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Cover Phototrazing of an assembly (see pages 31–33) © B/E Aerospace, Inc.
Communicator Spring 2009

Editorial

In this issue
We have a great mix of practical and research-based articles in this issue. On the practical side, we have contributors from Red Gate Software, BigHand, B/E Aerospace and Cambridge Technical Communicators describing their experience on projects ranging from illustration to monitoring support site usage. On the research-based side, we have results from two surveys, one of UK documentation managers and the other of people involved in managing and translating terminology, and a literature review of what makes for high quality in documents. On top of all that, we have a review of MadCap Blaze and more on conditional content in its established competitor, Adobe FrameMaker.

Sectors using technical communicators
In a recent discussion about an online article, I said that most of the technical communicators I know in the UK produce materials intended for some kind of specialist or business-to-business audience. The context was the relative importance of the lowest common denominator in ability, or willingness, to read in the population, compared with other influences on information design. I would be very interested to receive article ideas from people who do create materials for use by the general public. How do you address such a broad audience when you design information and what changes are you seeing in the ways in which people want it delivered?

Council membership
Last year, some people who expressed an interest in serving on Council found that they’d left it rather late to find supporters and submit their nomination forms by the deadline. If you would like to influence the operation of the ISTC in this way, it’s a good idea to start thinking about it early. The formal obligation for Council members is to attend most of the quarterly meetings, held on Saturdays in London. Beyond that, they should take on responsibility for specific tasks or areas of the ISTC’s operation. If you’d like to discuss the role and the election process, do contact me.

Article of the Year 2008
I am sorry to report that the response rate this year was too low to run the competition. This is a recurring problem for the ISTC when canvassing its members and I am disappointed that the upward trend I had been seeing has faltered. My thanks to those who took the trouble to reply; your time was not wasted as your feedback still helps me to judge the kind of content that is most useful to readers.

Article writing: tip #10
Take as much care with the brief author profile that we carry at the end of each article as you do with the article itself. Make it reflect the aspects of your skills and experience that relate to the article you’ve written rather than trying to fit your entire career into what is only a small space. Apply the usual rule of knowing your audience: readers who found the article useful will want to know your credentials for writing it and the environment in which you gained the experience.

Marian Newell FISTC
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Industry and affiliate news
As part of the handover from outgoing to incoming Editor of the ISTC’s free monthly newsletter, InfoPlus+, we decided to rationalise our news coverage. Rather than carry some items in Communicator, we will now carry all news items in InfoPlus+. To subscribe, contact istc@istc.org.uk. To submit news items, contact newsletter.editor@istc.org.uk.

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Communicator Spring 2009
ASL has been providing association management services to the ISTC since last May. As the time has now come to consider the period beyond the initial 12-month contract, your Council has been reviewing the activities that we specified originally with a view to renewing with a revised contract. We believe that continued use of an association management company is in the best interests of the ISTC and its members.

ASL has many skills that were not previously available to us and we have begun to use more of these in recent months. An area that has been considerably enhanced is the management and streamlining of membership and accounting records. New processes have now been fully implemented and are reducing the time spent on routine activities such as membership renewals, grade transfers and accounting issues. This will release resources for other activities, of which we have several demanding attention from a finite pool of volunteer time.

The area that has probably expanded more than any other over the contract period is education. We currently have around 100 students in various stages of study, with about 20 starting the course in the last couple of months alone. There is a considerable amount of work associated with each student and the processes involved have been the subject of some innovative solutions from ASL.

The processing of applications for membership and upgrades has also benefited from ASL’s experience in doing the same tasks for other non-competing associations. More improvements are in the pipeline, including online membership renewals.

Incidentally, if your expertise and training have grown to a point where you could upgrade your membership, contact the office. The staff there will provide advice on the requirements and quickly process your application. Thanks to new membership committee processes, applications can now be approved in a fraction of the time that was taken in the past.

It is with all this in mind that we are pleased to announce that ASL will continue to provide association management services to the ISTC for the rest of 2009. We will also look for ways to consolidate our current contractual arrangement into more of a partnership, stabilising arrangements for the future and providing security to foster greater engagement.

Your Council has been impressed with the services delivered and with ASL’s well considered and beneficial suggestions, and I would like to add my thanks, as Treasurer, for ASL’s unstinting and successful efforts in getting some of the detailed financial records into their present well-organised state. We look forward to being able to benefit from more of ASL’s expertise and, as a result of greater efficiencies, getting more initiatives off the ground.

The first additional contract we have placed is for ASL, in the person of Joanna Oliver, to organise Technical Communication UK. While administrative tasks such as processing booking fees are within the scope of our existing contract, we have found in the past that having a dedicated event organiser enhances the delegate experience and makes a range of specialist skills available to us. Bringing the roles of association management and event organisation together under one roof will improve coordination, reduce wasted time and help to avoid errors. We are all looking forward to seeing major improvements as Technical Communication UK becomes a national, rather than ISTC, conference.

Peter Fountain FISTC LCGI
E: treasurer@istc.org.uk

Authoring opportunity
Don't miss the technical author position in Berlin advertised by Ovidius on page 41 of this issue.

Joanna Oliver, Event Organiser

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Challenging times ahead
It is becoming increasingly apparent that the UK economy is in extreme difficulties and it has now officially entered recession. Every day I read of companies making staff redundant or, worse, closing completely. If you have been caught up in all this turmoil, you have my sympathies and I hope that the situation will rectify itself very soon.

I know it’s difficult during times like these to see light at the end of the tunnel but, if past recessions are anything to go by, then the upturn out of a recession provides opportunities for both companies and their staff. The past also teaches us that those who are best prepared benefit most from these opportunities.

This is where membership of a professional body like the ISTC can help you in a number of ways:
- Membership provides you with a professional status.
- You can gain access to a network of contacts.
- You can gain access to training courses and course providers (at favourable rates).

When money is tight and prospects are poor, it is only natural that we all look for economies and for ways to reduce our outgoings. It is tempting to save a few pounds by either not joining a professional body or allowing an existing membership to lapse. I believe both of these are false economies and, although the ISTC cannot guarantee you a job, membership does help you (in the ways I described earlier).

In the light of the current financial situation, we waived the late payment fees for membership renewals for 2009 and have also kept the membership fees unchanged. We hope that this will assist those who are experiencing difficulties to remain with us and together we can weather this storm.

On a brighter note…
I am pleased to inform you that preparations for this year’s conference are underway. It will once again be held at Eastwood Hall, Nottinghamshire, which was such an excellent venue last year. As Paul Ballard explains on the opposite page, we are planning a major overhaul of the event to broaden its appeal and to attract a wider spectrum of delegates. Watch for more details on the new website: www.technicalcommunicationuk.com

And now, the weather…
I am writing this looking at the photographs I took of my garden and the road at the front of the house during the recent heavy snow. Unusually for Swindon (where I live), we had several inches of the white stuff and I ended up with about a foot of lying snow across my lawn and patio area. My car was trapped in a snow drift and required some severe mining efforts to get it out. Driving was virtually impossible as the local Council ran very low on grit and salt. To all of you who suffered (some, I know, far worse than I did), you have my sympathies. I trust everything is now back in order.

Finally, I wish you all the very best for 2009 and hope that this economic downturn will not be too painful and that we can all survive it and emerge strengthened when it’s all over.

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

22–24 September 2009
www.technicalcommunicationuk.com
The Institute

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

The ISTC was formed in 1972 from the Presentation of Technical Information Group (est 1948), the Technical Publications Association (est 1953, later the Institution of Technical Authors and Illustrators) and the Institute of Technical Publicity and Publications (est 1963).

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

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Andrew Marlow (content)
Andrew.marlow@istc.org.uk

Technical Communication UK

‘We all thought the venue was excellent by the way — one of the best conference locations I’ve been to (and I’ve been to a lot!)’
‘Venue very good, not one bad presentation, very good conference.’
‘Fantastic location and service. Very well organised and executed.’
‘Thought the conference was very well organised. The venue and food was excellent.’

These are some of the positive comments we received after the ISTC Conference near Nottingham last September. From 2009, the ISTC will be organising a new event that will build on recent success and attract a larger audience. For such an event to succeed, it must appeal to potential delegates, speakers, exhibitors and sponsors beyond those who already know its value. It must appeal to the thousands of UK technical communicators who are not ISTC members and who may never even have heard of the ISTC.

Technical Communication UK is the new name

It will address the needs of technical communicators, their managers and clients from all corners of the industry. Given the economic context, the tone of this year’s event will confound the pessimists and demonstrate that our chosen profession comes in many flavours and that technical communicators’ transferrable skills can be valuable to them when they know how to apply them in different contexts. Meeting other professionals, hearing case studies, experimenting with tools, debating methods, sharing experiences, asking experts about what’s going on — these all contribute.

Technical Communication UK will deliver more than 30 sessions over the three days, with presentations, workshops, case studies and hands-on product demonstrations from fellow technical communicators, senior managers, technical consultants and industry leaders. Industries covered will include software development, mobile technologies, telecoms infrastructure, automotive, aerospace, banking, engineering and further education.

Peter Anghelides of IBM is the Keynote Speaker

Based at the Hursley lab in the UK, Peter is now Manager of Talent Programmes and Academic Initiatives. Until 2009, he was head of User Technologies, which includes the information development team alongside several other related disciplines.

Eastwood Hall, Nottinghamshire, is the venue

Technical Communication UK will be held at the same venue that prompted such positive feedback in 2008, set in 26 acres of landscaped grounds. Just 5 minutes from junction 26 of the M1, Eastwood Hall is purpose-built to provide the very best in 21st century residential conference and training facilities.

Put these September dates in your diary!

| Tuesday 22nd | Pre-conference workshops |
| Wednesday 23rd | Keynote presentation, a full day of workshops and case studies, and the Gala Dinner award evening |
| Thursday 24th | A full day of workshops and case studies |

www.technicalcommunicationuk.com is the event’s online home

Visit our new dedicated website for the latest news on confirmed sessions, exhibitors and sponsors. The full schedule will be in place before the end of April and booking will open during April, with early bird discounts available until the end of June.

Paul Ballard MISTC
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Security clearance
One member applied for contracts that required job candidates either to have security clearance, or to be ‘willing to undergo clearance’. Because he did not have security clearance, he was rejected. He asked why advertisers write ‘or willing to undergo clearance’ if they reject candidates who do not have it. A respondent said that some recruitment agencies asked him how much time he needed to get security clearance. They did not know that you have to be sponsored by the client.

The Cabinet Office wants job candidates to be vetted after they are selected for jobs. The only exception is if a job is short term. For more information, see the following web pages:
- www.pcg.org.uk/cms/index.php?option=com_content&task=view&id=2375&Itemid=639
- www.contractoruk.com/002675.html

Online communities
One organisation wants to establish an online community that contains web pages such as ‘About us’, a forum, announcements and photographs. The people in the organisation are not technical. Therefore, the software must be simple.

Joomla! (http://joomla.org) is an open source content management system that is moderately easy for non-technical people to learn. To make a website secure and friendly to search engines, add some of the free or low-cost extensions. Some extensions are excellent, and others are low quality, so choose carefully. To help to create the online community, install the free Fireboard discussion forum. Make it private as part of a member group, or public.

Ning (www.ning.com) is moderately easy to use but, possibly, has too many options.

Management commitment to TC
Some senior managers do not invest in technical communication. What can technical communicators do to make them understand that it adds value to a product?

One member explains to managers that a customer’s opinion of a company is dependent on both the equipment and the manual, which together are the product. Good equipment is no use if documentation is low quality, because customers cannot use the equipment correctly. In his previous job, he got a 300% increase in resources. In his current organisation, initially the technical author role was hidden in an administrative department but now technical authors report directly to senior management.

Another member uses the message, ‘we are the interface to the interface’. He has good relationships with senior sales people. The technical authors maintain some documents specially for the sales team, and they proofread and offer suggestions on marketing material. Sales people come to the technical authors for product information. A community website for developers contains the works of the technical authors and of the research and development team. The people who set up the software are dependent on the documentation, and the technical authors get good feedback from them. Managers see the technical authors talking to people, meeting deadlines, and helping the business.

Video for user assistance
One member wants to make short videos as part of an online help system. Members gave these comments:
- Make them less than about two minutes.
- Put captions in the same place and use a standard style and colour.
- Go slowly — viewers need time to understand the presentation.
- Minimise irregular pointer movements because they distract viewers.
- Be aware that speech makes files larger, and can be a problem if you localise.
- Divide the content into scenes, as on a DVD where a menu at the start lets viewers navigate to a particular scene.

One member supplied a list of websites:
- http://screencastingprimer.wikispaces.com/resourcelist
- Camtasia Studio® (commercial); www.techsmith.com/camtasia.asp
- Captivate® (commercial); www.adobe.com/products/captivate
- Capture Fox, a Firefox add-on (free); www.advancity.net/eng/products/capturefox.html
- Jing® (free); www.jingproject.com
- Wink (free); www.debugmode.com/wink

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- Advanced technical authoring techniques (3 days, £795) 16-18 Mar, 27-29 Apr, 8-10 Jun
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- Effective writing for technical staff (1 day) On-demand

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- Introduction to Photoshop (2 days) On-demand

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- 3ds Max and 3ds Max Design

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Using web analytics for documentation

Exploring the value of this data in understanding how users interact with a support site, by Rachel Potts.

Background
Web analytics is often used in Internet marketing to understand the success of advertising or determine why customers aren’t completing the purchase process on a website. Although the technique is less often used to understand the success of online documentation, I believe that such data could become a powerful tool in developing and maintaining websites containing user assistance and support information.

At Red Gate we’ve been exploring the value of web analytics in understanding how users interact with our support site. In this article, I’m going to use data from that site to illustrate some potential benefits, and limitations, of using web analytics.

Web analytics at Red Gate
The Red Gate support site (www.red-gate.com/supportcenter) is a Help and Support portal that comprises content such as product Help, a knowledge base, marketing videos and public forums. When we moved to this primarily web-based approach, we decided to take advantage of the Google Analytics tool that was already in use within the business.

Our main reason for enabling web analytics in our online Help was to find out whether anyone was actually reading it. We quickly confirmed that our help topics were viewed around 14,000 times a month in total. This was interesting, but we felt that it must be possible to get more value from the newly available web analytics data.

We are still in the early stages of exploring the possibilities of web analytics, but we use the data regularly to help us understand and improve our site. In the following sections, I describe some of the types of information that web analytics data enables us to access.

Understanding users’ language
By examining the terms users enter when they perform a search, we get a useful insight into

<table>
<thead>
<tr>
<th>Search term (product page searched from)</th>
<th>Page views</th>
<th>Unique page views</th>
<th>Exit rate</th>
<th>Most common next page viewed, other than site exit (% of visitors to the search page who looked at this page next)</th>
</tr>
</thead>
<tbody>
<tr>
<td>‘Snapshot’ (SQL Compare)</td>
<td>54</td>
<td>44</td>
<td>17%</td>
<td>Forum post: Free schema snapshot utility: SQL Snapper (37%)</td>
</tr>
<tr>
<td>‘Command line’ (SQL Data Compare)</td>
<td>44</td>
<td>26</td>
<td>7%</td>
<td>Knowledge base: SQL Data Compare command-line XML argument file examples (37%)</td>
</tr>
<tr>
<td>‘Asp.net’ (ANTS Profiler)</td>
<td>30</td>
<td>21</td>
<td>10%</td>
<td>Forum post: How to profile ASP.Net memory leak (15%)</td>
</tr>
<tr>
<td>‘Command line’ (SQL Compare)</td>
<td>30</td>
<td>21</td>
<td>10%</td>
<td>Forum post: help file for command-line execution (22%)</td>
</tr>
<tr>
<td>‘Thread blocked’ (ANTS Profiler)</td>
<td>34</td>
<td>20</td>
<td>9%</td>
<td>Forum post: Thread blocked (38%)</td>
</tr>
<tr>
<td>‘Source code’ (ANTS Profiler)</td>
<td>30</td>
<td>19</td>
<td>7%</td>
<td>Article: Why can’t ANTS Profiler find my source code? (64%)</td>
</tr>
<tr>
<td>‘Download’ (no product selected)</td>
<td>23</td>
<td>19</td>
<td>17%</td>
<td>Red Gate website home page (22%)</td>
</tr>
<tr>
<td>‘Inconsistent API use: generate script rewrite encountered a create action’ (no product selected)</td>
<td>18</td>
<td>18</td>
<td>94%</td>
<td>Forum home page (6%)</td>
</tr>
<tr>
<td>‘18210’ (SQL Backup)</td>
<td>17</td>
<td>17</td>
<td>53%</td>
<td>Knowledge base: VDI error 1010: Failed to get configuration from server (21%)</td>
</tr>
<tr>
<td>‘Restore’ (SQL Backup)</td>
<td>21</td>
<td>16</td>
<td>14%</td>
<td>Product walk-through (8%)</td>
</tr>
</tbody>
</table>
users’ world-view, particularly their terminology.

Table 1 shows data for the top ten searches on the Red Gate support site over three months at the end of 2008. We can use this report to ensure that topics use the same terminology as users, by altering titles, tagging topics with additional keywords, or defining synonyms within the search engine.

Understanding users’ experiences with site navigation
Some pages on the site are designed to take visitors to the information they need as quickly as possible. On the Red Gate support site, this includes search, index or ‘home’ pages, and getting started or ‘landing’ pages. These navigation pages generally don’t have a lot of information on them; instead they consist mainly of a number of hyperlinks.

The usage data for these pages enables us to understand how well these pages support users in trying to navigate around the site.

I’m going to take search pages as an example here, because Wiggins and Rosenfeld (2007) believe this is an area where web analytics can be particularly useful, but similar principles apply to other navigation pages. Figure 2 shows an example of one of our search pages.

The search experience we want for visitors to our site is that they perform a search, click on a result, and are so happy with what they see there that they leave the site. They don’t come back to the list of search results to see if there’s anything better (they don’t need to: they’ve already seen something that answers their question).

If users behave in this way, the data should show the following:

- The exit rate from search pages is low (because visitors don’t leave the site on a search page).
- The next page viewed should be a relevant content page (if visitors follow links to other navigation pages or pages for the wrong product, the search probably hasn’t been successful; we can also apply a more subjective view of relevance by looking at the content on the page).

Table 1 shows this data for the top ten searches. There isn’t space here to look at all the searches, but I’ll examine two contrasting examples.

Search example A
‘Inconsistent API use: generate script rewrite encountered a create action’
The exit rate on this search is 94%; most people searching on this term leave the site rather than following any links. The few people who do follow a link go on to look at the forum home page.

This search doesn’t look successful by either of our criteria, then: it has a high exit rate and the next page viewed is not a relevant content page (it’s another navigation page). The reason for this becomes obvious when we perform the search on the site for ourselves. The search returns with:

‘There were 0 results.’

Are there results we’d expect to see? Is this a bug or a misunderstanding about how to enter search terms?

Turning data into understanding
General information such as terminology and levels of usage is useful, but clearly there’s more to a web analytics strategy than just looking at the raw data.

For example, it was interesting to discover that the Red Gate help pages are viewed 14,000 times per month, but we had no way of knowing whether that was a good number or not: do we actually want users to view our help more or less frequently? Burby and Atchison (2007) suggest a promising strategy for getting from raw web analytics data to implementing improvements to a website, but—as with using data in any technical communications strategy—the most difficult step is identifying how successful user behaviour will be represented by the data.

Getting from data to understanding often requires additional information from users. The Conversion Rate Experts website has a useful list of free tools that can help you make contact with users.
We would need to look beyond the web analytics data to find this out, but what is very clear here is that web analytics has indicated a genuine problem: people are searching on a term and we don’t give them any information about it.

Search example B
‘Command line’
(from SQL Data Compare product page)
The exit rate for this search page is very low, at 7%, so it looks like visitors are finding useful results, rather than leaving the site at this page. 37% of views of this search page go on to look at a knowledge base article next: ‘SQL Data Compare command-line XML argument file examples’. This looks like a promising result, so it is likely that visitors are successfully finding the information they need. Once again, though, we’d need to look beyond the web analytics data to confirm that users are finding out all they need to know about the SQL Data Compare ‘command line’. For example, we’d compare this term with our data on support calls (assuming that if people don’t find what they need on our support site, they’ll call our support team instead). In this period there were three SQL Data Compare support calls in which users were asking something about the command line. This is a low number, which confirms that this search has been successful.

Identifying pages that no one reads
Pages such as help topics and knowledge base articles are designed to be read: the effort that technical communicators spend on carefully crafting topics only has value to the business if users read the topic. Web analytics data can give us an understanding of page usage, although this analysis requires a deeper understanding of the purpose of the content than in the previous examples. We’ll look at a particular type of help topic: ‘worked examples’ (as shown in Figure 3). We can begin our search for pages that no one reads by looking at the number of page views: if there are no views of a page, no one is reading it. As you can see from Table 2, there are no worked example topics with zero page views, which is good news.

If we were to find pages with zero views, we would use additional sources to determine why no one is viewing the page (perhaps users don’t need the information on this page or perhaps they need it but are having trouble finding the page).

However, the number of page views only tells us that the page is being viewed, not that it is being read (visitors might view the page and leave, without reading much of the content). Of course, we can’t use web analytics data to determine whether visitors are reading entire pages but, as worked example topics are designed to be followed in detail, we do expect visitors to stay on the page for a significant amount of time. A reasonable guess suggests that an average of less than 30 seconds spent on the page will be an indication that visitors are not using the page in the way we had hoped.

The data in Table 2 shows that the lowest average time spent on a worked example page was two minutes and three seconds. This is well over our 30-second minimum, which we can interpret as an indication that these pages are generally being read. If there had been a page with low average time spent on it, it could have been an indication that the topic isn’t needed or that the format of the page or the quality of the content were deterring visitors from reading the page. In both of these cases, web analytics wouldn’t be able to offer much insight: instead we’d have to look at other feedback from users, such as support data or usability tests.

This lack of qualitative insight is a weak point of web analytics data. This example reveals other limitations:

- This analysis shows us that the content we’re producing is being used. Without significant additional analysis it can’t tell us what content is missing.
- The data doesn’t tell us whether users were successful in finding the information they

Table 2. Usage of worked example topics (October – December 2008)

<table>
<thead>
<tr>
<th>Product</th>
<th>Worked example topic</th>
<th>Page views</th>
<th>Time on page (min:secs)</th>
</tr>
</thead>
<tbody>
<tr>
<td>ANTS Profiler</td>
<td>Performance profiling</td>
<td>608</td>
<td>03:01</td>
</tr>
<tr>
<td>ANTS Profiler</td>
<td>Memory profiling</td>
<td>452</td>
<td>06:04</td>
</tr>
<tr>
<td>SQL Data Compare</td>
<td>Synchronising databases</td>
<td>165</td>
<td>03:21</td>
</tr>
<tr>
<td>SQL Prompt</td>
<td>Examples</td>
<td>137</td>
<td>04:15</td>
</tr>
<tr>
<td>SQL Compare</td>
<td>General example</td>
<td>117</td>
<td>03:19</td>
</tr>
<tr>
<td>SQL Dependency Tracker</td>
<td>General example</td>
<td>87</td>
<td>05:34</td>
</tr>
<tr>
<td>SQL Doc</td>
<td>General example</td>
<td>75</td>
<td>04:17</td>
</tr>
<tr>
<td>SQL Compare</td>
<td>Scripts folder</td>
<td>45</td>
<td>04:45</td>
</tr>
<tr>
<td>SQL Packager</td>
<td>Packaging as .exe</td>
<td>35</td>
<td>02:09</td>
</tr>
<tr>
<td>SQL Multi Script</td>
<td>General example</td>
<td>33</td>
<td>03:24</td>
</tr>
<tr>
<td>SQL Packager</td>
<td>Packaging as C project</td>
<td>30</td>
<td>02:03</td>
</tr>
<tr>
<td>SQL Data Compare</td>
<td>Restoring from backup</td>
<td>16</td>
<td>03:25</td>
</tr>
</tbody>
</table>

Figure 3. Sample worked example page
needed on the page. To find that out, we could look at what page they viewed next, or — more commonly — we’d check with our support and sales team, to ensure that users aren’t having trouble learning to use these tools.

Planning documentation projects

Documentation projects are often under-resourced, and with little access to user feedback it can be difficult to identify priorities. Web analytics data can help here by identifying high- and low-use content, as well as giving insight into users’ issues.

Pages with zero views are the first target. If the reason the page is not viewed is that no one needs the information it contains, topics can probably be removed from future iterations of the documentation so that no effort has to go into maintaining content that is not used or needed.

There are no examples of pages with zero views in the data that I’ve included in this article, but Table 2 shows an example of a page with low page views compared to another page for the same product, SQL Data Compare:

- ‘Restoring from backup’ has 16 views
- ‘Synchronising databases’ has 165 views.

The page with 16 views is likely to be a lower priority for future work than the other (additional factors may also affect priority, of course).

In other analyses at Red Gate, we’ve also used web analytics data to understand whether there’s a need to continue to make the help for older versions of products available. On the Red Gate support site these pages are clearly marked, and it’s very likely that visitors arriving at them are doing so deliberately. The numbers of page views on these pages indicate the level of interest in these older software versions.

Search terms also offer interesting potential. These terms can give an insight into software usage: for example, in Table 1 we can see that ‘command line’ is a common search term for the SQL Data Compare product. This tells us that we have customers interested in using the command line for this product, so we need to ensure that attention is given to this area in the documentation.

Similarly, we sometimes see error strings occurring frequently as search terms. This indicates that users are coming across these errors, and that the error message within the software probably needs attention, as it has not been sufficient to help the user recover from the error.

Conclusion

Web analytics offers a unique insight into users’ actual behaviour — rather than their reported behaviour or a development team’s guess at their behaviour — and as such can be very valuable. The data is divorced from qualitative understanding of users’ experiences, though, and this means that web analytics is often better suited to identifying likely problem areas than to understanding the nature of the problems. Even in these circumstances, the data is still valuable for narrowing down areas that need attention or improvement.

The examples in this article demonstrate that web analytics can help to find useful information about a support site. The examples also show that arriving at conclusions is a complex process that often requires the addition of data from outside the web analytics. Some investigation targets, such as determining how useful a page is to its readers, may not be worth this effort, whereas others, such as identifying common search terms that don’t return useful results, are likely to be more fruitful.

Technical documentation is very different from the marketing pages with which web analytics is more traditionally used but, provided you have a good understanding of what you are measuring, web analytics can help you discover really valuable information about usage.

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- Embedded user assistance
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- DITA or other XML-based technologies
- Localisation for a range of languages and cultures

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Conversion rate experts. 14 free tools that reveal why people abandon your website. www.conversion-rate-experts.com/articles/understanding-your-visitors.


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Communicator Spring 2009
Wake up to terminology management

Sophie Hurst reports survey results underlining the importance of terminology management throughout global content creation processes.

SDL recently conducted two surveys to explore current trends and opinions on terminology management, both in organisations commissioning translations and in the translation and localisation industry. One survey was sent to translators to obtain their perspective of the use and management of terminology. The other was sent to organisations to look at the effects that terminology has on business issues such as branding and customer satisfaction. Organisations such as Citibank, Unilever, Disney, GE, Cisco, Philips, Panasonic, Siemens, British Airways and Verizon participated in the survey.

In this article we will look at the detail of the issues, trends, concerns and developments raised by both surveys, as well as the links that can be made between the two surveys and the two groups that responded to each. Initially, though, there are several key findings to state before elaborating on them further:

- Organisations consider terminology management to be key in maintaining a consistent brand.
- Many say they are managing their terms properly, yet inconsistencies in terminology are rife throughout the organisation.
- Business professionals and translators alike are less concerned with the cost benefits of terminology management than with quality and consistency, and their effects on external and customer perceptions.

Making the link between terminology and branding

In business today, organisations consider their brand to be one of their most significant and valuable assets. With 96% of respondents agreeing that brand consistency is important to their organisation, it seems they are fully aware that consistent branding is a key component in a successful business.

They are also sensitive to the impact that inconsistencies in terminology can have on the brand, as 72% believed inconsistent terminology to have a negative impact on branding and 75% said it would have a negative impact on communication within the organisation.

Product names are believed by 83% of respondents to be the most crucial terminology assets to manage and keep consistent, with 77% saying that corporate terminology is of similar importance. These are terms that form the backbone of the brand, give the organisation its identity and provide differentiation from its competitors.

Another interesting relationship between terminology and brand is that a slight majority of respondents (44%) believed marketing has the overall ownership of terminology within the organisation, followed closely by technical documentation (42%) and localisation (38%). The marketing department of any organisation is the brand champion and the driving force behind the majority of communications with the customer.

Considering such results, it is clear that organisations consider consistent terminology to be essential in maintaining a consistent brand, both internally between employees and externally in all communications to the customer or prospect. The key question to ask here is: what are organisations doing to manage terminology to maintain their brand consistency?

Managing terminology and eliminating inconsistencies

One of the major issues raised by the survey was that 49% of respondents said that they did have a process in place for managing terminology, yet a significant 85% revealed that they notice...
inconsistent uses of terminology within different departments of the organisation – 28% noticed inconsistencies frequently and 57% occasionally. The significant lack of correlation between these figures leads us to consider that these 49% are not managing their terminology effectively enough to avoid inconsistencies throughout the organisation.

The inevitable next question was: ‘what type of process do you have for managing your organisation’s terminology?’. The two most popular methods were ‘terminology lists in Microsoft Excel’ (33%) and ‘publish terminology in a style guide’ (36%). This may be where the problem resides.

Invariably, style guides are only accessed and used by a limited number of people and departments, such as the technical documentation or marketing department. However, terminology is typically used throughout the organisation. This is indicated by the fact that 61% of respondents said that lists of terms are shared across the organisation and that the majority of respondents (31%) revealed that more than 100 people in their organisation have access to their terminology. Furthermore, style guides are often only referred to when it is thought that a mistake is being made and they cannot effectively accommodate multilingual terminology, regular changes, updates or additions of terminology. Although style guides are effective for defining terminology, they do not fully ensure consistency across departments.

It is a similar case for lists of terminology in Microsoft Excel. Users of spreadsheets of terminology are not always sure they are accessing the most up-to-date version and, therefore, outdated terms are likely to be used.

Although both of these methods are definitely a starting point for gathering and defining key terms, they are not sophisticated enough to prevent inconsistencies occurring and to be accessible to all terminology stakeholders throughout the organisation. With 49% managing terminology ineffectively and 51% not managing it at all, it is no wonder that 85% of respondents are noticing inconsistencies in the use of terminology.
It will be interesting to see whether future surveys show a drop in levels of inconsistent terminology as organisations begin to address this need with more developed and sophisticated solutions for managing terminology. With 30% of respondents admitting that they would consider a terminology management solution or are planning to implement a solution, it appears that this may be the case.

Resolving quality and consistency issues in global content

The results from the survey to translators revealed similar issues to the survey sent to organisations: concerns about consistency, implications on quality and the need to manage terminology from content creation to translation. Most respondents (94%) admitted that terminology is very important as part of the translation process. Similarly, 95% said that they had noticed inconsistent uses of terminology in the source content that is to be translated. This supports the findings with organisations, of which 85% noticed inconsistent uses of terminology in different departments. There is clearly an issue with inconsistencies in terminology occurring at the source, which is confirmed in both surveys. The knock-on effect of this is being felt by translators as 76% believe it is ‘very important’ that a terminology management system can integrate into tools for creating content so that terms are used consistently in the source. Similarly, 77% believe it is ‘very important’ that a terminology management system is integrated into the translation environment. With this in mind, the need for end-to-end terminology management from the organisation to translator and back seems clear.

Most respondents (95%) also believe that inconsistencies in terminology have an impact on the quality of translation, whereas only 42% believe it has an impact on the cost of translating and 67% say it impacts their efficiency as translators. Similarly, most respondents to the organisation survey believed that the main impact of inconsistent terminology was on branding (72%) and communication within the organisation (75%) ahead of the cost of translating (65%). Again, an interesting comparison can be made between the two surveys here. Both translators and organisations are more concerned about the damage inconsistent terminology can do to customers’ perceptions of a brand, the service that an organisation offers and the quality of a translation, than about the cost implications.

The most common method of managing terms for translators was using terminology lists in Microsoft Excel (42%), which correlates with the answers to the same question for organisations, where 33% use lists in this way. Interestingly, yet not surprisingly, only 6% of translators access terminology in a style guide. This compounds the earlier comments that style guides are not the most effective method of managing multilingual terminology as it is clear that translators are not getting access to this popular method of storing terminology within organisations.

Translators agree that it is essential to manage terminology: 87% believe that their productivity would improve if a process for managing and storing terminology were implemented (41% estimate an improvement of 25–50% and 29% of more than that). The importance of productivity is confirmed, with 82% admitting that the most common difficulty they encounter with terminology is the time needed to research the terms. Also, 84% say that they are manually selecting terms from documents as opposed to using a tool to extract terminology, which further reduces their productivity.

Conclusions

The results of both surveys highlight clearly that both organisations and translators are aware of the importance of terminology, its link to the brand and its effect on the whole global content lifecycle, from creation to translation. They are more concerned that inconsistencies in terminology are damaging the external perception of their work and less concerned about the effect this will have on costs.

However, despite the awareness that exists around terminology and the need to store and manage it, it seems that most organisations and translators are not managing it effectively or even not managing it at all. By using style guides to store terminology, organisations are making a step forward and defining their terminology, but the next step is maintaining, sharing and applying this consistently across the organisation.

An important question for the future is: will organisations and translators invest in terminology management tools and processes to address the concerns and needs demonstrated in these surveys? If organisations want to maintain a consistent brand and translators want to improve productivity and quality then the clear answer is ‘yes’. Sophie Hurst is Director of Product Marketing at SDL, responsible for all its products for improving the end-to-end process of delivering global content. She speaks five languages, is a member of the Chartered Institute of Linguists and, from experience at various IT companies, has an excellent understanding of the cultural, linguistic and business challenges faced by organisations doing global business.

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Survey details
194 responses from localisation professionals
• 82% freelance translators
• 4% translators working for language service providers
• 5% in-house translators in translation departments of organisations
• 4% project managers
140 responses from organisations, from departments including:
• 25% marketing
• 20% technical documentation
• 18% localisation
• 19% other
and from sectors including:
• 25% information technology and software
• 15% manufacturing
• 12% localisation
• 8% life sciences

For more information, visit wwwSDL.com/terminologysurvey
Head of a board of directors or something to sit on?

Store and manage your terminology in one central location

Deliver the right word to the right author at the right time

Improve brand consistency and content quality

www.sdl.com/terminology
Interactive documentation at BigHand

Owen Flatau describes the process used to create the award-winning, interactive BigHand3 Technical Requirements document.

Introduction
The previous version of *BigHand3 Technical Requirements* was described as ‘the 40-page beast’, a term of endearment that did nothing to build the document’s reputation. Despite this, the sales team often used the document to address the concerns of prospect organisations, who wanted to know whether their systems were adequate to support BigHand Digital Dictation. The implementations teams also used the document when working with client representatives prior to installing the software.

BigHand3 is an enterprise-level system that has many optional modules, some of which can share computers with other applications and others that require special hardware or higher security considerations. These characteristics make a straightforward list of hardware requirements, such as those you might find on the box of a computer game, impractical and even misleading.

Over the course of a couple of software updates and corresponding document releases, the internal teams fed back that the technical requirements document was too long; that it was difficult to navigate, and that the format was not simple enough for our clients’ staff to decipher. The salespeople were very direct with their requirement: they wanted a ‘one-pager’, a document that summarised the information in a clear and concise way.

Planning and design
The audiences wanted different things from the document; one group wanted to maintain depth of information and improve navigability, the other wanted a summary that was easy to understand. These apparently conflicting requirements reminded me of another project from 2003, where I created an interactive scenario that displayed a hardware and software platform that changed over time and displayed different data at each chronological phase.

The only way I could think of to provide information depth while maintaining a single-page summary was to make the overview interactive, enabling users to drill down into a particular piece of the overview that interested them.

As BigHand’s software is modular, and each module has its own set of requirements, a software architecture diagram seemed to be the most concise way to display an overview of all the components. My idea was to build on this by making the visual representation interactive, so that the reader could get the requirements for a component just by clicking on it.

I proposed this idea to the product manager and the beta programme manager, explaining the concept by scribbling down some blocks and lines. They approved of the idea but my sketches were probably more enthusiastic than accurate, so they asked for a ‘proof of concept’.

Software architecture
The first step was to draw a quick architecture diagram using Visio. I chose the commonly used convention of rectangular blocks to represent discrete software components, and arranged these blocks into the traditional tier-based hierarchy¹. BigHand3 is a three-tier system with data access, business logic and client tiers. I represented these tiers in a similar way to that shown in Figure 1.

Component requirements
The next step was to put the data somewhere. I selected a familiar software component, copied the technical requirements for it (from the previous version of the document), then pasted the information into a text box in Visio. This text box went onto its own Visio layer.

When I repeated the process for another component, I recognised the manual effort that would be required for many components and future maintenance, but chose to push ahead with the sample and think about that problem later.

The important thing at that stage was that many of the components shared similar requirements, like server specification and operating system, which would play a part in data design later on.

My next step was to publish directly from

—

¹BigHand3 is a three-tier system with data access, business logic and client tiers. I represented these tiers in a similar way to that shown in Figure 1.
Visio to Acrobat, retaining the layers. Thanks to the project in 2003, I knew Acrobat could toggle the visibility of imported layers. In Acrobat, I used invisible rectangular buttons over the component blocks and used two visibility states to show or hide the imported layer (Figure 2).

Proof of concept and data refinement
I showed the resulting proof of concept to the two managers and there was thoughtful nodding of heads: a good sign. The beta product manager jokingly asked if we could ‘have another button to install the component’. (This has been filed away for future reference.)

This informal meeting provided me with the opportunity to check whether there was value in designing a ‘template dataset’ to cover the technical requirements of any of the components, thus making the final display more consistent and simple. Again, they agreed.

Implementation
My first hurdle in proper implementation of the document was the level of manual effort required for inputting the data in Visio. Each component had its own set of requirements, which I had previously had to manually copy, paste and format. This would be a significant drawback if I could not find a more automatic solution, in which I could keep all the data together, for editing and storage, and then ‘magically import’ it into the Visio diagram.

Data modellling
I did some research and discovered the idea of data graphics, whereby Visio shapes link with corresponding external data. I twiddled with this for the better part of a day, but the results were very much worth the time spent: I ended up with a master shape to drag onto the diagram (Figure 3) which, when dropped would prompt me to select a record from an external database and voilà! The shape automatically retrieved the text from the database.

I spent a little more time refining the data and the master shape, and then started the actual ‘writing’ of the document.

Data storage and review
After entering some of the legacy data into my new Access database and updating these technical requirements with the help of the subject matter experts, I realised it would be easier and much quicker to get the data reviewed before doing all the presentation work in Visio and Acrobat. I wanted to focus on getting the data right first, so I created a quick Access report to present all the technical requirements in a similar way as they would eventually appear on the data shape. I printed this to a PDF file so that the subject matter experts could review the requirements while I worked on the Visio part.

Interactive diagrams
While pushing the blocks around the page, I discovered that the final format had ‘more room’ available; the interactive diagram could display the relationships between the components as well as the technical requirements of each. This would mean making more buttons, and more ‘handcrafting’ work, but the value of a visual representation of the relationships seemed well worth the effort.

With this new goal in mind, I refined the architecture diagram so that the core of the...
system (the data) was represented as a foundation, with successive software tiers layered above, and the client access points right at the top.

BigHand3 has several client access methods (flexibility for the user is a key principle of its design), so a ‘visually sensible’ representation of the entire system was quite a challenge. I wanted readers to be able to choose a user access option, for example, the BlackBerry, and immediately see which software modules would be required to support this option. This would give the reader context for targeting the technical requirements for a relevant component.

I took the completed diagram to the managers, who nodded some more and even scribbled a bit. They were definitely interested.

Data layers and overlays
With the draft data, the data shape and an approved architecture diagram, I was ready to start adding the information elements. These elements, which initially would be invisible to the reader, fell into two categories:

- ‘Data layers’, one for each software component, which would contain an instance of the data shape populated with the technical requirements of the component
- ‘Overlays’, to visually highlight the relationships between components. Two ‘master overlays’ would identify all the components provided in our two most popular packages (the ‘BigHand3 Core’ and the ‘BigHand3 Mobility Suite’) to assist prospective buyers in decisions about hardware purchasing and platform licensing.

The Visio Drawing Explorer panel and a simple naming convention helped me keep track of the ballooning number of layers (Figure 4). Adding the data shapes was straightforward: drag, drop and select a record. I needed to take a little more care to align the shapes with each other and avoid hiding related components when the data shapes became visible.

The overlays were straightforward; I assigned copied subsets of the main architecture diagram to each overlay layer.

Finally, my diagram needed some controls and pointers to get the reader started. I chose to draw the controls and write the guidelines directly into Visio, to match the visual style and easily align the blocks, rather than using Acrobat’s form tools.

Publication to PDF
After editing in Visio, I tested the interactivity by toggling the layer visibility using the Drawing Explorer. I wanted to avoid finishing the document in Acrobat only to discover that one layer was missing a shape.

When I published the drawing to PDF, hiding most but retaining all layers, I was pleased that the layers came through perfectly; I immediately started toggling the visibility of layers to verify that all the data had come through faithfully.

Acrobat button controls
Using Acrobat’s Forms toolbar, I created an invisible button and lined it up over the first (top-most and left-most) software component. On the button’s property dialog, I added two ‘set layer visibility’ actions (Figure 4), one for each type of event.

- ‘on click’ event: when the user clicks the button
- ‘on-blur’ event: when the user clicks away from the button (the button loses focus)

Simply speaking, the button would show the information layer when the reader clicks it, and hide the layer when the reader clicks anything else. Later on, the product manager asked me to make this behaviour more obvious by putting a close button on each data shape. I copied the button and pasted it over all the other boxes before manually setting the layer visibility for each state and resizing the buttons as necessary.

I repeated this process for each of the overlays I wanted to show or hide, except that in these cases the button did not need to be invisible because I had drawn placeholder buttons into the diagram.

Review
When the reviewed data came in, I updated the information in the database, updated the existing data shapes in Visio, and then republished the diagram to Acrobat. The laborious Acrobat work was already in place, so I inserted the new page into the existing PDF file and moved the buttons onto the new page. The underlying diagram had not changed so the button sizes and shapes were right and, since the layer names had not changed, the layer visibility actions stayed accurate as well.

Traditional reading format
At this stage, I realised that some people would...
still want to read the technical requirements in a traditional linear fashion. I would need to provide for 'offline' reading (printouts) and for accessibility, which meant a non-interactive option.

By happy accident, I had fulfilled this requirement because of the need for a quick review: the Access database could easily generate a PDF report containing all the data, which is exactly what I wanted. I simply popped that report in after the first page (the interactive diagram).

Results
Refer to Figure 5 for this use case:

1. [Reader]: 'I want to record my voice with my telephone' (clicks 'Tel' button).
   [Document]: Displays the overlay, in white, showing related components.
2. [Reader]: 'I see that I need a telephone, a telephony server and the BigHand Server. I want to know more about the telephony server' (clicks Telephony Server).
   [Document]: Displays technical requirements and descriptive information.
3. [Reader]: (Reads or prints information).

Conclusion
When I published the document internally, the feedback was very positive. The salespeople now had an immediate method of finding the requirements that prospects asked about but, conversely, they expected that non-technical readers would have trouble with the complexity of the diagram. The UK Sales Director expressed interest in applying these methods to create other interactive information products.

On the strength of this positive feedback, I entered the document into the ISTC’s annual technical communication awards and was delighted to receive the award for the Descriptive class.

Based on my experience of this and similar projects, I believe interactive documents have advantages like maintaining readers’ interest and providing information in manageable, findable chunks, although the method I used does have some disadvantages. The final product takes some time to create and may be too manual and fiddly for some. There are also implications for translatability, where this type of information could benefit from a more structured and possibly automated creation process.

On the positive side, PDF files are portable and widely readable. The information itself is easier to find, through the 'reader interface', than it was in previous versions of the same document. Finally, creating the occasional interactive document using 'the tools at hand' is probably cheaper and quicker than trying to find or build a similar application that supports plain text/XML as a single source.

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Benchmarks for high performance

Ellis Pratt reports Cherryleaf’s findings from 21 hours of interviews with UK documentation managers.

At Cherryleaf, we have conducted a benchmarking survey on UK publications teams, from which we discovered there are some common factors shared by high-performing teams. The goal was to provide an accurate picture of the current state of technical publications teams in the UK. We looked at the techniques, tools and approaches used by publications teams—what they think of them, what works and what doesn’t. The findings are described in a 7,000-word report that provides detailed information from over 21 hours of interviews with documentation managers from all over the UK.

The survey covered the activities of about 5% of the technical authoring teams in the UK. It included resourcing, training and what teams were delivering (outputs), together with the processes and tools for creating the content. We were particularly interested in discovering the answers to questions such as:

- Is there likely to be a significant change in the number of authors in the team in 2009?
- Will the split between contract and permanent staff change in 2009?
- Is there a difference between teams that are single sourcing and those that are not?
- Is there any move to off-shore documentation?
- Are other departments encroaching on technical authors’ work?
- How is the team’s performance measured?
- Is there unanimity as to what makes a good document?
- How do authors develop and improve their skills?
- Is there a trend towards user-generated content?
- Is there a move towards DITA?
- Does the adoption of XML-based authoring lead to wider use of authoring tools outside the team?
- How important is documentation to organisations?
- Has there been adoption of Web 2.0 technologies?

The value of usability testing and measuring

We found the common factors shared by high-performing teams were:

1. Usability testing of documents
2. Measurement of document use through web analytics (see the article on pages 10-13).

Most teams didn’t measure their work to any great extent. For example, they found it hard to say how many users they have and how much content they produce. They struggled to measure how users regard the documentation they produce, but they were confident they were producing what users need. We believe this is why many find it difficult to justify the need for more budget.

The documentation teams that conducted usability testing or measured web statistics were able to provide more information on the value of the work they produce. Those that had measured the use of user assistance on the web reported at least 30% more users compared to those that did not have their documents on the web (or who did not measure usage).

Those that had analysed user behaviour through usability testing or customer site visits reported making significant changes to their documentation in light of their findings. This was also true for those analysing use of web-based content—they were rewriting the content so that it would appear higher up the search engine rankings.

They work in chaotic environments, often too busy to change the way they work

Many of the problems documentation managers had to deal with were caused by actions originating outside the team such as last-minute changes and unreported changes to systems. The larger organisations had more formalised processes, and teams working in an Agile environment had greater awareness of changes (although they often faced other, different, challenges).

Some recruitment, some freezes but no culls as yet

The documentation teams were typically under-resourced, with little scope for headcount reduction without it affecting what could be delivered. While some organisations had a headcount freeze, we saw little evidence of plans for reducing the size of documentation teams. However, we must recognise it could be that documentation managers have not been told of any planned redundancies.

Documentation teams are still islands in the organisation

Documentation teams generally continue to use authoring tools exclusive to the team, even those working in an XML authoring environment. There was little evidence of any moves toward a company-wide approach to sharing and managing intellectual content.

Those that were using authoring systems that allowed true single sourcing (for example, embedding chunks of text into multiple documents) saw opportunities for significant improvements in the performance of their teams. However, Arbortext users felt the system was good but that they had not yet realised the returns they had hoped for.

Summary

In some ways, our findings are common sense: you can’t manage what you can’t measure. However, many managers work in dynamic environments, where it is not easy to step back from the immediate demands of acquiring information, getting reviews returned and meeting shipping deadlines. Those who have managed to find the time are now developing interesting and potentially powerful solutions.
MadCap Blaze: should Adobe worry?

Geoff Hart reviews this tool for publishing long documents from a topic-based perspective.

MadCap’s Blaze software is a long-document solution designed to compete with FrameMaker and (to a lesser extent) with Word, which isn’t really optimal for long documents. In this review, I’ll give you a basic idea of how version 1.3 of Blaze differs from its competitors.

What’s different?
Most of the software we use for writing is based on individual documents: in the centre of the screen, there’s a document window, surrounded by a menu bar at the top and various floating toolbars or palettes. But it’s the document that is at the centre of this model. If you’ve written online help or created a web page, you’ve seen a different metaphor: the focus is on an ‘organizer’ that displays the collection of information you’ll be working with, a central area that displays a subset of that information while you work with it, and miscellaneous floating toolbars and palettes. But it’s the organizer and the collection of information it represents that lie at the heart of this interface. Blaze refers to this collection as a ‘project’.

Although Blaze is designed for the production of long publications, rather than online help or web pages, it relies on the latter interface. The Blaze workspace comprises the following main elements:

- At the left, you’ll see Project Organizer and Content Explorer windows that (respectively) show the project’s contents (all resources associated with the project) and a subset of those resources, such as the list of topics or graphics.
- At the centre, you’ll see the information you’ve chosen to work on, such as a single topic selected from the Content Explorer.
- Floating but dockable palettes for applying styles, adding index entries and so on, as well as support tools such as the menu bar and help window. All windows and palettes can be repositioned and resized, and you can save collections of window and palette layouts for future reuse.

All Blaze’s functionality takes up considerable space. You’ll be more comfortable with a large widescreen display than a square monitor; even my 21-inch square-screen CRT wasn’t large enough to display everything at an adequate size and my 21-inch widescreen LCD, though adequate, was more cramped than I would have liked.
Blaze’s approach resembles managing a small website or a collection of Help topics rather than working with a collection of documents or the ‘stories’ used by desktop publishing software such as InDesign. The difference is subtle, but understanding it is crucial to understanding how Blaze is different. Blaze is topic-based, which means that you build projects from discrete chunks of information that can be mixed and matched and assembled into larger publications. Dividing a large book created in Word or FrameMaker into individual chapters, with one file per chapter, is a step in this direction, but Blaze encourages and supports a far more granular approach. (Here, ‘granular’ means the ability to break things into grains of varying sizes.)

The advantage of this approach is that it lets you create collections of information ranging in size from the largest elements (individual topics) to elements as tiny as one or two sentences (such as a standard warning message) or phrases (such as your organisation’s name). In some ways, the approach is like playing with a large box of Lego, except that the building blocks in Blaze are defined once and then reused. In fact, Blaze is designed from the ground up to let you easily reuse information: instead of creating a unique copy of each piece of information for each publication that contains it, you create that information only once and then include it ‘by reference’; only a single original copy of the information ever exists, and updating that version automatically updates all publications that contain it.

For example, a standard organisation-wide ‘how do I reach technical support?’ page could be a mid-sized element of your project, whereas your organisation name itself could be a smallish element. Should your organisation be acquired by a larger one, your technical support page and organisation name would both change, but you would only need to update the original information for all parts of your projects and all projects to be automatically updated to use the new information.

You can fake this with other software, particularly if it offers a ‘library’ feature, but Blaze fully embraces this principle of reuse. In effect, it’s a form of single-sourcing, though you can’t create online Help with Blaze. (You can, however, open a Blaze project in Flare and create Help files that way.)

Blaze provides familiar tools for defining standard page layouts with recurring features such as running headers and page numbers that you can apply to each topic in a project. You define each page’s structure using ‘frames’, which are containers that hold subsets of the page’s contents. Typical frames include the running headers and footers that appear on every page, the body text frame that holds the majority of a page’s contents, and sidewbars. You can also use ‘text boxes’ similar to those provided by Word for exceptional information that doesn’t fit within the standard layout’s frames. There are many nice page design features, such as the ability to automatically align a page’s components and the ability to mirror pages to instantly create matching facing pages. Page layouts stored in a project’s Resources section are available for use in any topic in the project.

Blaze provides style sheets that store the formats for entire paragraphs (paragraph styles) or subsets of paragraphs (character styles), and you can define multiple style sheets per project. For example, you could create separate style sheets for the e-Book and print versions of a project. All the standard text-formatting options (typeface and size, indentations and spacing, bullets and numbering) are available. Blaze isn’t yet in the league of InDesign, but you can certainly set credible-looking and highly legible type once you learn where all the settings are hidden, and can change your typography quickly just by changing the style sheet.

writing, revising and publishing

Blaze provides a basic but effective text editor. It isn’t nearly as powerful as Word, but it gets the job done. The table editor is good, with nice features such as the ability to define a collection of styles for an entire table. Blaze’s ‘snippets’, predefined text shortcuts, are more powerful than Word’s autotext and similar to Dreamweaver’s library items: if you create standard snippets such as a copyright statement or a standard warning message, editing the original snippet automatically updates all copies of that snippet in a project. There are powerful features for creating numbered lists and nested lists that update correctly when you add new information in mid-list—unlike those in Word.

If you don’t like the text editor, you can do most of your writing and revision in your favourite word processor or in FrameMaker. If you save these files in Word’s .doc or .xml formats, or create FrameMaker files, Blaze can import these files for subsequent management and publishing, and can use the updated versions of these files if you continue to modify them outside Blaze. MadCap’s X-Edit family of products provides powerful reviewing tools that resemble Word’s revision tracking and commenting features. The basic X-Edit Reviewer software is free for downloading, and you can purchase more powerful versions that offer additional features. The basic approach is similar to Adobe’s InCopy plus InCopy combination, but less expensive.

Building publications

Blaze lets you create multiple publications, such as student and trainer versions of a training guide, from a single project. To do so, you create outlines, which are like shopping lists that define what elements should appear in each publication and their order. You can also create conditional tags, such as ‘student’ and ‘teacher’, that specify which elements should only appear in certain publications. Blaze also provides ‘templates’ that define broad collections of project settings that go far beyond simple gatherings of page layouts and text styles.
Blaze’s underlying document structure is XML, a tagging language similar to the HTML used to create web pages. Although the XML editor used for writing and revising content shows you the XML tags for each chunk of text, they’re off to the sides, for reference only, and you work in ‘what you see is what you get’ mode, so you can ignore the tags until you need them. (XML geeks will be pleased to learn that Blaze provides basic support for DITA, and MadCap is improving this support.) XML lends itself naturally to Blaze’s granular, topic-based approach, because XML defines a topic’s elements based on function (such as ‘title’), not format.

Graphics handling is simple and flexible, and you can collect all your graphics in the project’s Resources folder rather than inserting multiple copies in multiple files. Each image is then available for use anywhere, and when you update it, all topics that contain the graphic will be updated automatically to use the new version.

Blaze can automatically generate tables of contents (TOCs) for headings (both for a topic and for the overall publication), figures (graphics) and tables, as well as indexes and several cross-reference formats. The tools vary in their sophistication and maturity, but are all generally capable, if not as refined as their equivalents in Word and InDesign. Unfortunately, Blaze lacks scripting tools or macros; you’ll need a third-party tool such as MacroExpress to automate repetitive actions.

Once you’ve gathered all your information, you can define ‘targets’ that combine the subset of the project you want to publish with your choice of style sheet and output format (PDF, Microsoft’s XPS, XHTML, Word or FrameMaker). The final step is to ‘build’ each target, which is Blaze jargon for compiling the target’s contents into the final product. Once you finish building a target, you can issue a simple command to publish the project and send the output files to a network directory or a destination such as a website. The original source files used to create that output remain safely in Blaze: the published output contains only what is necessary for the audience to use the file on their computers.

Miscellaneous points
Blaze makes good use of embedded (‘dynamic’) help that changes to reflect your actions and provide orientation (what does this dialog do?) or details when you select an option (what does it do?). If you find that this gets in your way, you can use conventional context-sensitive help instead. There’s no printed documentation, but comprehensive, well-written PDF files are available, including a ‘Getting Started’ manual that was sufficiently detailed that I could learn the software well enough to create a newsletter while I was writing this review. There’s no formal tutorial to walk you through the process of publishing a collection of sample files, so if you don’t like learning software on your own, you may need to obtain basic training from MadCap.

Should Adobe worry?
Blaze is a sophisticated, complex, powerful program that will take time to master. The payoff for that effort will be an ability to create a large family of related documents of varying length and complexity from a single collection of information, which is something you’d be hard-pressed to achieve with document- or story-based software. Moreover, it makes the task of updating members of that family easier than in other programs because modifying the original elements will ensure that all instances of those elements will be updated throughout the family.

Blaze has rough edges and it isn’t as intuitive as Word or InDesign. But even in its current state of development, it’s an excellent solution that will only improve as it matures. I wouldn’t sell my Adobe stock just yet, but were I Adobe, I’d be watching over my shoulder from now on.

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Communicator Spring 2009
Creating web demos

JLuz Latham offers her thoughts on effective processes when planning web demonstrations using media creating software tools.

A post on the ISTC Discussion Group asking for information on web demos prompted me to write about my experience. I first created web demos during a work placement at IBM as part of the project for my MA in Technical Communication at the University of Portsmouth. I now work at BigHand and create web demos for marketing its products.

Choosing the tools
The tools I have used are:
- Qarbon’s ViewletBuilder
  This captures raw images of your computer screen which you then combine to form your movie file.
- TechSmith’s Camtasia
  This records your screen actions in the same way as a video camera.

Capturing individual screens can be tedious but editing videos can be difficult, so it’s a matter of choosing the tool that’s most appropriate to your requirement. ViewletBuilder’s images and Camtasia’s movie files are compiled with callouts, notes, interactivity, voice narration and recorder controls to produce movie files in a variety of output formats such as Flash (.swf files).

Setting the scope
The purpose of the IBM project was to provide detailed training for internal technical personnel and customers. The demos are available to the public.

BigHand’s demos are marketing-focused, enabling potential customers to view the products’ capabilities. The demos are published and distributed on CDs, shown in person or made available on BigHand’s public website.

Creating scripts
A script comprises a brief description of the screen capture, the text for each callout or note, and the narration. I created the IBM demos in collaboration with IBM marketing staff, who specified the content and provided the narration. During one of the recording sessions, I identified the need to write a script to ensure consistency and continuity across the series of demos.

Large file sizes and unstable editing environments have often caused me to lose work. Having a script readily available makes it easy to recreate a demo. While working at BigHand, I have developed the habit of starting every demo project with a script.

Creating prototypes
Both organisations have house styles that reflect their brands. I have found that I also refer to previous demo examples or prototypes. While creating a prototype, you will constantly be reviewing and editing the movie file until you are satisfied that the result matches the house style. There are practical issues to consider:
- Decide in advance whether you require voice narration. Adding it significantly increases file size, so it needs to add value for your users.
- Set a time limit. BigHand demos are about two minutes long to keep the subject matter concise and interesting for the audience.
- Determine delivery and file size. BigHand demos are easily portable through e-mail and the web. The larger IBM files are still deliverable over the Internet despite file sizes of up to 10MB (partly because of the narration). Larger files are zipped and made available for download.

Using guidelines
Both organisations already had guidelines specific to the tools. At BigHand, I expanded these to improve consistency and reflect my experience. The guidelines cover:
- Contents of scripts, including text for callouts and narration
- Editing tips, such as setting the duration for each screen capture or video recording, matching narration to the displayed view and giving the audience enough time to read callouts (which ViewletBuilder can automatically calculate)
- Details of callouts, such as shape, shading and background colour, and typeface size and colour
- Step-by-step instructions for compiling and publishing the demos, including compression type, frame rate and output file format
- Instructions for preparing the environment for recording, such as how to set up the desktop and browser to minimise clutter and avoid confidential details appearing on the screen during recording
- Guidelines for the review process.

Conclusion
Producing web demos has been a rewarding experience, particularly when I see them regularly used by staff. As for other authoring work, following styles and guidelines is essential in producing consistent work.
The ‘quality’ in quality documentation

Stephen Crabbe provides an outline survey of the characteristics of quality product documentation from technical communication literature.

Introduction
There is a growing body of research and publications on the characteristics of quality product documentation. This suggests increasing academic recognition of what is common knowledge among practising technical communicators; that is, that product documentation quality can be one determinant of user perception of product quality. To quote from Smart, Whiting & DeTienne, ‘the positive financial impact of documentation on a product’s value, usefulness, and sales suggests that adequate resources must be devoted to creating quality documents’ (2001: 309).

Technical communication is generally a busy, deadline-driven occupation so practitioners often do not have as much time as they might need to keep up to date with the burgeoning literature in their field. This article thus provides an outline survey of the key characteristics of quality product documentation from a broad selection of technical communication literature.

Selection of the literature
I have drawn on expert knowledge from North America, from widely respected authors or groups of authors such as Burnett, Eisenberg, Hargis et al and Schriver. These publications are complemented by a key European publication from the Council of the European Union, a publication from TCeurope — the European umbrella organisation for technical communication — and recent research by a UK-based expert, Byrne. The characteristics are grouped under the four headings 'appearance', 'language', 'structure' and 'content' suggested by Byrne (2006: 69). The references on page 31 will enable you to investigate any of the characteristics in greater depth, if you so wish.

What I mean by 'product documentation'
The term 'product documentation' is used in the technical communication field to refer to many different documentation types. For the purposes of this article, it is primarily referring to printed operating instructions for technical consumer products. However, you may find that many, if not most, of the characteristics will be applicable to other documentation types.

Appearance
The different appearance-related elements of product documentation not only affect the ease with which users can find and understand information on how to use a product, but also whether or not they even read the product documentation. There seems to be general agreement on all of the key appearance-related characteristics of quality product documentation except font type.

Many experts agree that a minimum of a ten-point font size be used for the body text (Robinson & Etter 2000: 150; Hargis et al 2004: 311). The potential correlation between the size of the printed page and the best font size for the body text is not, however, mentioned in the literature that was surveyed.

There is a difference of opinion concerning font type. The UK-based expert Byrne argues for the use of serif fonts for the body text (2006: 73) while the North American-based expert Hodgson recommends san-serif fonts (2007). The serif/san-serif dichotomy is complicated by the fact that studies investigating the legibility of serif and san-serif fonts, such as by Zachrisson (1965) and Moriarity & Scheiner (1984), have suggested that there is no significant difference between them.

Most product documentation for technical consumer products includes a variety of font sizes and types. The literature indicates that different font sizes and types are to be used for specific purposes — such as information differentiation and organisation — rather than simply for visual effect. The importance of this is emphasised by Burnett who makes clear that the choice of fonts can affect the ability of readers to search for, find and use information (2005: 395–396).

The literature further reveals that people generally find it easier to read left-justified text than fully justified text (Rubens 2001: 357; Burnett 2005: 386). Certainly, a large percentage of the product documentation for technical consumer products uses left justification. Similarly, line length affects readability. There is broad agreement in the literature that an average line length of between 40 and 70 characters maximises readability (Haydon 1995: 38; Schriver 1996: 263). White space is additionally identified by Weiss as positively affecting readability and as a major contributing factor in reducing text fatigue (1991: 154).

Product documentation for technical consumer products continues to be widely printed in black on white paper and includes, at most, one or two colours other than black. It is recommended in the literature that additional colours are used to convey specific messages to users and not simply to provide visual decoration (TCeurope 2004: 33; Burnett 2005: 447).

It is unusual these days to come across product documentation for technical consumer products that is predominantly, or solely, text-based. It is pointed out that visuals improve documentation...
usability on two levels. Firstly, the information is read more thoroughly than solely text-based information (Haydon 1995: 107). Secondly, it is understood quicker and retained better (Eisenberg 1992: 81; Burnett 2005: 386). The Council of the European Union recommends that visuals accurately resemble what users see and that they show only the necessary information (1998: 4). They further suggest that quality product documentation ‘does not confine itself to pictures with no text since that does not ensure clarity as pictures alone may not always be sufficiently self-explanatory’ (1998: 4). There does, however, seem to be a recent trend towards wordless product setup guides that use only simple visuals such as Hewlett-Packard setup posters and Xerox install sheets.

The review of the literature thus far indicates that quality product documentation brings together the different appearance-related characteristics in a way that supports the quick and easy understanding of increasingly technically complex products.

Language

The language in product documentation is a means to an end; that is, it enables users to learn how to operate the product. The literature points out that there should be no inconsistencies or errors in the grammar and the spelling (Council of the European Union 1998: 1; Hargis et al 2004: 182). These can confuse users and may negatively affect their attitude towards both the product documentation and the product manufacturer.

The literature also recommends the use of the active voice particularly for task-oriented information (Rubens 2001: 81; Lannon 2006: 547). This personalises the experience for users, which can increase their ability to relate to the information being described. Burnett further indicates that it may make the information more interesting to read (2005: 247). The imperative mood is also recommended (Eisenberg 1992: 182). This mood is mostly used for commands, and so can be particularly effective for increasing the usability of the step-by-step instructions in product documentation.

Byrne also identifies a conversational writing style as increasing the accessibility of the language (2006: 89). An overly informal style of writing that includes colloquialisms may not, however, be fully understandable by all users. The language needs to be sufficiently clear to be understood the first time it is read.

Some literature indicates that technical or specialised terms are only to be used when they are absolutely necessary (Council of the European Union 1998: 4; Hargis et al 2004: 141). Furthermore, they are to be used consistently and definitions of their meanings are to be provided (Eisenberg 1992: 179; Hargis et al 2004: 142; TCEurope 2004: 33).

The choice of voice, the style of writing and the use of technical terms and abbreviations can all affect the readability of the language. However, readability can also be affected by the length of sentences and words. There is a vast array of tests available for checking readability by calculating the average length of the words and the sentences that are used. I am familiar with the Fry Readability Formula, the Flesch-Kincaid Grade Level and the Gunning Fog Index and find all three straightforward to calculate. Some experts question the accuracy of readability tests based on the argument that short words and sentences are not necessarily always easier to understand than long ones (Weiss 1991: 150; Burnett 2005: 122). However readability tests, despite their potential limitations, can be a useful tool in the technical communicator’s arsenal for providing an indication of readability. The importance of readability is emphasised by Weiss who observes that ‘even when a book is suitable and accessible its ultimate quality lies in its readability’ (1991: 19).

Structure

I identified a small number of key structure-related quality characteristics in the surveyed literature. The first is a task-oriented structure (Council of the European Union 1998: 3; Hargis et al 2004: 3). This means organising product documentation into task-based sections with each section containing step-by-step instructions for completing a task. Hargis et al suggest that these sections are, in best practice, arranged in logical sequence according to the order that users would generally be expected to perform the tasks and thus need the information (2004: 222–224).

However, the information in product documentation for technical consumer products is rarely, if ever, exclusively task-based. It generally includes other kinds of information such as warnings and safety information, a troubleshooting guide and specifications. Robinson & Etter thus suggest structuring the information content from general-to-specific (2000: 49). This might mean having the warnings and safety information at the start of the product documentation, information about how to use all the features and functions of the product in the middle and other kinds of specific information such as a troubleshooting guide and specifications at the end. Organisations that are able to develop and maintain this kind of relatively consistent structure across all their product documentation are able to increase the usability of the documentation.

Hargis et al further point out that quick and easy information retrievability is enhanced by choosing headings that clearly identify the tasks being described (2004: 31). Headings in quality product documentation move from general to specific; they are consequently mirroring the structure of the information content.

Byrne emphasises that the structure is ‘fundamental to the success of the user guide and the way in which readers can use it.’ (2006: 91). The four structure-related characteristics
highlighted by the literature can help ensure that users have easy access to the information they need to operate a product.

Content
The content of all product documentation is determined, in large part, by its audience. Byrne reminds us that users may often have no previous knowledge of how to use the product (2006: 52). Quality product documentation should thus aim to be sufficiently comprehensive to enable all the users to use all the functions of the product, if they so wish. I believe that this is particularly important in product documentation for technical consumer products as new technology is continually being introduced.

Technical consumer products often come with a quick-start guide or a setup guide. This generally includes basic information on setting up the product and using its main functions. Eisenberg points out that this kind of documentation may, however, provide too little, or no, background detail, resulting in tasks being too difficult for new users (Eisenberg 1992: 176). The Council of the European Union recommend that both a quick-start guide and full product documentation be provided (1998: 3). They also list a variety of other content-related characteristics of quality product documentation such as:

- A list of the product versions covered
- A table of contents
- An overview of the tasks that can be performed with the product
- Clearly visible cautions, warnings and safety instructions at the start of the product documentation
- A troubleshooting section that describes common operation problems, their causes and solutions
- Customer service contact information
- Disposal/recycling information
- Technical specifications

I strongly believe that comprehensive cautions, warnings and safety instructions are essential in product documentation for technical consumer products such as digital cameras, video cameras and MP3 players as they are widely used in combination with computers and televisions with the resultant potential for increased user risk. The Council of the European Union states that ‘inadequate operating instructions may be a factor taken into account together with all other pertinent circumstances in considering whether goods are defective’ (1998: 1). Courts in the USA have gone even further by ruling that product documentation defects have the same liability as product defects in user injury cases (Lannon 2006: 535).

All the content-related characteristics of quality product documentation highlighted in the literature combine to ensure that all users have access to all the information they need to use a product fully and safely.

Summing up
The Council of the European Union states that ‘operating instructions for technical consumer goods are often perceived by consumers as inadequate, both because they are unclear and present language difficulties ... and because they lack structure and have inadequate content’ (1998: 1). The inclusion of the key characteristics outlined in this article may be a first step towards overcoming these perceptions of inadequacy.

The value of quality product documentation
The potential benefits of developing quality product documentation are clear from the literature. The first is a potential reduction in customer support costs (TCeurope 2004: 7). Help desks and customer service centres are often a primary source of contact and support for users who do not understand the product documentation. The costs associated with

References


providing these services may be reduced by providing quality product documentation.

The second is the potential for reduced product returns. Users return a product for many reasons, one of which is frustration at not being able to use it quickly enough due to poor quality product documentation. Quality product documentation can improve users’ experiences by enabling them to learn how to use the features and functions of products faster and with less effort.

Thirdly, TCEurope draws attention to the fact that users often associate poor quality documentation with poor quality products (2004: 7). The converse of this is that providing quality documentation may contribute to improved product sales (Weiss 1991: 53; Byrne 2006: 57). Furthermore, users who have a positive experience with an organisation’s product documentation are more likely to purchase other products by the same organisation (TCEurope 2004: 7).

Final words
This article has outlined a survey of the key characteristics of quality product documentation from literature from both Europe and North America. My hope is that it, firstly, confirms the quality of your organisation’s product documentation and, secondly, illustrates the common ground between the literature being published on product documentation and the product documentation being developed by practising technical communicators.

Stephen Crabbe has worked as a technical translator and author for technical product manufacturers including Panasonic. He was recently awarded an MA (Distinction) in Technical Communication from the University of Portsmouth and is currently researching his PhD on the extent to which a controlled language can improve the usability of international English language product documentation. E: stephen.crabbe@port.ac.uk
Turning photographs into illustrations

Bert Witsmeer describes how to use the phototrace technique to create illustrations in Arbortext IsoDraw/CADprocess.

As a technical illustrator at the world’s leading manufacturer of aircraft cabin interior products, I’ve spent years creating technical illustrations for a host of complex products. And, while there have been advances in illustration applications, the process remains time-consuming and painstaking. In this article, I describe one time-saving technique that I often use when illustrating disassembly and assembly procedures: phototracing.

I usually use phototracing when we need a special illustrated view that is hard—or even impossible—to create using 3D design software. Common examples are adding human hands to show actions and creating simple views of complex equipment. In the latter case, it is easier to trace the important lines than to clean up a vector graphic.

Step 1. Taking the photographs
Most digital cameras and some mobile phones can take photographs that are good enough to form the basis of technical illustrations. For the examples in this article, I took several photographs of my left and right hand. I made these as sharp as possible.

When I began to use phototracing more often, I photographed my hands in various positions. Later, I took more photographs of my hands but this time holding tools, such as a hammer, screwdriver, pair of scissors or utility knife. I have filed these in a library so that they are easy to use in future.

When photographing an object, it is essential to make sure that there is enough light. Be careful with shiny objects, such as metal or glass parts, which may reflect the light from a flash, if used. I always take several photographs, some with flash and some without. Afterwards, I select the best one to use.

Although I can manipulate photographs with features such as sharpening, I prefer to use images that are sharp enough in their original form.

Step 2. Positioning the photographs
After starting Arbortext IsoDraw/CADprocess, I open the JPEG files containing the images of my hands. I align the photographs of each hand so that they appear to be resting on a drawing sheet.

After placing the photographs, I select them both and use the Layer option to define them as a Background layer. This enables me to switch off the layer during the tracing stage to examine the first results. I then switch on the layer again to proceed.

When I am satisfied with the position of the photographs, I use the Lock option. This prevents them from being accidentally moved or deleted while I am tracing them. Now I am ready to trace.

Step 3. Tracing the hands
I use the Bézier curve option, which allows me to draw smooth, light, curved lines. By zooming in on one of the photographs, I can trace the outlines of the hands (Figure 1). Initially, I found the option difficult to use but soon I was soon able to work faster. The hand that holds the mouse needs the most accuracy, requiring hand-to-eye coordination, but it gets easier with practice.

When tracing the outlines, I can trace longer sections to work more quickly or shorter sections to achieve a more precise result. As I finish tracing each hand, I check the result by switching off the Background layer to hide the photograph (Figure 2).

What I like most about the Bézier curve feature is that the traced lines are easy to manipulate. Depending of the lengths and the total numbers of curves, I can use the handles or points to make corrections. With the handles, I can gently drag segments to change the curve that they form. Using the points inside the Bézier curve, I can also drag the curve wherever I want. So, after tracing, I can do a lot of fine tuning to optimise the results.

After tracing both hands, I can select which lines need to be thick or thin. In this case, I have decided to draw the outlines thick and the other lines, such as the wrinkles in my skin, thinner.

You can observe how the thick-and-thin line technique works in any two-dimensional drawing
created from a 3D design model. Outlines are usually thick, with other lines mostly thin or medium, but the choice of line thickness rests with the illustrator, who decides which thickness creates the most realistic impression.

**Step 4. Putting parts into the hands**

I drew the parts shown in Figure 3 using AutoDesk Inventor and then exported them to the IGES format. After importing them into Arbortext IsoDraw/CADprocess, I rotated them to suit the positions of the hands shown in Figure 4. I placed a tool in my left hand and the mating part in my right hand. I then zoomed in on the thumbs and fingers to remove unnecessary lines to make it look like each hand is holding a specific part. Figure 5 shows another example, this time with a tool as part of the original photograph.

**Technical publications at B/E Aerospace**

B/E Aerospace, Inc. is the world’s leading manufacturer of cabin interior products for commercial passenger aircraft and business jets. The B/E Aerospace facility in Nieuwegein, Netherlands, produces a range of food and beverage preparation equipment, which includes several oven types, coffee makers and water heaters.

Such equipment requires the support of component maintenance manuals (CMM). These contain the information that a service person needs to understand how to overhaul, service or repair the equipment. We compile them in accordance with the ATA iSpec2200 regulation, with the text written in Simplified English.

An important chapter of the CMM is the illustrated parts list. This contains illustrations of all the assemblies, each with a complete parts list. Historically, the Technical Publication Department used AutoCAD and BetterWMF to create them. Although the results were functional, they were very basic and had to be drawn from scratch. This process was time-consuming and labour-intensive.

Autodesk Inventor was later introduced, enabling many assemblies and parts to be exported to an AutoCAD format. Although this combination of tools reduced effort and increased quality, we still needed to save more time. We searched for a solution that would interact more closely with 3D design software and need fewer time-consuming steps to create and complete good-quality illustrations. Ultimately, we found Arbortext IsoDraw CADprocess.

The department’s authors and illustrators were soon able to realise major benefits. The creation of illustrations was faster and easier, and there was an exceptional improvement in quality. Arbortext IsoDraw CADprocess was the perfect solution to enable reuse of Autodesk Inventor files for the creation of important technical illustrations. There is inevitably an initial learning curve but we were producing good work within a couple of months.
Step 5. Filling in parts
To make a drawing look more realistic, I often use the Fill option. In this case, I filled the parts in grey. To do this, I copied the curves of my thumb and index finger, and the tool, as one object. I then removed any unnecessary lines to leave only outlines. It is these outlines that need to be filled; this is a precision job, which looks easy but requires care.

When filling a shape, I copy it so that I can work on the fill without affecting the original outline. I then check the copy for any double or missing lines. If any are left, the fill operation can have unpredictable results.

Once I am satisfied that the outline is complete and correct, I use the Join Bézier option. If that succeeds, it creates a single shape from the lines. I then use the Layer option to set this as a No Pen layer. When the illustration is later previewed, only the filled object is shown without the outlines.

When the shape is complete and correct, I fill this with a grey colour. I then drag this to the outline of the tool, held in the left hand. It automatically snaps into the position from which it was copied. I then position the filled shape in the correct position relative to the background.

I repeat the process for the part shown in my right hand.

Summary
Phototracing enables me to create effective illustrations quickly. The technique is useful for creating simple views of complex equipment (Figure 6) as well as for adding human hands to show actions as I have described.

Bert Witsmeer is an illustrator in the Technical Publication Department of B/E Aerospace in Nieuwegein in the Netherlands. He has extensive experience with AutoCAD, AutoDesk Inventor and Arbortext IsoDraw CADprocess. E: bert_witsmeer@beaerospace.com

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Communicator Spring 2009
Collecting the information needed for successful migration of an IT infrastructure and its applications, by Warren Singer.

Data centre migrations are part of the normal life cycle of a typical enterprise. As organisations expand, many reach a point where maintaining multiple, distributed data centres becomes increasingly complex and expensive to support. Integration of systems, applications and infrastructure, together with consolidation of staff and support services becomes a key driver for improving efficiency, and reducing complexity and costs.

The chances are that you will encounter an enterprise undergoing this process at some stage in your career as a technical communicator. I was recently involved in a complex migration project that required the consolidation of 18 data centres, located throughout Europe, into a single, centralised data centre. This article describes some of the strategies and methods we used for collecting and managing the information required to ensure a successful migration.

Migrations are highly complex and what is described in this article is only intended to provide an introduction to this topic.

**Adopting a structured approach to data collection**

Reliable information about the current data centre infrastructure is key to facilitating a smooth migration and avoiding downtime to critical systems. It is often the role of technical communicators to collect this information, which is then used by technical architects and project managers to plan the migration and set up the new infrastructure.

For the technical communicators involved, knowing where to start and how to manage the information-gathering process can be a challenge. A structured approach to your project can help ensure its success. The steps described in this article provide a methodological approach to this task.

**Set clear project expectations**

Set clear expectations about your role at the start of the project. (This is essential, as you may be working with colleagues who have overlapping responsibilities.) One way to do this is by producing a project brief, which is a short document that outlines your role, the scope of the deliverables, and time scales for completion. Have this approved before commencing any work.

- What data you will be collecting
- How you will collect the data
- When you will need to do this by

There may be dependencies, for example, the availability of subject matter experts who can provide you with the information you need, or work that needs to be done by third parties before you can commence. Your project plan should make provision for any foreseeable dependencies.

Your plans should also provide sufficient flexibility to accommodate changes to requirements, processes and tools during the course of the project.

**Clarify what data you need to collect**

Ensure that key stakeholders are engaged and given an opportunity to provide their feedback as to what information they want collected. Key stakeholders should represent IT infrastructure, IT security, business continuity planning, application architecture, service management and any other areas of the organisation that are either impacted by the migration or involved in migration planning.

**Note:** Failure to engage at the planning stage with relevant stakeholders could result in your team having to repeat the data gathering exercise at a later stage, as you did not capture all the information required. This could add significantly to project costs and cause delays to migration.

It is sometimes tricky to determine the level...
of detail you need when collecting information. Asking for too much detail could significantly slow down migration planning. Ask for too little detail and you may not have enough information to plan the migration. The panels to the left and right show the types of information that you may need to collect. The precise details will depend on the organisation and the nature of the project.

**Adopting a staged approach**

When a large amount of information needs to be collected, it makes sense to divide the process into stages. For example:

- **Stage 1**: Collect high-level information on current infrastructure and applications. For example, what’s out there? What does it run on? How important is it to the organisation? Does it need to be migrated?
- **Stage 2**: Collect detailed information on relevant applications and servers that need to be migrated. This flexible approach was one we adopted on our project. It enabled a quick initial information gathering exercise to be completed, which then led to a detailed discovery. This also ensured that subject matter experts were not overwhelmed with requests for information at a single point in time, minimising the impact on the organisation’s regular activities.

**Define the methods and tools to be used to collect data**

The methods and tools used for collecting information depend on the nature of both the data and the organisation. You can use a combination of the examples shown in Table 1.

**Define how information will be stored, maintained and presented**

It is essential that the information you collect is stored in a format that can easily be updated and retrieved by relevant areas of the organisation. If this information can be entered into a database, this makes it easier to generate reports and retrieve the data, as well as providing version control and tracking.

Companies that specialise in migration services provide database tools designed for this purpose.

**Identify areas in the organisation that need to be contacted**

The information you need to collect may span different organisational areas and responsibilities.

You will need to discover how the infrastructure is managed, as IT systems will be supported and owned by different departments. For example, mainframe, Windows, Unix systems and telecommunications equipment are usually managed by separate teams. This becomes even more complicated when organisations are spread across countries and regions, as some regions may have wider responsibility for elements of the infrastructure.

Clarify what organisational areas are involved and obtain nominated people who will be your contact and sponsor in each one.

**Define a clear communication strategy**

Clear stakeholder management is vital in large migration projects. You may need to communicate with key decision-makers and subject matter experts located across different organisational areas and regions. Providing a consistent message and approach will maximise co-operation with the data collection effort.

A clear communication plan should include:

- The communication process (who is involved, and how and when you will be communicating)
- Response times for returning information
- Escalation procedures
- E-mail and communication templates.

**Collecting information about applications**

To avoid confusion, it helps to have a clear definition of what constitutes an ‘application’. For example, how does your organisation see this as differing from a service or process?

Collecting application information is a complex and time-consuming task. There may be numerous applications installed on each server. Each may connect to several others, some of which may be hosted on site and others on sites belonging to third parties. Application discovery can be complicated if an enterprise is not aware of all its current applications. A large enterprise can run hundreds of applications in each data centre. In this case, one of your first tasks may be to create an up-to-date list of applications.

Prioritise your applications: identify which applications should be targeted first for data collection. You could base this priority on regional or project considerations: the plan might be to migrate each region or data centre in stages. You would also want to focus first on applications that are critical to the organisation. This may involve discussions with key stakeholders, who have a good understanding of the core applications in their operational area. You may also want to prioritise the information you collect, to distinguish essential information from nice to have. The key information you need includes the application owner, the criticality of the application, maintenance windows, service level agreements, and how the application links to other applications and to external clients. This information is used to determine the impact and timing of the application migration.

For example, if application A connects to critical applications B, C and D, then the migration planners may decide to move all these applications at the same time. Available maintenance windows determine when they can be moved. Service level agreements determine how much system downtime can be tolerated and who can approve extensions. You will need the application owner to confirm any migration decisions made.

**Application details you may need**

<table>
<thead>
<tr>
<th>Purpose/function</th>
<th>Sponsors, subject matter experts, commercial owners, delivery owners</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operational criticality measures</td>
<td>Service level agreements</td>
</tr>
<tr>
<td>Operating systems, databases and versions</td>
<td>Supported services, products, processes, batch processes and workflows</td>
</tr>
<tr>
<td>Supported customers and users</td>
<td>Maintenance windows, change freezes and backup times</td>
</tr>
<tr>
<td>Interfaces (for example, fax, mail relay, printing)</td>
<td>Licence details — type, serial numbers</td>
</tr>
<tr>
<td>Architecture and network topology</td>
<td>Upstream and downstream applications connected to this one</td>
</tr>
<tr>
<td>Upstream and downstream applications connected to this one</td>
<td>Ports and firewalls</td>
</tr>
<tr>
<td>Location (data centre or country where installed)</td>
<td>Data storage and archiving requirements</td>
</tr>
<tr>
<td>Data storage and archiving requirements</td>
<td>Hosting arrangements (for example, production, disaster recovery, test and development environments, their IP addresses and whether they are physical or virtual)</td>
</tr>
<tr>
<td>Any planned changes/upgrades</td>
<td>Messaging (for example, MQ, FTP)</td>
</tr>
</tbody>
</table>
Table 1. Data collection methods and tools

<table>
<thead>
<tr>
<th>Method</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electronic data collection</td>
<td>Automated scripts or queries that can be run on machines in the network to collect basic information on operating systems, IP addresses, applications, services, protocols, data volumes and data flows. Software may already be installed that monitors and provides statistics on the network.</td>
</tr>
<tr>
<td>Questionnaires</td>
<td>Provide a standard format for collecting information that cannot be obtained electronically. They may be presented as simple Excel spreadsheets, with fields that contacts need to complete, or HTML forms that can be submitted online.</td>
</tr>
<tr>
<td>Diagrams</td>
<td>Describe the connection between components and external clients, upstream and downstream data flows, where servers are located and how they are connected to the network.</td>
</tr>
<tr>
<td>Interviews and workshops</td>
<td>Enable more detailed discussions and identification of obstacles to migration. Once you’ve managed to collect basic information on applications, services and infrastructure, it is essential to get owners together to discuss the components in their area and how these can be best migrated.</td>
</tr>
<tr>
<td>Physical inspection</td>
<td>A physical audit of the boxes and cabling to identify serial numbers, available ports and wires connected to machines.</td>
</tr>
<tr>
<td>Technical documentation</td>
<td>System documentation, user guides, legacy plans and process documentation may be available for key systems. If not, you may need to create new documentation to fill in gaps.</td>
</tr>
<tr>
<td>Database management systems</td>
<td>Contain data on existing infrastructure and applications. Databases can be queried and used to generate reports. Some suppliers offer specialised tools and consultant services that are intended specifically for data migration projects.</td>
</tr>
</tbody>
</table>

The key to an effective plan is to ensure that it fits into the organisation’s existing structure and practices, and can be easily implemented.

*Validate the information collected*

Validating the data collected is essential for ensuring its accuracy. Data collected from different sources may provide conflicting information. Some form of data cleansing, validation and sign-off is appropriate before this information can be used for planning. For example, data could be validated using a workshop approach, as shown in Table 1.

Information can quickly become outdated. One problem with spreading application discovery over several months is that some information is already out of date by the time it is collected and presented to the organisation. To control this, it is good practice to ensure that mechanisms are in place to identify and update information that has changed, without affecting the integrity of data that has already been validated. It is also typical for organisations to impose change freezes around migrations to minimise risk.

*Tackling issues*

Things rarely go smoothly during complex migration projects. It is always best to adopt a proactive and positive approach to issues that arise. The following issues, many of which were encountered during our migration project, are likely to be relevant to other such projects.

*Finding suitable subject matter experts*

Often, due to redundancies and staff turnover, key subject matter experts have been lost and documentation is not available for many systems. In this case, you may need to do more detailed research and investigation to find the information you need. If you can’t find a nominated expert, try talking to alternative contacts and searching directories and intranets for additional information.

The value of such peripheral investigation should not be underestimated. I found it often enabled me to ask informed questions, which significantly improved the responses I received.

*Dealing with cultural differences*

Sensitivity is essential when working across countries and cultures. Communication difficulties can be compounded by the use of different languages — normal e-mail and phone channels may be less effective, so a visit may be required. It helps if you can find a contact in each region who can co-ordinate and escalate issues on your behalf.

Often data collection and migration projects are a preliminary step to closing down or selling off organisational areas — with associated redundancies. Team members should be aware of these sensitivities when asking for information. During the data collection process, try to find out if any plans have been made for selling off or outsourcing organisational areas and functions. This information will have an impact on how the migration is planned, and on what information you’ll need to collect.

*Dealing with third party suppliers and vendors*

Components of a system may be managed or hosted by third parties — vendors, suppliers or partners connected to your organisation. You will need to identify relevant supplier managers to work with. Will moving your systems have an impact on the service they provide?

Information about licence agreements and maintenance contracts is important; licences may need to be repurchased and maintenance agreements closed or renegotiated, as part of the infrastructure and application migration. Legacy systems may contain components with outdated licences. When the system is migrated, the components no longer function, as the licence has expired. At worst, new licences cannot be purchased because the vendor either is no longer in organisation or does not support the outdated version.

In some instances, systems are that are currently managed in-house may become candidates for outsourcing to third party suppliers who can host and manage the service more cost-effectively. This is particularly likely where a system needs to remain local or within the country of origin.

*Maintaining disaster recovery capability*

Migration planning must take into account not only the impact of downtime on existing live systems, but also the backup and disaster recovery arrangements currently in place, and what needs to be put in place in the new infrastructure. This includes information on backup and recovery objectives, and data retention requirements.
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Systems with disaster recovery need different planning and fallback testing to move both instances. You will need to work closely with organisational areas responsible for business continuity and disaster recovery planning, to ensure their information requirements are met.

**Determining application criticality**

Information on application criticality is essential for migration planning. It determines not only migration timing and resources required, but also fallback arrangements in the event that a system does not function after migration. As most application owners will tend to rate their applications as critical, it is important to arrive at a more objective assessment of application criticality.

You can use a number of key questions to determine how critical an application is. For example, how much revenue does the application generate? What transaction volumes does the application handle? How long can the organisation manage without it? What would be the effect on the organisation if the application were unavailable? What are the contractual agreements for service and availability for this application?

An application’s criticality can also vary, depending on the time, day or season. For example, a finance application may be critical at month-end or year-end, but not at other times. You can identify less critical applications by determining if the application is being phased out and is a candidate for decommissioning, or if there are alternative applications that can provide the same service to the organisation.

Some migration specialists offer weighting systems, which provide a measure of criticality based on answers to these types of questions.

**Identifying risks**

During the project it is important to keep track of ongoing issues and risks. Project managers need this information to effectively manage the significant risks associated with large-scale migrations. For example, if there is not enough resource to complete the information gathering phase, you should identify this as a potential risk that could cause delays to the migration. Various risk assessment methods and tools are available to help identify the most critical risks and activities.

**Taking into account the location of data centres**

Physical distance between the data centres is important: there can be technical limitations (for example, when synchronising machines that are far apart) and timing issues (for example, physical transport of tapes). Call centre staff and telephony equipment may need to be co-located, as there may be significant bandwidth and cost issues which make it impractical to run such equipment from a remote location. Systems in different data centres, even where running on the same hardware, may have different service level agreements. You will need to determine if these have to be harmonised.

**Addressing legal and compliance issues**

Legal issues include current agreements with customers, as well as regulation in the country where the applications are currently hosted. A country’s legislation may impose restrictions on movement of certain data or systems. Data protection laws may also differ.

In addition, there may be important tax implications for running systems out of different regions.

**Rationalising data centre equipment**

When consolidating many data centres, there are likely to be multiple copies of common items such as fax servers, routers and web servers. This needs to be identified early, since such elements may not be interoperable. When equipment is consolidated, new licence agreements may need to be put in place.

In addition to formal equipment contained in data centres or supported by IT, development teams and users may have unsupported equipment, usually sitting under their desks. As part of the data collection process, it is a good idea to maintain a list of all such equipment and their function.

**Including ongoing projects**

Migration in larger organisations is not a clear-cut process. There may currently be several projects under way, to deal with selling off, migrating or upgrading parts of the infrastructure. You’ll need to identify what these systems are, who owns them, and when the upgrade, sale or migration is planned.

**Identifying knowledge gaps**

Migration planning needs to consider how systems will be supported post-migration. This includes the transfer of knowledge from old data centre staff to any new staff that must manage the systems. Good documentation is essential to support this process. You may need to identify where there are currently significant gaps in documentation.

**Conclusion**

Migration projects provide opportunities for technical communicators to be involved in the planning, data collection and communication processes supporting the migration. Large projects are likely to have shifting requirements and involve multiple parties, including business analysts, project managers and third party consultants—all of whom you’ll need to work closely with.

As a technical communicator, you may only be involved in a small aspect of the data collection process described in this article. However, it is useful to have an understanding of how your efforts fit into the larger migration programme. Your role in facilitating good communication between organisational areas and achieving agreement can be important to the migration’s success.

The data collection and planning effort will involve a significant cost to the organisation. A systematic approach can ensure that the impact on daily activities is minimised, and help to facilitate the information-gathering process.
XML in Technical Communication

Charles Cowan

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Don’t rule out machine translation

Andreas Dürr explains how integrating machine translation into conventional workflows can achieve affordable human translations.

The cost of writing and translating technical documentation and product information amounts to several billions of euros per year and will rise further because of increasing globalisation. For example, complete documentation in the language of the target country is a must for opening up new markets, not only for marketing reasons but also because of legal regulations. For this reason, the optimisation of multilingual content creation and associated processes is one of the central challenges for all enterprises that want to be successful in the international arena. Machine translation can help in overcoming this.

Knowing its limitations

If you have ever tried one of the automatic translation engines on the web, you know how ridiculous the result can be. For the time being, the dream of fully automated high-quality translations will remain what it is now: a dream. Nevertheless, machine translation systems (MTS) have made good progress. Where most machine translations were based on linguistic rules in the past, they are now based primarily on statistical calculations and this has resulted in substantial quality improvements. Thus, the system learns how to translate from one language to another by analysing previously translated documents. The amount of reference material is an important precondition. The more documents analysed, the better the result will be. Other criteria for the selection of reference material include the timeliness of the texts, the logical coherence of the texts and the consistency of the contents (that is, the uniform use of terminology).

Even if the material satisfies these criteria to a high degree, machine translation cannot substitute for the translator or the translation memory systems that are widely used today. Translation memory systems store previous translations in the form of segment pairs. While translating a text, the system displays localisation proposals from the data pool. MTS serve as tools by means of which the overall productivity of the translation system and of human translators can be increased. Another use is for texts...
that would never be translated without machine translation and of which only an initial draft is needed to understand their essence. An example is the information from knowledge databases and customer relationship management systems.

Playing to its strengths
More often than not, a translation produced by an MTS is only an approximation of the text in the foreign language, and rarely delivers fully acceptable results. However, efficiency can be increased considerably by using machine translation as a supplement to conventional translation methods. For this to happen, the MTS must be part of an integrated holistic solution that merges the various technological translation approaches; that is, a solution that enables interaction between the MTS and the translation memory, as well as workflow and terminology components. The panel shows a typical workflow.

Refining its capabilities
To increase the number of full matches for subsequent translation projects, every new translation represents the most important data source for a translation memory. Depending on system settings, every pair of source and target languages is automatically or manually stored in the database to form the basis for future translations. To further improve the quality of results, the MTS can be trained with the newly created translations.

The networking capabilities of some language technologies contribute to consistent data and contents. In these systems, the translation memory and all the language data it contains are available to everyone involved in the translation process, including employees of the organisation and its subsidiaries and also external language service providers or freelance translators.

The art of optimising translation processes is in the tailored embedding of all available technologies. The technology platform should combine the various approaches and integrate them into a seamless workflow. The benefits depend on the type and volume of texts to be translated, the requirements for the translations and the overhead for customer-specific MTS training. In most cases, using machine translation is cost-effective only for medium and large volumes, and only as a supplement to existing processes (that is, as an additional step in the workflow between the translation memory and the human translator). The return on investment can easily be calculated from the productivity increase achieved.

Typical workflow incorporating machine pre-translation
1. In a new translation project, all texts are first compared with translation memory entries—that is, the system checks whether the language database already contains translations with identical wording (and formatting).
2. Text segments for which a full match is found are automatically pre-translated using the translation memory.
3. Text segments for which no full match is found are first submitted to the MTS.
4. The MTS delivers a preliminary translation that is sent to the language specialist for further processing.
5. Translators translate the full text, using one of two approaches as most appropriate:
   - Reading the machine-translated segments to understand the text, then translating it independently.
   - Taking the machine-translated segments as the basis for the translation, then adapting and correcting them as necessary.

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Look here for further information:
Conditional text strategies

FrameMaker can process condition tags or attributes using expressions. Terry Smith shows how these options affect output.

FrameMaker has the ability to show or hide conditional content to produce different outputs. FrameMaker 8 extended this capability to allow users to build expressions that use Boolean operators to process condition tags (in regular or structured FrameMaker) or attributes (in structured FrameMaker only).

In this article, I show some simple examples of how to handle conditional content in FrameMaker. The first example shows FrameMaker's traditional show/hide capabilities (now called 'Show as per Condition'). The next example shows how to use expressions that use Boolean operators (OR, AND, NOT) to process condition tags. Finally, I show how to use expressions to filter structured documents based on attribute values. I have used similar examples throughout to make the outputs easier to compare.

Although the screen captures show FrameMaker 9, the concepts are unchanged from FrameMaker 8.

Condition tags
You are probably familiar with FrameMaker's condition tags. Briefly, you define condition tags (for example, Print and Online), then apply the condition tags to the content that appears in different versions. Content that appears in all versions (unconditional content) has no condition tags applied and is always visible. Depending on your workflow, you may prefer always to apply a single condition tag when the content is conditional, or you may prefer to apply layers of tags. Either method works as long as you have a consistent process. For the examples in this article, the source document has two dimensions of conditional text, as shown in Figure 1.

The first dimension of conditional text is for the product (either the Light version of the product or the Pro version). The second dimension of conditional text defines the output, either print or online.

We need at least four condition tags: Light, Pro, Print and Online. Figure 2 shows a sample of a FrameMaker document with the Light, Pro and Print condition tags applied (the Online condition tag isn't shown on this page). Some of the text has only one condition tag applied and other text more than one. You can read the text in the sample to see which condition tags are being used. Notice that the text that has only the Light condition tag applied is light blue with a single underline, the text that has only the Pro condition tag applied is red with a double underline. The colour for the Print condition tag is a light orange, so the text with both Light and Print condition tags combines the colours from those two tags to become a greyed blue; the Pro and Print combination is reddish orange.

Traditional Show/Hide method
Now, suppose you want to create the printed output for the Light product. The next step is to show or hide the different condition tags as follows:

1. Select Special>Conditional Text>Show/Hide Conditional Text. The Show/Hide Conditional Text dialog box is displayed. Select the Show as per Condition option. The Show as per Condition option is the same as the traditional Show/Hide function that you know from FrameMaker 7 and earlier versions. (We'll discuss the new option in the dialog box, Show as per Expression, later.)
2. Move the condition tags to either the **Show** or **Hide** boxes. In Figure 3, the **Light** and **Print** condition tags are set to show and the **Online** and **Pro** condition tags are set to hide. What this means is that any content that has either the **Light** OR **Print** condition tags applied will show in the output.

3. Click the **Apply** button to show the Light and Print conditions.

4. The results are not quite what we need. As shown in Figure 4, the document title is correct (Light product) because that text has only the **Light** condition tag applied. The figure for the printed version for the Light product is also shown correctly. The problem is the next figure, which should only appear in the Pro version. Because the figure has both the **Pro** and **Print** condition tags applied (and **Print** has been set to show), the figure appears.

When you use FrameMaker’s traditional show/hide method, the solution is to create and apply more tags. For this example, you might add **LightPrint**, **LightOnline**, **ProPrint** and **ProOnline** condition tags. Next, you would remove the **Pro** and **Print** condition tags from the second figure and apply the **ProPrint** condition tag. Now you can hide the **ProPrint** condition tag. (While you’re retagging, you should also retag the first figure with the **LightPrint** condition tag.)

Of course, this is a really simple example with only four possible outputs. But what if you needed to create additional outputs for Windows, Macintosh, and UNIX platforms? You would need many more tags! In the past, writers who needed to create versions this complicated often decided to stop using conditional text at all.

**Expressions to the rescue**

Expressions using different combinations of the Boolean operators OR, AND and NOT let you create the different outputs you need using the minimum number of tags. The expressions can become quite complex, but after you have the expressions working, maintaining the different versions is much easier.

In fact, FrameMaker’s traditional Show/Hide method (**Show as per Condition**) is actually using an expression: the expression uses only the OR Boolean operator. Thus, as shown in Figure 5, the expression "**Light** OR **Print**" produces the same results we achieved by moving **Light** and **Print** into the **Show** box.

What would the result be if we used an expression with the AND Boolean operator instead of OR? To build the expression, do the following:

1. In the **Show/Hide Conditional Text** dialog box, click the **Build Expression** button.
2. In the **Build Expression** dialog box (shown in Figure 6), click the **Light** condition tag, then click the arrow button.
3. Click the **AND** button.
4. Click the **Print** condition tag and click the arrow button.

As shown in Figure 7, make sure the "**Light** AND **Print**" expression is selected and click the **Apply** button.
Figure 8 shows the result of applying the "Light" AND "Print" expression to our example. Only the figure appears, because that content has both the Light and Print condition tags applied. The content that has only the Light condition tag is hidden. So, unlike the expression "Light" OR "Print" (which is the same as the traditional show/hide method), instead of getting everything with either Light or Print condition tags, we get only what has both Light and Print condition tags. To get the result we really want, we don’t need to create more condition tags. One solution would be to always apply the Light and Print condition tags to all conditional content that appears in the printed version for the Light product. If you always layer all the condition tags like that, then the expression "Light" AND "Print" will give you the result you need. However, you can create a more complex expression that shows or hides the content correctly without reapplying any condition tags. The following expression will do the trick:

```
"Light" ANDNOT "Online" OR "Light" AND "Print" OR "Print" ANDNOT "Pro"
```

Logically, you can break the expression at the OR operators to separate the expression into understandable pieces. Table 1 shows an explanation of what this expression is doing.

Note: FrameMaker processes expression content in the following order: parentheses, NOT, AND, then OR. Keep this in mind when arranging your expression: you cannot use parentheses to change it.

Applying this expression produces the desired results, as shown in Figure 9.

**Sample expression for attributes**

You can use condition tags with either regular or structured FrameMaker documents. However, if you use structure, consider filtering your conditional content based on attributes instead of condition tags. Attributes are a natural part of any structured document, so being able to filter your conditional content based on attributes makes sense.

Figure 10 shows a structured document. A figure that should appear in the Light product’s printed output is highlighted in the document window on the left and in the corresponding structure view on the right. Notice that for the Figure element, the Product attribute is set to Light and the Output attribute is set to Print. Also notice that the other content in the document has attributes that correspond (as far as is feasible) to the condition tags used in the previous examples. The red dotted line in the structure view on the left indicates that the structure is invalid, but that’s ok, because the structure will be valid when only the Light Print content is showing.

When creating expressions for condition tags, the expression "Light" OR "Print" causes any content that had either the Light or the Print condition tag applied to show. The expression "Light" AND "Print" causes only the content that had both the Light and Print condition tags applied to show. Based on those expressions for condition tags, here are two expressions for filtering attributes that look as if they would give similar results:

<table>
<thead>
<tr>
<th>Table 1. Resolution of complex conditional expression</th>
</tr>
</thead>
<tbody>
<tr>
<td>&quot;Light&quot; ANDNOT &quot;Online&quot;</td>
</tr>
<tr>
<td>OR &quot;Light&quot; AND &quot;Print&quot;</td>
</tr>
<tr>
<td>OR &quot;Print&quot; ANDNOT &quot;Pro&quot;</td>
</tr>
</tbody>
</table>

Figure 8 shows the result of applying the "Light" AND "Print" expression to our example. Only the figure appears, because that content has both the Light and Print condition tags applied. The content that has only the Light condition tag is hidden. So, unlike the expression "Light" OR "Print" (which is the same as the traditional show/hide method), instead of getting everything with either Light or Print condition tags, we get only what has both Light and Print condition tags.

To get the result we really want, we don’t need to create more condition tags. One solution would be to always apply the Light and Print condition tags to all conditional content that appears in the printed version for the Light product. If you always layer all the condition tags like that, then the expression "Light" AND "Print" will give you the result you need. However, you can create a more complex expression that shows or hides the content correctly without reapplying any condition tags. The following expression will do the trick:

```
"Light" AND NOT "Online" OR "Light" AND "Print" OR "Print" AND NOT "Pro"
```

Logically, you can break the expression at the OR operators to separate the expression into understandable pieces. Table 1 shows an explanation of what this expression is doing.

Note: FrameMaker processes expression content in the following order: parentheses, NOT, AND, then OR. Keep this in mind when arranging your expression: you cannot use parentheses to change it.

Applying this expression produces the desired results, as shown in Figure 9.
In fact, the results are different. Let’s build the expression to see the difference:

1. Select Special>Filter By Attribute.
2. In the Manage Attribute Expressions dialog (Figure 11), click the New button. This displays the Build Expression dialog (Figure 12).
3. In the Expression Tag field, type a name for the expression.
4. First, specify which attributes the expression can use. In the Attributes box, click Output, type ‘Print’ in the New Value box, and click the Add button. Similarly, in the Attributes box, click Product, type ‘Light’ in the New Value box, and click the Add button.
5. Next, build the expression. Click Product in the Attributes box, then click the Add Attribute button. Click the AND button. Click Output in the Attributes box. Figure 13 shows the completed expression.

For more information
Use the video tutorials at: www.adobe.com/support/documentation/en/framemaker/?trackingid=ZLQL#tutorials
To conditionalise by output only, assign a value to the Output attribute and leave the Product attribute blank. (The content will display for both Light and Pro versions.)

To conditionalise by product and output, assign values to both the Product and Output attributes.

Figure 14 shows the results. Were they different from what you expected from an AND expression? Notice that all of the elements that have the Product=Light attribute are showing, not just the elements that have both the Product=Light and Output=Print attributes.

The reason for this is that the attribute values operate independently of each other. Thus, to get the desired results, apply these attributes as follows:

- To make an element unconditional, do not assign a value to either the Product or Output attributes.
- To conditionalise by product only, assign a value to the Product attribute and leave the Output attribute blank. (The content will display for both print and online output.)
- To conditionalise by output only, assign a value to the Output attribute and leave the Product attribute blank. (The content will display for both Light and Pro versions.)
- To conditionalise by product and output, assign values to both the Product and Output attributes.

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TCeurope Colloquium

Documentation Projects: Trends and Methods

Stockholm, Sweden, April 24th 2009

TCeurope is the European umbrella organisation for technical communication, currently representing technical writers and illustrators in ten European countries

Hosted by the Swedish Association of Technical Communicators, FTI (Föreningen Teknisk Information, www.teknikinformatoren.se)
Problems of quantity

Jean Rollinson highlights some of the problems that can occur when we use words to describe amounts.

Less/fewer
A surprising number of errors occur with the use of ‘less’ and ‘fewer’. Yet the rule seems simple enough—less applies to quantity and fewer to number. Or the rougher, but perhaps more easily understood, version—use less with singular nouns and fewer with plural nouns. So why do we end up with supermarket signs that read ‘Less than ten items’ when it should so obviously be ‘Fewer than ten items’. Perhaps part of the problem lies in the spoken word. We hear ‘less than’ more often than ‘fewer than’, so ‘fewer than’ sounds wrong. There is also the problem that the construction ‘no less than’ has become so common that it has the force of idiom.

The following constructions show the correct usage:

- There were fewer than six bidders for the contract.
- There were 700 fewer visitors to the site last year.
- You should take less sugar in your tea.
- He lives less than 50 miles from London.

This last example is also the cause of some problems. Surely 50 is a number, so according to the rule, it should be ‘fewer’. However, for distances, amounts of money and some other quantities, the amount is seen as a totality not individual items, and so we treat it as a singular not a plural.

Least/fewest
‘The least’ is used before uncountable nouns, and is the opposite of ‘the most’. ‘The fewest’ is used before plural nouns as the superlative of ‘few’. The same problems seem to arise with ‘the least’ and ‘the fewest’ as with ‘less’ and ‘fewer’. In spoken English, we often hear constructions such as ‘This page has the least mistakes’, when it should be ‘This page has the fewest mistakes’. The following are examples of correct constructions:

- He does the least work on our team.
- I am least happy when I have to work at the weekend.
- He read the book with the fewest pages.

Many/much
There seems to be less confusion between ‘much’ and ‘many’, but it is important to know the distinction. Like ‘less’ and ‘fewer’, ‘much’ is used with singular nouns and ‘many’ is used with plurals.

The following constructions show the correct usage:

- There isn’t much time before we need to leave.
- There were many dirty glasses left after the party.
- There are other considerations when using ‘much’ and ‘many’ with a noun. They do not need ‘of’ after them when there is no other determiner (for example, no article or possessive).
- There is too much information on that sign.
- There are too many children on the climbing frame.

The exception is when ‘much’ is used directly before personal or geographical names.

- Not much of Denmark is hilly.
- I haven’t seen much of Jane recently. When there is a determiner, then ‘much’ and ‘many’ do take an ‘of’.
- You can see too much of the screen in that figure.
- I’ve missed too many of my lessons to pass my exam.

Some/any
‘Some’ and ‘any’ are both used for an indefinite amount or number. They are often seen as vague, but more often they are used because the quantity is not important. ‘Some’ is most common in affirmative clauses. ‘Any’ is a non-affirmative word and is common in questions and negatives. Compare their use in the following examples:

- He needs some work.
- Do you have any work?
- Did you bring any examples of your work?
- I have some examples of my work.

Each/every
Strictly speaking, this may not be a quantity issue but there does seem to be some confusion between these words, particularly with non-native English speakers. So if you are working with text that was originally written by a non-native English speaker, you may find the words used interchangeably.

‘Each’ and ‘every’ are both normally used with singular nouns, and there are situations where either one can be used without much difference in meaning.

- She looked more beautiful every time we saw her.
- She looked more beautiful each time we saw her.

However, some constructions seem wrong because we tend to use ‘each’ when we are thinking about people or things separately; and ‘every’ when we are thinking about people or things in a group. It is sometimes useful to think of ‘every’ as being closer to ‘all’.

- Each child in turn went to see the school nurse.
- Every child in the class went to the museum.

This last example can also be phrased as:

- All the children in the class went to the museum.

Another construction to note is the use of ‘each of’ before a plural noun. This sometimes seems wrong because the verb is usually singular.

- Each of these sentences has problems.
- Each of us is aware of the world around us.

Further reading

A Dictionary of Modern English Usage
H W Fowler, Wordsworth Editions

New Hart’s Rules, Robert Ritter,
Oxford University Press

Oxford Style Manual, Robert Ritter,
Oxford University Press

Practical English Usage, Michael Swan,
Oxford University Press

Jean Rollinson FISTC is a freelance technical author, editor and proofreader. She is also an associate of the SFEP. When not gainfully employed she plays the clarinet in an amateur concert band. E: jean.rollinson@authoring-services.co.uk W: www.authoring-services.co.uk
Content Management: Bridging the Gap between Theory and Practice

Edited by George Pullman and Baotong Gu

Content Management: Bridging the Gap between Theory and Practice is introduced on the publisher's website as being aimed at ‘academics and practitioners in the fields of technical communication information design and business communications’. I am involved with CMSs of various flavours in both academic and business environments, and actively learning about the many practical and managerial issues in rolling out this technology. Therefore, I looked forward to reading this publication with some interest.

Book structure and terminology
The book consists of a relatively lengthy introduction by the editors, followed by separate pieces from the 11 contributors that are grouped into three parts:
1. CMS Implementation
2. CMS and Technical Communication Pedagogy
3. CMS and the Profession of Technical Communication.
Possibly as a result of the number of contributors and their varied interests, the term CMS (as used in the title of the book, and commonly an acronym for Content Management System) is used to cover a range of related concepts, including:
- A means of implementing an Internet or intranet website — a web CMS or WCMS is the terminology used in several places in this book
- An electronic repository for content such as corporate documents, photographic images, or academic papers
- An online teaching environment (a virtual learning environment or VLE in the jargon of higher education) — referred to as a Course Management System in places.

Analysis
One of the strengths of an edited compilation of this kind is the opportunity to draw expertise from a range of sources and to provide a more extensive and rounded view of a topic than is usually possible where there is a single author. So I found it disappointing that with one exception the contributors have very similar backgrounds in American academia, with the result that the text makes little concession to practitioners who are outside of the academic world. Most of the contributions are wordy, presented in a form akin to an academic paper, and with examples relying heavily on niche CMS products and scenarios specific to higher education.

The practical insights implied in the book’s title were disappointing, often descending into anecdotal descriptions of projects. Here I would have welcomed some discussion of ‘real world’ issues such as system security or identity management, to pick just two important considerations facing anyone operating a CMS, whether in an academic or a business environment.

As someone who is involved in the academic application of all the above types of CMS, I found some of the theoretical ideas raised of most interest. For example, I was aware of topics such as critical theory and theory of ‘place’ from the work of academic colleagues, but had not seen that they could provide an insight into issues such as the role of the content editor and the relationships between individual items of content in a website.

Conclusion
Sadly, the book does not really fulfil the promise of its title. As an academically oriented work, it starts out firmly on the theoretical side of the gap. It includes attempts to be practical, but the inclusion of some insufficiently detailed and rather specialised case studies undermine this. Consequently, the book seems to me to do little about closing the chasm between theory and the practical challenges of making a CMS work well in an organisational environment.

Perhaps surprisingly in the light of its title and the promise of the website introduction, I found the most useful sections of the book to be those dealing with theoretical concepts that are relevant to some of the tensions and problems that arise in managing content on a CMS (something I intend to follow up when time permits).

So, perhaps not a book to rush out and buy, especially when there are some excellent introductions to the practicalities of the subject such as the Content Management Bible (Bob Boiko) at around half the cost. However, if yours is primarily a theoretical or academic interest in the subject, it is worth borrowing this book from a library and reading it selectively, perhaps alongside The University of Google (Tara Brabazon) to provide a view of modern web technology from the contrasting perspective of a UK-based teacher of humanities.

About the book’s editors and contributors
The editors, George Pullman and Baotong Gu, are both associate professors at Georgia State University in the US, where they teach history of rhetoric and electronic communication, and rhetoric, composition and technical communication respectively. With one exception, a consultant, the contributors are researchers and/or academic teachers in similar areas to the editors’ specialisms — typically digital media, technical communications, writing, and rhetoric.
Across the international arena, there have been several interesting recent developments concerning both standards in development and new proposals. If you would like further information on any of these activities, please contact me. All published ISO standards can be purchased from both:

- The British Standards Institution
  www.bsigroup.com
- International Organization for Standardization
  www.iso.org/iso/home.htm

ISO/IEC 26511, 26512 and 26513 (software documentation)
These three standards from ISO/IEC JTC 1/SC 7/WG 2 (Software and systems documentation) are currently undergoing international ballot, which will close at the end of April. If you would like to receive free copies and comment on the drafts, please contact me.

The titles of these standards are:

- ISO/IEC CD 2651 – Requirements for managers of user documentation
- ISO/IEC CD 26512 – Requirements for acquirers and suppliers of user documentation
- ISO/IEC FDIS 26513 – Requirements for testers and reviewers of user documentation.

ISO/IEC 11581 – Icon symbols and functions
This was originally developed as a five-part standard within ISO/IEC JTC 1/SC 35 – User interfaces, and was published in the 1990s. ISO/IEC 11581 is now being revised and expanded to provide an introduction, incorporate several other SC 35 icon standards and create a database of standardised icons.

Under the revised numbering system, the proposed new parts will be:

- Part 1: Introduction and overview of icon standards
- Part 2: Object icons
- Part 3: Pointer icons
- Part 5: Tool icons
- Part 6: Action (toolbar) icons
- Part 10: Framework and general guidance
- Part 20: Guidance on icon families
- Part 30: Developing and evaluating icons
- Part 40: Icon registration and icon libraries.

ETSI guidelines and tutorials for improving users’ experience of real-time communication services
Last April, Specialist Task Force 354 of the European Telecommunications Standards Institute (ETSI) started work to prepare:

- A guide of user-centred guidelines based upon measures of user behaviour (for publication in November 2009)
- A web-based system that will enable advanced navigation among the guidelines and increase the understanding and application of the guidelines through on-line tutorials (for publication in February 2010)
- A technical report addressing future requirements based on the evolution of technologies and the development of user and market requirements (for publication in November 2009).

For more information and to obtain free drafts for comment visit http://portal.etsi.org/STFs/STF_HomePages/STF354/STF354.asp.

ICT accessibility standards
In the UK we now have more people over 60 than under 16 years of age and, as you'll have read in my Communicator articles, there is a strong focus across the standards community on the accessibility of information and communications technology (ICT) for elderly and disabled people. Many factors are driving this work including European Community Mandate 376, which will lead to accessibility becoming a key requirement for future public procurement of ICT products and services throughout Europe (in the same way that Section 508 has done in the US). Documentation for these products and services will be included (see Communicator, Spring 2008).

The website of the Digital Accessibility Team of the Royal National Institute of Blind People (RNIB) at www.tiresias.org supports all forms of disabilities. It provides information on accessibility standards (both published and those currently in development), design guidelines, accessibility evaluation, free fonts and much, much more. It’s well worth a look.

BSI Committee ICT/-/6 (eAccessibility)
As you see, there is a great deal of work underway to create standards that address the many aspects of accessibility for ICT products and services at national, European and international levels. To coordinate this activity in the UK, the British Standards Institution has recently established eAccessibility committee ICT/-/6. Anyone interested in participating in this work should contact Jean Stride at BSI British Standards (jean.stride@bsigroup.com).

Richard Hodgkinson FISTC has participated in the development of ISO, ISO/IEC and European standards addressing icons, symbols, software documentation, pen gestures and ICT accessibility since 1990. E: Richard_Hodgkinson@btinternet.com
A day in the life

Steve Rickaby describes a typical day in the late summer of 2008

Many years ago I made the decision to trade security of earnings for quality of life in remotest West Cornwall. Sometimes this has led me in strange and interesting directions, although whether successful ones remains to be seen.

8:10 Get up, make cup of coffee, turn on computer and check e-mail. Message from programmer at US client, who does not understand why I need to use his software at 120 dpi rather than 96 dpi. At 120 dpi some of the GUI elements malfunction. Explain about screenshot resolution and send him a white paper giving details. These are West Coast clients, so our working days dovetail nicely.

8:45 Make appointment to take elder cat to vet. Cat has clawed eye, possibly from run-in with Captain Gormless next door, who is in a foul mood these days due to a sore backside.

9:00 Print out ‘daily bread’ notice and labels. Baking has been a hobby of mine for many years; last year I took some courses with Lyn Tonkin of Blue Mango and now bake every day for a neighbour’s stall in the village and weekly for a village market in Lamorna. My working day generally maps out to preparing dough in the morning and technical writing from midday to about 7 pm, interspersed with tea breaks to move bread in and out of ovens.

9:15 Put out bread notice, collar cat and put in carrier, set off to vets, only to be stopped by the ex-postmistress and told that a neighbour’s 85-year-old mother was rushed to hospital during the night. This lady is a retired artist whose son I know; I worry all the way into town.

9:50 Cat at vets. He puts up with it well. Vet is concerned, so have to take cat back tomorrow and no food after 7 pm in case they have to sedate him and poke around in his eye.

10:30 Back home to find that reports of sick neighbour’s mother are complete fabrication engendered by the mere fact that there was an ambulance going somewhere, sometime in the night. Am relieved. As is the lady in question, who is touched by all the fuss.

10:45 Make two batches of rye dough and set to rise.

12:00 Write and print out labels for bread, then start work on financial software. We are revising the user guide for an application that demonstrates the performance of investment bonds. This is complicated by the fact that we are single-sourcing in FrameMaker to produce both a printable PDF and online help, so the FrameMaker source is thick with conditional text and links.

12:47 Check e-mail and am diverted by a blizzard of messages all telling me that the elderly lady is in fact fine, and please can I keep some bread for them? I can only bake small amounts each day at present, so generally don’t take orders. Bread-related discussion ensues and time is wasted.

12:58 Am distracted again by a long and technically detailed e-mail about audio sound quality from the son of the not-sick lady. He has a sufficiently refined musical ear to be able to point out in a particular Radio 3 broadcast that the viola player is using her Maggini and not her Stradivarius, so he has to be taken seriously. Must get to work!

13:30 Dough has had its first prove, so break off to work it, fill with tomato paste, mould and set to rest for an hour, then back to the financial software.

14:00 As the client’s application has been revised, it is necessary to re-enact all the tutorial chapters to make sure that they still work as they should and that no extra fields or checkboxes have been sneaked into any dialogs. With another client, I well remember a whole raft of new and undeclared functionality (not estimated for) whose presence was indicated merely by a single new toggle in a dialog, much as a serious fire can betray its presence by a thin wisp of smoke under a door.

I work mainly on Macintosh and the client’s software runs under Windows. I’ve hooked up the Windows machine to the network and control it through Microsoft’s free Remote Desktop Client so that it runs in a window on the Mac. This is an arrangement that works well, with only tiny extra work to transfer screen grabs from one machine to another.

As I work I come across features and functions that are unclear, so insert sequentially numbered queries in the source so that our clients can read and answer them in context, an approach that has worked well in the past. FrameMaker makes it easy to generate a hyperlinked list of such queries as a temporary addition at the front of drafts. This to the accompaniment of high-pitched twittering from the swallows on the power line outside my office, perhaps telling their fledglings how to get to Africa, a common sound here in late summer.

15:02 An e-mail arrives from the solicitors handling a local planning battle, so that must be checked to see whether it is urgent. Bread goes into the oven, then back to work.

17:45 Break to weigh, wrap and label cooled loaves and put them on the stall, where there is an expectant queue due to ‘advertising’ (a sheet of paper that says ‘Locally made bread here at 6 pm’). An e-mail arrives from the solicitors handling a local planning battle, so that must be checked to see whether it is urgent. Bread goes into the oven, then back to work.

18:26 The log man rings to ask if he can deliver a further load this evening, so out to move my car out of the way and to be briefly distracted by a conversation about horses with my next-door neighbour, then back to the computer. Despite all the interruptions, I am about 30 pages further on than this morning.

19:15 The US programmer is now in, so we have a brief e-mail discussion to find ways around some bugs in the new parts of his software.

19:45 Reach a convenient place to stop, down tools, set computers to back up, water the plants in the conservatory, then feet up, a well-earned drink and some Mozart. My favourite time of the day.

If you’d like to describe a day in your life, typical or otherwise, contact journal.editor@istc.org.uk. It might be a day spent creating content or one devoted to some of the many other activities for which we, as communicators, are often responsible.
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