing PDF files, either individually or in batches. It also has an option to save encrypted copies without modifying the original.

Since Acrobat PDF Version 1.4 (the format adopted for Acrobat 5), a 128-bit RC4 key can be used. Alternatively, protection using 1k RSA private and public keys can be applied.

Conclusions
Now that PDF is a mature standard, third-party products can be a cost-effective way to process documents, especially when only a subset of Acrobat’s functions is required. Users of Linux may be compelled to use these products; those on Windows and Mac should consider them carefully.

Resources
Acrobat www.adobe.co.uk
Apago www.apago.com
BCL www.bcltechnologies.com
ElcomSoft www.elcomsoft.com
flpsed www.ecademix.com
FormScape www.formscape.co.uk
Free PDF XP www.freepdxfp.de
Ghostscript www.ghostscript.com
PDF995 Suite www.pdf995.com
PDFBlender www.spaceblue.com
PixelPlanet www.pixelplanet.de
ScanSoft www.scansoft.co.uk

See pages 38–40 of this issue for a review of Adobe Acrobat 7.

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Illustration

Communicator Spring 2005

Using colour wisely

Richard Truscott describes common colour vision deficiencies that should influence our use of colour to convey information.

About 8% of white males and 0.5% of white females exhibit some form of colour vision deficiency (commonly called ‘colour blindness’). Smaller numbers of African (4%) and Asian (6%) males have colour deficiencies. All of these people could have difficulty accessing information shown in colour on websites and in Help systems and printed manuals.

This article describes how colour vision works and describes common defects in colour vision. Simulations show normally sighted viewers what colour-deficient viewers see.

I produce documentation that often contains complex flow or process diagrams. Using colour adds meaning to these diagrams but it can also confuse if readers cannot interpret the colours.

Bear in mind when reading this article that not all printing processes or computer monitors render colours accurately. If some of the colours do not seem correct to you, this may be the reason. You can check to find out if you have any colour deficiency at the website shown in the references at the end of the article. If you have any doubt about your colour vision, you should consult an optometrist.

How colour vision works

The human eye detects colour and brightness by photoreceptors in the retina of the eye called cones and rods (from their shape). The cones register colour in three bands roughly equivalent to red, green and blue. Rods detect brightness.

Rather confusingly, the colours go by different naming schemes as shown in Table 1. For people with normal sight, the peak sensitivity falls within the bands shown in the table (represented by grey bands in Figure 1).

Types of vision colour deficiency

A colour vision deficiency occurs when:
- Some of the cones do not respond normally.
- Some of the cones are not present.

A description of the three types of deficiency follows.

Table 1. Naming conventions

<table>
<thead>
<tr>
<th>Name</th>
<th>Also known as</th>
<th>Normal peak sensitivity (wavelength in nm)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rho</td>
<td>Red, L, Long wave, Protan</td>
<td>575–590</td>
</tr>
<tr>
<td>Gamma</td>
<td>Green, M, Medium wave, Deutan</td>
<td>535–550</td>
</tr>
<tr>
<td>Beta</td>
<td>Blue, S, Short wave, Tritan</td>
<td>440–445</td>
</tr>
</tbody>
</table>

Figure 1 Colour spectrum and cone peak sensitivity

Figure 2 Effects of colour deficiency
kind of colour deficiency because colour interpretation uses three colours.

In Deuteranomaly, the dysfunctional gamma cones are more sensitive to red light. The viewer has difficulty seeing colours containing red and green. This is the most common form of colour deficiency affecting 5% of males and 0.4% of females.

In Protanomaly, the dysfunctional rho cones are more sensitive to green light. Again, the viewer has difficulty seeing colours containing red and green.

**Dichromatic**

Viewers see only two colours because one of the cones is defective or missing. This is the most severe kind of deficiency because colour interpretation uses only two colours.

In Deuteranopia, the gamma cones are missing and the viewer relies on the rho and delta cones to give them colour information. The viewer has difficulty with colours containing red and green.

In Protanopia, the rho cones are missing and the viewer relies on the gamma and delta cones for colour information. Again, the viewer has difficulty with colours containing red and green.

In Tritanopia, the delta cones are missing and the viewer relies on the rho and gamma cones for colour information. This form of colour deficiency is very rare. The viewer has difficulty with colours containing blue and yellow.

**Monochromatic**

No colour is seen, only shades of grey, because the cones do not function or are missing. In this condition, the rods only are functioning and so the person sees in shades of grey. This condition is very rare and is truly ‘colour blindness’.

**Effects of colour deficiency**

Most types of colour deficiency manifest themselves as difficulty in differentiating red-green colours and, exceptionally, blue-yellow. Colour deficiencies come from inheritance in the X chromosome, illness or injury.

Scientists test colour perception by psychophysical observations. From the observations, they produce algorithms that simulate how the colours are likely to appear to a colour-deficient viewer. Figures in this article use the Vischeck software to produce the simulations. In Figure 2, the:

- Top band shows the colours of the rainbow, as seen by a normally sighted viewer.
- Middle band simulates, for a normally sighted viewer, how somebody with deuteranomaly sees the same rainbow. Reds appear as mid-browns, yellows as tan colours. Blue, indigo and violet all appear as shades of blue.
- Bottom band simulates how somebody with protanopia sees the same rainbow. Reds appear as shades of brown and greens appear as beige. Blue, indigo and violet all appear as shades of blue.

**Keeping colour-deficient viewers in mind**

Problems can arise for colour-deficient viewers because:

- Greens, reds and yellows appear as shades of brown, tan or beige. To a normally sighted viewer, colours containing red and green are distinct but they may appear similar to colour-deficient viewers.
- Blue, indigo and violet appear as shades of blue. The effect is that fewer colours are safe to use for conveying information. The next article will show how to design and test colour schemes suitable for colour-deficient viewers.

**References**

Vischeck website for producing simulations of how colours appear to colour-deficient viewers: www.vischeck.com/vischeck

Self-check colour-deficiency tests: www.kcl.ac.uk/tearss/gktvc/vctlit/colourblindness/cblind.htm

For information on optometrists: www.nhs.uk/england/opticians/typesofoptician.cmsx


www.internettg.org/newsletter/mar99/accessibility_color_challenged.html

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Website: www.sanger.ac.uk
Wycliffe Associates’ EasyEnglish

Rob Betts reviews a general-purpose controlled English system especially devised for those with English as a second language.

Half the world’s population is predicted to be speaking or learning English within the next ten years (Burleigh, 2004). This explosion of English usage is fuelled by an increasingly globalised culture and the rise of English as the medium of business and education.

However, most English speakers do not speak it as their first language, and many would benefit greatly from English texts written specifically with them in mind. This opens up enormous opportunities for controlled-language systems that have international and cross-cultural applicability. Wycliffe Associates, a UK-based organisation, has devised such a system, known as EasyEnglish (EE).

Wycliffe Associates (UK) produces Biblical materials for pastors, Bible translators and English teachers worldwide. We initially developed EE as a tool for the production of Bible translations and commentaries. We are increasingly diversifying into both translation and origination of other materials (including those for people with learning difficulties).

There are, of course, other controlled-language systems. One of these, AECMA Simplified English, was described by Mike Unwalla in the Winter 2004 Communicator; Ciaran Dodd reviews this system on pages 32–34 of this issue. However, EE is, as far as we know, the most highly developed general-purpose controlled English scheme for multicultural audiences.

EE is a formally defined subset of standard English, not to be confused with IBM’s EasyEnglish system — now called EasyEnglishAnalyser — which was described by Bernth, 1997. EE is able to express complex and abstract ideas in simpler words and grammatical structures without significantly losing meaning. It does this by:

1. Restricting vocabulary
2. Simplifying grammar
3. Applying a logical structure to optimise comprehensibility.

EE also aims to communicate to readers from a very diverse range of cultural backgrounds.

After describing these features of EE and noting the production tools used, we will compare EE with two other simplified English systems. We will end by critiquing EE and briefly discussing two major challenges.

Restricting vocabulary

We have until now used a restricted vocabulary based on the Cambridge English Lexicon (Hindmarsh 1980), a graded compilation of high-frequency words. However, we are now introducing a new vocabulary with the aid of a frequency list based on the British National Corpus (www.natcorp.ox.ac.uk). We took the top 3000 words by frequency from this corpus and supplied our own definitions, which were based on a number of published school dictionaries. For each word, we chose the most frequently used meaning (or meanings). The list has been adjusted by experienced EE writers in the light of our target audience, a significant proportion of whom are from the Third World, and who have a wide range of cultural backgrounds.

For example, we use few abstract nouns (such as ‘strength’, ‘anger’, and ‘peace’) because some first languages spoken by potential users of our material have relatively few nouns of this type.

Vocabulary size

EE comprises two levels. The simpler level currently uses around 1,200 words, and assumes a working knowledge of English as a second language sufficient to cope with most social and work situations. The more advanced level employs around 2,800 words and is directed at those with an intermediate level of proficiency in English.

Experience has shown that we can successfully translate the Bible and other, more general, materials with a vocabulary of 1,200 words without significant loss of meaning; the 2,800-word vocabulary at the more advanced level provides texts that exhibit a degree of style and sophistication. West (1950) states (primarily in relation to story-telling) that:

- With 750 words, one can tell fairy stories well and an adventure story with difficulty.
- With 1,100 words, one can tell adventure stories well but rather baldly.
- With 1,700 words, one can tell any plot, preserving much of the original style.
- A vocabulary of 2,000 words is sufficient for anything, and more than sufficient for most things.

Selection of meanings

Selection of words is only part of the process of building a working corpus. Most words have multiple meanings, which are a source of confusion. We need to select those that are suitable. This requires considerable understanding of the target audience’s use of English. For example, ‘fair’ can mean ‘beautiful’, ‘blond’, ‘unbiased’, ‘reasonably good’, ‘favourable’, ‘market’, ‘amusement show’ and ‘commercial exhibition’. EE prefers the sense or senses that first come to mind when the term occurs in isolation; for ‘fair’, the simpler EE level allows only ‘unbiased’.

The multi-functionality of many English words poses further difficulties. A word may be used as different parts of speech (for example, ‘wrong’ can be a noun, verb or adjective); the ‘-ing’ verbal inflection may be a participle (functioning as an adjective) or a gerund (functioning as a noun). This feature of English can prove very troublesome to second-language speakers.

Simplifying grammar

Lexical considerations, however, are not the biggest concerns when designing an English system for second-language speakers. The following rather amusing example demonstrates this (Anon. 2002). The Royal London Hospital in Whitechapel serves a community of people for whom English may well be a third or even fourth language. The outpatients department displayed the notice shown in Figure 1.

The problem here is not only (or even primarily) vocabulary. Probably...
only two words (‘anticoagulation’ and 'phlebotomist’) need replacement or explanation. The real problem is grammar. The sentence is too long and the train of thought is convoluted. In addition, the notice seems to assume prior knowledge of certain facts (that is, there appears to be implicit information). Restricting vocabulary is not enough; attention must be paid to simplifying grammar and sentence structure, and to making any implicit data explicit.

Sentence structure

EE’s grammatical structure is designed with one goal in mind: clarity. The structure is based on work done by Wycliffe Associates member Karen Bennett (Bennett, undated). Bennett studied sample English texts to see what made them complex. For example, Reader’s Digest texts (designed as easy-reading texts) were found often to use complex sentence structures. Bennett concluded that complexity is determined more by the number of ‘idea units’ or ‘units of meaning’ per sentence than by vocabulary. She developed a simplified grammatical system based on these findings and on her own experience as both a second-language speaker and a teacher of English. EE imposes limits on:

- Sentence and paragraph length
- Sentence structure (a maximum of two finite clauses per sentence is currently permitted)
- Number of prepositional phrases (for example ‘they ran to the shop in the village’ is allowed, but ‘they ran to the shop in the village before sunset’ is not)
- Nesting (also known as embedding). Nesting is an important feature of English and can be explained by the following example:

  My sister said that the man who was serving in the shop while we were buying cakes that my son had asked for was a neighbour of hers.

Three nested clauses occur within the phrase ‘the man was a neighbour of hers’. Readers have to hold the entire contents of the sentence (including the three subordinate clauses) and their inter-relationships in their minds while assimilating its meaning. Second-language English readers may find this quite difficult, with a consequent loss of comprehension. Their difficulties may be increased by the fact that many of them have first languages that do not employ nesting to this degree. Even native English speakers can lose themselves in the intricate subordination that can be found (for example) in some academic and technical writing! EE’s solution is to allow only one subordinate clause (that is, only one instance of nesting) per sentence. EE might translate the above example as:

  My sister and I were buying cakes in a shop, because my son had asked for them. There was a man serving in the shop. My sister said that this man was one of her neighbours.

Passive Voice

EE avoids almost all passives, because they are relatively complex forms for second-language readers. There is an immense variety in the use of the passive voice in languages; some languages (including many of the 850 or so spoken in Papua New Guinea) do not use passives at all, and those who speak these as their first languages may find the English passive difficult to grasp.

Ambiguous grammatical forms

EE also avoids ambiguous grammatical forms. Pronouns that can refer back to more than one noun are avoided, and the genitive is restricted to forms that make the relationship between the terms unambiguous (for example, ‘the city of Thessalonica’ might be interpreted as a city in a district called Thessalonica — a better alternative is ‘the city called Thessalonica’). EE also recognises and avoids ‘functional ambiguity’ — for example, the sentence ‘He hit the man with the umbrella’ requires clarification.

Applying a logical structure

On a broader scale, EE asks for a logical flow of ideas. This goes beyond simply controlling vocabulary and grammar, and deals with the underlying way in which writers convey their ideas. Outlining the logical sequence of ideas is an essential first step in the road to clarity and precision, especially when translating from standard English. EE translators are encouraged first to identify the basic idea units in a complex sentence or paragraph and then to arrange them in logical order. An example is:

  Even the glorious loneliness of the Highland’s wonderful landscape of loch, moor and mountain is a product of the ‘Clearances’ of the 18th and 19th centuries, which caused so much hardship and suffering.

We can identify no less than six idea units here:

1. The landscape of the Highlands consists of loch, moor and mountain.
2. This is a wonderful landscape.
3. The landscape is gloriously lonely.
4. The loneliness is largely a product of the Clearances.
5. The Clearances occurred in the 18th and 19th centuries.
6. The Clearances caused much hardship and suffering.

Identifying and arranging the elemental idea units in this way enables the EE translator to reassemble them in a series of short, simple sentences conveying a logical flow of ideas that builds the readers’ knowledge step by step. This process is as important as adhering to the rules of grammar and vocabulary. The above example might result in this EE translation:

  The Highlands of Scotland consist of lakes, mountains and moors. The moors are flat, empty lands where
no trees grow. This land is wonderful and magnificent because it is so empty. However, many people once lived there. But in the 18th and 19th centuries the owners of the land forced these people to leave. These people suffered many difficulties and troubles. People call these terrible events 'the Clearances'.

Note that there has been further consolidation and rearrangement of the idea units during the composition of the final EE text. Two words not permitted in EE ('Clearances' and 'moors') are also explained.

Communicating across cultural boundaries
We also use well-established techniques, commonly used (for example) by Bible translators, to ensure that the meaning is clear to readers from a wide variety of cultural backgrounds. Such an approach ensures that culturally specific metaphors and idioms are translated appropriately. This approach also requires us to make implicit information explicit. Implicit data is information the reader needs in order to understand the text, but which is not overtly stated. This omission is often because the writer assumes the reader has a similar cultural background, and can be expected to know the unexpressed details. EE always expresses implicit data.

Production tools
We use a variety of production tools, including a lexicon that lists permitted terms with their meanings. We have also developed computer tools to assess readability and conformity with EE style dynamically. Figure 2 shows an analysis of a text.

One potentially important tool that has begun to be developed is a thesaurus. This will extend the functionality of our lexicon by:
1. Listing EE equivalents for words or phrases not allowed
2. Prompting the writer with valid alternatives to permitted words or phrases
3. Providing the writer with groups of related permitted terms (for example, nautical, cookery and agricultural terms) — a kind of ‘palette’ of terms useful for original writing (rather than translation).

It is easy to forget permitted (and potentially better) alternatives when writing, especially at the more advanced level, with its larger vocabulary, and the thesaurus would help the writer to use all the available suitable terms.

Comparison with existing easy-reading Bible translations
One major use of EE so far has been Bible translation. Other easy-reading Bible versions (translations and paraphrases) exist that are suitable for second-language English readers. Two important examples are the Easy-to-Read Version (ERV) from the World Bible Translation Centre (2001) and the New Life Version (NLV) (Christian Literature International 1997). Comparison of our EE version against these alternatives reveals some interesting and perhaps unexpected differences, as shown in Table 1.

The EE version differs from the two alternatives in several ways. For example:
1. Both alternatives use the passive voice (the ERV example in Table 1 contains an instance of this).
2. Both alternatives make use of abstract nouns not permitted in EE (that is, 'faith' in both examples).
3. Both, to varying degrees, use longer and/or more complex sentence structures. (The first sentence in the ERV example is longer than EE would allow).
4. Both use many words and meanings that are not permitted at either level of EE. For example, 'early' in the NLV version means 'ancient', not a permitted sense in EE; 'family' in the ERV is an adjectival use of this noun, not permitted in EE.

The NLV was specifically designed for second-language English speakers; the ERV also includes second-language English readers among its target audiences. Yet they differ significantly from the EE version. In our view, EE is the most suitable of these three versions in meeting the needs of those using English as a second language. This in turn suggests that EE does indeed cater for our target audience better than the simplified English that underlies these versions.

Critique of EasyEnglish
However, we recognise that there are valid criticisms of our approach. Three issues spring to mind:
1. Perhaps the most troublesome issue is that EE text tends to exhibit lack of flow, or ‘choppiness’, because of the restrictions on the number of clauses per sentence. This can

Figure 2. Text processed by the EasyEnglish vocabulary checker
Red highlighting indicates non-permitted words; blue indicates words permitted only with certain meanings; green indicates words that are usually permitted, but may need validation (for example, for grammar); black words need no checking.
force subordinate clauses to be promoted inappropriately to full sentences. This, in turn, easily upsets the balance of emphasis in the text and hinders readers from distinguishing between background and foreground information. The distinction between background and foreground data is a vital element of meaning within the text, which, if lost, can seriously mislead or confuse readers.

2. Non-permitted terms often need to be replaced by phrases. This can introduce unwanted complexity and further disturb the balance of emphasis. This is a major factor in increasing the length of a translated passage.

3. Our rejection of passives can sometimes force us to find subjects for verbs when these are either not known or not important.

We may, in the future, decide to allow greater flexibility in applying the EE rules. We might, for example, allow a larger number of passives and relax the limitations on the number of clauses. This could help the text to flow more smoothly and restore proper emphasis, but it will also complicate the EE system.

Major challenges

Two other major challenges face us. Firstly, we know that many people feel satisfied with our material, because they tell us. But how many actually understand it as we intended? We are beginning to explore comprehension testing with members of our target audiences, to establish how well our EE materials actually perform.

Developing a corpus for EE has been a second major challenge. We are confident that the new vocabulary we are introducing is a major step forward but, doubtless, much fine-tuning remains to be done. A special problem here is the great cultural and social diversity of our audience. We distribute our materials mainly through the Internet to some 150 countries, and we aim to serve those in both urban and rural locations. No single corpus serves everyone equally well. We have to have a ‘happy medium’ — but where to centre that happy medium is difficult to decide.

We need corpora derived from collections of spoken as well as written everyday English from different parts of the world, and this is an area that remains to be fully explored. One possible avenue might be to obtain literature in simple English (such as texts used in primary/secondary education) in many of our key user locations — Africa, India, South-East Asia and South America.

Conclusion

We believe that the explosion in global use of English opens up immense opportunities for the EE system well beyond its present applications. Our major challenges are:

1. Adjusting our grammatical rules to allow greater flexibility, while not unduly complicating instructions to our writers.

2. Further developing the tools to speed and ease our writers’ task (such as the computer-aided tools and the thesaurus).

3. Fine-tuning our EE corpus.

4. Comprehension testing with our target audience.

Overcoming these hurdles would enable us to realise the full potential of EE in communicating across cultural and social boundaries worldwide.

References


British National Corpus, www.natcorp.ox.ac.uk


Rob Betts BSc DipLib is a database quality manager at Leatherhead Food International, with particular experience in indexing systems, vocabulary control and thesaurus building. He is also a member of Wycliffe Associates’ EasyEnglish team, and is currently developing EE portions of Key Terms for Biblical Hebrew, a web-based electronic tool for Bible translators.

E-mail: rbetts@btinternet.co.uk
Taming the English language

Ciaran Dodd examines the issues around using controlled languages and asks what their future impact might be.

Controlling language

Think of English, with its massive vocabulary, synonyms, homonyms, complex grammar, figurative and colloquial language, as a majestic wild horse roaming wherever it may choose. This is standard English. Now, imagine the same horse harnessed and blinkered under starter’s orders, focussed on the finishing line. This is controlled English. Its specified vocabulary and writing rules harness the power of standard English for specific types of writing.

An established example of controlled English is the aerospace standard ASD (AeroSpace and Defence Industries Association of Europe) Simplified Technical English™ pending Specification ASD-STE100™ pending (ASD STE)*. Mike Unwalla described this specification in the Winter 2004 Communicator.

In the article preceding this one (pages 28-31 of this issue), Rob Betts describes EasyEnglish, which has a very different application yet conforms to the definition of a controlled language. See, for example, Kirkman (1992: 150).

In this article I will outline the benefits of using a controlled language, the barriers to adopting a controlled language and then ask what potential controlled languages have in the future. Throughout the article, ‘controlled language’ refers to a system of language that restricts both the words that can be used and the permitted grammatical structures.

Benefits

Specification ASD-STE100™ pending states that the philosophy is ‘…to keep the texts as simple and as readable as possible.’ Source: ASD (2005:1-4-1).

Common language

A controlled language can quickly provide a common language where none currently exists. If all parties can learn the lexicon and the rules, they can soon communicate. This was the driver for the development of Caterpillar Fundamental English, devised by the Caterpillar Tractor Company in the 1970s. The language had 784 words with an illustrated list of parts. Caterpillar used these words in simple grammatical structures to write their technical manuals. Operators with no previous knowledge of English could be trained to use the documentation in 60 hours. A more recent example is in Iraq where there is a need for a common language to help rebuild the country. For example, texts used to train the Iraqi forces are rewritten in a controlled English, which is then used as a base for translation into Arabic. The two documents are published side-by-side in bi-lingual manuals.

Ease of translation

This example highlights another benefit of using a controlled language — ease of translation. One translation company commented that the more that is done to the style and formatting of a source document to make it clearer, the more savings can be made in translation, especially where a document is to be translated into several languages. It confirmed that writing the base document in a controlled language is an effective way to do this, because one word has one meaning and grammatical structures are much simpler, removing much ambiguity. Example 1 shows how translation is made easier.

Consistency

Consistency is another important benefit of using a controlled language. For example, a group of authors...
decided to adopt ASD STE because they wanted a common style for the manuals that they produced. Each author had a particular style that was evident when the manual was collated. The authors hoped to remove the differences in style by working to a specification with rules that could be checked and measured.

**Barriers**

**Personal preferences**

From my experience of training users in ASD STE, I have encountered a number of objections to adopting a controlled language. The most obvious ones are general resistance to change and more especially to standardisation. For example, the requirement in ASD STE that United States spelling be preferred to British spelling often provokes a negative response. Also, technical communicators have to let go of their personal preferences. On one course, a delegate remarked that he preferred ‘obtain’ to the permitted word ‘get’, whilst another felt uncomfortable using the word ‘obey’ as it sounded more forceful than the unapproved word ‘follow’. These are simple examples of a very real barrier.

**Lack of subtlety**

Technical communicators also feel that using a controlled language restricts the subtlety of expression. See, for example, Mike Unwalla’s point about tenses in his article (Communicator, Winter 2004). To some extent, I agree with this view but what I say to delegates is that non-native English speakers will not necessarily appreciate the subtleties of meaning that a native English speaker will understand. Also, if the non-native speaker does not have a particular element of language in their native language (as in Example 1), this will increase the obstacles to understanding. As Mike Unwalla correctly points out, writers must use their intelligence and above all, think of the needs of their reader, no matter how remote they may seem. Think of a controlled language as a different language rather than a poorer version of standard English.

**Cost**

Another barrier is the cost of implementing a controlled language. In my experience, simply providing technical communicators with the guide to a controlled language does not make them able to write competently in that controlled language. Users need to be trained first. This is because the rules often use grammatical terms and require technical communicators to have more than a basic knowledge of grammar to understand the requirements. Many people have an implicit rather than an explicit knowledge of grammar or else need to remember principles that they learnt a long time ago. Also, writing in

---

**Streamlining documentation**

Finally, using a controlled language can streamline the documentation process. The trend is for text to be written once and then stored in a database for repeated use in different documents in different formats. See, for example, the article on AECMA Specification S1000D in the Autumn 2004 Communicator. S1000D requires the text to be written in ASD STE. As with translation, if the stored data is written in a clear and unambiguous language, it should be easier and quicker to reformat it for publication.

**Monitoring quality**

The advantage of having measurable standards is that organisations can monitor the quality of their documents. There are a number of electronic checkers available that work like the spelling and grammar checks in Microsoft Word. They identify unapproved words and structures then suggest alternatives. SmartNY’s checker provides a Six Sigma quality report by measuring the writing against 8,500 rules and a controlled vocabulary.

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**...’controlled language’ refers to a system of language that restricts both the words that can be used and the permitted grammatical structures.**

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Example 2. An illustration of the benefits of using a controlled language
Reproduced with the kind permission of Roel Seegers, Tedopres International BV.
This example is from the documentation of a manufacturer of computer network security products, which implemented a controlled language to:

- Improve the quality of its documentation by using consistent terminology and a controlled vocabulary
- Enhance the readability of its technical documentation
- Reduce translation costs, as the company translates its technical documentation into various Asian and European languages.

Excerpt from original text
(taken from a procedure to connect Firewall, Ethernet and power cables)

5. If you connect to the Internet through a DSL modem or cable modem, reconnect the power supply to this device. The indicator lights flash and then stop. The modem is ready for use.
6. Attach the AC adapter to the Firewall. Connect the AC adapter to a power source. The power light on the Firewall goes on and the WAN1 indicator lights flash and then stop. The Firewall is ready for use.
7. Restart the computer.

Excerpt from improved version

5. If you use a DSL or cable modem, connect its power supply.
6. Find the AC adapter supplied with your Firewall. Connect the AC adapter to the Firewall and to a power source. The Firewall power indicator light comes on and the external interface indicator lights flash and then come on. The Firewall is ready.

WARNING: Only use the AC adapter supplied with the Firewall.
7. When the Firewall is ready, start your computer.

The results of implementing the controlled language were:
- In the full procedure quoted, the controlled language version had 280 words compared to 398 words in the original, and this was with extra information added to the improved version. The word count for the entire manual was estimated to be 500,000 words but the actual count was 375,000.
- Overall, in various manuals the number of pages was reduced by between 10 and 30% per manual.
- The reuse of information increased to 25% as a consequence of the standardisation of texts.
- The translation costs were positively influenced by the reduced word count.

A controlled language requires writers to construct sentences in a different way from that of standard English and again requires practice. That said, in a two-day course delegates quickly begin to construct sentences according to the rules. Nevertheless, there is a cost in training people that may be too high for some.

Ensuring compliance
The difficulty of ensuring that documents are compliant with the rules of the controlled language can also be a barrier. As already mentioned, there is software to assist with this but implementing software incurs a cost.

Quantifying benefits
Perhaps the biggest barrier is quantifying the benefits of implementing a controlled language. Generally, people can spot poor writing and can appreciate the benefits of using a controlled language, but when it comes to analysing the cost of implementing a controlled-language culture, how can we measure the benefits in order to make a sensible cost-benefit analysis? Example 2 shows how one organisation has quantified the benefits.

Potential
This question brings me to the final issue: the potential of controlled languages. It is nearly four years since I was trained in ASD STE and at that time its use seemed less widespread than my research for this article now suggests. My feeling is that for all the barriers listed, the benefits far outweigh the problems and that the current trend of moving production to countries such as China (see, for example, the potential joint venture between Rover and Shanghai Automotive Industry Corporation or the purchase of IBM’s PC business by Lenovo) will make the need for a controlled language more important.

I would like to end by asking for your views on using controlled languages. Please email your thoughts on the following and I will collate any results for later publication:
- How much knowledge or experience of either ASD STE or another controlled language do you have?
- If you have any experience of using a controlled language, what industry are you in?
- What do you think is the potential for using controlled languages in scientific and technical communication?

* As of January 2005, the AECMA Simplified English Guide has been re-issued to reflect the creation of ASD and the new name of the standard, which is now ASD Simplified Technical English™ pending, Specification ASD-STE100™ pending.

For more information visit:
- www.simplifiedenglish-aecma.org/
- Simplified_English.htm
- www.smartny.com
- www.tedopres.com

References
ASD (2005) ASD Simplified Technical English Specification ASD- STE100™ pending

Ciaran Dodd has supplied ASD Simplified Technical English™ pending training to Rolls-Royce since 2002 after being trained by the UK Simplified English coordinator in 2001. Since 1994, she has taught all aspects of the English language, in commercial and academic settings, both here and abroad. She is now a freelance trainer.
E-mail: ciaran@ciaran-dodd.fsnet.co.uk
Many authors must regularly find themselves wondering: ‘Wouldn’t it be nice if...?’ ‘Wouldn’t it be better if we could...?’ ‘Why can’t they make it check for...?’

Enter StyleWriter, designed to provide a solution to some of these problems for editors and writers.

**Intentions**
When developing the strategy for this review, the initial intentions were twofold:
1. Objective; does the software do what its makers claim it can do?
2. Subjective; how easy is it to use? Is it intuitive? Is it user-friendly?

Clearly, the second of these is very much a matter of personal preference, and every attempt has been made to accommodate this in a constructive (and, I hope, useful) manner.

**Objective**
Editor Software specifies that StyleWriter is designed to concentrate on style patterns and English usage, rather than attempt to emulate the (often frustrating) grammar checker supplied with Microsoft Word and similar products. It offers the means to check for some 35,000 problems related to style and English usage within the user’s work. It is also designed to recognise patterns in writing, rather than styles of speech. To this end, its design specification, and much of the actual software code, was written by editors rather than system programmers.

**In practice**
Once installed on the user’s PC, StyleWriter’s presence is recognised in most word processors by the addition of an icon to the toolbar and a ‘Plain English Style Check’ option to the ‘Tools’ menu.

When Plain English Style Check is first activated, it is reassuring to note that StyleWriter has some respect for the author’s efforts, and recognises the slight potential for instability whenever any additional package or tool is activated within Windows. To this end, its first response is to check whether the user would like to save their work before proceeding. Full marks for this.

Testing the product on a very early draft of this review showed the response in Figure 1. Double-clicking the words or expressions highlighted causes StyleWriter to offer one of several categories of assistance, from grammatical suggestions to a rather impressive form of thesaurus.

For example, even the first occurrence of the word ‘nice’ will lead to a warning that this is an overused word, which the author should try to avoid (Figure 2). (‘Nice’ is not a word that I would use with any frequency, if at all, within a technical document.) My use of the expression ‘initial intentions’ brought warnings that both of these are complex words, suggesting ‘first’ and ‘early’ as alternatives to ‘initial’, and ‘aims, plans, intents, designs, goals, objects, purposes’ as alternatives to ‘intentions’.

StyleWriter picks up on some of the most grating, common mistakes ignored by Word, for example, the difference between formerly and formally. I have more than once been exasperated, when a company has changed its name, for example, to see it described as: ‘ICL Outsourcing, formerly known as CFM’. Clearly, this should read ‘formerly’. In this example the error will achieve precisely the reverse of the directors’ intentions!

StyleWriter offers a very clear, concise comparison of such confused words:
- formally = officially, in a formal way
- formerly = previously, in the past, as before

The word ‘draft’ is given similar treatment, as shown in Figure 3. Similarly, looking at the difference between its and it’s, Stylewriter offers brief definitions, rather than the ambiguous ‘consider using ...’ (with no real guidance) offered by Word.
Within its Help menu, StyleWriter offers a very wide range of writing tips, showing that the creators have considered the diverse nature of the topic, and allowing the user plenty of scope for choice (Figure 4).

The Task menu allows the user to choose between the basic patterns of: general writing, academic paper, advertisement, instructions, legal document, letter, manual, memo, newsletter, regulation, report, student essay and technical report.

The differences here between ‘instructions’ and a technical ‘manual’ might be of specific interest to some members.

It was rapidly becoming apparent that StyleWriter offers some significant improvement over the grammar and spelling checks available within Word in many respects, even allowing for some of the advances offered by Word 2003. Take my earlier example: ‘The film over, the audience left.’ Word underlines this for grammar, and will yield the comment ‘Fragment (consider revising)’, in itself remarkably uninformative. StyleWriter recognises this as valid use of the English language.

The bar at the bottom
This shows statistical information about the document under scrutiny:

- **Words**: A fairly standard word count function.
- **Style Index**: ‘The Style Index measures all the plain English problems in your text, including a weighted score for long sentences. It then converts this measure into an index. The best writing consistently scores below 20, equivalent to two style faults for every 100 words.’ (As described in the product.)
- **Sentence**: The average length of the sentences in the document.

- **Passive**: The passive index is calculated by expressing the number of passive verbs as a percentage of the number of sentences in the document.

The user needs to become acquainted with the product, to ‘appreciate its style of presentation’, as one user observed, and be aware that there may be some suggestions that should be ignored, according to the context of the work under scrutiny. Try to understand the logic behind it; why the menus are presented as they are. This is not a steep learning curve, and any author reasonably familiar with the use of menus on a word processor (especially one where the menu options are placed in different locations in each generation) should find this very intuitive.

In context
Another feature that was appreciated was the fact that StyleWriter is context-conceivable. I won’t quite say context sensitive; it doesn’t always know, intuitively what the author is trying to say. However, what it does manage rather better than the ‘helpers’ bundled-in with many word processors, is to offer guidance with some indication not only of the choices before the author, but the contexts in which each may be applied.

It was also a delight to use a product that seems almost without fault in its capacity to accommodate the subtleties of the British use of the English language. I stipulate ‘almost’ because I cannot claim to have exhaustively tested it for every single nuance and clause that it is able to identify!

Practical issues
Once invoked, the small StyleWriter window has the option to stay on top [‘Always on top’ as it is described in the Options menu]. Since it can be advantageous to be able to edit the original within the word processor, and still see the next few comments from StyleWriter in context, this feature can be very useful. On the other hand, writers who consider the software would have better manners, were it to disappear whilst they are revising their work, have their wishes catered for, simply by deselecting this option from the Options menu.

StyleWriter has the means to interface with Ami Pro, WordPerfect and Word through menu options and toolbar buttons. This is not the case with Adobe products such as PageMaker or FrameMaker. However, I was advised by Editor Software that StyleWriter will interface with any Windows application through the use of clipboard. Since StyleWriter is
designed to help with the style of the wording, as distinct from the layout on the page, this is a reasonable approach, since most editors and many technical authors will check the wording and content before perfecting the layout and presentation.

StyleWriter has options to ignore all occurrences of a particular phrase, either within a document, or within a style definition (these may be customised, and added to by the user). There is also the facility to exclude quoted text — a useful feature, given that the author or editor cannot be held accountable for the phrasing or content of reported speech or third-party text.

**The outcome**

Back to my original intentions:

From an objective stance, the product is rather more sophisticated than it initially appears, and offers some very useful features lacking in most word processors. On a personal note here, I remain surprised that Editor Software manages to put so much vocabulary, knowledge and artificial intelligence into such a relatively small piece of software.

From a subjective viewpoint, there are many features that were enormously appreciated, and a few that might be considered to introduce more confusion than they solve. Even within the context of an acknowledged subjective position, this is a very personal matter. For some, to be reminded to think of such differences as ‘their’, ‘they’re’ and ‘there’, with examples, might be appreciated; for others this might lead to more errors than it solves. It’s analogous to re-reading an exam script if one has time at the end. Many students will spot errors, and gain marks by doing this, whilst a few candidates may ‘correct’ answers that were already perfectly valid, and lose marks in so doing.

Another of the beauties of the product is that it offers many options for customisation, both to meet the preferences of the user, and to accommodate rules surrounding the house style of an organisation.

To sum up, all things to all men (StyleWriter comment: sexist cliche) it is not. However, given that it is available for a month’s free trial, I would suggest it deserves serious investigation. It is clearly aimed at many markets. I can think of many university students (and a few lecturers) whose work would benefit from it. It is also such a sufficiently powerful and useful tool that it should not be ignored by the professional author. Some drivers are happier with an old, manual-transmission Land Rover; others prefer the comfort of a 7-series BMW; after all, there are still users who prefer DOS to Windows (or MacOS). Maybe their time to upgrade has just arrived!

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**Tony Seaton BSc MISTC** has worked in computing since 1986, specialising in technical manuals (to ISO 9000) in 1994. This led to documenting full software development life cycles, and writing user guides. In 2002, Tony started teaching ICT to students up to A-Level, where specialist units include Presenting Information and Website Design. E-mail: tony.seaton@bcs.org.uk

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**Reader offer**

The 30-day trial version of StyleWriter is normally $30, which is then deducted from the price on purchase. Editor Software is offering a free trial version to ISTC members quoting this review. The upgrade to full version does not entail reinstallation: customers simply enter a licence key given on payment.
The launch of Acrobat 7 sees Adobe maintain its focus on the professional market in business, creative and technical areas. Its key messages centre on creating, combining and exchanging documents, collecting and comparing comments, and tailoring the security of a PDF file for fast, reliable document exchange.

Firstly, there is good news for Apple Mac users; PDF files can be viewed within Apple’s Safari web browser. Both forms and web-based reviews are also supported. This functionality has been promised since Acrobat 6 was first released and is now finally available.

More good news for many users will be that the 'Find' command is back in Acrobat 7. A toolbar option can be used to perform a basic search, rather than having to use the search panel.

On top of that, Adobe has now opened up the PDF commenting tools so that users of Adobe Reader can participate in e-mail reviews.

Versions
The main variants of Acrobat remain the same as in version 6: Elements, Standard and Professional. Anyone needing to edit and carry out in-depth work on PDF files will need Acrobat Professional. Table 1 shows the main differences between the variants.

There is a new version of the free reader. Adobe Reader 7 is currently available for Windows and Macintosh platforms. Support is promised during 2005 for Linux, Solaris, HP-UX and AIX.

New features include:
- Spell checker for fields and comments
- Support for overprint preview

A new variant of Adobe Reader for the PocketPC (Figure 1) introduces several new features:
- Slideshow viewing in landscape or portrait from Photoshop Album/Elements
- Printing support
- Digital Editions (eBooks)

![Figure 1. Using a PocketPC](image)

Table 1. Differences between members of the Acrobat product family

<table>
<thead>
<tr>
<th>Feature</th>
<th>Adobe Reader 7.0</th>
<th>Acrobat Elements</th>
<th>Acrobat 7.0 Standard</th>
<th>Acrobat 7.0 Professional</th>
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<td>Initiate PDF reviews within Adobe Reader</td>
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<td>Create intelligent forms using Adobe LiveCycle Designer (Windows® only)</td>
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Activation
Users of Adobe Photoshop CS will have noticed that they need to activate their products. Adobe is adopting this policy across its product range. Activation ties the software to a user’s hardware. It requires a telephone call or web connection within 30 days; after this, the software can no longer be used. Licenses can later be transferred.

Organizer
The organizer (Figure 2) enables users to find quickly and preview PDF files they have accessed before. In addition, users can create ‘Collections’ of documents.

Collaboration
One of the most important changes in Acrobat 7 is its ability to activate the commenting functionality in Adobe Reader. The ‘Send by Email for Review’ feature in Acrobat 7 Professional enables a user to send a PDF file to others, who can then add comments and return them by e-mail (Figure 3).

While this makes Adobe Reader far more flexible, it does not provide the full power of Acrobat. The review is a one-way process, in which users cannot see or reply to other users’ comments.

Using a web-based review, true collaboration is possible and the features of Acrobat 7 really come into play. Unfortunately, Adobe Reader does not permit such reviews.

Adobe has also added new commenting tools, including a Callout Tool (Figure 4) and a Dimensioning Tool.

Forms
Adobe has made huge advances in form technologies in Acrobat 7. The existing forms model (AcroForms) will continue to be available in Acrobat Professional but a new product, Adobe LiveCycle Designer, is shipped on the Windows platform. Note: Designer is not available on the Mac.

Adobe Designer supports many of the features that users have wanted in Acrobat forms: dynamic tables, resizing of fields, headers and footers, and reflowing across pages.

It supports a more XML-based approach to handling form data. Forms fields can be directly associated with an XML Schema, which can then be exported from Acrobat.

Dynamic Forms
For many users of Acrobat forms, one of the biggest issues was that forms were static: if you designed your form with 10 rows, it was impossible to add another; if you wanted to hide areas of a form based on user selection, you had to hide a whole section.

This is no longer the case in Designer. Forms can be truly dynamic, enabling users to add additional rows
and to add or remove sections.

**Adobe Reader**
Adobe Reader’s forms functionality is unchanged. It is still impossible to save forms locally. Printing and submitting to a server remain the only options, unless using a Reader-enabled PDF file. To create an ‘enabled’ file requires the use of Adobe Reader Extensions.

**Existing Forms**
Those who have previously created forms using Acrobat need not worry about having to rework them in Designer. Acrobat 7 still allows ‘old style’ forms to be created and used. Over time, however, it is likely that Adobe will drop this method.

**PDF Makers**
Adobe has improved and added to the list of PDF Makers that it provides with its products. In general, the performance of the PDF Makers has been improved. They are quicker and convert structure more accurately. Improvements include:
- New ‘Fit to Width’ option in Microsoft Excel to force an entire spreadsheet onto a single PDF page
- ‘Fit to Width’ option for single page output of project plans
- Support for transparency in Microsoft PowerPoint
- Object level tagging of metadata in Microsoft Visio (Figure 5)
- Compatibility with Microsoft Office 2004 on Mac OS (without support for bookmarks or links)
- Reduced size of PDF files from Autodesk AutoCAD, plus smart conversion of text to allow ‘hidden text’ behind vectorised text to improve searching and indexing, and support for multiple layouts and model spaces.

**Microsoft Outlook**
In Microsoft Outlook, it is now possible to save either an individual e-mail or group of e-mails as a PDF. For groups, bookmarks are created to enable users to find messages by subject, sender and date. Another useful feature is that attachments to e-mails are also imported into the PDF file.

**Microsoft Project**
A new PDF Maker for Microsoft Project has been provided.

**Improvements to Internet Explorer**
Adobe has extended PDF support in Internet Explorer. PDF files can now be created for either a complete page or a selection from a page. In addition, it is now possible to append pages to an existing PDF file. This is useful when using Internet Explorer to research a topic. Sending important pages to a single PDF file simplifies the process.

**Microsoft Publisher**
Creating PDF files from Microsoft Publisher is now possible. This includes support for crop marks, bleed marks, links, bookmarks, spot colours, transparency and CMYK conversion.

**Microsoft Access**
Support for PDF creation in Microsoft Access enables users to convert a selected database object (such as a table, query or report) directly to PDF.

**Autodesk Inventor**
PDF Maker for Autodesk Inventor (3D) supports Drawing, Part, Assembly and Presentation file formats. It also supports the placement of searchable hidden text.

**Printing Improvements**
Useful new printing features include:
- N-up support
- Ink manager
- Print as image to control resolution
- Improvements for CJK (Chinese, Japanese and Korean) printing.

**Distiller**
There are many improvements in Acrobat Distiller 7. Firstly, there is a Queue Manager that shows the jobs being processed and whether they were successful. As well as the ability to convert colour to CMYK settings, other new features are:
- Improved pass-through of JPEG images
- Improved support for Citrix and Windows Terminal Services
- Use of ICC profiles specified in EPS comments
- Improved support for PDF standards, such as PDF/X (used in print publishing workflows) and PDF/A (used in PDF archival).

See pages 24-25 of this issue for an overview of other PDF tools.

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Adobe’s FrameMaker (FM) includes two options that can change the text that appears in your published document: variables and conditional text.

**Variables**

FM has a number of predefined variables for items, such as page count and modification date. You can edit the definitions for these, and you can also create your own variables. Typically, variables are used for text that might change but there are lots of applications, including:

- Keyboard shortcuts for long, frequently-used text strings
- Keyboard shortcuts for specially formatted text, such as product names with a marketing-defined typeface, or special characters from a symbol typeface
- Text that will change, such as a product’s version number or a document’s issue number (or even the product name: yes, I really had a client who couldn’t decide what to call the product)
- Text that can be customised for separate editions for special customers: however, if the different versions are known in advance, it may be better to use conditional text, as described below.

**Defining a variable**

To define or redefine a variable in a single document, position the cursor in a text flow and use **Special>Variable** to open the ‘Variable’ dialog box. You can use ‘Create Variable’ or ‘Edit Definition’: in addition to their obvious functions, both allow you to add a new variable by editing the name and definition of an existing user-defined variable. To use special formatting, you must have defined the character formats you want to apply.

**Inserting a variable**

To insert a variable at the cursor position, you can use the ‘Insert’ option from the ‘Variable’ dialog box. Alternatively, use **Esc q v** (or **Ctrl-zero**) and start typing the variable’s name: when you have typed enough characters for the required variable to be identified, as displayed at the bottom left of the screen, press **Enter** to insert it.

If you plan to use the keyboard shortcut for inserting variables, you should consider this when you first assign their names.

**Updating variables in a book**

FM does not include a book-wide option to redefine a variable. Instead:

1. Update the variable in one document (preferably your template document), and leave this file open.
2. In the Book file, select all the files in which to update the definition (using Shift-click or Ctrl-click).
3. Use **File>Import>Formats**, make sure that the updated document is shown in ‘Import from Document’, check only the ‘Variable Definitions’ box, and click ‘Import’.

This operation will update all the variables in the selected files with the definitions for all the corresponding variables in the ‘Import from Document’ file. If you have not been rigorous about ensuring any on-the-fly changes you made in any documents were also made in your template, you may get some surprises. One solution is to set up a template document that only includes a definition for the variable you want to update. In any event, it is a good idea to back up your files before making book-wide format updates, as these are not reversible.

**Conditional text**

FM’s conditional text option is a powerful tool, which can be used to:

- Mark comments and inserted or deleted text, using the default conditional text tags (but this is rather cumbersome)
- Set up text that will only be used in certain circumstances, such as installation instructions that are not required for online delivery, or different text for different models or operating systems.

You can set up multiple condition tags for different uses, such as ‘Model1’ and ‘Model2’, and, for each tag, you can define the condition indicators for style and colour.

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**Readers’ tips**

Bill Stevens of Kratos Analytical has the following tip:

‘If you want to import an image that is wider than the Text Frame, deselect the Cropped and Floating tick boxes, and the anchored frame expands into the Side Head.’

You can show or hide text marked with selected condition tags and, if the text is shown, show or hide the condition indicators. The indicators make it easy to see which text is conditional, but you will want to hide them before publication.

To mark text as conditional, select it and use **Special>Conditional Text**. The ‘Conditional Text’ dialog box enables you to select the condition tag to use, to edit or create a new tag, and also to show or hide the text and indicators for the current document.

If you set the Show/Hide options differently for different documents in a book, FM warns you of this when you update the book. You can control the conditional text book-wide using **View>Show/Hide Conditional Text** and **View>Hide Conditional Text Indicators** for a Book file.

When marking text as conditional, be careful how you mark punctuation, spaces and paragraph markers at the beginning and end of the text, and consider how the unconditional text will look when the conditional text is hidden. Note that, if you insert a Return at the end of a paragraph where the existing marker is normal but the preceding text is conditional, you add a normal paragraph but the original paragraph now has a conditional paragraph marker!

There are lots of keyboard shortcuts for conditional text, but I find them too complicated to remember and use. Check out the onscreen help under **Quick reference>Markers and variables** for details.

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Communicator Spring 2005
Usability research supports using follow-ups in context

One of the e-learning tasks in the research was for users to cancel their participation in a course. Nielsen explains that, instead of using the intranet’s registration management feature, almost all went directly to the course page where they had originally signed up. However, on this page there was no link to cancel the course. He, therefore, recommends communicators make new or follow-up information easily accessible from the location of the original information or transaction.

He explains, ‘Usability is often enhanced when people can find follow-up transactions on the page where they conducted their first transaction. Conversely, usability is reduced if the original page contains no hint of what people might need to do at a later stage.’ Full results will be reported at the Usability Week 2005 conferences in New York (18-23 April), Stockholm (9-13 May), London (16-21 May) and San Francisco (20-25 June).

Inclusive sign design

Accessibility consultant and partner at JBC-London, June Bretherton, spoke to a well-attended meeting of the Sign Design Society on 19 January at Wood & Wood International Signs in London (www.signdesignsociety.co.uk). Being blind, Bretherton brought a personal perspective to the use of inclusive design techniques to make signs accessible to people with disabilities.

She focused on the requirements of the Disability Discrimination Act 1995 and the pending legislative changes to close its loopholes. Bretherton took a pragmatic stance, discouraging excessive signage but encouraging careful consideration of the best solution in each case. She pointed out that Braille, useless when out-of-reach anyway, is used by just 13,000 of the two million people in the UK who have significant sight loss. She praised the grooved guidance tracks used in other European countries and discussed technological solutions such as RNIB React, a device that activates speakers as the carrier approaches them.

Annual reports getting bigger, not better

A survey entitled ‘The Company Report Report’ by corporate communications consultancy Prowse & Co concludes that increasing regulation is forcing companies to report in greater detail, making it more difficult for shareholders to see the big picture. More specifically, Operating and Financial Reviews (OFRs) in the UK, Nouvelles Régulations Economiques in France, and social and environmental reporting in Scandinavia and the Netherlands, mean annual reports of Europe’s top 100 companies are ‘getting bigger, but not better’, says the Report’s author, Matthew Grenier.

The Report places British energy company BP, German software company SAP and Swiss pharmaceuticals group Novartis as the top three performers in terms of annual reports. At the bottom of the pile are Italy’s Generali (insurance), the French conglomerate Suez and another Italian company, Unicredito Italiano (banking).
In the country rankings, Switzerland is the top performer, thanks to effective reports from Novartis, Nestlé and Crédit Suisse. With just two companies Statoil and Norsk Hydro in Europe’s top 100, Norway comes second, while Germany comes third with its 16 companies and strong performances from SAP, Bayer, BASF and BMW. The UK is fourth, up two from 2003, and Italy drops to bottom place.

Content Management Europe enjoys successful second year
From 30 November to 2 December, over 10,600 visitors attended Content Management Europe in London. The opening keynote session from best-selling author and founding father of Web and Internet usability, Jakob Nielsen, left only standing room in the main conference auditorium. Moreover, the Online Information conference attracted around 900 delegates from over 40 countries. With about 230 exhibitors, the event had three new show features — Enterprise Document and Records Management (EDRM), Enterprise Search Solutions and e-Publishing Solutions. These features provided visitors with exhibition trails and seminar programmes focusing on these topical areas within the information management field.

Arbortext acquires Advent3B2
Provider of XML-based Enterprise Publishing Software, Arbortext, says it is a world leader in enterprise publishing software, after its acquisition of Advent Publishing Systems (Advent3B2) in October. Arbortext maintains that its Enterprise Publishing software now offers unparalleled capabilities, with the world’s most complete and powerful XML technology-based publishing software.

Senior Analyst at The Gilbane Report, Mark Walter, explains, ‘The 3B2 software complements Arbortext’s well-known XML editing tools. It will enable Arbortext to target more typographically complex publishing applications in the corporate setting as well as make a more concerted effort to sell into commercial Scientific, Technical and Medical (STM) publishing, where many publishers are in the midst of migrating to XML.’

Broadband to cover UK by the Summer
British Telecom (BT) predicts that more than 99% of UK homes and businesses will be able to receive broadband Internet via telephone line (ADSL) by the summer. This will position the UK ahead of any other G7 country (Britain, Germany, France, Italy, United States, Canada and Japan) in terms of DSL availability.

By December, Internet via ADSL had soared to above four million users, with more than 95% of UK homes and businesses already able to receive this broadband service. In addition to the four million ADSL subscribers, there are also an estimated 1.7 million cable broadband customers in the UK.

According to figures from the regulator for UK communications industries, Ofcom, the rapid uptake in broadband follows several years in which the UK lagged behind in broadband uptake.

More country-specific search engines in Europe
This year, European search engine company, Seekport, is planning to rollout country-specific search engines in Spain, Italy, Scandinavia and Eastern Europe. These search engines, which will have higher hit quality than traditional US-centric search engines, follow last year’s launch of www.seekport.co.uk in December, www.seekport.fr in France in October and www.seekport.de in Germany in June.

The company uses new ranking algorithms, subject-specific website categorisation and an indexing team of people to help cut spam and ensure that users gain faster access to relevant country- and market-specific content.

Large WiFi work environment open to public
Mobile workers will be pleased to hear that the British Library and Building Zones have been showcasing Central London’s largest WiFi (Wireless Fidelity) hotspot at the Library’s St Pancras site in London. From 18 January to 11 March, a special interactive installation demonstrated the integration of the latest in practical furniture design and wireless technology. Chairman of Building Zones, Philip Ross, says ‘The Library is a popular location for mobile workers and its strategic location between the three major transportation hubs of Kings Cross, Euston Station and the soon to be opened Eurostar terminal is a huge factor in attracting these users who need to be able to access email and the Internet.’ He adds, ‘In the near future, wireless technology will change building design, urban planning and how people work, and the launch of The British Library project is a major success story for this technology.’

British Library website wins innovation award
The British Library’s Turning The Pages website has won the ‘Innovative’ category in Yahoo! UK and Ireland’s Top 10 Finds of the Year competition. The site, at www.bl.uk/collections/ treasures/digitisation2.html, enables Internet users worldwide to browse and magnify the handwritten pages of masterpieces, including the Lindisfarne Gospels, Leonardo’s Notebook and Sultan Baybars’ Qur’an.

The site’s three-dimensional animation mimics the action of turning each page, which can be done using a mouse or by scrolling. Users can magnify the images and read or listen to notes explaining the beauty and significance of each page.

SDL International appointed Microsoft Premier Supplier
Provider of translation services and technology solutions, SDL International, has been appointed as a ‘premier supplier’ of translation and localisation services to Microsoft. The agreement, which is not constrained by language or by Microsoft product choice, includes a multi-million dollar minimum commitment each year for three years.

In addition, The Gallup Organization has awarded SDL International a contract to localise market research and management consulting content into over 40 languages. Gallup publishes thousands of surveys and reports each year through offices in 20 countries worldwide.

Written by Kathryn Valdal Fourie.
If you have a story for the news pages contact us at newsdesk@istc.org.uk
Power and legitimacy in technical communication

Volume 2 — Strategies for Professional Status

Edited by Teresa Kynell-Hunt and Gerald J Savage
Publisher: Baywood Pub Co, ISBN: 0895032473, $44.95

Reviewed by Gavin Ireland MISTC

In Volume 1, Kynell-Hunt and Savage sought to show how the technical communicator and the profession have evolved, comparing the development to that of established professions such as engineering. Despite being hard going for the average reader, the book makes many valid points and provides an interesting collection of background stories and hints for the future. In Volume 2, the same editors begin to explain and suggest strategies for developing the profession, based on the lessons learned in Volume 1.

In Part 1, Kynell-Hunt recaps the development of technical communication out of the engineering profession, through the introduction of engineering writing courses and on to recent history. Chapter 2 examines the more recent history of technical communication and suggests future direction. Chapter 3 examines points of reference contributing to the professionalisation of technical communication, selected from several technical communication journals dating from 1988 to 1997.

Part 2, ‘Strategies for Contemporary Practice’, contains three essays that discuss the current situation and problems faced by technical communicators. It examines the differences and relationships between the practitioners and academics.

As in many chapters in both books, Marjorie Davis compares the profession's development with the professionalisation of engineers and medical doctors. She argues that, while most of us have 'drifted' into the field, the emergence of what she calls 'the new professionals' who consider themselves apart from us 'drifters' represent new, higher standards of professionalism. She also identifies key areas of development for a professional future, including research, accreditation for technical communication programmes and licensing for practitioners — areas that any professional association in the field should already be aiming for.

Louise Rehling looks at relationships between professors and practitioners of technical communication, and describes the apparent disregard between the two. She goes on to suggest that, as long as we lack respect or recognition for each other, we can hardly expect to be respected or recognised by anyone else.

In the last chapter of Part 2, Robert Johnson examines the recent growth in technical communication and suggests it must be sustained to develop our profession. He looks at 'deeply sustaining a relationship with technology', 'deeply sustaining academic programs' and 'sustaining communities and selves' and concludes that we should 'redefine growth as it applies to technical communication programs', 'become stewards of the technologies that fall within the purview of technical communication' and 'foster a stronger sense of technical communication's responsibilities outside of our immediate academic and workplace contexts'.

In the final part of the book, the authors look to the future of the discipline and some of the paths that our profession may take. Carolyn Rude examines Best Practices in Policy Discourse and uses various examples such as computer documentation, feminist critique and studies of stakeholder participation in practice to see what lessons we can learn. The title of this part, 'Strategies for Alternative Futures', might lead you to expect some strategies or direction for the future of technical communication. However, it reaches a rather weak conclusion that suggests where we might end up if we fail to identify practices that lead policy discourse in a direction that suits practitioners.

In 'Critical Interpretive Research in Technical Communication: Issues of Power and Legitimacy', Nancy Roundy Blyler suggests that scholars could adopt an alternative research perspective and re-examine the goals of research, thereby altering the type of legitimacy sought for our field. Blyler gives practical suggestions of how 'Critical Interpretive Research' could change the way in which research is done and the conclusions that it reaches, challenging the traditional concepts of power and legitimacy.

Savage, in the penultimate chapter ‘Tricksters, Fools and Sophists’, gives a detailed and easy-to-read discussion of how existing and previous notions of professionalism are becoming unsuitable for both the theory and practice of technical communication. He presents an alternative model for its development, based on a sophist practice.

In the final chapter, ‘Technical Communication in the 21st Century: Where Are We Going?’ originally published in 1999 in a periodical, M Jimmie Killingsworth examines some of what we currently do and offers one or two alternatives. However, he seems to avoid the subject of where technical communication is heading in the 21st century completely. The chapter is interesting and well written, but badly titled and not the best choice with which to finish the book.

Like its predecessor, Volume 2 makes interesting points and tells entertaining stories, but fails to live up to its title. I would expect it to be aimed at people in a position to change things in technical communication. However, not everyone in such a position has an academic background and so I suggest that the editors, in adopting such an academic tone and language, have failed to consider an important section of their audience.

Teresa Kynell-Hunt is a professor of English at Northern Michigan University and is currently Chair of the NCTE Committee on Technical and Scientific Communication and Book Editor for Technical Communication Quarterly. Gerald Savage is an associate professor in the English Department at Illinois State University, where he teaches technical communication and technical editing.
How do we decide what goes in?

Marian Newell launches a series of articles by explaining how an issue of Communicator is planned.

Three months ago, the magazine now in your hands was little more than a twinkle in a few contributors’ eyes. I would like to give you a glimpse of how Communicator is produced, partly because it uses typical workflows that might be useful to you and partly because a better understanding of our processes may help those of you who contribute articles in future.

Selecting articles
This is the first step in the creation of an issue, sourcing content to publish. Over the past three years, the number of people wanting to write for us has risen steadily. Many contact me with offers to write about activities or research that they have done in the course of their work. Other people I approach, usually following up an online discussion or a news item that I have seen. Some press releases are interesting enough to prompt me to commission articles. More recently, I have used Conference feedback forms to identify inspiring speakers willing to write up their sessions.

During this first contact, I usually ask for a synopsis detailing the planned content, level of detail and viewpoint. Authors who think hard at this stage rarely deliver poor articles.

Occasionally, I have to reject an article. This is usually because either it was not written specifically for our readers or it was not discussed in advance and covers a topic of little relevance. There can be other issues, such as the publicity angle being too evident or reviewers identifying serious concerns about the content. It is also important for the writing style to exemplify best practice in our field, although we naturally offer help to those specialising in other areas or whose first language is not English.

Most articles are written in Microsoft Word, preferably using our template (www.istc.org.uk/pages/journals.php).

Illustrating articles
Given that a recurring complaint from ISTC members was that Communicator looked dull, one of my main goals was to carry more pictures. You will see the difference if you compare issues from 2001 with those from 2004. Increasing our page count last year enabled us to make graphics larger, giving them more impact and making text easier to read. It is a great help to me when authors find or create relevant graphics that add interest and clarify concepts. It is better still if they know the difference between vector formats (such as AI or EPS) and raster formats (such as BMP or TIFF), using appropriate tools for each and taking care with lossy formats (such as JPEG).

Laying out articles
The current team inherited a newly designed publication in 2002 (the work of Malcolm Beaumont, under Colin Battson’s editorship). We carried out an extensive update in Spring 2004 (done by Per Porter) and have made minor refinements in this issue (see page 4).

By combining elements from technical publications with elements from magazines, we have developed an identity that I hope is both distinctive and appropriate. We have never tried to mimic mainstream magazines, partly because we do not have the images and design resources to apply adventurous techniques across all articles, and partly because we want the journal to reflect the nature of its readers’ work.

Many readers skim publications, only reading articles that catch their eye, and so illustrations, captions, headlines and callouts are important for drawing them in. Often it falls to the production team to identify such elements but it is better if authors create them as they write. Working within our template makes it much easier to plan where graphics will fit and where text references to them will be located.

Balancing the content
I plan the content of the issue using a flatplan, which is really just a table showing the length and sequence of articles. It enables me to see which pages face each another, which advertisements must occupy specific positions and which colours will be used in feature articles.

I usually carry a variety of topics, avoiding themed issues because they can leave some readers with little to interest them for a whole quarter. However, pairs of complementary articles can often explore subjects more thoroughly than single pieces. We still have gaps in which new writers would be especially welcome; for example, we have yet to carry an article on a large-scale content management tool such as Documentum.

One of the toughest challenges is to find a royalty-free cover image that has high visual impact and at least some relevance. I prefer it to be tightly related to an article but this is not always possible. We often strengthen images by emphasising diagonals in them; with our orange taglines, this helps to create a consistent ‘brand’ from unusually diverse subjects.

Taking the current issue as an example, we have used a photograph taken by a member some years ago and related it to an article on home-working by exploring the idea of living where we want, not where we work. Extending the analogy, we superimposed taglines over the view to convey how modern technology can enable home-workers to ‘see’ both their local and professional environments from their desks.

Ideally, the cover resolution should be 300ppi, requiring an image that is 2598 pixels wide and 2953 pixels high. The original photograph must be sharp and never have been saved at a lower resolution. When supplied in JPEG format, the compression setting needs to be minimal to avoid loss of detail.

The next stage
So, we have the content. In the Summer 2005 issue, we will look at editing: why do we change what authors write?

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When working with technical illustrations, you must consider perspective. The following article will provide you with some useful information for working with both true and parallel perspective.

**True perspective**

Every technical illustration is done in a perspective. Usually, you will employ the perspective that best suits the information you wish to communicate within the depicted situation. Individuals who are new to technical illustration are confronted with several questions when choosing the appropriate perspective. Quite often, they try to depict a body as realistically as possible. To achieve this, they choose a vanishing point perspective (for example, true perspective).

However, as a general rule, you can say the more natural the perspective is, the more complex it is to include it in the illustration. The reason for this is the perspective reduction used. Sighted people know from experience that an object appears smaller at a distance than it does close up. It is also true that lengths are reduced as they move further from the observer’s eye. This has two effects:

- **Creation of a true perspective is difficult.** When creating a true perspective manually, you cannot work with real measurements. You have to project every measurement and the effort is disproportionate to the result. In various positions, ellipses, for instance, have different diameters, values and angles.

- **It is not possible to re-use existing objects.** Since the size and orientation of each element, down to the last screw, will change wherever it appears, it is not possible to reuse an object that has been drawn before.

**Parallel perspective**

Parallel perspective is certainly the most efficient method of depicting an object spatially and, therefore, it has become the most commonly used method of representation in technical illustration. In a parallel perspective model, you can use real measurements, which means that measurements can be also taken directly from technical drawings.

Since dimensions shown in a parallel perspective do not become smaller as distance increases, elements in both foreground and background can easily be recognised and compared. Elements can be reused when they are in the same installation position. The best known parallel perspective is isometric. This variant offers the additional advantage of allowing elements to be used in other views by rotating them through 120°.

Reusing a drawn part is an extremely important factor in the time taken for illustration. Imagine that you need to create a complete set of manuals for a machine (for example, assembly instructions, an operating manual and a spare parts list) in which the machine and its parts need to be depicted in various situations. Using parallel perspective throughout the document means you can reuse parts in all kinds of illustrations. This not only saves you a lot of drawing time, but also ensures that the parts are clearly recognisable for the reader.

**In conclusion**

While true perspective is visually pleasing, it is more suited to technical advertising than technical illustration. A suitable application for true perspective would be the coloured cover page of a technical manual. The contents of the manual, however, are intended to convey technical details in an understandable way. Here, the parallel perspective is the most appropriate method.

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**Figure 1. True (a) and parallel (b) perspective**

**Figure 2. Drawing using parallel perspective**
Writing instructions for software users

Nick Robson offers further suggestions for constructing effective software user guides.

On this page in the Winter 2004 issue, I suggested things to consider when establishing your target audience, and ways of adapting your writing style to suit that audience. In this article, I shall be expanding on how to present the information. Both articles assume that you are producing hardcopy instructions for users of your software.

Making the pitch
Having established the technical abilities of the audience for your publication, you now need to work out how best to pitch the information to them. However, don't forget to factor in any requirements of your house style guide.

Document structure
- Minimise the amount of front matter; try to restrict or condense the product disclaimers and trademark references; restrict the number of heading levels in the table of contents.
- Keep chapters short. Examine the software application with a view to breaking larger tasks down into a series of smaller sub-tasks (incidentally, this can be a good time to give useful feedback to the application architects).
- Keep subsections short, even if it increases the length of the chapter. Emphasise the division between subsections by using a prominent typeface for the heading, maybe a different one to that used for the body text, or reverse the standard typeface white on black.
- Don't overdo the number of index or glossary entries. Tailor them to fit the document. For glossaries, omit generic terms that can be defined elsewhere. For a library of publications, consider publishing the glossary only once.

Page structure
There are several things to consider:
- Aim for a good proportion of print to white space; don't let the page become too black. For example, increase the line spacing, or the space between paragraphs.

- Use of page headers (for example, to repeat the chapter title) and footers (for example, to repeat the publication title).
- Width of margins and line lengths. For example, for an A4 sheet size define a left margin of 50 mm and a right margin of 25 mm to provide a useful line length of 135 mm. You can then use the large left margin for side-heads or other devices.

Vocabulary
It is always good practice to keep the vocabulary as straightforward and simple as possible. For example, instead of 'Acquire' use 'Get'; instead of 'Commence' use 'Start'; instead of 'Enquire' use 'Ask'. Generally:
- Use everyday words, but don't over-simplify; this is still a technical publication.
- Avoid contentious words; use 'abandon' not 'abort'.
- Use words with fewer syllables.
- Position verbs as early in the sentence as possible.
- Be consistent.
- Be aware of translation and cultural requirements.

...aim to present clear readable lines of text that attract and hold the eye.

Writing style
Write the instructional text as a set of numbered items, with one instruction for each number. Unless you are conveying conditional information, place the verb at the start of the sentence. Try to write each instruction using one sentence. Do not use more than one instruction for each numbered list item, even if it increases the length of the list. Follow each instruction with the corresponding response of the software application as a separate sentence, but without a number. For example:
1. Select the Enter Personal Details button. System X displays the

Personal Details screen, with the current date filled in for you.
2. Type in the personal data from the application form.
3. If the date of birth is not provided, type 'xx/xx/xxxx'.
4. Select OK when you have finished. Try to minimise the amount of explanation within the instruction; put this at the beginning.

- Use the word 'Select' rather than 'Click on' or 'Press', to allow for the reader using the mouse or shortcut keys to make selections.
- Keep the reader involved by using the second person; for example, 'If you need to repeat data capture, go to...'.

- Ensure text that introduces a screen capture does not become separated from it, even if the result is more white space on the page than usual.

Typography
Whether serif or sans serif, aim to present clear readable lines of text that attract and hold the eye. Left justify only; right justification will look messy in this instructional format. Highlight button and screen names in bold.

Artwork
When properly done, artwork can save large amounts of text (for example, when showing program flows). As this topic is extensive, I shall expand on it in a future article.

In summary
- Know your audience.
- Know your subject.
- Pitch the information appropriately.
- Design for consistent readability.
- Design for good information flow and retrievability.

After 23 years as a contract software technical author and editor, Nick Robson FISTC is Customer Information Manager for De La Rue Identity Systems in Basingstoke, Hampshire.
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ISO/IEC TR 9294 provides guidance on the management of software documentation to managers who are responsible for the production of software or software-based products. This guidance will help them to ensure that effective documentation is produced by their organisation.

What is ISO/IEC 9294?
ISO/IEC Technical Report 9294 was first published in 1990. It was revised over two years by WG 2 under the guidance of Tom Kurihara ending in 2004. It is available from the British Standards Institution (www.bsi-global.com) or from ISO (www.iso.org).

Documentation is needed for all stages of the software life cycle. Consequently, the preparation and maintenance of documentation constitutes a necessary and continuous effort from its inception and continues with the design, development, testing, installation, use, modification and enhancement of the software. The documentation process ends when information about the software is no longer needed and the use of the software is terminated.

Documentation is an essential component for the success of any software project, and the production of documentation implies the commitment of time, effort, and money. It is the responsibility of management to ensure the effective deployment of these resources and to recognise the importance of documentation to the quality and success of the software product.

The guidance applies to all types of software, from the simplest program to the most complex software suite or software system. All types of software documentation are addressed, relating to all stages of the software life cycle.

The principles of software documentation management are the same whatever the size of a project. For small projects, much of the detail given in this technical report may not apply. Managers can tailor the recommendations to their particular requirements.

Guidelines
ISO/IEC TR 9294 provides guidance on the following topics.

The managerial role
Effective performance of software documentation management can be regarded as:

- Management’s commitment to the documentation; the recognition that documentation is important and must be planned, designed, developed, tested, reviewed, approved and maintained.
- Evidence of that commitment and support in the form of policy statements, published procedures, allocation of resources, continuous review and improvement.

The functions of software documentation
These include user, development and management documentation. Software documentation has six major functions:

- Communication to management of the progress of the project and to enable support for direction, decision making and resource allocation.
- Communication among groups of developers.
- Documenting quality assurance responsibilities, product and process requirements.
- Instruction and reference information to enable acquirers, users and managers to understand the software product.
- Training, maintenance and user support.
- Historical references for other projects and conversion of the software to new environments.

Documentation policies
These should be prepared and supported by management to provide guidance to all decision makers.

Documentation standards and guidelines
These should be adopted or established. The document types and their contents should be defined:

- Development documentation provides an overview during the software development activities.
- Product documentation provides information for the use and maintenance of the software.
- Project management documentation provides information on the life cycle of the software product.

In addition, these should be defined:

- Document quality and how this is to be achieved and maintained in the context of the quality of the content, structure and presentation of the documentation.
- Standardised document formats to assist in maintaining quality control, preparing documents, ensuring readability, maintaining and re-using information among documents.
- A document identification system to provide effective control.

Documentation procedures
These should be established to implement the documentation policies and to define documentation sequences consistent with the software life cycle process and software documentation management.

Resource allocation
Managers should allocate resources. This includes project team members, facilities and funding (the cost of documentation may be offset by reduced costs for user support and software maintenance).

Documentation plan
This should be distributed to all team members and should state:

- What is to be done.
- Where it is to be done.
- When it is to be done.
- How it is to be done.
- Who is to do it.

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Using interpreters to negotiate

Freelance interpreter Luca Salice finds the Romans provide a lesson in more than just ancient history.

But slowly a capital difference between Romans and Greeks emerged … The Romans spoke Greek to the Greeks. Flaminius … and Lutatius Catulus … were fine Greek speakers [and] it was for the Roman to decide whether he would speak in Latin or in Greek to a Greek public — that is, with or without an interpreter. The Greeks never had a choice. They could only speak Greek to the Romans, and it was for the Romans to decide whether they wanted an interpreter. We must assume that in 280 BC, Cineas spoke Greek in the Roman Senate and was translated by an interpreter. An interpreter is specifically mentioned for the mission of the three philosophers on behalf of Athens in 155 BC: the interpreter was one of the senators.

This passage comes from ArnaldoMomigliano’s Alien Wisdom, a study in the complex relationships between Greeks, Romans, Jews, Celts and Iranians after Alexander the Great. The Ancient Greeks never bothered with other languages and as a result found themselves at a disadvantage vis-à-vis their Roman challengers. The Romans, on the other hand, knew that language is power and used interpreters wisely when the occasion demanded it.

Such interpreters are nowadays called ad hoc interpreters and their role would probably be familiar to ancient Roman statesmen and generals. (I am not discussing here the other kinds of interpreter, such as the simultaneous interpreter who works in a booth with headphones and is detached from the main action or the court interpreter who works under oath.) Ad hoc interpreters are usually engaged and paid for by one of the parties. Interpreters are expected to be impartial, though, so how can a professional hired by one party be impartial? Shouldn’t the client (who after all foots the bill) be entitled to some special consideration? Actually, it is in the client’s interest to have an impartial interpreter during negotiations, because the interpreter’s impartiality quite literally gives the client a voice. The client doesn’t speak or understand the other party’s language: an impartial interpreter thus enables the client to take part in the discussion, whereas a partisan interpreter would effectively take over the client’s role and speak with his or her own voice instead of the client’s.

Both sides need to respect the interpreter’s impartiality, though, or they end up hiring their own interpreters, thus increasing costs. Membership of a professional organisation such as the Institute of Translation & Interpreting (ITI) may reassure the parties that the interpreter will behave impartially and ethically.

Nevertheless, the application of all ethical principles to actual situations requires personal judgment. During one meeting, for example, I was surprised to be asked for my opinion of the appearance of a vacuum cleaner prototype, simply because I was the only person there who had never seen it before! Interpreters are not normally required to give aesthetic advice but, in that case, I judged that the request was harmless and offered my opinion.

A rather less trivial example concerns Albanian-speaking asylum seekers. Some migrants from Albania were reportedly pretending to be from Kosovo in order to claim asylum during the recent troubles. Kosovo and Albania share a language, but there are small differences. An Albanian interpreter who worked for the immigration service told me that he usually had little doubt where applicants came from but never disclosed this to the authorities he was working for. His reason was that he was an impartial interpreter and not a law-enforcement agent. Some interpreters doing police work are former police officers and are rather more willing to help their former colleagues, but they — and their clients — should exercise great caution where the role of the interpreter is overstepped in this way.

Outside the meeting, the interpreter’s conduct may need to change. When the actual interpreting is finished, the client may wish to quiz the interpreter about the other party’s behaviour during the meeting. The client might have gained the impression that the other party was unwilling to compromise, for example, but this perceived rigidity may in fact be a cultural construct. English understatement is sometimes puzzling for foreigners, or a common bureaucratic formality in one country may seem flippant in another culture and be taken as an indication of lack of commitment. The boundaries of what is appropriate may also be different, for instance regarding humour or remarks that could be perceived as sexist or offensive.

The interpreter needs to respond sensitively to the client’s cultural difficulties, having regard not only to the client’s needs but also to the principle of impartiality and issues of confidentiality. It is generally the case that the requirement for impartiality is less relevant once the meeting itself is over; then, the interpreter can sometimes slip out of his or her role and become almost an ordinary member of the client’s delegation. It all depends on the particular case.

As the Ancient Romans realised, knowledge of the other party’s language, combined with a skilful use of interpreters when that knowledge is lacking or insufficient, is an advantage in complex negotiations. Mussolini, who was extremely vain (even by Italian standards), would not admit that his German was insufficient for a diplomatic conversation and therefore did not use interpreters in political negotiations with Hitler. He may have said Ja too often at the wrong moments, thus hastening his own downfall. That was not a skilful language policy.

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In this issue, we meet Trevor Grout, a Student member who became a technical author last year.

What is your present role? Please describe what you do?
I am a technical author for a software house in north London. I joined the company three months ago, and this is my first role as a technical author. I am one of a team of three authors who maintain the user guides and reference manuals for the software, which is used by specialists in market research.

What qualifications do you have?
I recently took the Part 1 exam for the City & Guilds certificate in Technical Authorship. This is the first exam I've sat since leaving school over 20 years ago, and I am looking forward to receiving the results. The last section of the course wasn't easy for me as I had a lot to learn on my new job at the same time. On the day though, I enjoyed taking the exam — it made all the effort beforehand seem worthwhile.

What made you decide to become a technical author?
I've worked in IT for over 20 years, and technical communication of one form or another, including the occasional production of user guides, was always a part of my job. However, the software was mostly developed for in-house use, and as the budget rarely included anything for proper documentation, the role of technical author didn't exist. I was also aware of the less-than-good quality of technical communication generally. When I was made redundant last year, I was able to spend time identifying my skills and strengths and thinking about what I would really like to do next. I did several of those exercises that help to identify suitable careers based on background and preferences, and technical authoring was always on the list. At that point I had a 'Eureka!' experience — technical authoring seemed such a perfect choice that I now don't know why I didn't make the change years ago.

What type of writing do you do?
As with many other software companies, most of our user documentation is now produced in online format only. Although it would have been fascinating to see some of the more traditional publishing processes for real, online documentation is also proving to be an exciting area to work in. Our current challenge is to improve the integration of help information in the user's desktop environment, and make that information available by whatever route the user might choose to look for it. For example, we are experimenting to find a help format that produces the best results with the new generation of desktop search engines.

What appealed most to you about the job?
To be able to give technical communication tasks the time, attention and expertise that they really deserve. As I say, this was rarely possible in the past.

What concerned you about it?
I was mainly concerned about the possibility of working in isolation, and the perceived low status of technical authors. In fact, neither of these problems has arisen since I started in my present role. The other technical authors are supportive, as are the software developers, and there is a real sense, often expressed in words, that the documentation is critical to the success of the products. This was a pleasant surprise that I would like to share with anyone else thinking of breaking into the profession.

How did you make the transition?
My first task on deciding to become a technical author was to speak to other technical authors to learn more about the realities of the work and get advice on how to break into the profession. Not knowing any technical authors personally, I searched the Internet for specialist agencies and phoned them up for advice. Most of the people I spoke to were happy to help, and offered useful information. I think that nearly everyone I spoke to suggested joining the ISTC, even when they weren't members themselves. It didn't take me long to realise that formal training in the subject would be a good idea, and that studying for the City & Guilds certificate was the most effective way forward. I enrolled on a distance learning course, and I think that doing so helped me to get the job that I have now.

Is there enough training in technical communication?
Well, the City & Guilds route is a very good introduction to technical authoring, and as a bonus, the qualification appears to be widely recognised. What I particularly like is that you can study for the exam in a reasonably short period by distance learning. I think that this is important for a profession like technical authoring that often appeals as a second career. Individuals like myself who have young families to support, can't normally consider long-term full-time education, or even part-time education that won't deliver some sort of practical benefit quite quickly. The main problem with the City & Guilds exam is that too much of the syllabus is outdated and no longer relevant to employers, particularly in the IT industry. Unfortunately, there appears to be little chance of that situation improving.

What are your interests outside of work?
We have a four-year-old son and are expecting our second child in the summer. Recently, we have spent a lot of time lining up builders and decorators to get our house ready for the big day. When I'm not occupied by home improvement activities though, my favourite interest is cycling. I used to do cycle racing when I was younger, but now I'm happy riding through the countryside at my own pace.
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