

Communicator

The Institute of Scientific and Technical Communicators

Spring 2022

- Breaking into Tech Writing
- Developing a good rapport with your team
- Using alternatives to replace text



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From the editor

Welcome to the Spring issue



Recent changes

As the ISTC welcomes you to 2022, *Communicator's* team and Council members want to ensure readers are feeling heard throughout the year, and are able to understand the printing changes that have been recently implemented. At this point we don't have the full figures yet but the numbers are showing that our readers are indeed keen on paper – I can understand that because even though I love technology, I'm a bookworm who really appreciates the smell of a book – or of a shining new printed issue!

We've also decided to experiment with two issues per year that have a set theme and two issues that are the opposite, giving us the chance to unlock content that's relevant and interesting, but at the same time do not completely relate to each other.

Themes of this issue

Our President quotes a few interesting reads and what she has learned in the past few weeks. In the debut of the 'We are all ears!' section, *Communicator* addresses a comment that was made by a reader online about collaboration tools. Natalia Dowding writes about her passions that led to a career change that culminated with a move to Technical Writing – she even took a course provided by one of our business affiliates, Cherryleaf. Sneha Sridharan shares tips on how to best deal with Subject Matter Experts inside of your company or in a particular project:



Source: – <https://unsplash.com>

preparation, focus, and the ability to get the information you need from people who might not be available often, can be a real asset in your career. Kiriaki Kampouridou tells us a bit about TCWorld, an online conference that was streamed last November, aimed at Technical Writers. David McMurrey writes about something he knows very well as an experienced Teacher and courses developer, nontextual documentation. This issue also features not only one but two book reviews. Gavin Brian uses his own experience as an English Teacher to assess 'A Guide to Professional English' and Katherine Judge reviews Geoff Hart's book on working faster with word processing software tools. Ciaran innovates by replying to a reader's impressions and Matthew explains what the concepts of branching and source control mean.

Getting to know a little bit more about you professionally

Everyone that has been registered in the ISTC was sent an email around the beginning of last December, in which we encouraged professionals to share useful information that can shape our knowledge about the industry today. It's essential to know the most relevant skills, qualifications, level of experience and compensation that your peers are getting, so you can trace a factual comparison with your personal situation – that might enable you to assess where you are in your career. We will share the results in our next issue – stay tuned.

Ongoing call for Copyediting

Communicator is looking for a copyeditor to help out Tony. This volunteering role is very rewarding and

teaches you new things every couple of weeks. Tony has explained a little bit about this role in the autumn issue, and coincidentally in the current journal, Sue Littleford (invited by our regular Jean Rollinson) talks about the very same topic in the 'Editing' column – if you are keen please reach out.

Congratulations

After such a long time being a member and having helped us to craft *Communicator* across many years, the ISTC has granted a well deserved Honorary Membership to our copyeditor, Tony Eyre. Congratulations, Tony!

Open space

As always, this is an invitation to those of you who are long-term loyal ISTC members and *Communicator* readers, or those who have just joined us: you're welcome to engage with us and make comments and requests, voice concerns and/or share new ideas. Our social channels, email contact and ISTC online forums are an open and inclusive space for everyone.

I hope you enjoy reading this issue and have a great new year while also finding some time for yourself and chances to let your hair down. Finally, I'm going to leave you with a fascinating find for word lovers: have you tried playing Wordle? It's a great brain exercise referenced at the bottom – you will definitely get hooked!

Yours, ■

References

- Eyre, T (2021)
'*Communicator: The copyediting process*',
Autumn 2021: 34-35
- The New York Times. <https://www.nytimes.com/games/wordle/index.html>

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istc.org.uk/homepage/publications-and-resources/communicator/#subscribe

Guidelines

www.istc.org.uk/publications-and-resources/communicator

2022 dates

Spring	copy by	1	February
Open	published	15	March
Summer	copy by	9	May
Content	published	25	June
Autumn	copy by	22	August
Career	published	8	October
Winter	copy by	24	October
Open	published	10	December

Back issues

www.istc.org.uk/publications-and-resources/communicator/archive-of-back-issues
(ISTC login required)

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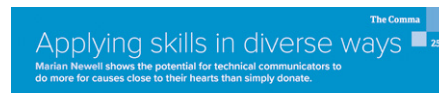
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Have your say

Do you have something to say about the articles in *Communicator*? You can share your views on this page, or through the ISTC online channels.

A reader said:

'I really enjoyed reading the autumn issue but the article that really stood out for me – because the writer mentioned not only the skills needed to perform her role but also the fact she was doing something close to her heart while helping a non-profit organisation – was Marian Newell's article about *The Comma*, a publication aimed at moths and butterfly lovers.'



Some of you may remember me as the Editor of *Communicator* from 2002 to 2005. I had no previous experience of producing periodicals but had subject-matter expertise, having been a technical author since 1985. In this article, I'll tell you a little about how I was able to transfer the skills I acquired to a voluntary project in a sector that's important to me – conservation. I'm now the Editor of *The Comma*, the magazine of Butterfly Conservation's West Midlands Branch.

The Comma

The magazine is designed to inform and motivate branch members, who receive a printed copy three times a year (generally a quarterly schedule with no summer issue because people are busy in the field). By increasing engagement, the magazine helps to retain members and motivate them to do more for butterflies and moths.

Readership

In thinking about this article, I realised that *The Comma's* readership is a far wider range of a diverse population. Head Office may have data on branch demographics but here I'm thinking about the level of interest and expertise. At one end of the spectrum, some of our readers are qualified conservationists with in-depth subject-matter expertise. At the other end are people like myself who become more involved casually interested and wanting butterflies and moths to thrive.

The editorial role

I commission content and prepare it for a designer to lay out. A big challenge for me is taking on *The Comma's* vast archive of fabulous images available; many photographers are also keen photographers. Consequently, although I do the layout request for part of my tenure with the ISTC, I'm glad to have access to a graphic designer (now progressive cartoonist too). My current contributors often need more help in developing articles than ISTC members do, because they are not professional communicators; this help may take the form of

The images and spreads provided were beautiful and I also learned a little bit about butterflies in the section that was added to the bottom of the article. I never had heard about *The Comma* as a type of butterfly before and I thought that the link between the name of the species and the punctuation mark was very thoughtful. I loved the in-flight sequences shared by photographers who are also passionate about nature. The article made me look up the mentioned Painted Lady, a type of butterfly that



Source: <https://pixabay.com/>

migrates a route of nearly 8,000 miles – for such a small and fragile creature this is incredible! I also checked the Butterfly aberrations website, which has a compilation of images that can help any amateur entomologist or curious onlooker to spot differences between species. I guess I enjoy case studies, reviews of features/products and/or books but this time it was intriguing to read about something unique.' ■

To have your say

Email communicator@istc.org.uk or get in touch through our ISTC_org social media channels.

Reference

Newell, M (2021) 'Applying skills in diverse ways' *Communicator*, Autumn 2021: 25-26



Freezing the action

Essex Skipper in the Flower Garden at Stokesley Court

A professional photographer shares some of his successes.

Branch and its excellent Facebook group to steer me in the right direction when my enthusiastic identifications have veered away from the species I am actually trying to photograph.

Catching the moment
The continuity aspect of my enterprise, which is now mainly concerned with butterflies in flight, has been fantastic. Chasing sightings and reports has meant that, for a while, lockdown could be forgotten. This process began in April, when only local walks were allowed. As you remember, it coincided with a glut of warm weather and one of our earliest butterflies, the **Orange-tip**. At the top of our lane, among the banks of forget-me-nots, I found myself pausing as my wife walked on with Lola, our dog. All I wanted, and there were thousands of cut-of-focus shots, was to catch the moment when the male lifted off.

To say I have become addicted to colour would be an understatement! Butterflies are the ultimate aerial specialists and, in my book, easily jump birds in flight.

Seeing some firsts
In May, I had the help of a local expert at the Bog car park on the Spantons, which turns out to be a

Andrew Fusk Peters is a professional wildlife photographer and author of many books, the most recent of which is *Hill & Dale, My Shropshire Year*, published last October by New Tree Press. See www.andrewfuskpeters.com for details.

Small Pearl-bordered Frillfly at Brook Vessons

habitat for **Green Hairstreak**. They are tiny, making them doubly difficult to frame mid-air. In June, I went to Brook Vessons for **Small Pearl-bordered Frillfly**, which are both shy and zigzaggy in flight – on top of that, the boggy ground meant wet feet. Little did I know that the other orange jolly I saw when I returned a few days later was a first for the area – a **Dark Green Frillfly!**

In July, I finally heard of **Marbled Whites** at Brook Vessons – a **Skipper** in the Flower Garden at Stokesley Court was an **Essex** –

CONFIDENT ON PAGE 14

Winter 2020

President's View

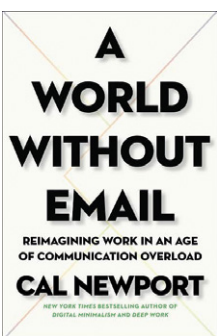
Linda Robins shares the latest ISTC news.



I usually take the opportunity at the start of each year to reflect on how things went in the previous 12 months and to assess the potential for improvement in the coming year. This is not necessarily to make resolutions as such since this can be setting oneself up for failure. It is rather an opportunity to think that things can be different – that is, better – then set out to make it happen.

As usual I consulted the experts for inspiration. I settled on looking at two aspects of professional life: managing the working day and how to work effectively with others.

Managing the working day



The striking and intriguing title of Cal Newport's book attracted me: "A World without email" (Ref.1). The strap line is "Reimagining work in the age of overload" with

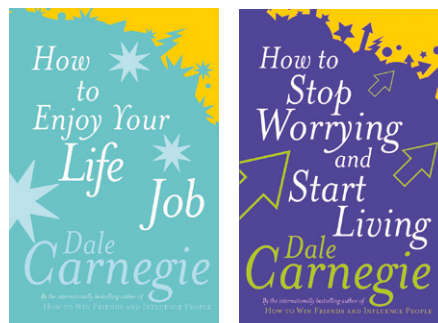
the invitation to "find focus; transform productivity; improve communication". There is significant evidence in the book of the inefficiency inherent in the usual way of working. This encourages the individual to respond 'instantly' to the items in an inbox without considering the relative importance or urgency of specific items. The author cites case studies where use of email was abandoned entirely (by accident or design). They found without exception

that productivity and innovation improved in the new way (of working).

This may all sound over-dramatic and the solution too radical. There is significant supporting theory which makes the book very thought provoking. An individual cannot opt out of email, nor is that the only way of making improvements. At the very least there are valuable tips on arranging the seemingly relentless flow of messages to best effect. There is good advice on meaningful categorisation and practical organisation of email so the individual can work effectively and according to priority. I have now improved the place of email in my own workflow and made associated changes. I cannot claim yet to have mastered its management, but with improved categorising of importance/speed of response required and so on, I can now claim to be working more efficiently; so far, so good.

Working effectively with others

For a better way of working effectively with others, I returned to the classic protagonist, the American author and lecturer, Dale Carnegie. His best sellers and influential books, "How to win friends and influence people" and "How to stop worrying and start living" were first published in 1936 and 1948 respectively. Excerpts from these and other books of his, relating to man management, have been combined into new titles and published in India. I turned for inspiration to one of these books, "How to enjoy your life and your job" (Ref.2).



I first encountered the author's writing on public speaking some years ago when working on my technique for presentations. At the time I also read "How to stop worrying and start living". This made quite an impression on

me with his life lesson. Dale Carnegie exhorts the reader to imagine the worst outcome of a given situation, then one must decide how to cope with this and find resolution. Having done so, the reader is ready to face anything and move on. Some examples he gives are startling but the method is surprisingly effective in everyday life and working life.

In "How to enjoy your life and your job" – again there are worked real-life examples. Dale Carnegie draws on anecdotes about significant figures including former US Presidents and business magnates, and social entrepreneurs. This is a different sort of read, but very refreshing with its positive life-affirming message of how to succeed; this entails valuing the thoughts and opinions of others, by showing respect always. There are tips too for effective working (pre-dating email of course). Most important though, are the stories from life which show how to get the best from others while remaining true to oneself. I am working through some of the specific tips, with some success to date.

I encourage you all to take the opportunity to explore ways of working more effectively and efficiently. It is always possible to make improvements and you should reap the benefits in your working lives.

ISTC News: reflecting and looking ahead

TCUK important announcement

Council has been considering when to return to an in-person conference. We now feel that we have the best chance of success by staging this next year; so TCUK 2023 will be an in-person event. For this year we plan an online event in the last week in September (including the ISTC AGM and UKTC Awards as in the last two years). We will be seeking support from members interested in helping to make both events happen. More information will be sent out separately in the near future; however you can contact us now via istc@istc.org.uk if you would like to know more.

UK Technical Communication Awards

Communicating excellence

We are taking entries for UK Technical Communication Awards 2022. The established guidelines apply again this year. They are open to any individual or team, whether employed, self-employed, contracting, volunteering, permanent, temporary, full-time or part-time. We continue to encourage entries of all types, from traditional documentation to those demonstrating technical innovation.

There is a dedicated UKTC Awards website: <https://uktcawards.com/>.

Details of last year's entries and their authors are given on the website: <https://uktcawards.com/past-years/winners-2021/>.

See the Winter 2021 issue of *Communicator* for articles by last year's winners (Ref. 3)

Closing date for submissions is 31 July. Please contact the office (at istc@istc.org.uk) for details.

Community

Fortunately some Local Area Groups were able to meet in person during last year with others continuing online. We plan to encourage expansion of these groups, and to establish Special Interest Groups. Also we will capitalise further on use of social media to publicise activities.

Professional Development

With membership renewal for 2022, we have renamed the 'junior member' grade to 'entry level member' grade. The junior member grade was introduced to bridge a gap between student grade and full member grade. This was accompanied by the mentoring scheme to guide juniors through their early years in the profession as they gained the experience needed for full membership.

We have made the change of grade name to 'entry level' in recognition of the fact that many entrants are second or third career professionals. The current issue of *Communicator* exemplifies this with an article by a very experienced engineer now moving into technical writing (Ref. 4). We want these entrants to be aware that we recognise their special situation. Usually they have considerable relevant experience in

their scientific or technical discipline, but now need to acquire the knowledge and skills necessary for effective technical communication.

This year we are reviewing our CPD framework and our mentoring scheme to ensure that all members can benefit and contribute effectively in recognition of the value of 'lifelong learning'.

Resources

We continue to review and add to the members-only page introduced last year. Tools and resources here are available only to ISTC members and business affiliates. There are free courses on technical communication, articles, reference material, online discussion forums, presentations, videos, the ISTC YouTube channel and much more.

Also on the ISTC website we provide details of resources available to non-members, including courses accredited by the ISTC.

ISTC Meets 2022 – new name for our monthly online meetings

The TCUK Online monthly meetings continued throughout last year; these sessions started as a spin-off from TCUK Metro Online in 2020.

The presentations are short (half hour, plus questions), provided free of charge. It's a good opportunity for members to stay in touch, share knowledge, and practise presentation skills, as well as something to include in your CPD.

Since the start of 2022, these meetings are now called ISTC Meets. Details of previous events are available on the ISTC website at istc.org.uk/events. Please follow ISTC Meets on our Eventbrite page to be notified of upcoming events.

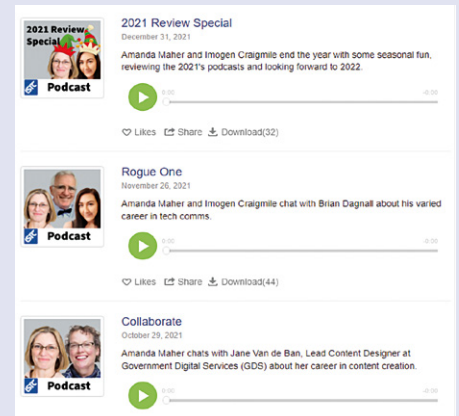
ISTC Meets

Each month, we have a speaker offering a presentation on a topic related to technical communication, along with a chance to ask questions and join in a discussion about the topic – all in just one hour!

If you'd like to be added to our mailing list for these events, contact istc@istc.org.uk

ISTC Podcasts

The monthly podcast launched at the end of 2020 continued throughout last year. Each podcast is about half an hour of chat with technical communicators covering experiences working as a communications professional. The last podcast of last year featured a review of the year's podcasts (Ref 5) : 2021 Review Special (December)



If you would like to participate, please contact the office (istc@istc.org.uk).

Finally

We are always keen to hear your opinions on how we are doing and with your ideas for improvement and as always, we have opportunities for volunteers for projects great and small.

Please contact the office if you would like to get involved (at istc@istc.org.uk).

We always welcome suggestions from ISTC members and all readers of *Communicator*. Please contact me (president@istc.org.uk) or the ISTC office (istc@istc.org.uk). ■

Linda Robins FISTC

president@istc.org.uk

References

Reference 1: 'A World without email' Cal Newport: ISBN 978-0-241-34141-4 (2021) <https://www.calnewport.com/books/a-world-without-email/>

Reference 2: 'How to enjoy your life and your job': Dale Carnegie: ISBN 978-83-8252-990-8 (2018) <https://www.amazon.co.uk/How-Enjoy-Your-Life-Job/dp/0749305932>

Reference 3: Robins, L. (2021) 'Presentation of the UKTC Awards 2021' (Winter 2021: 14-16)

Reference 4: Dowding, N. (2022) 'Breaking into Technical Writing' (Spring 2022)

Reference 5: ISTC Podcast. <https://istctechcomm.podbean.com/>

Membership

New Membership updates.

What new members have to say



Shelly Wolfe

I've worked in technical communications since 2008 and recently completed my MA in Technical Communication

and E-Learning from the University of Limerick - writing my thesis on the topic of open source documentation tools and frameworks and their impact on an organisation's documentation culture. In 2014 I came to Ireland from Canada on a working holiday visa, and was hired as the sole technical writer and content manager at a software company that specialises in mobile marketing automation and customer relationship management. Late last year we (finally) hired our second technical writer and are working to create a new developer documentation portal to support our upcoming expansion of API offerings. I've always been an advocate for great user experience and content design, across both our documentation and product offerings, and look forward to applying those principles to our new developer portal.



Sara-Jane Holbein

I'm based in Kerry, Ireland, and I began my technical writing career in 2012. I have recently joined Swrve, a leading marketing platform,

as a technical writer. My career to date has mainly focused on end-user software documentation, but my new role has seen me move into API and SDK developer documentation and as part of this I'm getting hands-on experience with creating a dedicated Swrve developer portal.

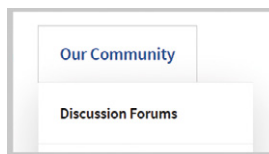
Featured contributors

Stuart Culshaw was delighted to receive his *Communicator* copy after contributing to the Autumn 2021 issue.



If you would like to contribute to this section, please reach the editor: commissioning.editor@istc.org.uk

Engage with our community online through our forums



Member news

as at March 2022

New members

A warm welcome to all new members who have joined the ISTC.

Member

Annet van der Cingel	Netherlands
Martin Gibson	West Dunbartonshire
Kevin Delderfield	Cumbria
Sara-Jane Holbein	Ireland
Shelly Wolfe	Ireland
Helen Bishop	Oxfordshire
Chris Gray	Lincolnshire



Associate

Helena Bower	Berkshire
--------------	-----------

Entry level

Amie Grace	Dublin
------------	--------

Student

Elizabeth McPhillips	County Monaghan
Amanda Lindsay	West Lothian
Saba Azad	California
Gregory Bridgman	London

Transfers

Congratulations to all on your new membership status.

Member

Laura Cannon	Northumberland
Stephen Wild	Berkshire
Catherine Pope	East Sussex



Rejoiners

Welcome back! We hope you gain much from your membership.

Member

Sandra Lynes	Hampshire
Peter Ford	Shropshire



What does it mean to be an ISTC member?

- Mentoring scheme
- TCUK annual conference
- UK Technical Communication Awards recognition
- Publications: *Communicator*, *InfoPlus*, ISTC Books
- ISTC Code of Professional Practice



ISTC groups and online

ISTC area groups offer an opportunity for technical communicators to network and share knowledge and expertise. The groups are open to members and non-members alike and meetings/events are generally free to attend. Refer to InfoPlus for the latest news and events. To get involved, contact the relevant organiser, or istc@istc.org.uk.

Area groups

Cambridge

Organiser: Deb Stevens

✉ cambridge_areagroup@istc.org.uk

[in](#) Cambridge Technical Communicators

East of Scotland

Organiser: Holli Hamilton

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[in](#) Technical Writers (East Scotland ISTC)

Irish

Organiser: Adrian Rush

✉ irishgroup@istc.org.uk

Irish Technical Writers

Organisers: Yvonne Cleary, Bridget Walsh

✉ irishtechwriters@istc.org.uk

[in](#) Irish Technical Writers--An ISTC Area Group

Midlands

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[in](#) ISTC Midlands Area Group

Thames Valley

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Online groups

ISTC member discussion forums:

istc.org.uk/community/discussion-forums

[in](#) Institute of Technical and Scientific Communicators

[f](#) ISTC Community

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Online presence

www.istc.org.uk

www.eventbrite.co.uk/o/istc-495786380

Podbean: istctechcomm.podbean.com



When Typography met Tech Comms

January 28, 2022

Imogen Craigmile talks with Gerry Leonidas about his role as a Professor of Typography at the University of Reading and the many ways in which typography and technical communications are linked.



iTunes: itunes.apple.com/gb/podcast/the-istcs-podcast/id1345913619



Technical Communication UK

<https://istc.org.uk/tcuk/>

[@TCUK_conf](#)

[f](#) TCUK — Technical Communication UK



UK Technical Communication Awards

www.uktcawards.com

Your ISTC directory

* ISTC Council member

The Institute of Scientific and Technical Communicators (ISTC) is the largest UK professional body for people engaged in technical communication. The ISTC encourages professional development and standards, provides research resources and networking opportunities, and promotes technical and scientific communication as a profession. To join the ISTC, change your grade, or get involved in what we do, contact the ISTC office +44 (0) 20 8253 4506 or istc@istc.org.uk.

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We are all ears!

Thayna Desmond looks at the changes made to Confluence and the alternatives on the market.

Every so often members reach us via social media asking for advice and making suggestions. This time we are addressing a concern as one of our readers, who is a heavy user of Confluence, was wondering which other options are available, as Confluence recently discontinued some useful macros.

What is Confluence?

Have you ever worked for a company that had an intranet or internal system with lots of useful information that was supposed to be used internally, or where wikis were created about a certain process or procedure carried over by a certain department? Confluence is a software product made for collaboration – meaning that anyone inside a company – governance dependent – is able to create work-related content that can be read by their peers, not shared externally. In that way Confluence pages work as an open space for projects, knowledge sharing, internal wikis, checklists, training – basically any content that may be required for a team to thrive and be productive.

Confluence allows teams to create pages, use built-in templates, restrict the access to an unfinished draft, select a few people as ‘editors’, among other functions.

Atlassian – a software company – owns Confluence and the product is not available for free. (They have a complimentary version for very small teams but individual features and add-ons are available for purchase.) While many features are very useful, a few employers and smaller sized companies may not have a set budget for content purposes, and as price varies, it is a good idea to compare a few market players.

What has changed in Confluence recently?

Atlassian opted for removing a few useful macros that were previously built-in into the platform and helped writers. They still have plenty of macros

available though and those pieces of functionality allow collaborators to use templates, attach formatting, media, visuals and reporting-related widgets into the body of text, aiding content distribution and the look and feel of a page. The reference section at the end of this article provides a link to the main macros that have been removed and the alternatives you can use, if your company still uses Confluence.

Why do companies decide to remove features?

It’s quite common for businesses to decide to EOL (end-of-life) a few features and the reasons behind that can be varied: for example, a Product taking a different roadmap direction, analytics revealing that a certain tool has a very low usage but demands high maintenance, or poor performance – which seems to be the case for the macros discontinued in Confluence, according to Atlassian’s support and community pages.

Which alternatives to Confluence are available in the market?

Whilst doing some research, you will see lots of possibilities - websites that offer a full breakdown of details, including the pros and cons of each tool mentioned are listed in the reference section. Tetra, Nuclino, Notion, BookStack, Wiki.js, DokuWiki, Helpjuice, SharePoint, BlueSpice, Bit.ai, CloudTutorial, Kipwise, Basecamp and Samepage are some of the options available - a few of those are free open-source applications with intuitive WYSIWYG (what you see is what you get) editors.

What to do next?

The tool your company will decide to use depends on its budget, goals, size, needs, and many other factors. We hope this article can assist you in trying a few things out and making an informed decision that is both good for you and for your team. ■

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Glossary

EOL (end-of-life). A product at the end of the product lifecycle which prevents users from receiving updates, indicating that the product is at the end of its useful life (from the vendor’s point of view). At this stage, a vendor stops the marketing, selling, or provision of parts, services or software updates for the product. (The vendor may simply intend to limit or end support for the product.) Source: https://en.wikipedia.org/wiki/End-of-life_product (accessed 14 January, 2022)

WYSIWYG. A system in which editing software allows content to be edited in a form that resembles its appearance when printed or displayed as a finished product, such as a printed document, web page, or slide presentation. Source: <https://en.wikipedia.org/wiki/WYSIWYG> (accessed 14 January, 2022)

Thayna Desmond

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Career change: breaking into Technical Communication

Taking a new path. Natalia Dowding shares her hopes as someone new to Technical Writing.

“You can’t connect the dots looking forward; you can only connect them looking backwards. So you have to trust that the dots will somehow connect in your future. You have to trust in something—your gut, destiny, life, karma, whatever. This approach has never let me down, and it has made all the difference in my life.” Steve Jobs

In June 2006, I was about to join my husband on his new mission in Paris. My excitement about this journey was bursting out as I arrived at the Gare du Nord late in the evening to meet him. We were anticipating a new adventure.

Paris met us with a baking hot summer. The evening had descended upon the city, breezing through the overheated streets and soothing, exhausted people. The streets were quiet, resting from the swelter and buzz of a busy Parisian day.

We took a taxi and went to our hotel. The elegance of the streets, the delicate masonry of the buildings, the graceful balconies hanging over pavements - Paris is a bewildering city. For me, it was the start of a new journey.

I was recovering from burnout. The previous period had been busy and rather stressful as after completing my PhD, I worked as a software developer in a robotics company. It was tricky to balance my studies and a job with looking after my family.



Figure 1. Photo by Camille Bradard on Unsplash

Learning a new language

At this point I needed to do something different, so I started learning French and joined an art course. Art and languages - what else can you think of in Paris?

I was learning French from scratch, and I was determined to get fluent as soon as possible but when you learn a new skill, you need to accept your own ignorance and take your time to allow the learning process to become an adventure.

Working as a translator

I have always loved working with words and often lost the sense of time while trying to identify grammar patterns, as different languages have very interesting ways of expressing similar concepts and that really fascinates me.



Figure 2. Photo by Ella Jardim on Unsplash

When my son was small, I changed jobs as my engineering position demanded full focus and relentless long hours, which was not ideal.

Instead, I took a job as an in-house translator for a big IT project that required a linguist with an expert knowledge of Information Technology, and it was there that I first came across extremely well-written documentation. As I did not have any formal training, impostor syndrome haunted me for a long time, but my colleagues shared their knowledge generously. Soon I grew more confident in translating and interpreting business meetings, training courses, and documentation. After

that experience, translation work accompanied me through my life as a side job.

I learned three lessons whilst working with languages: words are very powerful and must be chosen carefully, having knowledge of languages is an asset that opens doors to new worlds and serves as a source of extra cash, and having the opportunity to work and live in different cultures is an advantage in the modern globally connected world.

I also began working on two mobile applications that required NLP (Natural Language Processing) techniques, at the same time while experiencing Parisian workspaces and having many different ideas that included writing – as a pleasure and as an escape. In the meantime, translation jobs were coming erratically, and I wanted to use my energy in a more efficient way – perhaps a freelance job which would fit well with my busy life and, for the first time, I thought about writing as a career.

The beginning of a pandemic

Life changed abruptly in the middle of March 2020. We left France a week before the French government announced lockdown and we have not been able to return since then.

We settled back in our house in a small, charming village in North Yorkshire and life transformed dramatically. There was no more rushing between trains and buses, no more tightly scheduled appointments. Now we woke up with the birds rather than the increasing noise of a rush hour traffic on boulevard Haussmann.

A huge amount of time suddenly freed up and soon after I was determined about returning to full-time work. What I could not decide was in which direction to go.

My career path so far looked like a crazy paving. I had so many skills and undertakings, seemingly totally unconnected from one another, that it made me feel uncomfortable. Later, someone reminded me of a Steve Job's metaphor of "connecting the dots" - one must believe that the dots will connect at some point, the picture will clear up and things will make sense. That helped me a lot.



Figure 3. Photo by Rachel Strong on Unsplash

Transition to technical writing

Brushing up my skills and going back to development work seemed like a logical choice. However, I felt that development would not be the right choice anymore as the industry evolves at a great pace, making it challenging to keep up even for young developers and I was not sure that at this stage of my life, returning to such a dynamic profession would work.

After conferring with friends and family, I turned to online writing, choosing a technical niche, then to technical writing.

As a first step, I had to do some research about technical writing. But exploring this field was not straightforward because unlike marketing content writers and UX (user experience) writers, technical authors rarely write blogs or philosophise about their work.

Coming from a development background, I had heard about technical writing and felt that I would have an advantage because of my technical knowledge. I know from experience that companies often care about producing quality user guides and training materials, but they rarely provide their development teams with consistent, well-written documentation.

During my research I found the ISTC (Institute of Scientific and Technical Communicators), which I consider to be a valuable discovery as I believe that professional associations are a great place to inform yourself about the latest trends in the industry and learn from the experience shared by experts in the field.

I still wanted to find out more about technical writing as I needed to gain basic knowledge and found that there is a great number of courses available but how to choose a good one? How to ensure that the time and effort you spend on learning something new is not wasted?

I saw many MOOC (Massive Open Online Courses) platforms, such as Coursera and EDX, but they are designed for a different audience and do not include niche fields like technical writing. Later, I found out CherryLeaf's online course on the ISTC site - it ticked all the boxes: the curriculum covered essential topics, from planning to editing; the course was recognised by the ISTC in the UK, the STC (Society for Technical Communication) in the US and the ASTC (Australian Society for Technical Communication) in Australia. The approval of these official bodies left no doubts about the quality of the training and the ability to study remotely at my own pace was crucial during the pandemic.

The course comprised several modules, each covering a topic of the writing process. I learned to adapt my writing to a specific audience, researching, ideating, planning, and reviewing. Assignments were the most important element of the course, and once submitted, the student would receive prompt feedback from the course leader. Comments were invariably helpful, encouraging, and full of useful advice.

Once I completed my course, I felt it was the time to join the ISTC.

Honing my skills

Then I faced the hard part: it was time to think about my next job. I was unsure about my abilities and felt I needed more knowledge and practice. I listened to podcasts, read articles, and practised as much as I could to fill the gaps.

One of the challenges for me was learning the terminology that at times was counterintuitive. It was not obvious how copywriting and content writing differ from each other and where is the place of Content Strategy and Information Architecture in all that? Can they be used in a different context? I had an idea and started creating glossaries of terms with references and their sources - that helped a lot when I needed additional information on the subject.

Practice is also indispensable to improve confidence so I created a few sample documents that could prove my writing skills to future employers - mock-ups like manuals for open-source projects, white papers, diagrams, and blog posts.

I sought lots of online expert advice and found that brafton.com, copyblogger.com are useful resources on marketing content, uxbooth.com on UX design, www.idratherbewriting.com on API (application programming interface) and other technical documentation.

As for podcasts, I like Write the Docs, CherryLeaf podcast and Contentrookiepod, among others. In order to plan and organise my writing, I use Bear and Evernote for gathering and labelling resources; Mind Mapping for ideating and Milanotes and SimpleMind for brainstorming. I also like the Storyboarding technique to arrange ideas in groups and sequences, using large sheets of paper and coloured pens. As for grammar checking, Hemingway and Grammarly have an excellent reputation.

Intense job hunt

Going through interviews introduced me to reality and the demands of businesses, both big and small, towards writing. Once I started going through the interviews, I had a clearer picture of what I needed to do next.

The companies with whom I had interviews had very different demands. Some of them had a clear idea of what they expected from their candidate and had established an overall content strategy. Others wanted someone to re-design their documentation repositories as, after many years of accumulation, the silos of documentation had become difficult to manage. This would require the candidate to undertake auditing, categorising and process mapping – plus writing extra content.

The future

Interviews have also made me realise that in technical writing, all the dots of my crazy career path began to connect somehow. I can use science and IT knowledge as technical expertise, knowledge of languages and attention to detail as a writing aid, and art as an insight into design decisions. It takes time though and I am still searching for my first customer as a freelance writer.

I keep learning about content strategy, information architecture, content management and try to practise these where possible. Writing every day on a certain topic and genre teaches me a lot and gives me hope for a fruitful career in the future.

Technical writing offers many diverse opportunities and, depending on your skills and preferences, you might choose different niches. Undertaking a new professional path in your life may look like a radical move, but if you feel it is the right path for you, it's worth taking the plunge. ■

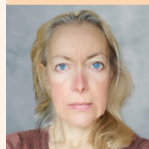
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 Content Rookie: <https://podbay.fm/p/content-rookie>
 Copyblogger: www.copyblogger.com
 Evernote: <https://evernote.com/>
 Grammarly: <https://www.grammarly.com/>
 Hemingway: <https://hemingwayapp.com/>
 Milanotes: <https://milanote.com/>
 SimpleMind: <https://simplemind.eu/>
 STC. Society for Technical Communication: <https://www.stc.org/>
 UX Booth: www.uxbooth.com
www.idratherbewriting.com
 Write the Docs: <https://www.writethedocs.org/>

Glossary

- API.** Application Programming Interface. Type of software interface, offering a service to other pieces of software. A document or standard that describes how to build or use such connection or interface is called an API specification. Source: <https://en.wikipedia.org/wiki/API> (accessed 28 January 2022)
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- Information architecture.** Structural design of shared information environments; the art and science of organizing and labelling websites, intranets, online communities and software to support usability and findability; and an emerging community of practice focused on bringing principles of design, architecture and information science to the digital landscape. Source: https://en.wikipedia.org/wiki/Information_architecture (accessed 28 January 2022)
- Massive open online course.** Online course aimed at unlimited participation and open access via the Web. Source: https://en.wikipedia.org/wiki/Massive_open_online_course (accessed 28 January 2022)
- Natural language processing.** Subfield of linguistics, computer science, and artificial intelligence concerned with the interactions between computers and human language. Source: https://en.wikipedia.org/wiki/Natural_language_processing (accessed 28 January 2022)
- Storyboard.** Graphic organizer that consists of illustrations or images displayed in sequence for the purpose of pre-visualizing a motion picture, animation, motion graphic or interactive media sequence. Source: <https://en.wikipedia.org/wiki/Storyboard> (accessed 28 January 2022)
- User experience.** How a user interacts with and experiences a product, system or service. Source: https://en.wikipedia.org/wiki/User_experience (accessed 28 January 2022)

Natalia Dowding



Natalia is a software developer, competent in Mathematics and Computer Science. She has always been fascinated by the incredible creativity and energy of the digital industry. Her experience in translations and interpreting helped her to develop a deep interest in the ways language works. She is looking forward to merging her passions: Languages, Literature and Technology.

Tips to maintain a good rapport with your SMEs

Sneha Sridharan writes about the importance of developing a few essential skills to succeed as a Technical Writer.

One of the most important aspects of being a technical writer is being able to extract information that other people don't know how to get. You can do it in many ways, such as: diving deep into different functional documents or wikis, through trial and error, or even by skimming through code. However, anybody can do that. What sets you apart as a technical writer is the ability to get information from people who aren't very forthcoming. It is all about setting up meetings with the appropriate individuals, asking them the right questions, and getting the correct information out of them, which is then used to create your documentation. Maintaining good relationships with your Subject Matter Experts (SMEs) and other (human) sources is at the heart of this, and that is what I will address in this article.

SMEs have strong technical/specialist knowledge and technical writers are rich with information design, translational, and communication skills. The purpose of this article is to highlight techniques to maintain a positive relationship with your SMEs; this can have a significant impact on the quality of your documentation.

Why does it matter?

The simple answer to this is, writing can only take you up to a certain level. More often than not, the information that you need to build documentation is not available online. The data that we can extract from research, exploration, trial and error, and internal docs is limited. You cannot write useful documentation if there is a lot about the subject that you don't know or don't understand.

The only way to get all the information that you need is from the SMEs; mostly through meetings (otherwise known as SME interviews). It is essential that you identify the right people and ask the right questions to get the information you need. Once you've done that, your documentation will have all of the answers, and people will trust it as the source of truth, which is your ultimate aim.

Being prepared for the meetings

The worst thing a technical writer can possibly do in an interview with an SME is say, "OK, describe the feature/product to me." SMEs appreciate it if you arrive prepared and have tried the product or feature before the meeting. This approach will aid in the development of trust and credibility among your SMEs. It also demonstrates that you value their time and provides a nice starting point for the conversation.

Asking the right questions

When it comes to asking the correct questions, there is always a sweet spot. While it's important to ask clever, well-informed questions, it's also not a terrible idea to ask some basic ones (if you are not able to find them through any other means). There may be another user who has the same question as you and would appreciate it if you answered it in your documentation. However, it is important to remember that if you can find the solution to a simple query through research, trial and error, internal documents, functional documents, wikis, or by going through code, it's not worth taking it to the SME. Also, it is always best to mention your assumptions and the steps you took to arrive at the intended outcome during the meeting.

Establishing focus

It is vital to have a clear understanding of the goal of the meeting with the SME and the desired outcome. When the agenda is unclear, the entire meeting might quickly devolve into a hazy information sharing session. It is critical to understand what information you require, why you require it, and how it will benefit the customer/end-user.

Here is a technique that might be of help: as you are working through your documentation, trying to incorporate everything you know, you will have a lot of questions. You can jot them down and create a list, then, when you have gathered a set of 20-30 questions, you can set up a meeting with the concerned SMEs. You may email them this list of questions while you're setting up the meeting and tell them you want to go over them in the meeting. People are unlikely to refuse if the aim of the meeting is made crystal clear.

Recording meetings

A technical writer's work is typically described as converting information from SME's jargon to plain English. SMEs are well-known for having their own language, and the information they provide during SME meetings is sometimes too overwhelming to grasp. If you are unable to absorb the information shared in the initial meeting, you may need to schedule more meetings with them, which might tire them. It might also be difficult for you, since you may have to rummage through your memory for facts you've forgotten or missed.

A simple solution to this is to record the meetings. You may then go over them again and again, carefully piecing them together. If the project is delayed for any reason, the recordings will allow you to refresh your memory even weeks or months later.

All the information that you need to write docs is pretty much inside the SME's head, but it often comes out in random structures and tangents and in ways that are hard to understand. A recording allows you to shape and control that information. You can then turn to the notes and turn them into documentation.



Figure 1. By Gary Butterfield on Unsplash

Being curious

This goes without saying and is self-explanatory. Curiosity for technology and a desire to solve linguistic puzzles are essential qualities for a technical writer. It not only answers a lot of your questions, but it also lets you document and share your journey with your users. When you can explore and uncover as many answers as possible on your own, the quality of the questions you ask SMEs improves, and the quality of the dialogue during SME meetings improves as well.

Responding quickly to emails and messages

The quicker you respond to emails and messages, the more people feel connected and listen to you. Being responsive aids in building rapport and trust. In fact, the faster you respond, the fewer details you need to include about that particular issue or problem. It is essential for a technical writer to be as approachable as possible, and one way to establish that is by being responsive.

Prompt responses encourage SMEs to share additional information. Particularly if they are currently in the middle of a problem, and typically they may share extra information when you ask follow-up questions. Such conversations build a relationship of trust, whereas when you wait days to react, the topic dies and people eventually lose interest.

Conclusion

It is extremely important for technical writers to go above and beyond to maintain a good relationship with other team members such as engineers, developers, project managers, and support specialists since it somehow or other has an effect on the quality of the documentation being produced. Working with SMEs is one of the most important skills that a technical writer will develop over time and as they gain experience. ■

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Sneha Sridharan



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Cruising for NonTextual Possibilities

David A. McMurrey compares text-heavy documentation with the use of graphs, illustrations, charts, tables and references.

The practice of technical communication, and of writing in general, has principles that are absurdly obvious. For example, “...write so that your intended audience will understand.” That theory is absurdly obvious, but its practice is equally difficult. Similarly, “...convert text to graphics and tables for more effective presentation...” seems almost as absurd as well.

As technical information developers, we don’t need to be told to convert prose into graphics or tables whenever possible. However, there are some corollaries to that established wisdom that might not be so familiar. Let’s review some obvious situations where conversion is useful, then we can consider what sort of text must remain (if any) after those conversions.

Cruise your text

As writers and editors, we should cruise through our rough drafts for text that could be converted to graphics or tables.

How about a process illustration? The following excerpt describes a process: a flowchart would be nice, though not critical. You can go to the end of this article to see the revision.

Text-only version

The Software Development Life Cycle begins with an analysis of user requirements, progresses with the overall design of the program, continues with the coding of the program, moves on to documentation and testing of the program, and ends with the operation and maintenance of the program.

Combined text-and-graphic version

As illustrated in Figure 1, the Software Development Life Cycle (SDLC) begins with an analysis of user requirements, progresses clockwise with the overall design of the program, continues with the coding of the program, moves on to documentation and testing of the program, and ends with the operation and maintenance of the program.

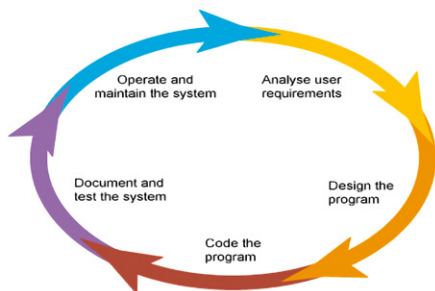


Figure 1. Software Development Life Cycle, beginning at the top and moving clockwise.

How about a table? The text in this next excerpt calls out for tabular presentation—desperately! The data could be far more effectively presented as a table.

Text-heavy discussion

Physical Attributes. The LG C1 measures 32.7” x 57” x 1.8” without its stand and 33.9” x 57” x 9.9” with its stand. It weighs 52.9 pounds without the stand and 71.9 pounds with the stand. The LG A1 measures 32.7” x 57” x 1.8” without its stand and 35.1” x 57” x 10.7” with its stand. It weighs 52.2 pounds without the stand. No information was available about its weight with the stand attached. The Vizio H1 measures 32.69” x 57.03” x 2.17” without its stand and 35.52” x 57.03” x 11.29” with its stand. It weighs 60.85 pounds without the stand and 70.99 pounds with the stand. One reviewer noted the bulkiness of the Vizio H1’s stand and stated that it could be frustrating to assemble. Although these TVs are extremely similar in size and weight, the LG C1 is slightly preferable for the small depth of its stand.

Textual discussion reduced by tabular reformat

Table 1. Summary of Physical Attributes of LG C1, LG A1, and Vizio H1 TVs

	LG C1	LG A1	Vizio H1
Dimensions w/o Stand (in)	32.7 x 57 x 1.8	32.7 x 57 x 1.8	32.69 x 57.03 x 2.17
Dimensions w/ Stand (in)	33.9 x 57 x 9.9	35.1 x 57 x 10.7	35.52 x 57.03 x 11.29

How about a flowchart depicting recursion? Unlike the previous example, sometimes a more complex flowchart can save many futile words.

Text-only version

The documentation process begins with a definition of the client’s requirements (in this case, a user document) and continues with a definition of the document’s purpose. The process continues with finding information sources and developing a tentative outline (in some cases, outline development necessitates finding additional information sources). With adequate information and a stable outline, the process can move to the rough-drafting stage. During this stage, several recursive things may occur: additional refinement may be needed in which case the process must

return to the finding information stage; the outline may need revising in which case the process must return to the outlining stage; the document purpose and requirements may have evolved in which case...

Textual discussion reduced by graphic presentation

As can be seen in Figure 2, recursion (backtracking) to earlier stages of the process occurs between the rough-drafting stage and the completion stage. During the rough-drafting stage, the writing team may realize the need for more information or the need for outline changes.

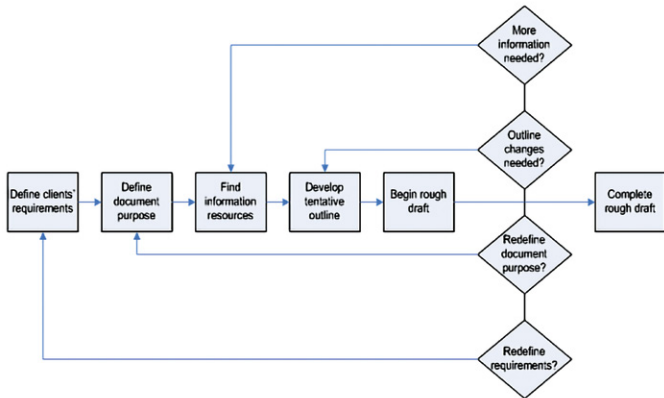


Figure 2. Illustration of the recursive nature of the writing process.

How about a chart? Pie charts, bar charts, and column charts can all be used to reinforce or clarify nearby text, as this next example shows:

Text version reinforced with a pie chart

Management of MSW in the United States in 2015. In 2015, the majority of MSW was landfilled (52%), while the remainder was recycled/composted (35%) and combusted with energy recovery (13%), as illustrated in Figure 3 below.

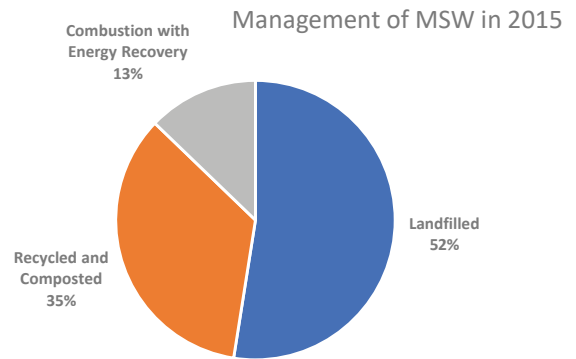


Figure 3. Management of Municipal Solid Waste (MSW) in 2015. Source: United States Environmental Protection Agency.

How about a graph? In the revision of this next excerpt, a stacked area chart clarifies not just the text but a table as well.

Recycling went from approximately 5,610 thousand tons in 1960 to approximately 67,770 tons in 2015. Composting went from negligible in 1960 to approximately 23,390 thousand tons in 2015. Combusting with energy recovery went from 0 in 1960 to approximately 33,570 thousand tons in 2015. Landfilling and related operations went from approximately 82,510 thousand tons in 1960 to approximately 137,700 thousand tons in 2015. (See Table 2.)

Table 2. Recycling, Composting, Combustion with Energy Recovery, and Landfilling of Municipal Solid Waste, 1960 to 2015 (thousands of tons)

	1960	1970	1980	1990	2000	2005	2010	2014	2015
Recycling	5,610	8,020	14,520	29,040	53,010	59,240	65,260	66,550	67,770
Composting	Neg.	Neg.	Neg.	4,200	16,450	20,550	20,170	23,020	23,390
Combustion with energy recovery	0	450	2,760	29,760	33,730	31,650	29,310	33,210	33,570
Landfilling	82,510	112,590	134,360	145,270	140,260	142,290	136,310	136,170	137,700

Version with text clarified by a stacked area chart

As can be seen in Chart 1, from 1960 to 1980, waste was almost exclusively deposited into landfills, the exception being some limited recycling options. Between 1980 and 1990, the US saw an increase in recycling as well as in combustion with energy recovery. Composting has seen the smallest increase from late 1980 to 2015s.

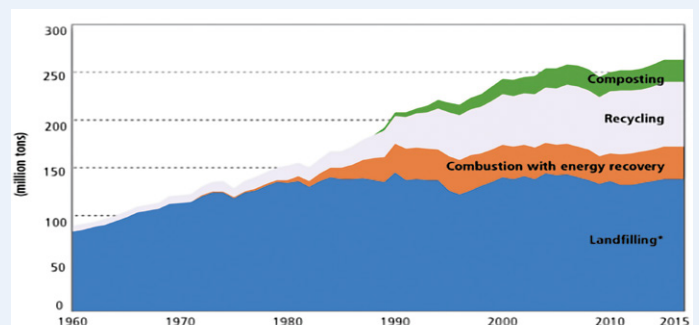


Chart 1. Recycling, Composting, Combustion with Energy Recovery, Landfilling, 1960 to 2015. Source: EPA. Advancing Sustainable Materials Management: Facts and Figures 2015. (Adapted by permission from Trista Shattuck.)

How about a diagram? Without the diagram in the text-with-diagram version, can you picture what's going on with dimples in this next excerpt?

Text-only version

The main anatomical cause for cheek dimples is a double (or bifid) zygomaticus major muscle. This just means that the zygomaticus major muscle is split into two separate muscles which have two attachment (or insertion) points to the corners of the mouth. One attachment point is at the corner of the mouth and the other is below the corner of the mouth. During the act of smiling, the movement of the zygomaticus major muscles causes tension on facial skin as it draws around the double zygomaticus major muscles. A depression (dimple) is created along the split section of these muscles where they attach at the corners of the mouth.

Text with illustration and informative cross-reference

The main anatomical cause for cheek dimples is a double (or bifid) zygomaticus major muscle. This just means that the zygomaticus major muscle is split into two separate muscles which have two attachment (or insertion) points to the corners of the mouth. One attachment point is at the corner of the mouth and the other is below the corner of the mouth. Figure 4 below compares the anatomy of a normal zygomaticus major muscle on the left (a non-dimpled individual) with a double zygomaticus major muscle on the right (someone who has dimples).

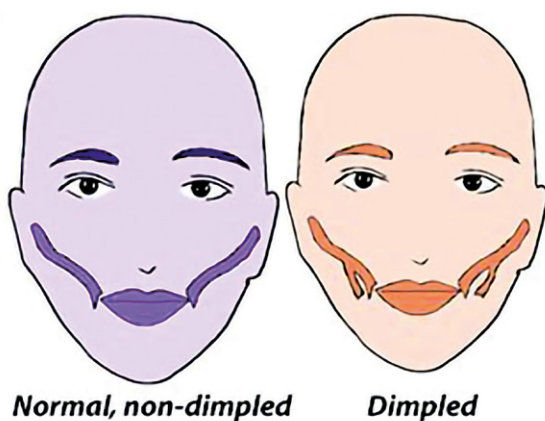


Figure 4. Illustration of zygomaticus major variations. Retrieved from <https://melindaazel.com/zygomaticus-major-variations-the-dimple/> (Adapted by permission from Greta Hedrick.)

Don't toss text overboard!

As you can see in the revisions of the preceding excerpts, 'cruising' of words to transform text into tables, charts, or figures did not result in the elimination of all text. Some can certainly be tossed, but strong cross-references must remain.

For a period of time in the 1980s and 1990s there was excitement about the possibility of wordless, graphics-only technical documents. Document developers were giddy at the idea of how money could be saved in translation costs. For example, documentation for AIX RISC systems and the AIX operating system, at that time, would no longer have to be translated into 14 languages!

Using the classic wordless document, the user could unfold a system map on a table and place components of the new computer in the indicated (but not word-labelled!) spots according to the shapes of the components. But if you consider anything less simplistic, such as creating a strong password or changing UNIX file permissions, the wordless idea becomes next to impossible.

But what about wordless videos? That technology was not practical in the 1980s and 1990s. Applications like TechSmith Camtasia and Adobe Captivate would change that, but only when computer power and storage capacity radically increased. Even so, for wordless videos, hardware and software interfaces would have to be localised. Translators of the 14 languages would have to be hired; even so, the effectiveness of the technical communication might still be unacceptable.

So the idea of wordless documentation did not prove practicable—or at least not yet.

Lighthouses for info-oceans: the cross-reference

When text is removed and replaced with tables and graphics, something must remain. What is it? It's the dear old cross-reference. You know, that See Table 3 gadget or that See Figure 4 gadget. But the cross-reference has most often been submerged with disregard and neglect for many years. Editors have to coax writers to add the simplest of cross-references.

As the examples in the revisions above illustrate, the cross-reference is a golden opportunity for technical communicators to elucidate or reinforce technical ideas. However, the common cross-reference we have come to know and dislike (or at least I do) wastes that opportunity. The barren See Figure 3 is an insult, a brusque, diffident, snobbish, curt, non-cooperative statement. The author might as well tell the reader to go for a boat ride in a hurricane.

The preceding revisions show that the strong cross-reference often provides a clue, some light as to how to interpret what's going on in the graphic or table—like a lighthouse. ■

David A. McMurrey



You can check out **David's** background at <https://www.prismnet.com/~hcexres/index.html>. He maintains the Online Technical Writing Textbook and is the principal of McMurrey Associates Courses in Technical Communication.

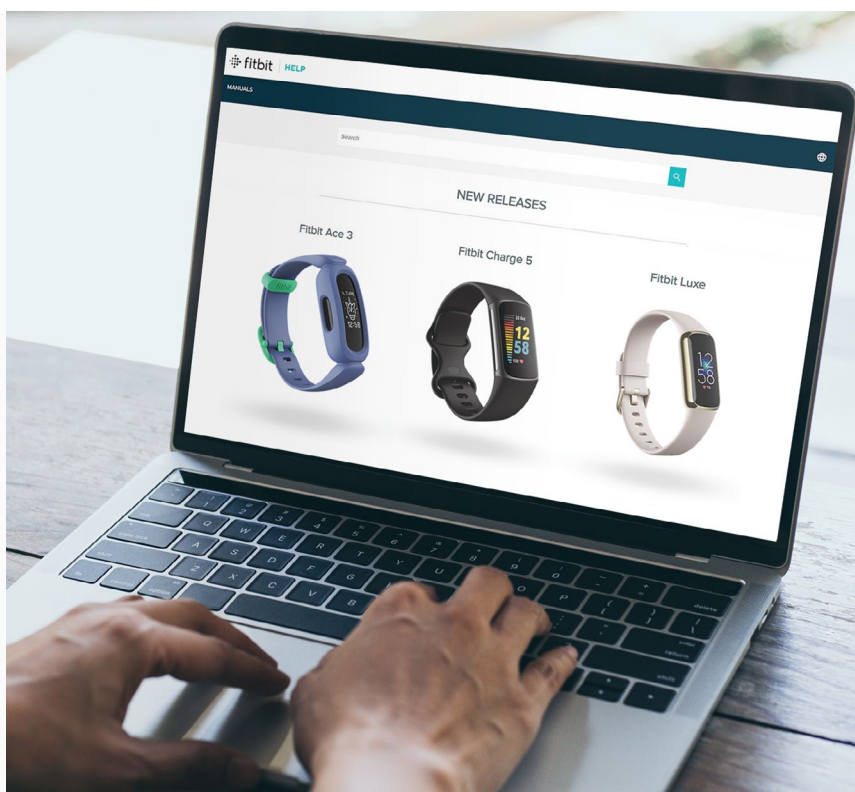


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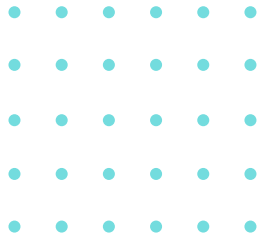


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With MadCap Flare, I was able to jump in and start building out specialized templates that would work for all of the FAA regulations and elements that the FAA requires in documentation. At the same time, we wanted to get off of PDFs and print and into an HTML online world as much as possible. We have achieved that goal using Flare.

Chris Bradley
Director of Publications
& BCP Coordinator



The beauty of MadCap Flare is that in terms of the set-up, software, and processes, it has us totally covered. We wouldn't have been able to keep in step with the company's move to agile development or the cloud without it.

Kai Weber
Lead Technical Writer



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- User Guides
- Quick Reference Guides
- Installation Guides
- Troubleshooting Guides
- System Requirements Specifications



MadCap Flare's single-sourcing capabilities help us streamline our processes to rapidly deliver the information our customers need for any new product releases.

Pat Holmes-Clark

Team Leader and
Specialist Technical Writer

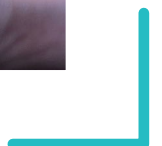
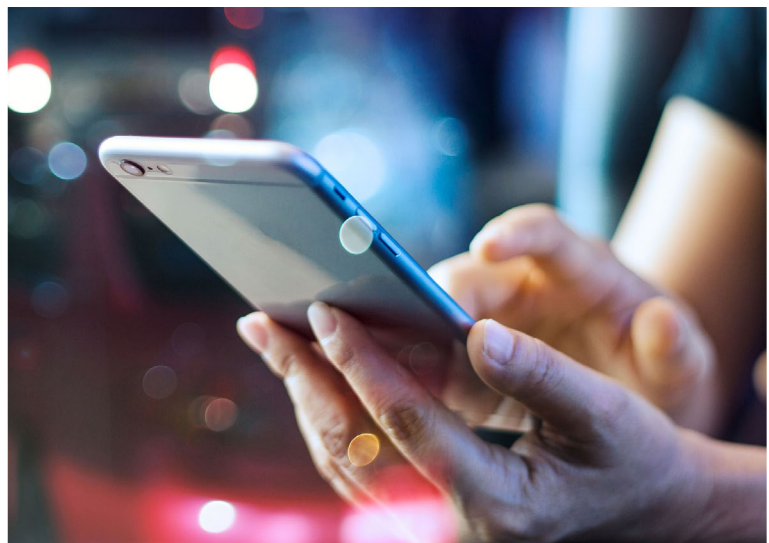


MadCap Flare's rich functionality has played an integral part in enhancing the Vodafone user experience when they are buying, installing, and using One Net Business.

Pawel Kowaluk
Technical Director



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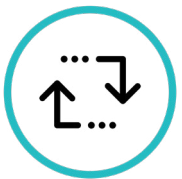
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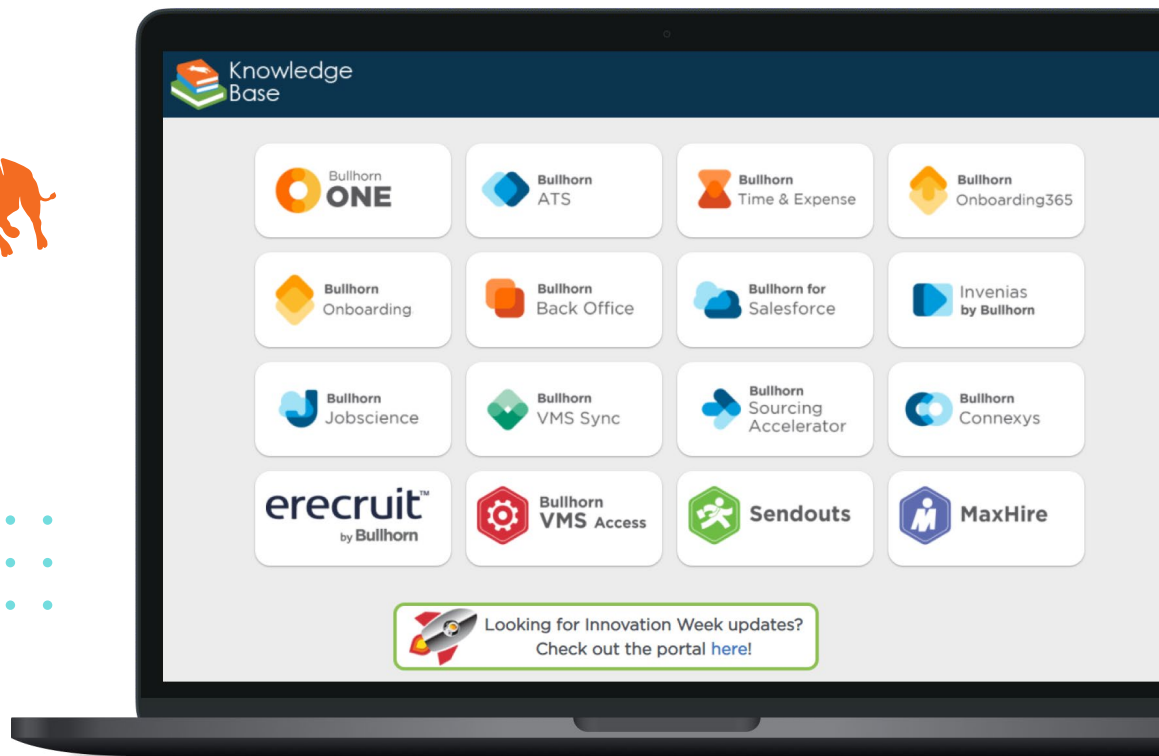
I love MadCap Central because I can build a dashboard of all the different projects, look at what people are doing, and hone in on things that could create a poor customer experience that the author needs to focus on.

Ryan Nicholson

Director of Content and Training, Bullhorn, Inc.



+



The micro content in MadCap Flare is fantastic. It allows us to do announcements and get short pieces of information out without confusing our end users, and it has helped immensely with deflecting questions and tickets, and just generally sharing information.

Ryan Nicholson

Director of Content and Training, Bullhorn, Inc.



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Information Architecture

Taxonomies, classification and metadata, by Warren Singer.

Information architecture (IA) focuses on organising, structuring and labelling content to help users to find information and to complete tasks.

IA might focus on how information on a customer-facing website is structured, or how internal information within an organisation is structured and made available to staff.

As technical communicators, being able to produce clear and easy to use information is an essential part of our job role, but helping users to find the information they are looking for is just as important.

In this article, I'd like to provide an introduction to IA and explain why I think it is so important for technical communicators to have a good understanding of this subject. There are many good books and courses available for more information; see the *References* section at the end for details.

Moving house

I recently spent an interesting few weekends going through cupboards, and packing away items in boxes, in preparation for a long-anticipated house move.

During this process, I realised how many unused and redundant items had accumulated over the years. I found old clothes, no longer used, but kept in the back of cupboards. Piles of books, files and papers — the accumulation of years of previous studies, short courses, hobbies, tax return preparation and records, some stored in filing cabinets, whilst other legacy papers, going back over twenty years, were in boxes up in the attic. There were old gifts and ornaments, items forgotten about, used once or twice then never again, old computers and electrical appliances, bottles of cosmetics and creams, photos, mementos and memorabilia from family and holidays.

I could go on. Some of the highlights were finding packets of unused instant soup dating back to 2012, in the back of the kitchen cabinets and sorting out clothes and discovering the hat I thought I'd lost years ago.

Whilst to the casual visitor, the house appeared to be tidy and organised, behind the scenes, hidden in cupboards and up in the attic, lay a host of uncategorised items that were difficult to locate and find.

Sounds familiar?

Properly sorting and labelling the physical items in my home would have saved me time by making it easier to find and retrieve the items I was looking for. It would have prevented us from buying things we didn't need because we already had them in the house, thus saving money and freeing the house from clutter.

Workplace analogies

At the organisation where I work, there is a similar problem — finding information. Often, we are not aware it exists, because it is hidden away in some folder on a user's machine or on a network. If we do locate the required information, we find it has become redundant, duplicated or out of date. Somebody in one team may work on a document describing a product or

service, whilst a user in another team is creating a separate document, on the same topic, but giving it a different name and saving it to a different location. Now there are two documents, but which one will I be able to find, and which one should I use?

Maybe both documents are relevant, but written for a different purpose and with a different target audience in mind. However, without actually opening the document and reading through it, I have very little by way of easily identifying the type of information I am going to find.

It would have been great if our organisation had taken the time to ensure a consistent standard for tagging, labelling and organising our digital assets, to make it easy to search and filter and find relevant information.

Information is the key to business continuity and business transformation. However, to be useful, it needs to be available on-demand, in the format users need and it should also answer the questions they need answers for. It should help them solve the real problems of concern to them.

Classifying and labelling Assets

In the house example I described earlier, labelling of the physical items I owned and putting them in the right category before boxing up would have helped with finding things afterwards.

This categorisation could have been done in different ways. When moving house and packing items in boxes, the simplest and easiest method I found was to pack away items by room and then by category within the room, as described in Figure 1.

I then labelled each box, to make it easy to identify the contents. When arriving at the new house, the labels made it easy to take the correct box to the appropriate room and unpack the items as needed.



Figure 1. Labelling boxes in a house during a house move

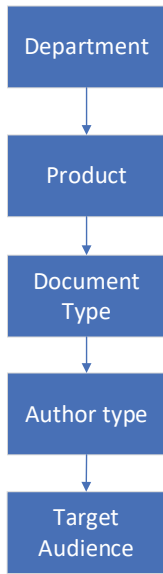


Figure 2. Example of a Simple Taxonomy

In the workplace, there may be a number of ways in which your digital assets can be classified. An easy way to categorise digital assets could be based around a department, and within a department, you might decide to organise your documents by product, and then by document type. See Figure 2. Figures 1 and 2 are examples of simple taxonomies.

What is a Taxonomy?

A **taxonomy** describes the categories in which items such as physical objects, information or digital assets should be organised. You may have come across the term in school

biology classes, when learning about the taxonomy — the classification system — used for plants and animals.

The process of putting actual information or digital assets into categories is called **classification**. An example is shown in Figure 3.

Related to a taxonomy is the concept of an ontology. An **ontology** is a system that describes the relationship between the assets in your taxonomy.

While in some cases it may be useful for you to design your own taxonomies and ontologies for your organisation, there are also existing taxonomies and standards, prepared for different industries, which you may be able to use or adapt to the specific needs of your organisation. For example, there is an ISO (International Standards Organisation) Taxonomy Standard for Information Systems and Software Engineering.

Once you have implemented a taxonomy, it then becomes easier to classify your digital assets and information, also to provide your users with a navigation system (in other words your menus and headings) which reflects the structure provided by your taxonomy.

The mystery of the missing sock

Let's return to the house analogy. Ever had the experience of looking in your cupboard, after a round of washing, and finding one of the socks in a pair is missing? I have a drawer filled with unmatched socks.

What do missing socks have to do with Information Architecture?

A missing sock is a physical asset that cannot be matched with its related mate, thereby diminishing the value of the sock. In the digital space, two pieces of information or documents might be linked, but somehow when searching the link is not available or cannot be found.

Without the matching information, the digital asset may have little value on its own.



Figure 3. Classifying documents based on a Taxonomy

Metadata tagging of your Assets

Tagging of assets with data about the asset (metadata) can help create the link between assets that make them easy to find and be associated.

Figure 4 shows an example of metadata tags added to a user guide. Items in grey boxes in the first column represent the categories in your *taxonomy*, while items in white boxes in the second column are the *classification* of a single instance of a user guide.

To add these metadata tags to the document, we could use the document properties and/or provide a cover page.

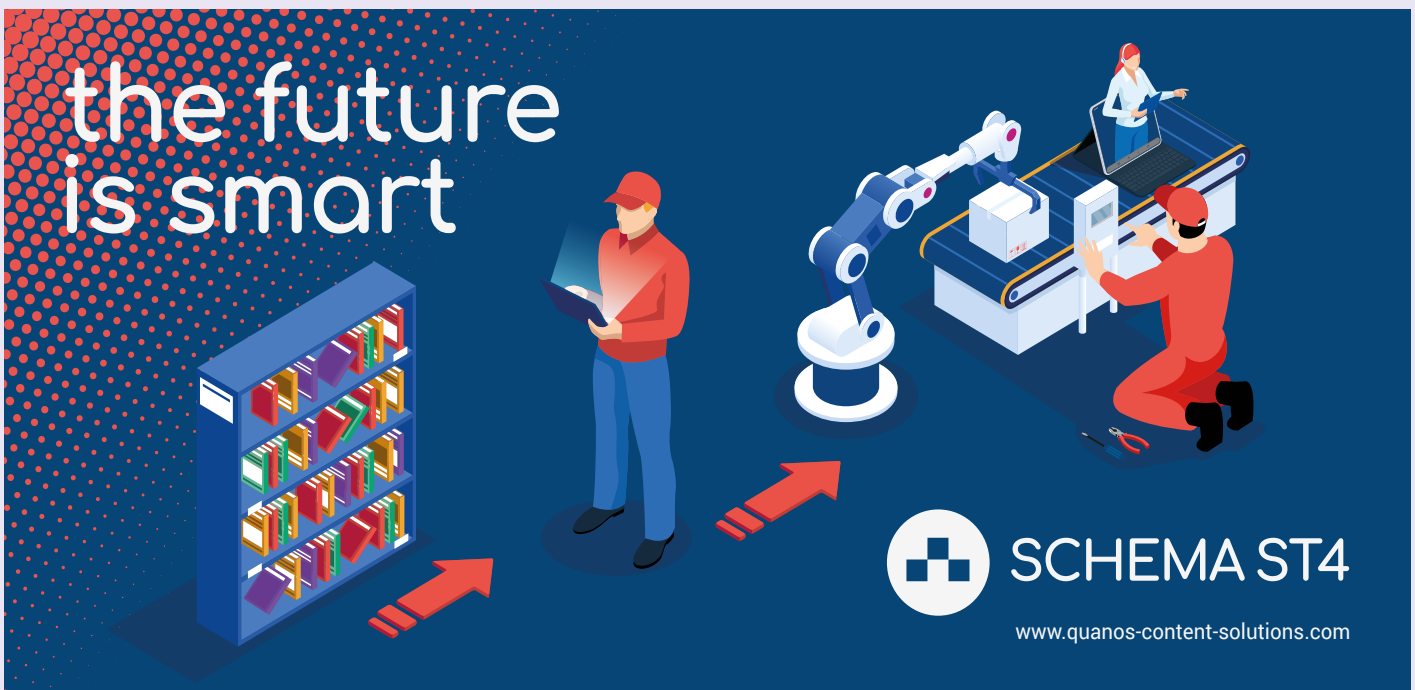
Example for a typical organisation

Let's give a concrete example of why tagging and linking between assets is important. Consider the following process:

1. A customer contacts your customer services team to request a new system feature. The customer services representative logs the query under a Salesforce ticket and reports it to Development.
2. Development investigates the request and raises a separate ticket using Jira (a well-known Issue and Project Tracking application), to log the change required to the system.
3. Business analysts create a separate page on the company's Wiki page which provides more details of the system updates. This includes detailed specifications.
4. The product manager eventually notifies the technical communicator via email that a guide needs updating. They arrange a video call to discuss the changes, and there is an exchange of emails and draft documents circulated for review.
5. The technical communicator makes the final version of the guide available to the customer support team on the Internal Confluence website.
6. A copy of the document is uploaded to the Customer self-support website.

User Guide Attributes	
Title	Administrator's Guide
Sub-Title	Transaction Management System (TMS)
Description (short)	Creating user profiles, viewing and managing transactions
Product Code	TMS-ADM
Date Created	01/10/2020
Date Last Modified	10/01/2022
Status	Released
Classification	External Usage
Key words	Profiles, transactions, user roles, admin, account management
Target audience	Admin User within client's company
Publication number	TMS-ADM-67383
Publication date	15/01/2022
Version	1.2
Author	Tom Jones

Figure 4. Adding Metadata Tagging to a document



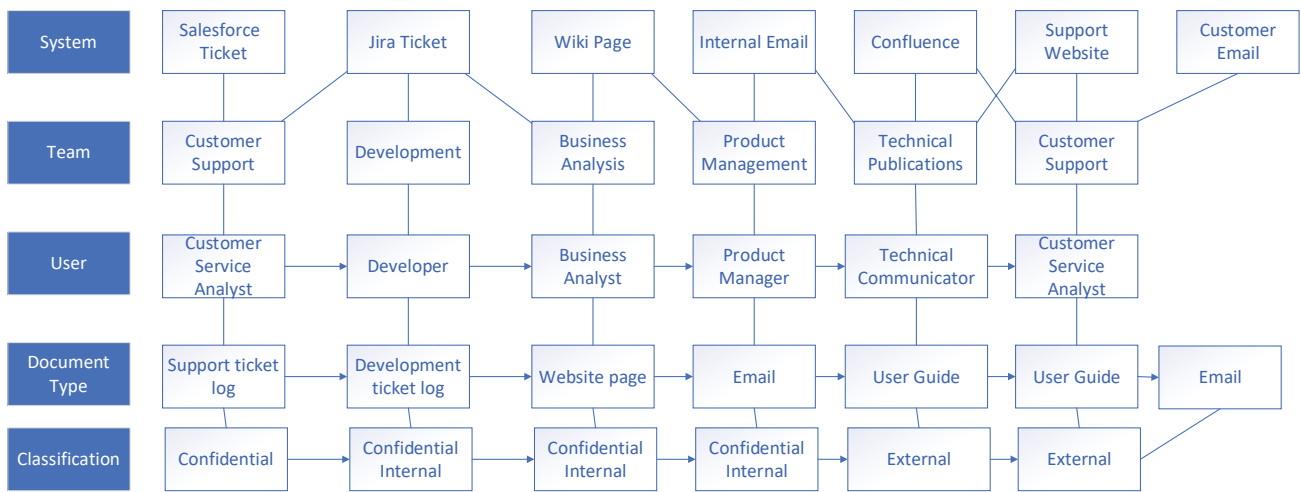


Figure 5. Ontology describing documentation as part of a process

7. The Customer support team send an email communication to all customers, to notify them of changes to the system and availability of the new guide.

At each step in the process, different parties are collecting and recording information. However, this information is being captured in different systems, using different referencing and ticket numbering, and is being stored in different areas of the business. Some information, such as email communication and wiki pages, is totally unstructured and not captured in a format or location that is accessible to other users.

By drawing out a diagram showing the relationship between items in this process, as shown in Figure 5, we can see that the systems for storing information are not connected.

The link between the separate components of information is tenuous — existing only in the minds of the parties that were informed and who worked on the updates. Information is not readily accessible and available to anyone who wants to understand the change, why it was necessary, what has been done and how has this been communicated.

Somehow, we need to link between this information, in order to preserve the associations and help other users understand the full picture.

The metadata tags we add to our documents or digital assets can help to create this link.

How about, in the above scenario, if each of the disparate systems included tagging that enabled the information to be linked? For example, allocating a unique ticket reference number, which identifies the product and its version status.

Let’s say the ticket relates to our Sunrise System. This is given the unique *product code* of SUN-4.04, denoting the product and version. The feature change is also given a unique identifier, such as a *Change control number*, 25012022-1 which is automatically assigned when the ticket is created. We now have both a product code and a change control number that, if included in all relevant documents, will allow these documents to be linked and easily retrieved when filtering or searching.

Conclusion

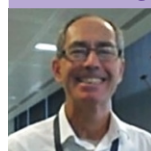
I hope this brief introduction to IA has given you something to think about when deciding how to label and organise the assets you are working on. There is much more to discover about the principles of IA and how to apply these to your work. This article has given a flavour of this.

A recommended introductory course on IA, which is specifically designed for technical communicators, is available from Firehead; see the References section. ■

References

- FireHead Information Architecture course by Jordan Stanchev: <https://firehead.net/product/information-architecture-basics-for-technical-writers/>
- ISO Taxonomy Standard For Information Systems and Software Engineering ISO/IEC/IEEE 21839:2019, 3.1.1: <https://www.iso.org/obp/ui/#iso:std:iso-iec-ieee:21841:ed-1:v2:en>
- The Elements of User Experience: User-Centered Design for the Web and Beyond (2nd Edition) by Jesse James Garrett
- Information Architecture for the World Wide Web: Designing Large-Scale Web Sites by Peter Morville and Louis Rosenfeld
- Information Architecture , Web Style Guide 3rd Edition: <https://webstyleguide.com/wsg3/3-information-architecture/index.html>
- Components Used in Information Architecture: <https://computer.howstuffworks.com/information-architecture.htm#pt3>
- Information Architecture 3.0: http://semanticstudios.com/information_architecture_30/
- Understanding Information Architecture: <https://prezi.com/aafmvy6bk7t/understanding-information-architecture/>

Warren Singer MISTC



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TCWORLD CONFERENCE

Kiriaki Kampouridou shares her impressions of the 2021 conference

The digital tcworld conference 2021, November 8–19, brought together more than 2,600 attendees, speakers, students and exhibitors in technical communication from around the world. In parallel, tekomp Studio in Stuttgart offered a ‘real-life’ complement to the virtual format.

Around 200 international experts in technical communication helped shape the programme of tcworld conference 2021 and covered all relevant topics – from user experience and service information to terminology, elearning and software documentation. They shared their expertise with over 2,600 attendees and visitors in about 175 live lectures and exhibitor presentations, as well as meetups, workshops and tutorials in German and English.

Conference attendees and fair visitors had the chance to network and exchange with other attendees and experts in the NetworkingLounge – whether in a chat or at one of the themed tables in Café tekomp.

TECHNOLOGY DAYS AND TEKOMP FAIR

New at this year’s tcworld conference were the Technology Days on November 8 and 15, 2021, which were integrated into the tekomp fair. The thematic focus here was on the design of content processes in the change to digitalization and was thus aimed at everyone involved in content creation: from managers to technical editors to translators. On both days, there were exhibitor presentations on technological trends and new approaches, including in the following areas: content strategy, content delivery, project and cost management, terminology, and language and translation technology. In the subsequent panel discussion, participants had the opportunity for a professional exchange with the speakers.

At the virtual tekomp fair with around 50 international exhibitors, visitors were able to search specifically for products, services and job offers in the exhibitors’ showrooms. At the same time, they also used the opportunity to hold personal discussions there with the exhibitors via video call.

LIVE FROM TEKOMP STUDIO

As the community idea is very important to tekomp, an additional on-site event was set up taking the current Corona regulations into consideration. The event ‘tekomp Studio’ took place in the Kulturhaus ARENA Stuttgart and featured two theme days on ‘Gender’ and ‘Standards’, as well as providing opportunities for networking. The event was also rounded off with a theatrical interlude – improv theatre at its best. And the tekomp All Star Band was also engaged again this year!

INTERESTING STATISTICS

In addition to the expert presentations and workshops, participants also interacted on the conference platform ‘tekomp live’. The busiest days were November 9, followed by November 11 and 12, 2021.

Which sessions were the favourites among the presentations or tutorials held in English? The most

- 2,600 attendees and visitors

- 175 live lectures

- 50 international exhibitors



Source: Gregor Schäfer (Tekomp Deutschland)

popular session, with 189 participants, was “Tech Doc will go social and semantic, as the web did” by Fabrice Lacroix. It was followed by the presentation “Storytelling in documentation” by Dr. Stephanie Grubenmann, which attracted about 161 people. Also very popular was the tutorial “Leveraging infographics in documentation”, moderated by Sara Stein with 127 participants.

There was also a lot going on in Café tekomp: a total of 1,238 sat down at tables. The most popular themed tables included tekomp Austria’s, followed by Software Documentation and Terminology.

KNOWLEDGE BITS TO TAKE AWAY: QUOTES FROM SPEAKERS

In an era of TMI (too much information), infographics help to convey complex information quickly to a global audience. Leveraging visual language effectively will make your data stand out so your message is understood.

Sara Stein

Define your framework, specify your verification rules, and get your keyboard ready – post-edit technical translations like a pro with these tricks up your sleeve.

Michael Schroeder

Writing documentation can be a nightmare if people don’t have the tools they need. With the Docs-as-code approach we make it easy for our developers, product managers, and UX experts to collaboratively create documentation.

Hans-Jörg Elsen, Luca Raimondo

In fast-paced SaaS environments, you must focus on the needs of your customers but also avoid exhaustion and burnout. Incorporate Agile techniques like pair writing into your practice to better collaborate with co-workers and quickly produce high-quality technical documentation.

Jennifer J. Black

To embrace lean, minimalist content, you need the right structure.

Leah Guren

Technical writers have often been doing content operations as an add-on, which makes it seem so easy that the effort gets devalued. Time to change that.

Rahel Bailie

Even more daily reviews with multimedia highlights such as pictures from tekomp Studio, graphic recordings and knowledge bits are also available in the reference section. ■

Reference

TCWorld. ‘Impression of the TCWorld Conference’. 2021. <https://tcworldconference.tekom.de/translate-to-englisch-impressionen> (accessed 10 January, 2022)

Kiriaki Kampouridou



Since 2014 **Kiriaki** has been responsible for corporate and social media communications at TCWorld GmbH and Tekomp in Stuttgart. <https://www.linkedin.com/in/kiriaki-kampouridou-69384443/>

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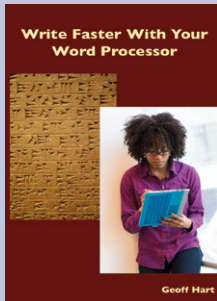
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“A comprehensive reference with tips for concentrating on your writing by improving the way you use tools and plan / structure your work.”

By **Geoff Hart**. Diaskeuasis Publishing, Canada (2021).

Printed version: 15 USD 352 pages + index.

ISBN 978-1-927972-29-8

PDF version: 548 pages + index. ISBN 978-1-927972-30-4

EPUB version: (unpaginated) 10 USD ISBN 978-1-927972-31-1

Reviewed by **Katherine Judge FISTC**.

Introduction

The book discusses using your word processor to increase your writing speed. It provides hints and tips for helping you work smarter with Microsoft Word for Windows or Mac. There are plenty of tips even for a seasoned Word user.

The reviewed version is in PDF format with 548 pages. That's a lot of pages and even the blurb on the website says don't read it cover to cover use it more as a problem-solving resource. The book is aimed at anyone who's creating a book or writing a very long document.

The book isn't about the craft of writing although there are multiple instances throughout the book where you will find tips in this area. As page 3 states:

“...stop focussing on the mechanics of writing and pay more attention to the craft.”

Content

The book contains 4 parts:

- Part 1: Get started
- Part 2: Write your first draft
- Part 3: Revise your draft
- Part 4: Appendices and miscellaneous resources

In addition to the parts there is an extensive table of contents and index making navigation easier as well as a long glossary for those terms you need to look up. All of these are a necessity in a book which the reader is going to use for researching information.

Each chapter has a link to a web page for up-to-date images.

Part 1: Get started

There are three chapters in this part with advice for using the book

effectively, personalising your computer and developing safeguards. I found this part very wordy and time consuming to read, but I also found that there were lots of useful tips within the information.

Part 2: Write your first draft

The eight chapters in this part look at the writing aspects of creating an outline and revising it. This part also looks at how you can set up your word processing software so that you get the most out of it by creating styles and templates, and quick ways to navigate and select text. Useful time-saving features you can customise such as automatic formatting, AutoCorrect, and AutoText are explained. These features can save you time and are worth the initial time investment.

Part 3: Revise your draft

As you create your draft, this part (six chapters) provides tips and guidelines for ensuring consistency throughout your final book or documentation.

Keeping track of characters within a novel to ensure consistency for things like the character's back story, their habits, likes, dislikes and sayings is vital for creating a book which absorbs the reader and doesn't question the reader's recollection of a character. I think this quote in the book (page 211) sums up consistency:

“Inconsistency is something readers never notice – until they trip over an inconsistency.”

Geoff Hart discusses using style sheets and style bibles for keeping track of these consistencies. As a technical communicator, I found the recognised

publishing term “style sheet” difficult to read as every time I read it, I thought about it as a file for storing and applying formatting.

Part 4: Appendices and miscellaneous resources

This part has useful information on creating backup strategies, protecting yourself from injury while using a computer and helpful keyboard shortcuts.

What I would have liked to have seen

I felt that the book was missing information about working with word processors in the cloud and storing your work there.

It's biased towards Word and long documents and doesn't look at chunking, which is prevalent in technical writing, but instead the book gives a holistic approach to streamlining your tools and processes so that you can concentrate on the writing.

Summary

This book is a reference source. It's not intended to be read cover to cover. With that in mind there's a comprehensive table of contents, an index and a glossary, making navigating the book easy.

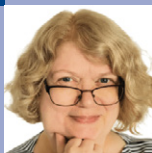
The book contains lots of useful tips and information about ways of working smarter in your writing, using a word processor, as well as how you plan, structure, and write your novels or documentation.

This book is for anyone searching for a comprehensive reference with tips for concentrating on your writing by improving the way you use tools and plan / structure your work. ■

About the author

Geoff Hart is a freelance writer, editor, and translator who specialises in working with authors who speak English as a second language but must nonetheless publish in English. He's worked as a technical communicator since 1987.

For more information on Geoff's work and publications: www.geoff-hart.com



'Apt words' and the author's voice

What is copyediting? Sue Littleford, *Apt Words*

There's one question I don't get asked nearly often enough. Why are you called *Apt Words*?

That's simple enough. All words are not created equally, let alone all phrasing. It's important that your writing is appropriate – or apt, if you will. One might even say it's important that you use apt words. And that's one of the things I help with, as I'm editing your text.

What you write and how you write it depends on two big things:

- 1 Who you are.
- 2 Who your audience is.

That applies to every piece of writing you do – or it should.

Big Thing 1: Who you are

The first one is inescapable. You are you.

You have your own feelings about what words go in what place, your own rhythm.

You have your own pet words and your own list of words and phrases you just don't like. (Mine are 'commence' (shudders), 'utilise', 'as such' and 'you'll find this in life'. Just... ugh.)

You have your own verbal tics – things you write, or a way you write them, that you repeat more than you realise. (Mine are an overuse of starting sentences with 'So', and an over-reliance on en dashes, when I should be starting a new sentence, or using a comma or semicolon. When I'm writing for publication, I have to go back over my writing and calm it all down. When I'm not, I let 'em rip. Apologies to people receiving my emails!)

You also have your own set of beliefs about what words are appropriate in what place (aka apt words!). You won't find me complaining about jargon – it's useful shorthand when used for the right audience, and it shows your familiarity with, nay, mastery of, your field. Bring me your terms of art, and I won't flinch.

But some of those beliefs may not be as useful as you think. The copyeditor is there to represent the reader, which can involve taking out some of the

padding, or suggesting rewording. I've noticed a distinct move away from pomposity in academic writing over my editing career, and most welcome it is. But some authors, admittedly mostly novices, still get tied up trying to make things sound more impressive than they perhaps are – and in the process you tie your readers up too.

More and more scholars are writing more and more directly, so it was such a shame to see the following incident reported on social media a few weeks ago. A PhD student had gone back to his editor with the comment that his natural, direct, un-pompous writing (helped along that route by the editor) had, at the behest of his supervisor, to be puffed up a bit. We all know the sort of thing: more 'utilise' and less 'use', more reliance on the passive, rather than just the right amount for the right effect, and a sprinkling of 'in order to' and 'due to the fact that' and their ilk. And preferably a lot more pointless puff to bolster the word count.

Yeah, let's make people read a lot of unnecessary words. How much time does that waste, when you multiply it by the number of readers now and ever after? Adding a level of formality isn't something you can just graft onto a text, if it's to work. It has to be fundamentally rewritten to change the vocabulary, the phrasing, the tone.

That said, I'm not a fan of cutting text to the bone. The text has to breathe, to find its own rhythm if it is to sweep the reader along. If that means an introductory word or two, or a phrase that could possibly be cut but that allows you a moment to take in what you've just been reading, that's fine by me.

Reading dense text with fact after fact, idea after idea, pounding down the road to you in quick succession can make you feel like you've been slapped upside the head. It's hard work, and it can make your reader put down your book or article and never pick it up again. Readers need time to appreciate what you're telling them. Give it to them, without boring the

pants off them. It's a fine line to tread. But ask yourself: how can they cite you if they couldn't read and absorb what you wrote?

So remember – you write you. But how you write depends also on the second big thing: who your audience is. The name for this is 'register'.

Big Thing 2: Who your audience is

If you're writing for your peers, you'll use a more formal register than if you're writing for the general public. If you're writing a note to a friend you'll be utterly informal, compared to a letter of complaint to the council or utility company. If you're writing a textbook, you'll be different again

So far, so good. But you'll also change your register depending on what you want to happen, once someone's read your text. Who are you appealing to? What are their likes, dislikes and unspoken prejudices and preferences? Do you want your readership simply to be informed, or to do something? What?

Choosing what to foreground, and what to place less emphasis on, or even omit, is a key part of getting the register right for the purposes you have for whatever it is you're writing. It doesn't all have to go in, all the time.

If your textbook is for GCSE pupils, you'll have a different approach – or at least should have – from how you'd tackle your textbook for undergraduates: higher-level ideas, simpler language, more explanation of the basics, fewer or even no references.

If you're writing a report for the government body that funded your research, then you may place more emphasis on the steps needed to fix whatever it is you've been researching, rather than taking all the space to simply describe the situation and its origin.

If you were writing a contribution to your institution's Research Excellence Framework submission, you'd take a different approach again. You would

be much tighter, much terser, with only the highlights but bounded by the requirements for what information to include – and how much of it, all while staying within the defined word and reference number limits.

This is why copyeditors will ask you who the intended readership is, before beginning an edit. We're trying to understand how you need the writing to be pitched. We're trying, you might say, to ensure you've used apt words.

Big Things 1 & 2 = the authorial voice

These two big ideas together – you and your audience – combine to create your voice as an author. This is something a sensitive copyeditor will aim to preserve. I don't want my authors to sound like me – heaven forbid! (If you like the word 'commence' you can have it.) I can't believe publishers want to put out cookie-cutter books. More and more, these days, I'm seeing briefs that tell me to follow the author, rather than impose the publisher's style rigorously, though a floundering author will end up edited into the publisher's style. A competent author will end up having things much more their own way!

Journals, in my experience, tend to be much keener that authors stick to the style guide, and their copyeditors will be more thorough in ensuring they

do. It's still entirely possible to do that without compromising your authorial voice. For the journals I work on, the register of the articles in an issue goes up and down the ranks of formality, though within a fairly narrow range compared to all that's possible. But the structuring, the mechanics, will adhere to the journal's house style (or at least they do once I've finished with them).

In summary

It's not my job, as a copyeditor, to trample all over your writing; it's my job to edit sympathetically, balancing the tripartite needs of the reader, the publisher and you, the author. I want to preserve your voice, using apt words. ■

This article was originally published on 15 November 2021 on Sue's website <https://aptwords.co.uk/apt-words-authors-voice/>.

Sue Littleford

Sue is the author of the Chartered Institute of Editing and Proofreading guide *Going Solo*, now in its second edition. She went solo with her own freelance copyediting business, *Apt Words*, in March 2007 and specialises in scholarly humanities and social sciences. LinkedIn: <https://www.linkedin.com/in/sue-littleford-apt-words/>

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<https://morson-projects.co.uk>

Silver

3di Information Solutions

www.3di-info.com

MadCap Software

www.madcapsoftware.com

Technically Write IT (TWI)

www.technicallywriteit.com

Bronze

Armada

www.armada.co.uk

Author Services Technical

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ESTON Training

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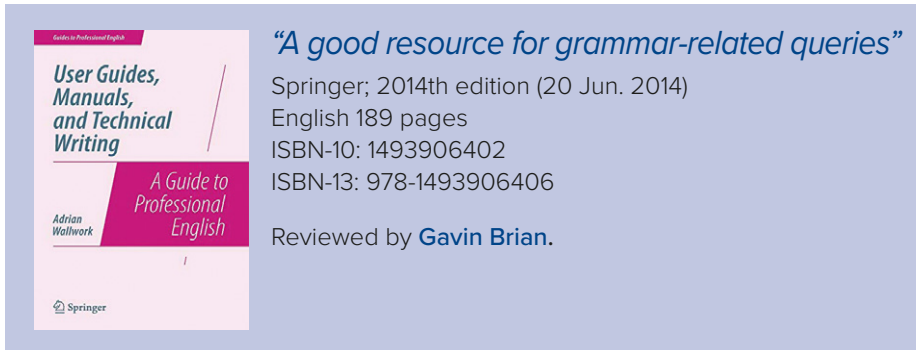
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User Guides, Manuals, and Technical Writing

A Guide to Professional English. By **Adrian Wallwork**

Rating: ★★ ★



“A good resource for grammar-related queries”

Springer; 2014th edition (20 Jun. 2014)

English 189 pages

ISBN-10: 1493906402

ISBN-13: 978-1493906406

Reviewed by **Gavin Brian**.

Introduction

The book was written by an experienced English teacher, and his background shines through. The design and layout leaves much to be desired - the very simplistic pages and lack of colour were probably caused by printing costs - and might make the read a bit less exciting and not visually appealing at all.

The copy is divided into the following categories:

- Structure and Content
- Clear Unambiguous English
- Layouts and Order of Information
- Typical Grammar and Vocabulary Mistakes

Each piece provides examples of what ‘good looks like’ against a second example of the opposite. I found that lots of the tips that are outlined can be useful to anyone, including native English speakers, but the material is very much aimed at helping non-native English speakers to write in a clear and concise manner, whilst avoiding common mistakes such as misusing ‘than’ instead of ‘then’.

The writer motivates anyone who wants to work in the field of Technical Writing by **emphasizing that writing is a skill that can be learned by applying the techniques mentioned, practising, and bearing in mind the audience’s knowledge, format and style and the employment of clarity that does not give space to ambiguity**. He also notes that Technical Writing usually involves crafting text for user guides, manuals and documents that are informative, not used for literature purposes and as a result, should not be embellished.

Getting to the detail

The categories previously mentioned cover a range of topics – figures on the right provide some examples:

- How to write a clear table of contents (Figure 1)
- How to describe a product overview and its key features (Figures 2 and 3)
- How to outline instructions (Figure 4)
- How to write about troubleshooting (Figure 5)
- The difference between warnings and recommendations (Figure 6)
- How to write about warranty (Figure 7)
- Writing from a reader perspective (Figure 8)
- Avoid redundancy and long sentences (Figure 9)
- Avoiding ambiguity (Figure 10)
- Rules for word order: adverbs, adjectives, different verb tenses, nouns and negations (Figure 11)
- Terminology and simplicity (Figure 12)
- Referring to buttons concisely (Figure 13)
- Using ‘If’ to explain consequence (Figure 14)

The book also contains a section about the good and bad aspects that come with automatic translation websites. For example, using synonyms tends to confuse these tools and the chances you will get something that you can use are lower. The most interesting section regards common mistakes people tend to make when using:

- Comparative vs superlative
- Adverbs and prepositions used with comparisons
- Definite and indefinite articles
- Use of genitives

Figure 1.

The contents can be laid out in various ways. Here is a clear example showing the first and last items of a table of contents.

CONTENTS

Welcome to digital satellite TV!	1
Getting started	3
Your remote control	4
Turning your digibox on and off	5
Changing channels	6
.....	
Connecting your digibox	28
System set up	29
Further help	30
Glossary	31
Troubleshooting	32
After sales service	37
Specifications	38
Index	39

Writing a Table of Contents

Figure 2.

2.1 Key features

If you have not already described the key features of your product in the Introduction, then you could have a separate section. This gives users a quick preview of what your product or service does and how it will be useful for them. Below are extracts from some literature explaining some of the services that a bank offers.

EASY TO BANK WITH US

At XXX Bank, we want it to be easy for you to contact us and access your account.

Online Banking

Our secure online banking service provides access to a wide range of services at any hour of the day or night from any location. You can make payments, check your balance.

Telephone Banking

We offer a range of services including payments, checking balances and ordering cards. We have consultants on hand to answer your call Monday to Friday.

ATMs

Use your card at any cash machine to withdraw cash, pay in cash or cheques, get a mini-statement and check your balance.

Describing Key Features

Figure 3.

Yes	No
Thank you for choosing SHUB®, the sync & charge station that acts as a SuperSpeed USB 3.0 HUB and as a smart charging box. With HUB IT® you can connect your computer to as many as seven electronic devices, such as smartphones,...	Congratulations for choosing SHUB®, the highly innovative sync & charge station that is designed to provide the capabilities of a SuperSpeed USB 3.0 HUB, whilst simultaneously functioning as a smart charging box. Due to the state-of-the-art technology employed in the design of HUB IT®, a computer can be connected to as many as seven electronic devices, such as smartphones,...
SHUB® automatically recognizes any devices that you plug in and then charges them at the maximum speed possible. LEDs tell you the charging status of each device.	Any devices that are plugged in are automatically recognized by SHUB® and the appliance then charges them at the maximum speed possible. Users are informed of the charging status of each device through the utilization of a set of LEDs.

Writing a Product Overview

Figure 4.

Writing procedures involves:

- identifying the major tasks and separating them into subtasks
- writing a series of steps that walk the user through each subtask (often presented as a list of bullets)
- not having two steps in the same sentence or bullet
- only giving the reader information at the exact moment that they need it (this is known as ‘just in time’ information)

Remember that users may be in a state of frustration as a result of having failed to carry out the task by themselves. So when they read your instructions, they need to be able to follow each step easily and clearly.

Giving clear instructions

Figure 5.

- you can divide your troubleshooting section into subsections (in this case: *On-screen messages and General problems*)
- a clear layout and clear headings make it easy for readers to find what they want and resolve their problem
- your instructions should be exhaustive. In this case, the manual does not simply say call your broadcaster's helpdesk, but also where to find the telephone number for this helpdesk
- you do not need to fill in every cell (in this case, there is no need to explain the reason for the disappearance of the remote control!)

Troubleshooting

Figure 6.

6.1 warning vs recommendation

A warning describes an action that the manufacturer considers will be dangerous, damaging or harmful either to the user, to the product or to whatever is used in conjunction with the product. The manufacturer is saying: *You must not do x.*

A recommendation is not as strong as a warning. The manufacturer is saying: *You can do x if you want. But we don't think it is a good idea.*

To protect your company from possible legal issues with clients, you need to be clear whether you are writing a warning or a recommendation.

Warning vs Recommendation

Figure 7.

7.2 Warranty

A warranty is a written guarantee that your company will give to users / purchasers, promising to repair or replace it if necessary within a specified period of time. Warranties usually have exceptions that limit the conditions your company will be obligated to respect in order to rectify a problem.

Take legal advice before writing this section. Ensure that you take all precautions to draft the warranty in a way that protects your company as much as possible. Do not simply cut and paste the warranty section from documents that you find on the Internet.

Writing about Warranty

Figure 8.

	YES	NO
1	With filters you can focus on the records you are interested in.	The use of filters enables the user to focus on the desired set of records.
1	If you are familiar with the classic XYZ gateway ...	If the reader is familiar with the classic XYZ gateway ...
2	When the translation has been completed, the Send button is enabled. This allows you to submit the translation to...	When the translation has been completed, the Send button is then enabled to allow the translation to be submitted to...
3	If you want to use a filter from a column header, click on the arrow.	Filters are also available on each column header by clicking on the arrow in the column header.

Writing from the reader's perspective

- Infinitive vs gerund
- Negations
- Passive and active voice
- Pronouns and general vocabulary

Points worthy of mention

As an experienced teacher of English as a Second Language myself, there are individual tips spread throughout this manual that did strike a chord with me. A few tips worthy of note are:

- Clear up any potential ambiguity between a warning and a recommendation
- Avoid any confusion through misuse of the adverbs *usually*, *normally* and *generally*
- Include a whole section on typical mistakes (many of which I have experienced myself), which works like an FAQ section

Figure 9.

	YES	NO
1	This supports the installation.	This supports the activity of installation.
1	Achieving this is difficult.	Achieving this is a difficult task .
1	We believe the results are significant.	We believe the results are of significant value .
2	They should be green and round.	They should be green in color and round in shape .
3	Note that the sum of the values needs to be lower than...	It is worth noting / Bear in mind that the sum of the values
4	This component does not support XYZ.	Furthermore / In addition / In particular / It is worth noting that this component does not support XYZ.
5	Market data are not required by the system.	As stated above , market data are not required by the system.

Avoiding redundancy

Figure 10.

	YES	NO
	You can translate up to 100 pages of text within 10 s .	Large amounts of text can be translated with KwikTrans within a short timeframe . Clearly there will be a certain percentage of errors within the resulting text, so users are advised to dedicate some time to checking the text.
	Note: KwikTrans has a 95% accuracy rate . This means you will need to revise the resulting text.	

Being precise and avoiding ambiguity

Figure 11.

10.1 Key rules for word order

Put the most important information at the beginning of the sentence. The most important information is generally new information or negative information.

English word order is strict: 1) subject 2) verb 3) direct object 4) indirect object – all these four elements should go as close as possible to each other.

Adjectives go before nouns.

Past participles generally go after nouns.

Most adverbs go immediately before main verb.

Word Order

I also quite enjoyed the few moments where the advice seems blatantly obvious, such as 'be precise'.

There is almost a feeling of frustration coming through from the writer, as if they experienced first-hand the joy of finally getting to a crucial step in a boring manual and then throwing it against the wall - something I have done many times myself. These moments of personality in this text are brief and will only be noticed if one chooses to carry on reading. Apart from that, it's a stale read.

My final thoughts

Even though some of the items make the book a good resource for grammar-related queries, I was disappointed by the assumption that the reader does not know things such as how to use 'if' clauses and the pronoun 'which', making it an extremely basic reference source that can be kept on your shelf for a quick check when in doubt. ■

Figure 12.

YES (according to STE)	NO (according to STE)
show	demonstrate
help	facilitate
start	initiate
change	modify
stop, end	terminate

Simplicity according to STE (Simplified Technical English)

Figure 13.

	Yes	No
1	Click Save As and choose where you want to save the file.	Click on the Save As button and choose where you want to save the file.
2	Click OK	Click the OK button.
3	Click OK	Click on OK.
4	Click Save As.	Make a left-hand click on Save As.

Referring to buttons concisely

Figure 14.

YES	NO
Do not wash undrewired bras in this machine. If the wires become detached, this may damage your clothes and the machine.	Do not wash undrewired bras in this machine. Should the wires become detached it could cause damage to your clothes and the machine.

Using 'if' to explain consequence

Glossary

STE (Simplified Technical English): A controlled language developed in the early 1980s to help second-language speakers of English to unambiguously understand technical manuals written in English. Source: Wikipedia https://en.wikipedia.org/wiki/Simplified_Technical_English (accessed 22 January 2022)

Reference

User Guides, Manuals, and Technical Writing: A Guide to Professional English (Guides to Professional English) : Wallwork, Adrian: Amazon.co.uk: Books https://www.amazon.co.uk/gp/product/B00RZ19ACY/ref=db_a_def_rwt_bibl_vppi_i1 (accessed 22 January 2022)

About the author

Adrian Wallwork is a published author (ELT and EAP) who lives and works in Pisa, Italy. He has written 20 books on academic / professional English for Springer Science (1.35-million chapter downloads), four general English books for the BBC, four course books (+ WBs and TBs) for Oxford University Press, four discussion books for Cambridge University Press and Scholastic, as well as grammar manuals and phrasebooks for Rizzoli, De Agostini and Vallardi.



Colour coding

Ciaran Dodd examines a reader's question

“Standards should reflect all good practice, not just [the] subject domain, surely?”

Figure 1.

Lois Wakeman
June 27, 2021 · 🌐

I've just finished reading this month's issue and was surprised to read that the latest STE standard used pale red and pale green highlighting to distinguish good and bad examples of usage, respectively.

One of the basic principles of accessibility is not to use colours that may be indistinguishable by colour-blind people to convey meaning.

Less common types of the condition (protanopia and deuteranopia) mean the two colours are indistinguishable. More common types (deuteranomaly and protanomaly) may not be so challenging.

👍 🤔 3 6 Comments Seen by 77

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Traci Nathans-Kelly
Ugh. How did this get through editing?
Like · Reply · 30w

Lois Wakeman
One might well ask - standards should reflect all good practice, not just the subject domain, surely?
Like · Reply · 30w 👍 1

ISTC Group, Facebook

I should start by thanking Lois Wakeman for raising this question in response to something I wrote in last summer's issue of *Communicator* (Dodd, 2021). Lois posted this comment in the ISTC Community group on Facebook. Refer to Figure 1). Being a latecomer to the group I only recently saw and responded to the comment.

In my response, I explained that several of us in the ASD-STE100 Simplified Technical English (STE) Maintenance Group raised this point before we released issue 8 in May 2021. After virtual discussions and email exchanges within the STE Maintenance Group (STEMG), the consensus was to try this colour coding in issue 8 and then review the colour coding based on user feedback. Anyone can submit change requests to the STEMG on the website (ASD-STE100 2021). And, as the UK representative on the STEMG, I can also raise these comments at the next meeting that we have to discuss changes for issue 9.

As I write, this question is live in another standards group that I am in: the S6000T Steering Committee (SC). S6000T (S6000T 2021) is part of the S-Series of specifications that define data standards for integrated logistics (product) support. (S-Series 2021). This is a subject for another column! S6000T (T stands for training) is at issue 2.0 and was co-authored by members of the SC. Issue 2.0 took a lot of editing because of individuals' preferences in style, terminology and complexity of language. You know from previous columns that I'm an advocate of writing clearly, concisely, consistently and accurately, which is never more important than when you are writing a specification for someone else to pick up and use. And whilst everyone agrees on that last point, I have a meeting next week to discuss how much of the STE / plain English approach we can use without making the S6000T specification too prescriptive. And that is without considering the accessibility

issues like those that Lois mentioned in her post, although I will advocate for those as well.

Next week, I will advocate for many of the principles embodied in STE and that are consistent with plain English. In particular, STE section 6 on descriptive writing has an excellent worked example that shows how to link sentences with key words to help the reader follow the logic of the description. I will talk about structuring the sentences with subject and verb at the beginning of the sentence rather than complex dependent clauses that can distract the reader from your point. I will of course advocate for the active voice, one of the most contentious of principles, because it focuses the writer and reader on the point of the sentence. One area that the S-Series specifications are strong on is terminology management, which is a key element of consistency. There is a Terminology Working Group that defines and manages terms for the S-Series. Members of the STE Maintenance Group are on this working group to make sure that the STE principles of terminology management are employed in the wider S-Series. But there is so much more that we could do.

In many ways, specifications seem to be following the same path as traditional technical documents once did. The specifications are still paper-based linear documents published in PDF. There is scope to make these specifications searchable, dynamic, intuitive and accessible for the user so that they “reflect all good practice, not just [the] subject domain,” to quote Lois. My sphere of influence is making the text clear, concise, consistent and accurate so that these specifications are as user-friendly as possible. And that seems a good place to start! ■

In the last column (Winter 2021) I wrote: “I have delivered training in plain English on behalf of the Plain English Campaign (PEC). This charity campaigns to have all information...” However, The PEC is not a charity. PEC is a commercial organisation.

STE help: parts of speech 4

– adjectives

What is an adjective?

An adjective is:

“A word that modifies a noun or noun phrase. It describes, for example, the type, size, color or number of a noun or noun phrase.” (2-0-4, ASD-STE100, 2021)

In technical writing, we frequently use adjectives to specify:

- which part an instruction refers to;
- what kind of fixture you need;
- how many fixtures you need; or
- which parts belong to a system or assembly.

So, adjectives are a key part of technical writing.

One issue with adjectives in STE is that many words can be adjectives and another part of speech, such as a noun or verb. For example,

- A file (noun) is a tool.
- To file (verb) is the action of using the file.
- A file blade (adjective) describes what kind of blade we mean. Blade is the noun that we are modifying with the adjective file.

STE tries to give each word one part of speech. So, ‘file’ is permitted as a technical name (rule 1.5) but not permitted as a verb. The approved alternative is ‘remove’. Therefore, you must be able to identify whether a word is an adjective or another part of speech. Ask yourself: “What noun is this word describing?”

It is easier to identify an adjective that comes immediately before the noun it describes. Simple examples are: ‘the large component’ or ‘an approved person’ (adjectives underlined). Adjectives also come after state verbs like ‘to be’ or ‘to become’. For example: ‘The surface is hot’.

Some adjectives use the -ed form of the verb called the past participle. For example:

“An approved person must do the important checks.” (2-1-Q1, ASD-STE100, 2021)

In this example, ‘approved’ (the past participle), is an adjective describing the noun ‘person’. An adjective made from the past participle describes the condition of something, in this case the condition of the person. Alternatively, I could write: “I *approved* that report yesterday.” Here ‘approved’ is a verb (in italics) and the past participle indicates an action that was completed in the past (simple past tense). In STE, the past participle (-ed form) has two permitted purposes:

- a. To show the simple past tense of a verb.
- b. To be an adjective.

In STE, there are two ways that you can use the past participle as an adjective:

1. Before a noun.
2. After a form of the verbs ‘to be’ or ‘to become’.

There are examples of these forms under rule 3.3 (1-3-2, ASD-STE100, 2021).

But there is one final twist to this tale of adjectives. STE requires the use of the active voice rather than the passive voice:

XYZ authority approved the person.
(Active voice)

The person **was approved** by the XYZ authority. (Passive voice)

To write the passive voice, you use a form of **to be and the past participle** (in bold). This is the same form that you can use for the past participle as an adjective. So, you have one grammatical structure doing two jobs. For example:

The person **is approved**. (Past participle as an adjective describes the condition of the person.)

The person **is approved** by the XYZ authority. (Passive voice describes who approved the person.)

One job (past participle as an adjective) is permitted in STE, the other job (passive voice) is not permitted! ■

References and further reading

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Real-life dilemmas

Advocating for Environmental and Community Awareness in the Workplace

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

In this dilemma, Kevin and Sarah discuss what they can do, as technical communicators, to advocate for change within the organisations in which they work, to promote awareness of their organisation's role in protecting the environment and making a positive impact on the community.

After reading this dilemma, let us know your thoughts. The best responses will be published in the next issue of *Communicator*.

Environmental awareness

Kevin: "We hear so much about global warming and environmental pollution in the news. Everyone seems to think it's a terrible thing, but no-one seems to be willing to do anything about it."

Sarah: "I know what you mean, it seems like it is someone else's problem to sort out, not ours. People point a finger at countries like China and India, and say, they are polluting and not doing anything to protect the environment. But at the same time, most of us sit back, continue with our current lifestyles, and expect our government to sort out these issues."

Kevin: "I know, we bury our heads in the sand, or shrug our shoulders and say 'what can we do about it?'"

Sarah: "Agreed, that's one of the problems. We are not prepared to change our behaviour or lifestyle. The problem seems so vast and insurmountable, it's easy to feel helpless or believe there is nothing we can do, either personally or at work, to make changes."

Sarah: "My organisation is totally focussed on growth and market expansion, but I worry this may be at the expense of the environment. However, I don't believe that anything I can say or do would make a difference."

Kevin: "You do have a voice. If ordinary employees like us point out that we all have a responsibility to protect and look after the environment as best as we can, then just maybe the

executives will start to realise that this issue is important to their staff. I think that nowadays it's not just potential employees, but also investors, who are looking to work with organisations that are environmentally responsible and care about their community, and not just their profits. So, in the end, it makes good business sense as well."

Sarah: "Well, I am sure my organisation would be good with the rhetoric and marketing around saying they are environmentally friendly, but not with any action on the ground to follow that up."

Kevin: "What do you mean?"

Sarah: "Well, we have all these policies and strategies in our organisation focused on making more money, but there is no policy and no strategy that focuses on environmental impact and working with the community."

Kevin: "So, what do you think needs to change?"

Sarah: "I think there should be a policy and a strategy in place that looks to address and solve issues such as 'how do we reduce the amount of greenhouse gasses our organisation produces, directly or indirectly, and how can we move towards more sustainable sources of material and energy for our business?'"

Kevin: "Sounds good, but how would that work in practice?"

Sarah: "I think, first our organisation should measure how much energy we are consuming and the types of materials we produce. Then we should be considering how we dispose of items that are no longer needed or promote reuse and recycling. We should be looking for alternative materials for our production processes, choosing to work with partners and suppliers who also show environmental awareness, reducing the amount of work-related travel, implementing energy-saving features such as efficient buildings, solar heating and solar panels. Activities like this. Unless there is a focus on change, nothing will change."

Kevin: "So, why don't you suggest this to your organisation?"

Sarah: "I am not sure. I am worried I'll be ignored, or worse, considered as

naive and a trouble-maker. I also, sort of feel, that as a technical communicator, it's not really my role to advocate for change, maybe it should be HR or our executive team who raise the issue."

Kevin: "I don't think you should feel that way. You have to start somewhere – especially if no-one else seems to be prepared to raise the issues. If you present this as a question or open discussion, rather than pointing fingers, people will engage."

Sarah: "I guess so."

"On a related theme, I'd like to see my organisation contributing towards and allowing employees to volunteer and to take part in community projects and to support charities."

Kevin: "You mean, like sponsoring employees for events to raise money for their charities?"

Sarah: "Yes, but also things such as community outreach programmes, and providing free training and computer equipment to kids from deprived backgrounds."

Kevin: "All this costs money. I imagine there may be a limit to what your organisation will be prepared to do."

Sarah: "Yes, but it's also a great and low-cost way to promote our brand."

Kevin: "Good luck! Let me know how your conversation with your organisation goes." ■

Over to you

Tell us what you think. The next issue of *Communicator* will feature your responses.

If you have a dilemma you'd like advice about, write to us in confidence.

Note: To protect the identity of real people, all names and places are fictitious.

Warren Singer MISTC

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Readers' letters in response to Harry's dilemma, described in the Winter 2021 issue of *Communicator*.

Summary of Harry's dilemma

Harry was a freelancer who had been hired by a large System Integrator organisation that built and installed industrial-scale automated systems for the manufacturing industry. He had produced an operational guide for the system that had been installed at a customer's factory. An explosion and fire at the factory was due to a user error in operating the system, caused by missing information in the documentation. Harry was worried he would be held liable for the legal costs, due to the omissions in the documentation.

Gerry

"Since Harry was sub-contracted to work for the organisation that built and installed the systems, I think that this organisation will be the first point of contact for any legal claims. They built the end-to-end solution and signed off on the user guide, so it was ultimately their responsibility to ensure that the full solution – the user guide plus operation of the system – was safe from a user's perspective.

It's likely like the organisation would have taken out mandatory liability insurance, to cover just these types of incidents.

I think Harry can relax. It is highly unlikely that anyone will decide to pursue Harry for compensation."

Mathew

"I think, while it's probably unlikely that Harry will be taken to court, that this could potentially have an impact on his future as a contractor. It is unlikely that the organisation will give Harry a recommendation, and if Harry works in an industry where reputation spreads by word of mouth, he could find contract opportunities drying up."

Pauline

"A self-employed freelancer or business should always take out liability insurance, to cover just such potential circumstances. Liability insurance should also include legal fees.

When things go bad, I can see the situation arising where an organisation might look for someone to blame or scapegoat, to direct attention away from their own failings.

There are also situations where you, as a technical communicator, may actually be at fault and accidentally or inadvertently cause damage. I have given some examples below of mistakes that are easy to make:

- While accessing an organisation's internal network, you mistakenly and unknowingly click on a link in an email which downloads a virus that

brings down the entire organisation's systems, costing millions of pounds.

- While inspecting an operating line, to document a process, you inadvertently bump a button which causes a sudden electrical overload, switches off the production process, and costs hundreds of thousands of pounds of damage.
 - When publishing some guides to the website, you mistakenly also release some confidential information, which causes damage to your client.
- The list is potentially endless. ■

Editor's notes

Some useful feedback from readers. Technical communicators should rest assured that legal action is rare. Provided that you follow recognised processes for the drafting and quality control of your documentation, and abide by an organisation's guidelines relating to confidentiality, security, privacy, data protection, you should be fine.

If you are self-employed, you should bear in mind there are a restricted set of legal circumstances under which you could potentially be sued.

First, there must be a written or implied contract between you and the party that is suing you.

You can be sued for breach of contract if you agreed to deliver a user guide or other deliverable by a specified deadline, but failed to deliver without any valid contractual reason for not delivering.

You can be sued for negligence, if as a result of failure to take reasonable steps to protect your client or provide the service you were hired to do, you caused damage to your client.

You can be held liable for knowingly giving bad advice to a client, for example, by inducing them to enter a contract with a third party who you knew could not deliver a service or where the service was overpriced.

There is a time limit for any claims that can be made, which depends on the type of claim. For example, the limitation period for a contract claim is six years from the date of the breach of contract.

You should always consult with a legal professional when encountering issues.

You should consider taking out business liability insurance. However, the best protection you can provide to yourself is to always follow the highest standards of ethical behaviour and diligence towards the needs of your clients.



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Branching in MadCap Central

Matthew Ellison talks about source control.

The recent service release of MadCap Flare (version 2021 r3) introduced many source control enhancements, including improvements to the interface and new support for working with branches on MadCap Central. So, I thought this might be a good time to talk about source control in this column; in particular the benefit of branching, and how you can now use branching on MadCap Central.

Why use source control?

The main benefit of source control is for Flare users who work within teams. Source Control enables each team member to have their own local copy of the Flare project, while ensuring that all changes are synchronised across the team via a remote source control repository.

However, source control can also be extremely useful even if you are a sole author with no other collaborators on a Flare project. For example, source control provides you with a full history of all versions of the files in your project – and enables you to go back to any previous state of the project. This can sometimes be a life saver!

Source Control also provides the opportunity for **branching**, which enables you to work on different concurrent variations of your project without needing to use conditions. This could be useful, for example, if you wanted to be able to create and edit a new set of topics covering features that have not yet been released, while still maintaining the topics for the current release version of the product. In this case, you might create a new branch called 'new-features' in addition to the main 'master' branch in which you maintain the current version. When the new features have been released into the product, you could then potentially merge your 'new-features' branch back into the 'master' branch.

Using MadCap Central for source control

As well as offering other features such as Analytics, MadCap Central provides

a distributed Git-based source control system. An advantage of distributed source control is that you have your own local copy of the source control repository and can continue to do source control operations such as committing changes even when offline.

Up until the recent service release of Flare, a significant limitation of using MadCap Central as your source control repository was that it did not support branching. However, with Flare 2021 r3 and the current version of MadCap Central, branching is now possible.

Creating a new branch in Flare

Let's imagine that you are working in a Flare project that has been bound to Central for source control, and you now wish to create a new branch to document a new feature.

The easiest way to create a new branch is to do the following:

1. Open the Branch Management dialog (on the Source Control ribbon, click the main part of the **Branch** icon, not the drop-down arrow beneath it).
2. Click **Create** to open the Create Branch dialog.
3. Enter a new Branch Name, and select the **Switch to branch** check box, before clicking **Create**.

As a result, the new branch is created and has become the active branch. You can confirm this by looking at the useful new indicator on the right-hand end of the Status Bar at the bottom of Flare's interface. This shows the currently active branch (see Figure 1). You can now close the Branch Management dialog.

Figure 1.



Uploading changes to MadCap Central

When you upload (push) your changes to MadCap Central, it is important which branch is currently active, because Flare only uploads commits from the active branch. So, if you want other team members to be able to contribute to your new 'new-features' branch, you will have to push changes when this

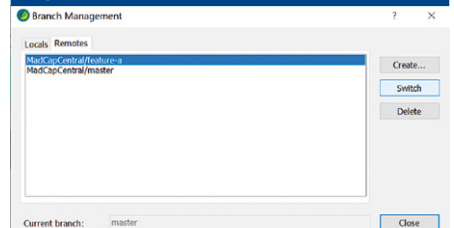
branch is active – otherwise, this branch remains private to you.

Switching to a branch created by a team member

Let's say that one of your team members updates their local copy of the project from Central. Although the content for all branches is pulled down to their local Git repository, they will not see the new branch that you have created, either in the list of branches in the Source Control Explorer, or in the drop-down list of branches available from the Status Bar. So how can they switch to your new branch?

The solution I discovered by reading Flare's comprehensive documentation is to open the Branch Management dialog, and select the **Remotes** tab (which is new in Flare 2021 r3).

Figure 2.



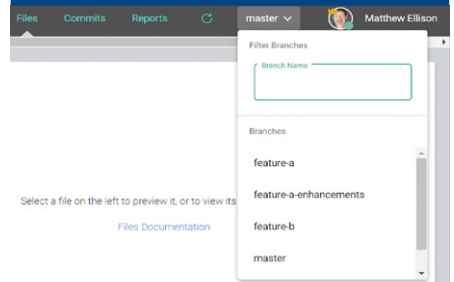
Remotes tab on Branch Management dialog

To switch to the branch, select it on the Remotes tab, and click **Switch**. The Branch then becomes active and is added to the **Locals** tab as well as to the list of available branches in all other parts of the Flare interface.

Viewing and publishing branches on MadCap Central

When you are using the MadCap Central portal, you can choose between

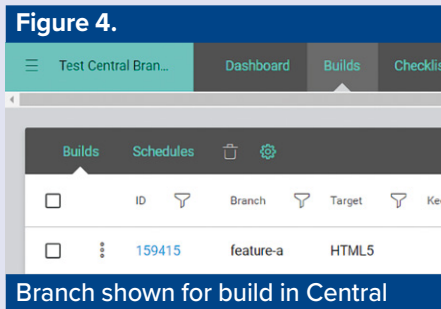
Figure 3.



Selecting branch in Central

the different branches when you view the Files or Commits for a project.

You can also choose to build a specific branch in Central, for example if you wanted one of your internal SMEs to review the draft documentation that you have written in a new branch for unreleased features.



Conclusion

The new support for branching in MadCap Central is a significant and welcome enhancement. It provides more flexibility for working with variations of your content without the complexity of conditions, and matches the branching capabilities of other Git-based source control providers. ■

Matthew Ellison FISTC

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Further reading

MadCap Flare Help on Branching Enhancements for Git and MadCap Central: <https://help.madcapsoftware.com/flare2021r3/Content/Flare/Introduction/Whats-New/Whats-New-Branching-Enhancements.htm>

MadCap Flare Help on Branch Activities for Git: <https://help.madcapsoftware.com/flare2021r3/Content/Flare/Source-Control/Git/Branch-Activities/Branch-Tasks-Git.htm>

Official Git documentation - Basic Branching and Merging: <https://git-scm.com/book/en/v2/Git-Branching-Basic-Branching-and-Merging>

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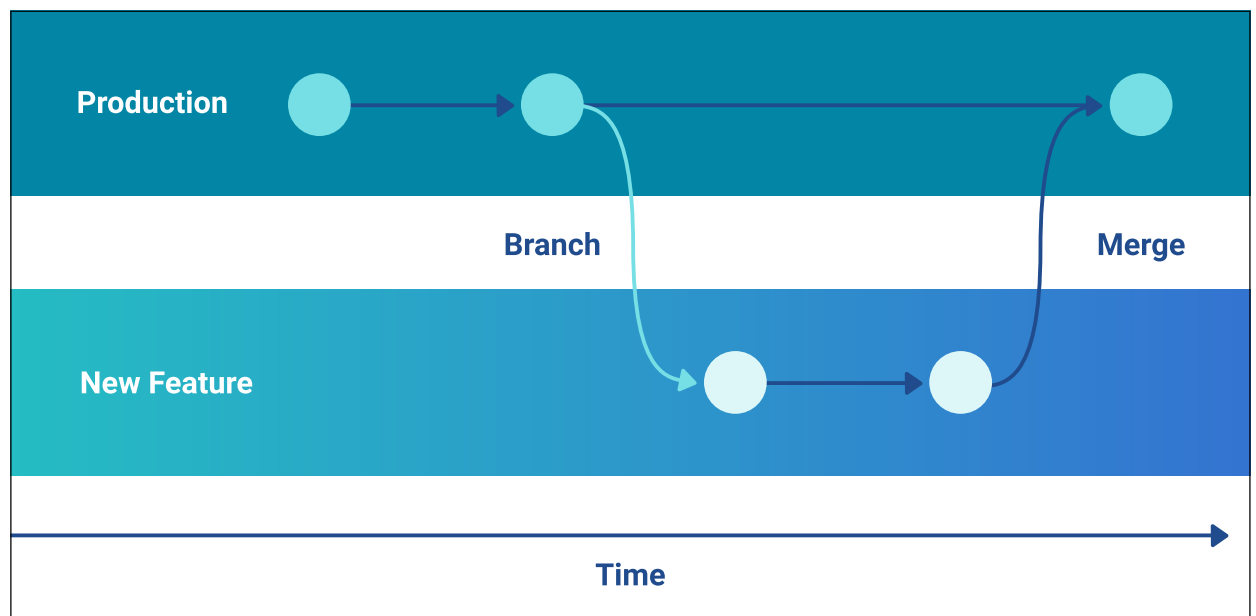
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New Release

MadCap Flare 2021 r3

New Branching Support for Your MadCap Central Git Repository

Whether you are a lone author, or part of a team, branching offers many benefits. With this new feature, continuously develop new content while not affecting your main (production) branch used to generate approved content.



Branching support in MadCap Central is a huge game-changer for us. Having the ability to create a new branch and push it to MadCap Central is going to revolutionize how we manage our projects tremendously.



Rosa Davis | Technical Writer and Documentation Strategist, Vaison

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