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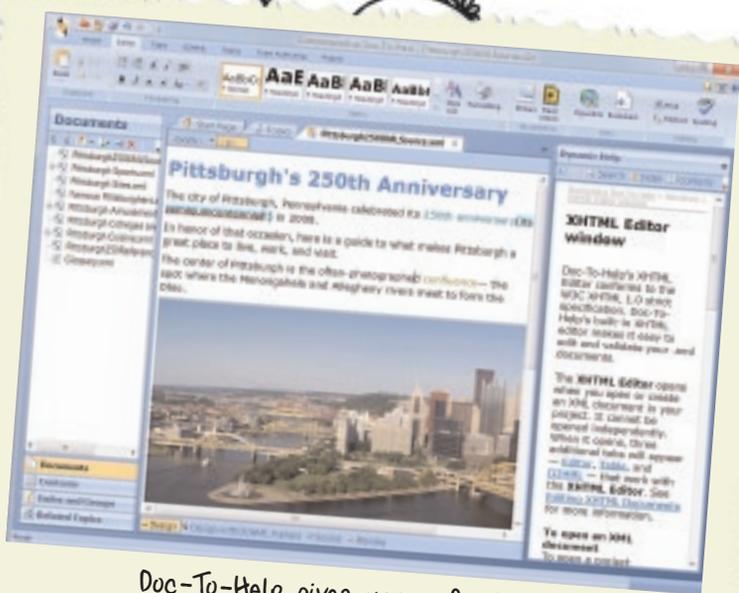
*Putting
Ourselves in
Someone Else's*

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**EDITORS AND DESIGNERS:
6 IDEAS FOR BETTER COLLABORATION**

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**WHEN STATECRAFT FAILS: TIPS ON
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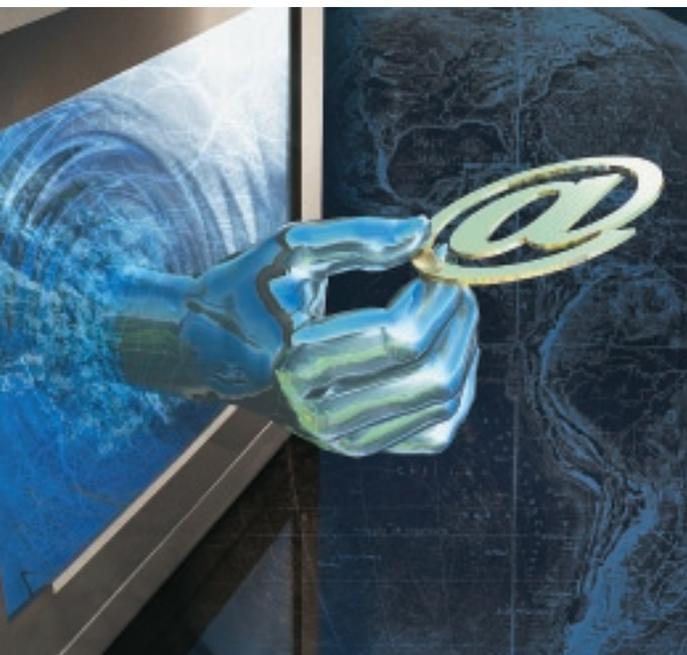
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By Julie Henning

As technical communicators, we are the most critical users of other companies' documentation—the hardest to win over and the easiest to alienate. Henning discusses how to channel our own frustrations with documentation and redirect that empathetic energy into seeking out different, better, or more creative ways to create support materials that our own users will want to use. She also shows how putting ourselves into our users' shoes lets us create measurable contributions to our employers' bottom lines and tangible accomplishments for our own résumés.

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Style manuals are among the most important resources available for helping to create clear, consistent, and professional documents. They are also the most hotly debated tool in a professional communicator's toolkit, often inspiring fierce "all or nothing" loyalty on the part of their users. In this article, the authors show communicators and their organizations how to cut through the politics and emotion and conduct logical, well-considered evaluations and selections of style manuals.

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Intercom, the magazine of the Society for Technical Communication, is published to provide practical examples and applications of technical communication that will promote its readers' professional development.

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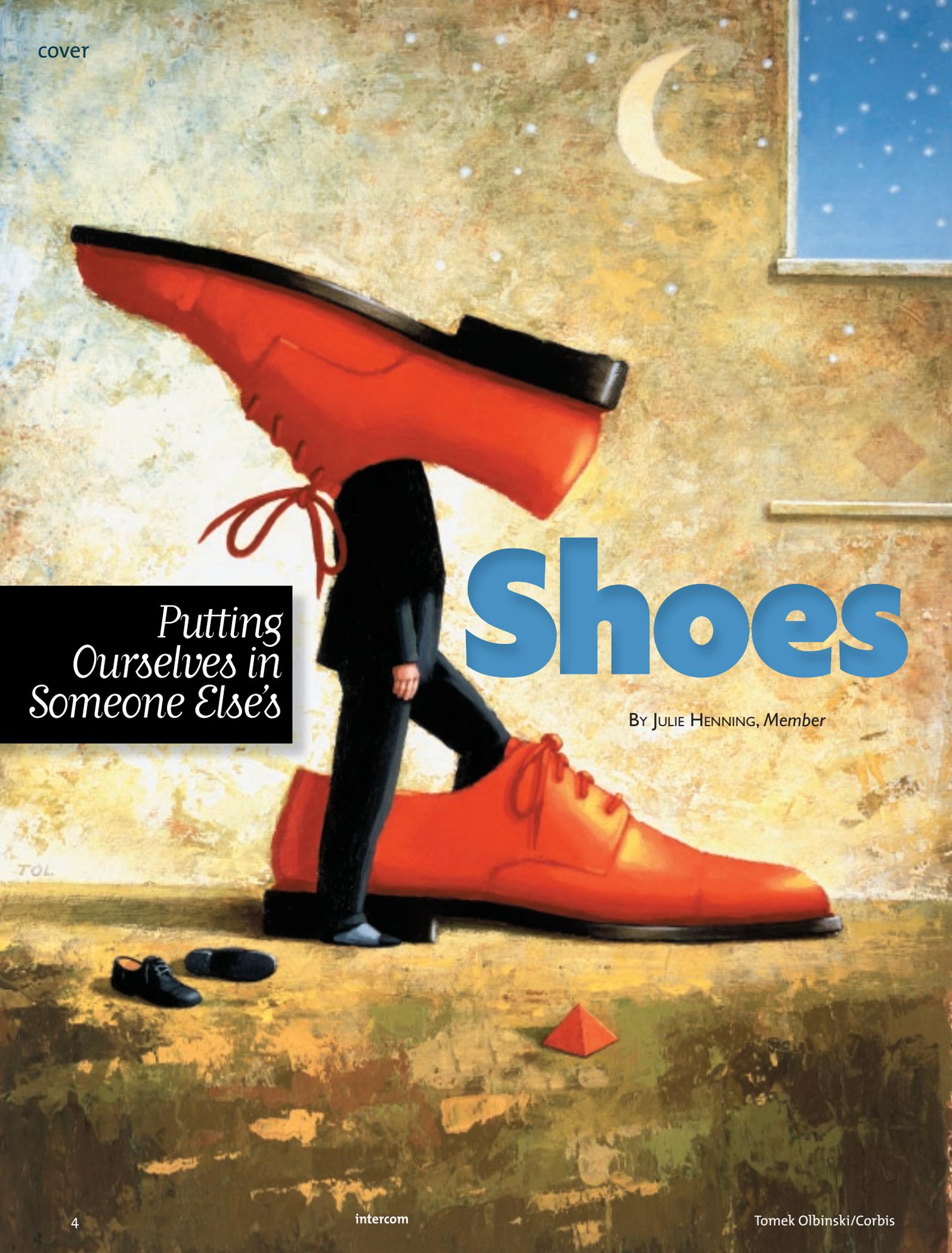
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*Putting
Ourselves in
Someone Else's*

Shoes

By JULIE HENNING, *Member*

Showing our value as it relates to the company's bottom line gives our profession increased credibility.

I have a confession. I'm a technical writer and I don't like to read user manuals. Especially the 300-page "book" that sits (barely used) in the glove box of my car. I'm not proud of this fact, but I did have an end-user epiphany this spring when the battery died. Alone on the highway, I sighed and immersed myself in the wonders of positive and negative terminals and pondered a three-dimensional drawing of what eventually led me to the trunk and to a battery hidden under the spare tire (!).

With user manual guilt fresh on my mind, I started asking myself why I typically don't read the manual when I propagate equivalently sized documents in my chosen profession as a writer in the medical device industry. To locate and recharge my car battery, all I really needed was a short document covering two topics: (1) locating the battery and (2) connecting the jumper cables. Ideally, for usability, durability, and increased longevity, the information could be on laminated paper. Perhaps instructions for a jump start could even be laminated right to the battery itself.

Moving Closer to the User Experience

Medical device technical writers have a common understanding in our profession. When people remind us that no one reads the manual, we take comfort in the fact that both the federal Food & Drug Administration and our competitors are diligently adding the pages to a file cabinet somewhere. Extrapolating the jumper cable experience to the larger technical writing industry, I propose an end-user analysis intervention.

One of the challenges facing medical device technical writers is the lack of "audience" interaction. The opportunities we have to observe procedures and interact with medical professionals are few, especially as companies are shrinking travel budgets and the laws regulating the frequency and nature of contact between device manufacturers and device users continue to grow in complexity and severity.

In my years writing and editing in both high-tech and low-tech industries, I have come to depend less on the "internal" departments (the individuals design-

ing the product and the user interface) and more on the "external" departments (those people building components or interacting with the end user in a real-world environment). Bringing me out of my cube and putting me closer to the user experience has helped me to understand exactly what parts of the documentation are used (and, subsequently, how they are used), or if they are used at all.

I'm not advocating a mass exodus from the development process—quite the contrary. Often, a process of asking questions and "playing" with a product or application ultimately drives design changes that create a more user-centered and user-friendly product. Good questions to ask can simply start with:

- "Why do you..."
- "How do you..."
- "What do you..."
- "Where do you..."
- "When do you..."
- "Who do you..."

Take notes and, when you are finished, examine your paper for common themes and key words. Make an outline and follow it when creating small content chunks (or topics). If you have the opportunity, watch someone else use the product. Compare your experience with theirs and see if you can identify different ways to perform the same task. Listen for questions similar to yours and be sure to specifically address them within the documentation.

Thinking Like the Boss

Despite our good intentions for the end user and the production of the best possible user experience, we have to remember that change sometimes is slow. Writing and documentation trends come and go and being educated enough on them to make suggestions

for improvement can make your job easier in the long run (not to mention, help you define and grow your career along the way). In my experience, proposing any change that either consumes man hours or budget dollars is best presented to key decision makers with data that supports one (or all) of the following areas:

- Number of documents affected
- Cost savings as a percentage of time or money (man hours, capital expenses, training costs, and/or document conversion fees)
- Impact to the business or customer experience

Companies with large budgets for documentation and translation can sometimes lose focus on the size and scope of the documents they produce. As documents grow in size and complexity, they become harder to manage and more expensive to change. Unless you are working directly with or for a documentation manager, waving the "red flag" of unmanageable documentation falls on your shoulders. As creators and lifetime "owners" of technical documentation, the responsibility for creating intelligent, affordable, and usable products falls within the realm of our expertise. Showing our value as it relates to the company's bottom line gives our profession increased credibility.

Coming Full Circle

For example, in my most recent job, I sat next to the one-person purchasing department. User manuals were being re-ordered and I was surprised to learn the cost to print and bind one copy was about \$50. Maybe this is a drop in the bucket for a large company, but not for companies where the profit margin on one sale feeds travel budgets, payroll, and free coffee. I had a paradigm shift in my thoughts about document fulfillment (inventory vs. print on demand), electronic documentation (XML and PDF), content re-use, and content chunking.

The current user manual was more than 300 pages long and encompassed hardware, software, and other (sold separately) accessories. No single chapter could be easily extracted from the



document and used on its own (e.g., one chapter starts with assembling hardware, explains the human anatomy, and then brings the user into the software interface). My recommendation was to cut the manual apart and reassemble it into standalone chapters that could be used, distributed, and managed in a more streamlined way.

Perhaps this solution is not shocking to anyone who has been in the technical communications field longer than my 11 years. I do, however, continually find myself amazed by the fact that convoluted, lengthy documentation is the norm (not the exception). I wonder:

- Do most companies really know the cost of writing, printing, maintaining, translating, and distributing the documentation that accompanies a product or software program?
- Are writers given the opportunity to conduct both audience and content analysis on their documentation to really understand how and when it is being used (if at all)?
- Are writers effectively meeting the needs of their internal customers, including Marketing, Engineering, Sales, and Operations (re-using and re-purposing documentation to save costs and increase productivity)?
- What would motivate a customer to keep a 300-page user manual somewhere other than a drawer or glove box?

My hope is that, at some point, a company can identify all the activities that go into documentation (from project kickoff meetings all the way to legacy product support)—ultimately taking a proactive approach to controlling cost and improving customer satisfaction.

Too often, writers are introduced into a project in the eleventh hour, after key decisions (and budgets) have been made. Our work tends to fall between the cracks, somewhere after the R&D notebook but before the glossy marketing brochure. I believe many people with an engineering, marketing, or sales background do not like to write technical documentation (the task is daunting and, well, not exactly full of danger, adventure, or romance). Unfortunately, this approach to project management is not enabling technical writers to provide their expertise in usability or have a positive impact on customer service.

Walk the Walk and Talk the Talk

Who among us has ever read a user manual *without* critiquing it in our head? More often than not, we all find ourselves noting both cardinal sins and virtues in the documentation we use, such as:

- improvements in organization and content usability
- addition or expansion of indexes
- inconsistent use of terminology
- counterintuitive formatting

- unclear section headings
- poor editing
- attractive (or unattractive) page design
- innovative use of multimedia
- inappropriate or ineffective matching of content and medium (e.g., print, online, multimedia)
- images that support tutorials and other instructional text
- navigation

For example, a pet peeve of mine is a manual without an index, but I openly admit to having produced less-than-adequate indexes in my own work. The crutch “no one will even use this manual” is sometimes a path of least resistance, and I am guilty of taking it.

A character-building (and humbling) experience as a technical writer is to look at *our own writing* beyond the constraints of the style guide and the writing guidelines. Parallelism, correct grammar, and semantics are just as important as usability concerns such as, “Does the customer really need to see a screen shot of every user interface when they are most concerned with a key area inside the user interface?” and, “Do our how-to procedures really reflect the kinds of tasks that our users *actually* do?” Both are important, both have to be balanced—neither should be sacrificed in the name of the other.

We’ve all used documentation where one clearly has been sacrificed for the

Who among us has ever read a user manual without critiquing it in our head?

other, such as the 300-page manual in which typos and grammar errors won't be found—but neither will an index or an inviting, user-friendly page design. As technical writing professionals, we look at those manuals and wonder how many hours were spent executing the perfect edit—and wish that some of those hours had been diverted to indexing or template design. And we've seen too many flashy multimedia demos with poor punctuation and incorrect field labels in the on-screen text—leaving us to figure that the sound editing stage of the project must have been allowed to cut into proofreading time.

But we're not limited to what we find on our own. Even when technical writers don't have direct contact with their readers, there are other information sources all around our organizations if we're willing to do a little digging and a little talking. Collecting and tracking user feedback from such sources as

- electronic surveys performed by the marketing and/or business development groups,
- bug tracking systems used by the help desk,
- customer service databases that track orders, renewals, and service requests,
- course feedback surveys from the training group,
- topics listed in custom training requests,
- registration and/or attendance counts for webinars and conference sessions,
- field service logs written by technicians, and
- sales call reports from your sales team

is beneficial to writers as we plan documentation enhancements for the next launch, the next regulatory submission, or the next software release. Even when our readers don't give much thought to our existence in a company, they are still talking to us—just through different, indirect channels—about what they're doing, trying to do, wanting to learn how to do, or having trouble with.

Direct conversations with our coworkers in other departments are always a wealth of information—particularly the anecdotal knowledge gleaned from conversations with customers but never

documented. Also, there's the intuitive assimilations of observations that folks store in the backs of their minds that are not forgotten but somehow never find their way into emails to you. Marketing knows what web pages on the company site get visited the most frequently. Sales knows what bullet points, charts, and case studies in the marketing literature yields the most interest during conversations with prospects. Installation teams know what a user's first concerns are as soon as a new product is installed. For all these reasons, a cross-departmental content review may be a worthwhile activity from a branding perspective. For instance, does the content on the website match the brochures going out to customers? Do the technical specifications referenced by the field service engineers match the product datasheets? When discrepancies are identified, how is the information disseminated to the customer (e.g., FAQ web page, video cast, company newsletter, email blast, blog, case study, etc.)?

A former manager of mine once said she reads everything out loud before finalizing it. This exercise forces her to use inflection and read every word slowly. Another manager turns her documents on a right angle and examines them carefully for mistakes—literally, from a different perspective. If possible, the luxury of working on documentation over a period of days allows time to re-read the text for omissions and improvements.

Conducting a competitive analysis is another way to critically examine your company's documentation methodologies. That is, if you can identify your competitors and analyze how *they* document products and/or software, you can see what you are “up against” in terms of trends and technology. This analysis can

also help make a case for infrastructure upgrades and professional development during goal-setting and performance evaluations. Is it possible your writing department is wearing flip flops when they really need army boots?

Writers as a Commodity

When writing departments reach a certain size, a primary responsibility of the technical communications department manager is to support and balance the needs of the internal clients and the needs of the writing department (including workloads, scope creep, and offering professional development and customer-interaction opportunities). But what happens when companies do not have internal writing services at their disposal?

Consider the position of startup or virtual companies that have only a handful of employees. Without a description of their products and services or a clearly written value proposition to set them apart from their competition, these companies are at a disadvantage. Specifically, new customers and investors may not have a strong concept of what the company can do for them. Enter another opportunity for an end-user analysis intervention.

Budgets for writing in companies where the owner is usually not even receiving a paycheck are small—if they exist at all. Keeping that in mind, independent technical writers offer value in that we are trained in both content and audience analysis and can offer solutions based on price, need, and purpose. Our job is to efficiently write, in a shorter time frame and from an outside perspective, what these companies cannot produce themselves. For example, we can often turn lengthy technical documentation into concise product descriptions that are free of jargon and industry-specific acronyms, while addressing the pain points of the customer.

The key to justifying our writing services involves thinking about our writing as an activity that is necessary to the long-term growth of the company. This approach to writing strengthens our ability to propose different levels or “packages” of deliverables. For example,



Level 1 includes existing content analysis, audience analysis, usability testing, and product documentation. Level 2 includes brochure copy, web content, and datasheets. Level 3 includes training materials, engineering documentation, and online help. And so on.

Charging a per-hour or a per-project rate for documentation then allows a company to track their investment and accurately budget for future writing needs. Ultimately, as the company expands, the justification for a full-time writer already exists. And, the company can better identify their writing needs and articulate what types of skills and experience they are looking for in a writing candidate.

But, how do writers use the car battery example when they are starting from the ground up? Starting with no documentation can be overwhelming unless you can look at the project as an opportunity to think from the end user's perspective.

Ask yourself these questions as a starting point:

1. When would I need documentation?
2. How would I use the documentation?
How long would I spend reading it?
3. How motivated would I be to seek out documentation? Would I just pick up the phone and call customer service?
4. Where would I store the documentation? Would it be readily available when I needed it?
5. Would I look for a manual or would I go to the company website?
6. How complicated is the product?

Would I immediately throw away the manual when the product arrived?

There are certainly other questions to add to the list, but the general concept is to put yourself in the customer's shoes and think about your own experience with the product. Some companies (especially those in the medical device and pharmaceutical industries) are mandated by law to provide documentation. Others provide it as supplemental material. Help your client or employer identify the customer experience and then work within the writing budget to best help meet everyone's needs.

And last (but certainly not least), you are building a portfolio of experiences along with establishing your credibility. Before beginning a project, have metrics (and your résumé) on the brain. Consider these statements:

- Reduced the amount of redundant language by X percent.
- Reduced the amount of inconsistent terminology usage by X percent.
- Increased website traffic by X percent.
- Saved X dollars in translation costs.
- Implemented on-demand printing and electronic documentation, resulting in budget savings of X dollars.

Although often you can't talk directly to your users, networking with other technical writers and hearing what conclusions they're drawing about user experiences will ultimately benefit all users in some way. Even when you're talking about radically different products, the

fundamentals of a good user experience are the same. For these reasons, it's important that you surround yourself with a supportive group of experienced and novice writers, work together, and mentor each other so that you can grow and identify areas of development based on everyone's successes and failures. Share and collaborate ideas; the most isolated of us can still find support and professional camaraderie through email and online discussion boards and forums. And, finally, attend conventions to network and exchange ideas—but don't forget your jumper cables! 

SUGGESTED READING

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Style Manuals:

The Politics of Selection

BY ELIZABETH G. (BETTE) FRICK,
Associate Fellow, AND ELIZABETH A.
(BETSY) FRICK, Associate Fellow

There Bette was, in front of an attentive audience of 100 senior managers, scientists, and clinical managers in a beautiful auditorium. She advanced her next slide projected on a huge screen behind her... the serial comma.

No, this wasn't a hallucination, or even a dream. It was the rollout of a year's work with employees of a division of a medical device manufacturing firm that had decided to standardize language within their written documents to improve their consistency and correctness. We ultimately achieved enough consensus to produce a 24-page style guide that was posted on the division's intranet and circulated among the company's many thousand employees.

To understand the effort entailed with this project within the larger context of style manuals, you need only to recall those

posts you've seen on technical writing listservs that recommend using *The Chicago Manual of Style (CMOS)* or the *Associated Press (AP) Stylebook*, as if these were the *only* style manuals available. We'll explain style manual selection for technical communicators, and why other choices might be appropriate.

We'll explain what a style manual is and why these resources could be helpful to writers and organizations, and will also describe the different style manuals available for purchase (paper or online) with the express purpose of helping technical writers better advise their clients about selecting the best style manual for them. We'll conclude with a narrative description of the successful style guide project mentioned at the start of the article. Finally, we'll provide a link to a useful matrix that explains a number of published style manuals

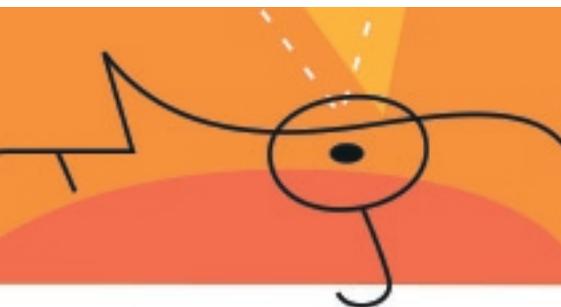


on the market today. (This article focuses on American English style manuals because that's the language we work in; we invite international members to offer their own ideas and suggestions in future articles. Additionally, we've excluded style manuals that focus exclusively on design, typography, or website style.)

What is a Style Manual and Why Would You Want to Use One?

We define a style manual as a publicly published set of standards for the writing of documents. Most of the ones we know have been created by publishers, nonprofit organizations, or government agencies to encourage authors and editors to create clear, consistent, professional documents. For technical writing projects, adhering to one chosen style manual helps to ensure standardized usage and conventions such as these:

- words and terminology (Web site or website? employee or associate?)
- formatting of written elements (numbers, dates, times, units of measure)
- capitalization
- punctuation
- reference citations
- formatting of tables
- sentence length
- writing style (formal, informal)



All Style Manuals are Inherently Political

The choice of a style manual can be more political than you might imagine. Just as people choose their style of dress, hair, and food and remain loyal to their choices, language and style preferences become entrenched, and few individuals welcome change. Bette experienced this when she taught a technical writing seminar at a small medical testing firm. One seminar member asked her for a recommendation for a published style manual. Bette answered, "In the absence of a corporate requirement to use a specific industry style manual like the *AMA Manual of Style* (American Medical Association) or the *Publication Manual of the American Psychological Association* (APA Style), I think a great choice for your company is *The Gregg Reference Manual* for good general business style."

Another seminar member reacted very strongly, insisting that *The Gregg Reference Manual* was for secretaries, and that members of the class should use *CMOS*. After a rather heated discussion about the pros and cons of each, the issue was dropped, but when Bette arrived to teach her class the next week, she found a box of *Chicago* manuals (a \$1,000 investment) on her desk to distribute to the class.

After that, learners would email Bette with questions like, "How does *Gregg* handle XX?" or, "We're having an argument here about how to format YY, and it's not listed in *Chicago*. Could you look it up for me in your copy of *Gregg*?" This is why it's valuable to know which style manual is best for which industry or purpose. *CMOS* was developed for the University of Chicago's academic faculty and is best today for authors of scholarly works. *The Gregg Reference Manual* states that it is "the business writer's survival manual" and as such includes many items not found in *CMOS*.

Because there are so many manuals on the market, employees and independents should know about several of them and should be able to articulate to different clients in different industries the pros, cons, and purposes of each. And, yes, this often means that you must own and be well-studied in the most recent edition of a variety of style manuals, especially since our practices may differ from year to year with changes in clientele. A cogent explanation of why your client or department should choose one style manual over another demonstrates your professionalism and value.

What Does Your Style Manual Say?

Why does it matter which style manual you recommend? As noted earlier, style differs from one manual to the next, and you need to promote the manual that's most appropriate for the kind of writing you and your clients do. For example, *CMOS*, *The Gregg Reference Manual*, and *AMA* require a comma before "and" in a series of items, but *AP* omits it. Most experts say that the serial comma is necessary for clarity in technical writing; if you are creating technical materials, *AP* would not be the best choice.

We invite you to participate in a short exercise here. Read over the list below. What do your style manuals say about each item?

1. Changes in formatting, such as underlining (or not) for items that appear only in print, such as URLs and email addresses as well as book titles in bibliographies
2. Plural forms of dates (years) and acronyms
3. Internationally acceptable formats for dates
4. Punctuation of dates and years in sentences

5. Punctuation of cities, states, and countries in sentences
6. More concise ways to write, such as “now” for “at this point in time,” and replacements for clichés
7. Business letter format, email format
8. Spelling, especially of computer and Internet terms such as “email” and “login” (two words, hyphenated, or one word?)
9. Trademark and copyright issues
10. Structure and formatting of references (bibliographic material)

Does your manual address these issues, and are the guidelines appropriate for your clients and their readers?

Benefits of Adopting a Style Manual

In the end, the benefits of having a style manual in place are the same no matter which one you choose. They:

- save time and money for both writers and organizations
- act as a catalyst for consistency
- enhance an organization’s professionalism within the industry and with the public

Because time is money, a style manual saves the organization money by providing quick answers to questions that arise while writing. The manual precludes “walkabouts” that waste time to get opinions from others (e.g., “Is healthcare spelled with a hyphen, as two words, or as one word?”).

Consistency happens when writers can look up how to format numbers. Consistency helps readers, too; they won’t have to figure out if Stage 1 cancer is different from stage I cancer because what they are reading uses the same term throughout. Because inconsistent and error-ridden documents cast doubt on the credibility of the writer

and the organization, the style manual helps add to the organization’s brand of professionalism.

Recommending a Style Manual

When you work on a project as a consultant or employee, one of your preparation questions should be, “Which style manual do you use?” If the answer is “None” (or a blank stare), find a tactful way to double check. Sometimes there is, indeed, a preferred corporate style manual, but the people on your project don’t know about it. This situation occurs so often that Betsy is thrilled whenever her clients or workshop participants can name even one style manual, even if it’s not the best one for the job.

Whom can you check with to see if there’s a style manual in place? The company editor, the documentation manager, the publications department, the marketing department, the public relations department, someone in human resources, the company intranet—all are good sources.

When there really isn’t a style manual, be ready to provide at least one recommendation from the list provided in our Style Guide matrix (which can be viewed at www.textdoctor.com/stylemanuals.html) or from your own research and experience with similar companies in similar industries. Even the smallest of companies find a published style manual to be of value. You’d be wise to determine who makes decisions about purchasing a style manual so that it can be included in the budget.

Be aware that a company-specific or project-specific *style guide* can accompany the published *style manual*. The style guide answers questions about the specifics, such as use of the company name, slogan, and logo; product name spell-

ings or company jargon; and design and layout decisions for a document.

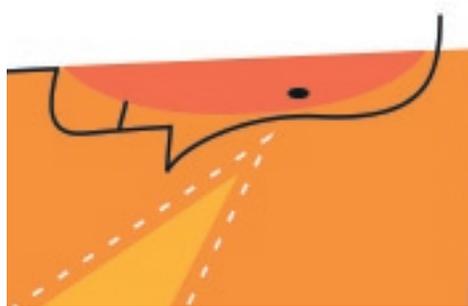
Writing a Company-Specific Style Guide

Bette’s experience working with a division of a large, multinational corporation to set their style and publish it demonstrates the politics involved in a project of this scope. First, we had to find a core group to carry the idea to management to obtain support in the form of funding for the project. We provided a clear explanation of the return on investment (ROI) for such a document (as explained in this article). It also helped that Bette was editing 180-page regulatory submissions for them and was able to benchmark the costs of hiring a third-party editor to standardize style issues for a variety of writers.

When we had management support in place, our core group brainstormed the names of individuals across the division who should be involved. We asked for volunteers from quality, regulatory, and other clinical groups, inviting anyone who cared about style in written documents. Our initial group included 10 contributors and grew to 12 as word circulated about our mission.

We met monthly for several hours over lunch. Our first decision was to adopt *AMA* as the standard style manual so that we could avoid “reinventing the wheel.” Our mission after that was to document three types of line items that would appear in our style guide.

1. Reiteration of the most common style issues explained in *AMA*, which contains more than 1,000 pages. (Following the 80-20 rule, we determined the 20% of *AMA* guidelines that affected this division.)



2. A clear explanation of how the division style would vary from *AMA*.
3. An explanation of formatting issues that were important to the division and did not appear in *AMA*.

We documented *AMA* style issues such as how to format phrases that include percentages, use of hyphens, and why to use the word “patients” rather than “subjects” when writing about clinical studies. Departures from *AMA* included not formatting numbers of four or more digits with a half-space or thin space used to separate every three digits (12 345 678); see section 19.1.1 in *AMA* (10th edition). We decided to conform to the American system of using commas to separate the digits (12,345,678) because the company had more American employees than international and submitted documents to an American regulatory agency; also, our readers would find the spaces jarring and would expect commas instead.

A second departure from *AMA* style involved proprietary names (see 15.4.3). *AMA* requires that the proprietary names for a drug or device be initially capped, but in accordance with the *Journal of the American Medical Association (JAMA)*, leaves off the trademark symbol (™) or the registered trademark symbol (®). The company’s legal department demanded that these symbols appear on product names the first time they appeared in any document. The lawyers won, of course, and we readily agreed.

The third category included items in our guide that didn’t appear in *AMA* but were important to the division. We specified typefaces and the use of articles, for example, along with a discussion of how to format references in *Endnote*® software.

How did we reach consensus? It helped that Bette had 17 years of experience with the company as a vendor and was recognized as an expert chosen as project manager and keeper of the “Action items” document. We started with a list of style issues and discussed them heatedly but respectfully. Some were moved into the “agreed-upon column” and then incorporated into the guide. Some issues were tabled for more research or until stakeholders could be

present. Some issues have never been resolved. (This last option provides a “safety valve” for groups who face difficult questions or opinionated people.)

When the document was finalized and published, we scheduled our rollout. Management supporters were invited to speak about the project, and all major stakeholders were offered the opportunity to speak as well. Bette explained the salient style decisions and fielded questions (there were many, as the audience was openly engaged).

The document was then rolled out internally, and there have been several revisions, scheduled quarterly. Everyone can contribute to the revision database, which is discussed at quarterly meetings. All suggestions are considered. Because of this openness, there has been relatively little overt resistance from employees; in fact, many other divisions have asked for copies of the style guide. It was fun to produce the guide, but it is even more fun to see employee engagement about correct and consistent writing.

Conclusion

When do writers need a style guide or a style manual or both? The answer is twofold: whenever two people write in an organization, or whenever a document is going to be more than four pages long with more than one heading. For more information on selecting style manuals and creating style guides, check out the resources listed in the References section below as well as the URL referenced earlier in the article. ❶

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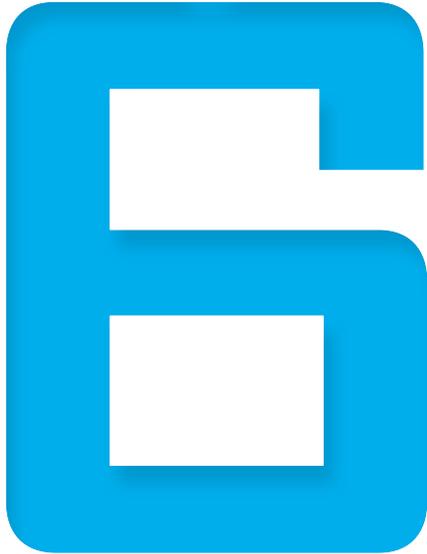
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Editors and Designers:



Ideas for Better Collaboration

Musicians are famous for it. You'll also find devotees among the ranks of businessmen, scientists, academics, and politicians. Choose almost any industry, and you'll find groups of people collaborating to accomplish things together that they couldn't accomplish alone. Why, then, do you so often find editors and designers sitting in opposite corners of a shop—our only contact the passing back and forth of the project we're said to be working on *together*? As budgets dwindle, staffs shrink, and editorial processes become streamlined, it's easy to let collaboration, which can take extra effort, fall out of the picture. But it's one of the most vital tools we have in ensuring that our readers are handed the best possible publication, and in the long run, saving time and money.

Norman A. Darais, director of the Publications and Graphics Department at Brigham Young University in Provo,



BY ERIN HALLMARK, MEMBER, AND MARLA SOWARDS

UT, has been a devout collaborator throughout his 35-year career as an editor. As a new editor, Darais was initially introduced to what he called the “tried and true industry approach to publishing,” wherein a writer crafts the text, an editor cleans it up, and the designer adds it to the art design—the responsibility of each ending as the project is passed into the next set of hands. “I soon discovered that wasn't the way I wanted to work,” Darais said. “I didn't want to just turn over copy [to the designer] and say, ‘Good luck.’ The magic is in the process. There is synergy when [editors, writers, and designers] chew on a problem together.”

Editors and designers work in a variety of work environments and carry a variety of responsibilities, but for all of them, maintaining a collaborative relationship with one another is key in creating the best publications possible. No matter if you're the editor or the designer, here are some ideas for improving and enhancing your collaborative efforts.

1. Give up your personal preferences and focus on what is best for the reader.

Work is always for your client—don't let your ego get in the way. Are you more worried about your credibility or your job responsibilities? If you work with someone with an ego concern, and you're reading this thinking that you don't want to be the first to bend, reread this paragraph.

John Scott, an art director, commented on a blog by Mark Newman and said that many issues between editors and designers are simply due to ego; people must learn to control the impulses of their egos. “[Projects are] a team effort and there must be mutual respect and a bit of humility.” Seth Godin, a well-known marketing and advertising writer, said, “You need to be...willing, if the work meets your strategic goal, to embrace it even if it's not to your taste.” Additionally, Heather Burns, a corporate editor, believes that “all changes to art must be tied to business strategy—your opinion alone isn't a good enough reason to change a design.”

As an example of collaboration, one editor recalled a time when she was working with an outsourced illustrator for a magazine article in which an illustration of her company's president would grace the cover page. The editor presented the illustrator with an image to work with, but because of the illustrator's stylistic preferences, the completed image portrayed a man who was much larger than he should have appeared. Upon hearing the editor's concern, the illustrator slightly modified the photo, but it still was not altered to fit what the editor had asked for. This example demonstrates the discontent that exists when one of the parties isn't willing to bend.

2. Encourage everyone to contribute ideas for the project.

As writers, editors, and designers, we all come from different camps, and we all have ideas on what should and should not be. We need to be strong in our opinions, but we also need to recognize when our idea may not be as good as someone else's—and when we are up against something that we don't know much about. Designating a short period of time as an open, impartial forum for presenting ideas can help people see things from another point of view and allow room for innovation.

In their department, Darais and the art director implemented what their employees came to call “toast meetings”—they, and occasionally the department's photographer, would gather each morning around a toaster in a corner of the press building's basement and eat toast while they discussed their current projects. Often they would pin photos to the wall to help inspire the text and design. What came out of the discussions was a whole slew of innovative publications with unusual cohesiveness, finesse, and longevity. “You don't want to have a preconceived notion of exactly where you want to land,” Darais said. “Figure out where [a publication] needs to go and why, but have the flexibility to freewheel for a while and push back and forth. If you hit the right balance between the design and the text, they enhance one another.”

Collaboration *can* foster disagreement, and deciding when to stand your ground and when to stand aside is a fine art. A

You know the old proverb: “Don't judge a man until you've walked a mile in his shoes.” Publications professionals can walk a mile in the shoes of their counterparts by learning the basics of the parts of the publications process they don't have a hand in—that way, they can better understand and accommodate their counterparts' reasoning and decisions and allow that knowledge to shape their own work. Here are some resources to accompany you on the trip.

WRITING

- *On Writing Well*, William K. Zinsser
- *Style: Lessons in Clarity and Grace*, Joseph M. Williams

EDITING

- *The Elements of Style*, William Strunk and E. B. White
- *Eats, Shoots & Leaves*, Lynne Truss
- *Grammar Girl's Quick and Dirty Tips for Better Writing*, Mignon Fogarty

good rule of thumb is to step aside an equal number of times as those with whom you work. Be selective on which projects you feel strongly about, and be willing to let others feel strongly about other projects. Realize that the magic of collaboration is allowing the best ideas to rise to the surface, and letting the rest fall away. Everyone has good and bad ideas—including you. Give other people's ideas a chance, and speak up when yours aren't getting the attention they deserve.

3. Realize that an error you introduce in a publication can be attributed to someone else who worked on it.

Designers should understand that the editors get the blame if there is something wrong in the layout, like a typo. No matter that *you* were the one flowing the text into the layout; readers will think the editor messed up. Go the extra mile and proof the copy while you're reviewing the design. You don't have to be the world's best speller or grammarian to spot a word out of place. Likewise, editors should understand that the designers get the blame if there is a formatting concern, like stacking hyphens.

- *The Slot: A Spot for Copy Editors*, Bill Walsh (www.theslot.com)
- *Corporate Writer & Editor* newsletter
- *Q&A* section of *The Chicago Manual of Style* (www.chicagomanualofstyle.org)

WEB DESIGN

- *Don't Make Me Think*, Steve Krug
- *Web Bloopers: 60 Common Web Design Mistakes and How to Avoid Them*, Jeff Johnson
- *The Non-Designer's Web Book: An Easy Guide to Creating, Designing, and Posting Your Own Web Site*, Robin Williams

LAYOUT DESIGN

- *Thinking with Type: A Critical Guide for Designers, Writers, Editors, and Students*, Ellen Lupton
- *The Newspaper Designer's Handbook*, Tim Harrower
- *The Non-Designer's Design Book*, Robin Williams
- *FPO: For Publications Only* magazine
- *Before&After* magazine
- www.Lynda.com

You were the one who wrote the text, so help rewrite it to prevent a formatting *faux pas*. And while you're at it, check to ensure that your publication partner inserted the correct photos and their accompanying captions. We need each other to make sure the document is correct and perfect in all areas; just because something was right when you passed it off doesn't mean it will remain correct later. We are only human.

4. Have clear expectations from the beginning.

Bringing all concerned parties together for a brief meeting at the beginning of a project can spare a lot of time, cost, and confusion in the long run. That way, the editor is able to get a vision of what the writer and editor are going for, and thus fix the copy according to that vision before the designer flows it into a design layout. It also ensures that projects get done on time and that the deadlines are realistic. Karol A. Keane recorded, “At no time is it more important for editor and designer to meet face-to-face. All good designers find it helpful to know the end goal for important articles; they'll work forward from that

so the art supports the content.” Once you have secured a direction for your project, share it with everyone involved. If they don’t already exist, create some design standards so everyone will understand what is expected. PhelpsTek, an online marketing and communications company, wrote, “Whatever schema you implement, it should make it so easy for the user to find what they are looking for that they barely notice it.”

5. Be willing to learn more about the other person’s viewpoint.

If you’re a designer, read up about writing. If you’re a writer, learn some basic elements of design. Lots of people have interests in both editing and design, but, unfortunately, most of us are limited to only one career option. So there’s no reason you can’t develop an interest, too. Darais said that the key to successful collaboration is “pleasant give and take.” He stressed the importance of becoming educated in one another’s crafts—not in order to tell each other what to do, but to make useful contributions. “It’s not helpful to say, ‘I don’t like that’ and then, when asked why, answer, ‘I don’t know,’” Darais said.

Becoming educated also allows that knowledge to drive your own work. “The more you learn about design and graphics, the better editor you become,” Tony Chambers explained in an article by MagCulture.com. “I’ve always believed the editor and the art director are equals in producing a magazine. In the end the editor is obviously the boss, they get the plaudits of success and it’s their head on the block when things go wrong. But I believe it’s a partnership, the two roles go hand in hand. An editor has to have total respect for the art director and how they interpret the editor’s content, and the art director has to be able to understand and contribute content.”

6. Be respectful of the other person’s knowledge, even if it seems to overlap on yours.

Jeremy Leslie agrees that “it is common for two lead creative roles [to] often cross-over, even blur, [but] it remains incredibly rare for one job to lead to the other.” Godin adds, “You don’t know a lot about accounting so you don’t backseat drive your accountant. You hired a great de-

signer; please don’t backseat drive here, either.” Newman recalls a time when Anthony Picco, who served as an art director for four years at a not-for-profit, admitted that he prefers less specific comments from his editors—“Nothing drives an art director crazier than an editor who is a frustrated art director.”

Although designers are responsible for the visual look of the piece overall, the editor is responsible for the message the text conveys, and sometimes its formatting carries part of the message. Writers have the right to format text according to style, such as if an editor italicizes the name of a magazine; designers should accept that formatting as part of the design. But if a writer has applied italics merely for the sake of design only, the designer should consider that the editor has a prior idea about the overall look of the text.

In our own experience, we’ve seen editors and designers who clash for this same reason; this is a similar idea to how some people think they can write professionally simply because they know how to write, how some people think they are a photographer because they know how to take pictures with a camera, and how some people think they know great art because they like Monet and Van Gogh. If you are the designer and you have a good editor, there is a good chance that the editor knows what is best, even if you are uncomfortable with the editor’s work. The same example can be inverted to represent the designer as the one with a stronger knowledge base. PhelpsTek’s website reminds us that some people think writing is just creating a collection of words when, in reality, it is much more than that. And for designers, Keane tries to remember that the designer is taking into account a number of factors that may not be apparent to the editor, and messing with the arrangement might subconsciously interrupt the readers’ experience.

By throwing away our assembly-line mentalities and embracing the idea of collaboration, we can introduce innovation into our publications, save time and money, more expertly serve our readers, and enjoy better working relationships with our colleagues (on the condition that we all keep our egos out

of the mix). Take this approach on your next publication to see what collaboration can do for you. 

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Single Sourcing

Help Content

for Software Manuals

BY ROBERT P. MOHR, *Senior Member*

Do you maintain an online help system and user manual for the same software application? Are you struggling to juggle updates to the help system and manual because you haven't found a better way? If you answered "yes" to these questions, read on.

This article details a method by which you can single-source content from an online help system to produce a manual for the same software application.

The method discussed in this article relies upon Microsoft Word and RoboHelp; however, these same concepts can be applied to other help authoring tools that give you the abil-

ity to selectively identify and generate content to external files (such as AuthorIT, MadCap Flare, and Doc-to-Help).

Since its early days, RoboHelp has given you the ability to determine the content to output:

- Conditional Build Tags: used to identify text, tables, and images for print
- Conditional Build Expressions: used to select content based on specified Build Tags (see Figure 5)
- A Topic Organizer: used to select the help topics and their order (see Figure 6)
- A Style Mapper: used to map styles in the help system to styles in a Word template (see Figure 8)

Figure 1 depicts the process flow in which all of this comes together. As you will shortly see, the upfront planning and effort that you put into creating a well-designed Word template, as well as a content reuse strategy for your help and manual content, is critical to the success of your single-sourcing efforts. Without it, tasks like selecting content to include in the manual and mapping styles becomes much more difficult.

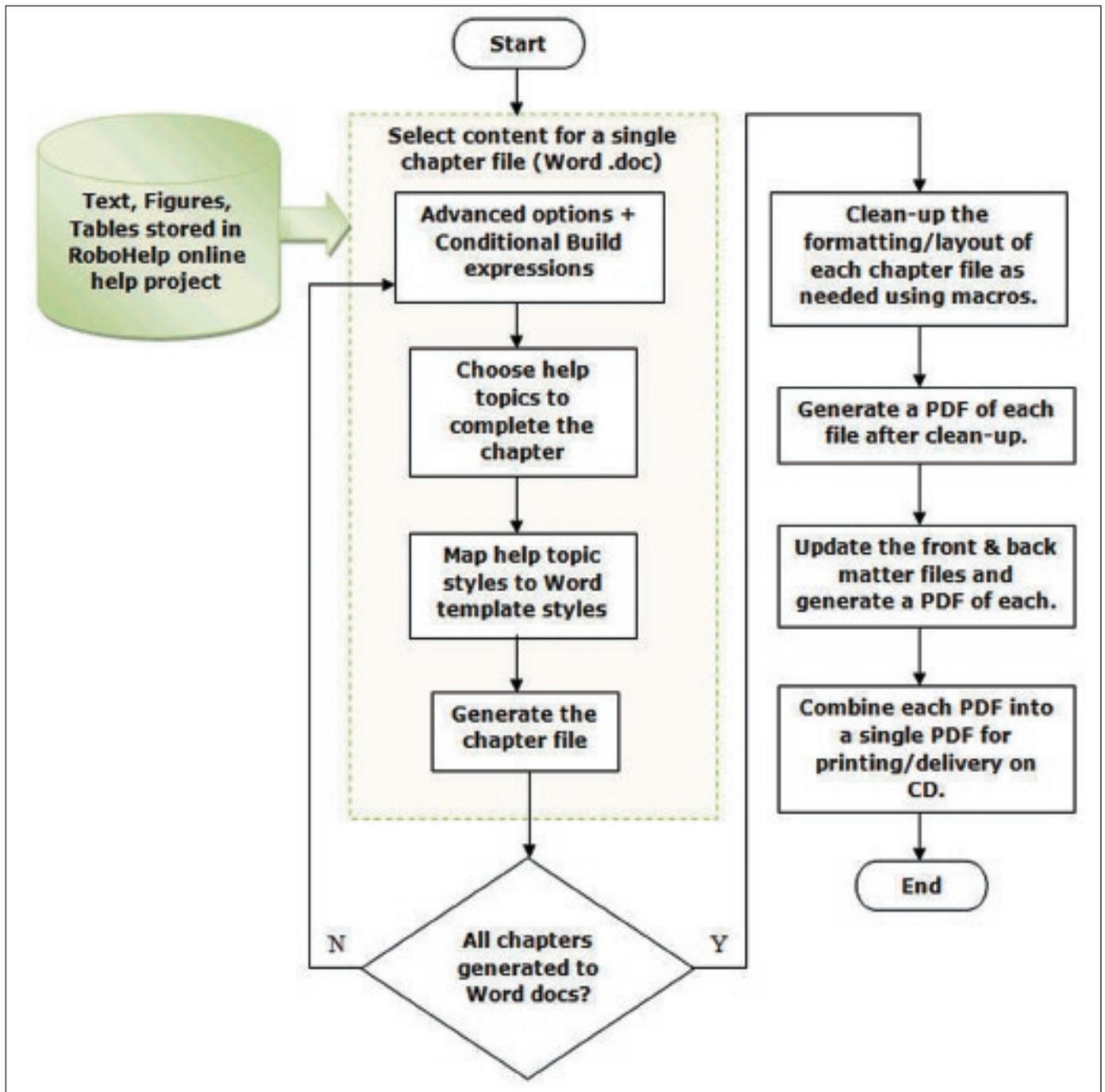
Figure 1. Process flow

Conditional Build Tags

Think of RoboHelp as a miniature content management system: all content resides in the RoboHelp *project*, but not all content is handled equally. Each of my RoboHelp projects includes a minimum of two conditional build tags: *Print* and *Online*. These tags are selectively applied to content elements such as text, tables, or images so that they can be included or excluded from generated output using conditional build expressions.

For example, I seldom include screen captures in help topics viewed online since a typical user would already be viewing the screen when the F1 key is pressed in order to display the applicable help topic. However, I do want the image included in the printed manual, so I add the image to the help topic and then apply the *Print* conditional build tag to it.

When generating the online file (*.chm), I use a *Not Print* conditional



be generated from RoboHelp. The template should take into account the manual's page size, header/footer information, and paragraph styles. The styles used in the help topics will be mapped to those in the template, as shown in Figure 8. The template should be created before generating the chapter files from RoboHelp.

Generate the Manual's Chapter Files from RoboHelp

When designing an online help system, do so with the idea of creating a book from it later on. For example, a typical online help system contains high-level topics under which there may be one or more lower-level topics. Those high-level topics may serve well as chapter titles for a printed manual.

RoboHelp's single-source layout feature is perfectly suited to generating *chapters* as Word (*.doc) files. Create a single-source layout for each chapter and use the layout's Properties windows to determine the chapter's contents and appearance.

The figures in this article illustrate the steps that are involved with specifying the properties and content for chapter files as single-source layouts from a RoboHelp project.

The first window of layout properties shows the essential file-level information for a chapter file (see Figure 5).

The second window lets you select the appropriate topics for a chapter's content (see Figure 6).

The third window lets you select the formatted sections for a chapter (see Figure 7). All that is needed here is the Chapter Layout since all chapters will be combined with other files that contain the cover page, table of contents, and index for the entire manual.

The last window of properties (see Figure 8) lets you map/match existing paragraph and character styles used in the help project to corresponding styles in a previously prepared Word template file (selected from the Microsoft Word Template drop-down list).

After all chapters have been generated, the RoboHelp portion of the process is complete.



Showing Changes from Previous Versions

Using RoboHelp to generate Word files has another useful purpose: to show reviewers of your help content *exactly* what has changed from the previous help system to the newest help system.

Here's how to do it—assuming the help system for XYZ Software Release 1 is complete and it's now time to update it for Release 2:

1. Duplicate the XYZ Release 1 RoboHelp project to make a new Release 2 RoboHelp project.
2. Make all updates/changes to the help content for Release 2. Be sure to note which help topics are changed, deleted, or added for Release 2.
3. When the help system for Release 2 is complete, generate a Word document containing the changed and new topics noted in Step 2.
4. Return to the Release 1 RoboHelp project and generate a Word document containing the topics noted in Step 2, if any.
5. Using Word's Document Compare feature, open the Release 1 Word document, and then open the Release 2 document. Word points out all the differences between the old and the new content using its Track Changes feature.
6. Save this "diff" document as a separate file and send it to your content reviewers. They'll appreciate seeing all the changes so clearly marked, and it will shorten their review time.

Format Chapters in Word

RoboHelp does an admirable job of generating the Word document, but it is not perfect. Some manual reformatting may be necessary. In Word, you can create macros to speed up the more repetitive tasks and add them to the chapter template as a custom toolbar and menu (see Figure 9).

When the formatting of a chapter is complete, make a PDF of it, then repeat the process on another chapter.

Build the Manual

After the chapters are complete, the manual's table of contents and index must be updated. I perform these steps on what I call the front and back matter files.

The front matter file contains the cover, title page, trademark acknowledgements, and the table of contents. The table of contents is generated using Word's Reference Document (RD) field code and the Table of Contents (TOC) field code. The back matter file contains the index and back cover. The index is generated similarly to the table of contents using the RD and INDEX field codes. (*Note: Complete details of how to generate the table of contents and index for books using RD field codes are in the "Building Books with Word" article in the April 2005 Intercom.*)

When the front and back matter files are updated, generate a PDF of each. The final step is to combine all of the chapter files with the front and back matter files into a single PDF using Adobe Acrobat.

Summary

A little planning and work is necessary to create the chapter files, reformat them, and update the front and back matter files. However, even though I update the help content continually during the software development phase, the chapter files are not created until the help is complete, usually after software testing. Manuals of any size can be created using the method described herein with a minimal amount of effort. **i**

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WHEN STATECRAFT FAILS: Tips on Surviving "The Great Game"

BY GEOFFREY J. S. HART, *Fellow*

In my previous article ("Statecraft: Applying the Science of Politics to Office Politics," *Intercom*, September/October 2009), I proposed strategies for building workplace credibility so colleagues and managers will take you seriously and give you opportunities to improve the way things work. That approach works if everyone shares our good intentions and wants to cooperate for the greater good, which will be true for most of our colleagues.

Unfortunately, there are always a few bad apples whose only goal is to increase their own power. Many were

encouraged by management consultants selling books full of wisdom from historical figures you wouldn't ordinarily associate with management. For example, Sun Tzu and Miyamoto Musashi became popular sources of "management as warfare" advice during the 1970s and 1980s, and Nicolo Machiavelli became the poster boy for "management as manipulation."

More recently, Joep Schrijvers, author of *The Way of the Rat*, presents an even nastier view: the Schrijvers workplace is a sewer in which rats endlessly compete to defeat each other and seize power. If this book is the "international best-seller" its cover proclaims, thousands of readers have learned to see workplaces as Tennyson's "nature, red in tooth and claw." Disciples of Schrijvers, of whom I've met a few, would consider my previous article hopelessly naïve. Here, I'll suggest some ways to protect yourself against such people.

A note of caution: Schrijvers believes it's idiotic to try using his techniques defensively. In some Dilbertian workplaces, he may be right. Unless you're willing to become a rat yourself, it may be wiser to leave such situations, since even a strong defense is no guarantee you'll escape the attention of the worst rats.



Overall Strategies

Schrijvers offers three powerful tactics for workplace domination. First, identify all the competing interests and their power sources, including the “courts” in which decisions are made, by observing how your workplace really works. Second, observe more often than you act, and act only at opportune times. Third, learn the many tricks and traps that will win workplace battles, and keep a cool head. Intellect must prevail over emotion.

Each tactic suggests a matching defense:

- “Learn how the game is played. Who are the real powers? How do they play political games? What written and unwritten rules do they follow?”
- “Identify power sources that can be used against you and that you can use to protect yourself.”
- “Stay alert for tricks and traps that can be played against you.”
- “Learn how to judge people. You can’t protect yourself if you don’t know who to trust and who to worry about.”

This requires a talent for observation and a willingness to observe. It’s been said we have two ears but only one mouth, and should use them in that proportion. That’s good advice for anyone, but particularly important when there are rats in the workplace.

Learn How the Game Is Played

Shortly after starting with a new employer, you learn there are two sets of rules. First, there’s the policies and procedures manual or employee handbook. These formal, written rules codify how managers believe the organization *should* function, and for many mundane functions (e.g., requesting reimbursement of travel expenses), they’re accurate. But there’s also a parallel set of rules, never written down and transmitted only by word of mouth or by imitation. Rats follow the first set of rules when convenient, but exploit the unwritten rules whenever it’s expedient.

That second set can be more important. When I worked for the federal government, the reimbursement procedure was straightforward: copy your receipts, attach the originals to a form,



total up each category of expenditure, and submit the paperwork. Some interminable time later, a check arrived via internal mail. Before I prepared my first form, I introduced myself to the appropriate clerk, explaining that I wanted to fill out the form properly and minimize her hassle. We struck up a friendship, since unlike many others, I honestly wanted to be helpful. Instead of throwing my form on the pile, she processed it immediately and had my check issued within days—in part because she didn’t itemize my expenses, and instead gave me the standard *per diem* rate. When I questioned this, she told me she was willing to process my actual expenses, but pointed out that everyone hated the additional paperwork and that managers looked the other way because they believed this approach saved the government more money in staff time than it cost in payments.

Sometimes it’s difficult to know when to follow the official or the unofficial rules. For instance, the government used formal procedures to deal with problems that required intervention from the Human Resources department, but a friend warned me that following these procedures sometimes angered managers, who wanted to be

consulted first. One rat taught me that sometimes there’s no obvious right path. The first day he became my manager, he shook my hand firmly, smiled broadly, and told me to bring any problems to him. “That’s why I earn the big bucks,” he said. Charming and helpful, he deceived me completely.

When a colleague began causing serious problems for our group, I collected evidence and witnesses to validate the problem. But when my supervisor received this evidence, he grew enraged at being asked to solve the problem. Instead of acting on the evidence, he called me on the carpet and berated me for a good 10 minutes, making it clear that if I took the problem to Human Resources, I’d regret it. Having a young family to support and no stomach for a fight, I backed down and let the problem slide.

You can’t learn the rules of the game by hiding in your cubicle. To navigate the sewer, you must first learn the layout of the tunnels. Staff newsletters, memos, and meetings announce important *official* changes that shape our work, but the unwritten rules are only revealed through the connections we develop throughout the workplace. Some workplaces practice open-door management, and let you discuss your concerns with any manager. Others are rigidly hierarchical, and interpose strong barriers between managers and employees.

In any workplace, there are ways to gain access to managers, such as serving on the committees responsible for social activities, computer decisions, or workplace safety and health. Such committees include representatives from multiple departments and typically include at least one manager who approves the group’s recommendations or brings them to senior management for approval. Befriending committee members builds a powerful intelligence-gathering network, and keeping your eyes and ears open reveals surprising insights into the currents flowing through the sewer.

Identify Power Sources

The most obvious power derives from your position within the hierar-

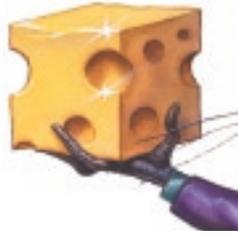
chy. Managers, for example, can command their staff without seeking their opinions. If someone disobeys, managers can discipline them and possibly even fire them. People obey such managers out of fear, and unsubtle managerial rats flex their muscles publicly. Subtler rats use psychology, charm, and a friendly veneer to enforce their will, as they understand that raw power is best reserved for extreme situations, and that consultation and persuasion are more broadly useful.

As expert users of words, technical communicators have more power than our formal roles might suggest, since a carefully prepared, skillfully argued case has the power to persuade. But we must remember that the most effective approach varies among people and situations. Sometimes *argumentation* works best: present carefully organized facts when logic and objective reasoning will be compelling. Other times, *persuasion* works best: present words that appeal to the emotions and instincts when feelings and subjective assessments are stronger than logic. Choosing the right approach requires knowledge of the best approach for each person you're hoping to sway and insights into how context affects their thinking.

Though unwritten rules are sometimes more powerful than formal rules, don't ignore the formal rules. Official policies and procedures provide powerful ammunition when you need to accomplish something or want to avoid being forced to do something ethically suspect. Few of us aspire to become a rulebook lawyer, but awareness of the rules provides trump cards that might otherwise be unavailable. My rat manager taught me the hard lesson that the written rules for personnel problems would work best, though he moved on before I could test that opinion.

Interestingly, unwritten rules often depend on leaving no paper trail, whereas formal rules can require significant paperwork. When unwritten rules are used against you, creating your own paper trail—what experienced office workers call the *CYA* (cover your ass) approach—is a wise tactic. “Active listening”—paraphrasing what someone said in order

Unwritten
rules are
sometimes more
powerful than
formal rules.



to confirm your understanding—is a powerful tactic. The *CYA* version of this tactic involves transforming off-the-record oral communication into a formal memo that reiterates your understanding and requests approval to proceed. (Having a witness to the conversation is helpful, but wily rats won't fall for that trick.) Anyone hoping to manipulate you will resent this tactic, but you can plausibly insist on confirmation that you truly understood their request. If your organization still uses printed memos for such exchanges, store a copy of your memo somewhere safe—possibly even at home—and protect the word processor file so you have a dated copy. If you communicate via email, retain copies of your email. In truly hazardous situations, use the *BCC* (blind copy) field to send copies of your email to a workplace friend who can subsequently prove that your message was successfully sent. Oc-

asionally, you can visibly *CC* a memo to another manager affected by your discussion. You won't win any friends by thwarting a rat this way, but sometimes that's a necessary tradeoff.

Speaking of friends, it's essential that you find some. Isolated individuals with no allies are easy prey. But people who like you or owe you favors are likely to help when trouble arises; strangers have less reason to risk discomfort (or worse) by helping you. Rats form such alliances purely to acquire weapons they can use in future conflicts; you should form alliances because they provide a more pleasant way to spend eight-plus hours of your day than living as a hermit.

Whatever your reasons, you're stronger with allies than you are on your own, and you can sometimes achieve remarkable things. At a former workplace, I discovered that I walked the same route to work as a senior manager. Rather than walking alone, we walked together and struck up an informal friendship. That friendship opened his door to me at work, a privilege I took great pains not to abuse. Many months later, when I really needed a favor, he removed some intractable obstacles from my path.

Stay Alert for Tricks and Traps

If you keep your eyes open and learn about your coworkers and workplace situation, you'll discover how the currents of power flow, and may even become privy to some of the ongoing power plays. More importantly, you'll gradually learn who you can and cannot trust.

Deal cautiously with anyone who has a reputation for manipulation or power plays. Should they ask you to do something, think carefully before accepting. What might their true goals be, and could those goals endanger you? Do they have reason to protect you from becoming collateral damage on the way to achieving their goals, or might they let you be harmed? (That willingness may not be anything personal. Rats are often chess players who think nothing of sacrificing pawns if doing so brings them victory.) In each case, carefully consider the consequences of your interaction within the context of the larger workplace. You may find ways to refuse to

play their games or to enlist allies who can protect you or even stop the game fast.

Carefully monitor how people respond to you. People who seem reluctant to spend time with you or who are unwilling to engage with you on anything but the most superficial level may be trying to tell you something. People you've crossed swords with or actively harmed while achieving your own goals or while trying to survive some rat's machinations are unlikely to help, and may actively undermine you. Learn which allies are strong enough to provide useful help, and which are weak or only fair-weather friends. Whenever you need support, carefully consider whether you have that support, whether this will be an opportunity for someone to gain revenge for an old injury, or whether you'll be leaning on a rotten stick that will snap beneath your weight. Then plan accordingly.

That being said, someone with no reason to like you may still help you because they see a personal advantage in doing so. Even someone you've harmed in the past may help simply because they never embraced the way of the rat and are sufficiently ethical to do the right thing rather than seeking revenge. People are complex and cannot be reduced to simple rules; treating people as simple stereotypes can lead you far astray.

Learn How to Judge People

Most technical communicators are at least somewhat introverted. It's not that we lack social skills or the desire to be social, but rather that the writing and other communication we do for a living tend to be solitary activities. But communication requires two parties (the speaker and the listener), and the best communication involves two-way interactions. In the workplace, we must never become hermits just because we have more work than time to complete it, and must never become so isolated from human contact we lose our ability to communicate with our fellows. As Alexander Pope noted, "The proper study of Mankind is Man." Practicing those interactions helps us to understand our colleagues.

Most people are lousy actors. Anyone can briefly maintain a façade, but only sociopaths (who are mercifully rare) can pretend to be an entirely different person for long periods. If you pay attention, chinks will gradually appear in the performance of even a skilled deceiver, letting you spot their inner rat. Deceptive words are easy to utter, but the ways people act and behave are stronger clues to their true identity.

Forming a network of friends and allies is a good strategy in any workplace because it makes work much more pleasant, but these people also become your source of strategic information about potential rats: even the most nimble rat leaves a wake of evidence and victims. Of course, you shouldn't blindly trust even your friends; they're every bit as human as you are and, thus, make mistakes, carry grudges, listen to unfounded gossip, and misinterpret what they see. Always seek confirmation before judging someone to be a rat. The reality is often more nuanced than it first appears.

People who are exceptionally charming or who seem to have unnaturally good control of their emotions require particular attention. Most really are what they seem: pleasant, emotionally mature adults with a strong sense of fair play and a mild temper. These are good people to know, because it's refreshing to deal with them after a hard day of dodging rats. But some are skilled deceivers who use charm and emotional control as tools of manipulation.

A Few Caveats

In a few short pages, it's impossible to communicate lessons that others spend entire books explaining. My goal here is simple and, therefore, limited: to alert you to the possibilities and encourage you to keep your eyes and ears open. Don't become paranoid, but do be aware. These few tips cannot compensate for a lack of awareness, and they're no substitute for practice and experience. Unfortunately, the learning curve can be harsh, and you'll make mistakes while you learn. But, as I did, you can survive those mistakes if you're willing to learn.

Understanding the way of the rat should not lead you to become a rat. Just because others are following nasty rules, that doesn't mean you should, too. As Friedrich Nietzsche famously observed in *Beyond Good and Evil*, "He who fights with monsters might take care lest he thereby become a monster." I've found that you *can* succeed by following an ethical approach that involves respect and consideration for your colleagues. But I've also learned the hard lesson that not everyone shares that philosophy. Don't spend your days nervous as a mouse, always worried some rat will attack you. *Do* learn the games being played in your workplace, and watch out for those who may try to use you in those games.

Can you simply refuse to play? Sometimes. Striving for the moral high ground and building a reputation for fair dealing and honesty is a laudable goal, and one I've used successfully in my own career. But I've also learned that not everyone respects this philosophy or will leave you alone. The tips in this article have brought me through an occasional fire unscorched, with ethics largely intact, but I've also occasionally resorted to various degrees of unethical behavior to protect myself or friends. When to make such compromises is an intensely personal decision, but if you learn from what I've presented in this article, you'll have to make that decision less often. 📌

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BY ROGER MUNGER, Member, LORI PENNINGTON, AND SARA BROOKS



1 Intern Orientation

Most students complete an internship because it is part of their degree requirements, while other students intern to explore a career option or get their foot in the door. Regardless of how they come to be your interns, they will probably be a little nervous, a little overwhelmed, and eager to apply what they have learned in school. To reduce their anxiety and to help them get started, an effective intern orientation is critical. As the intern's supervisor, you are not solely responsible for this orientation. An intern's orientation is a team effort, involving the faculty internship coordinator, you and your colleagues, and the intern.

Intern Orientation Starts at School

Although the specifics vary for administering academic internship programs, all academic internships will have an assigned faculty internship coordinator. This person will work closely with the intern during the internship experience. One important role for faculty coordinators is that of intern advocate. That is, they look out for the interests of the student interns and help them have a valuable internship experience. To reach

this goal, faculty coordinators have the important responsibility to start an intern's orientation. Before the intern's first day at work, the faculty coordinator should make sure interns understand the steps necessary to receive academic credit for their experiences, their legal rights and responsibilities, and strategies for succeeding in the workplace.

Interns need to know how to get academic credit for their internship.

The intern should know what paperwork needs to be completed, including what paperwork his or her internship supervisor needs to submit. Typically, the intern will first need to submit to the Registrar a signed internship application that details the job duties and total contracted hours for the internship. The department offering academic credit for the internship will often require the intern to maintain regular contact with the faculty coordinator, complete an orientation, maintain an activity log, submit progress reports, provide work samples, reflect on their learning, and complete an evaluation of his or her experience. The internship supervisor might be asked to provide progress reports and an end-of-the-semester evaluation. The faculty coordinator is also

responsible for making sure both the internship supervisor and the intern know the deadline for completing each task.

Interns need to understand their rights and responsibilities in the workplace.

Many interns are new or returning after a long absence in the workplace. Although you should provide your intern with your specific company policies, the faculty coordinator should introduce harassment laws and resources. At a minimum, faculty should educate students interning in the United States about three laws enforced by the US Equal Employment Opportunity Commission (www.eeoc.gov/index.html):

- *Title VII of the Civil Rights Act* (www.eeoc.gov/policy/vii.html) prohibits employment discrimination based on race, color, religion, sex, or national origin.
- *Age Discrimination in Employment Act* (www.eeoc.gov/policy/adea.html) protects employees who are 40 years of age or older from harassment based on age.
- *Americans with Disabilities Act* (www.eeoc.gov/policy/ada.html) prohibits harassment based on disability.

For students interning in other countries, faculty should direct students to applicable employment laws for that country. Faculty also should provide interns with advice regarding whether they need to carry their own health and/or liability insurance. Finally, faculty should underscore that interns are accountable for using and protecting confidential data. When appropriate, faculty should help interns understand nondisclosure (i.e., confidentiality) agreements.

Interns need to be familiar with the soft skills desired by employers.

Each year the National Association of Colleges and Employers (NACE, www.naceweb.org) surveys employers on the qualities and skills they look for when hiring recent graduates. Not surprisingly, most employers value communication and interpersonal skills over technical know-how. The top qualities and skills cited by employers are communication skills, honesty and integrity, and teamwork skills. Because an internship can be a 10- or 16-week audition for a

permanent position, faculty should educate interns on some of the skills and qualities employers will expect them to demonstrate. At Boise State University, all interns, regardless of major or class standing, must complete a 45-minute online internship orientation in which they learn, for example, specific strategies for effective workplace communication, dealing with conflict, and the value of respecting the organization and fellow employees.

Workplace Orientation Should Be Structured

You have agreed to hire an intern. Now what do you do? Start by determining the type of project(s) on which the intern will work, the intern's workstation, the duration of the internship, and the intern's goals. Using this information, start thinking about how to efficiently orient your intern. The orientation needs to be quick but thorough so the intern can move from trainee to contributor.

As an intern supervisor, before you begin orienting the intern, you first must consider the intern's background, knowledge, and learning style. During the interview process, ask some questions that will help you plan the orientation:

- What is your past experience with our type of product? Software? Client?
- Is this your first internship? If not, briefly describe your role in your other internship(s).
- What do you expect to gain from this internship?
- How do you feel your knowledge and skills will aid you in your tasks with us?

Answers to the above questions will help you tailor the content of the intern's orientation, especially the type of on-the-job training an intern will need to succeed at your company. For example, at Cougar Mountain Software, documentation interns typically receive four levels of orientation: overview of company mission and organizational structure, training on in-house software applications, introduction to basic workflows and processes, and specialized advanced training.

Interns need to be acquainted with the company.

During initial orientation, interns are introduced to all management and key personnel with whom they might work. Although an intern is not expected to remember everyone or their roles, this process makes interns feel like they're part of the team and, in turn, introduces the team to them. At this time, interns also benefit from gaining an understanding of the company structure and the layout of the offices and buildings. Along with introductions to key personnel, you might also consider inviting the interns to client meetings and involving them in other company activities (see Table 1).

Interns need to become familiar with your products and services.

You will likely need to provide your interns with some information on your products and services. For example, at Cougar Mountain Software, if interns are highly knowledgeable in accounting or have accounting software experience, they might only attend one to two days of internal training; if the interns have little or no knowledge in this area, they might train for an entire week. The training level also depends on the tasks you intend to have your intern complete.

Interns need to understand your workflows and processes.

Interns need to understand how you go about doing what you do. For many entry-level interns, this means learning your company's documentation process and corporate style. An orientation to your documentation process might include a basic overview of the documentation output, tools, processes, style guide, and overall document requirements. At Cougar Mountain Software, for example, the interns work through the *Documentation Training Manual*. This manual begins with a brief explanation of the company's software products and ends with the interns developing a mini-guide. This allows the intern to work independently on a project that can be used for their professional portfolio, and allows for a closer evaluation of their abilities. An approach such as this might also help you assess the interns

more thoroughly to ensure they are capable of completing the intended tasks. At the very least, you will know how you need to train or support them so they will be successful during their time with your company.

Interns Help Orient Themselves

The prospect of being "the new kid" at an organization can be daunting. Though an intern may feel somewhat helpless before and during orientation, there are many steps an intern can take to guide the process and to be an integral part of it. Doing their homework, asking questions, keeping open lines of communication, accepting criticism, and being confident are among the most important things interns can do to ease into their new work environment.

Interns must do their homework.

Researching the company—its mission, products, and services—does not stop after the interview for the internship. If anything, more research is needed. Interns should review all the material available on the company website as well as any materials provided to new interns. Unlike an academic course where students can sometimes "wing it" without doing the assigned reading, it will be obvious when an intern arrives at his or her internship unprepared. Moreover, it wastes everyone's time. During the orientation and the first few days on the job, the work for interns does not end at quitting time. Interns should devote time at the end of each day to organize orientation materials, review notes, and commit colleagues' names and functions to memory. Interns must not only treat their internships just as they would a regular job, but they also must treat it as an academic experience, and that means doing their homework before each workday.

Interns must feel free to ask questions.

Interns should be encouraged to ask questions during all phases of orientation. Even answers to questions that may seem insignificant or irrelevant will help your intern feel more secure. Encourage your interns to take notes when they get answers. The answer might make sense

Table 1. Ideas for Orientation Activities at Work

<ul style="list-style-type: none"> • Start with a Q&A session. 	<ul style="list-style-type: none"> • Include your intern in training classes and social events.
<ul style="list-style-type: none"> • Give your intern a tour of your facilities, including restrooms, break rooms, and supply room. 	<ul style="list-style-type: none"> • Eat lunch with your intern. Get to know them as a person.
<ul style="list-style-type: none"> • Introduce the intern to company executives, personnel in other departments, and clients. 	<ul style="list-style-type: none"> • Take your intern to an STC meeting and other meetings of professional societies.
<ul style="list-style-type: none"> • Involve your intern in the process of gathering necessary supplies (i.e., writing and organization tools, notepads, reference materials). 	<ul style="list-style-type: none"> • Encourage company personnel to include your interns in both routine tasks and special projects.
<ul style="list-style-type: none"> • Invite your intern to participate in or observe planning sessions, client meetings, and special events. 	<ul style="list-style-type: none"> • Outline your expectations of the intern early in the orientation process.
<ul style="list-style-type: none"> • Review your organization's goals and objectives together. 	<ul style="list-style-type: none"> • Ask your intern what qualities make a great supervisor for them.
<ul style="list-style-type: none"> • Provide quick feedback on your intern's first work product. 	<ul style="list-style-type: none"> • Make it fun: scavenger hunts using the employee handbook, word puzzles, and games.
<ul style="list-style-type: none"> • Schedule regular face-to-face meetings with your intern at the start. 	<ul style="list-style-type: none"> • If possible, create learning teams of new interns.
<ul style="list-style-type: none"> • Break "must-know" information sessions into several short sessions over several days. 	<ul style="list-style-type: none"> • Have colleagues share stories of their first day on the job.
<ul style="list-style-type: none"> • For each orientation topic, answer, "How will this affect me?" 	<ul style="list-style-type: none"> • Share your intern's project success with other key personnel within the company.
<ul style="list-style-type: none"> • Offer constructive reassurance to alleviate potential anxiety. 	<ul style="list-style-type: none"> • Get the intern involved right away with tasks so that he or she can become an immediate part of the team.

at the time, but by the next day or week, their memory might be fuzzy. Interns should make it a goal to soak up all the information they possibly can; this not only demonstrates a genuine interest in the job, but it also will reduce the time coworkers must spend answering the same question.

Interns should be honest with their supervisor about their comprehension of material. When in doubt, they should ask questions. Sitting at their desks all morning trying to understand information they did not quite get when it was first explained would not impress anyone. That internships are learning experiences should be emphasized to interns and coworkers alike. Keeping open lines of communication with coworkers, and not just those in their department, will help interns feel more at ease and will give them insight into other aspects of the company. This extra knowledge will make them feel more comfortable during meetings or even just encountering others around the office.

Interns will struggle.

Interns should not beat themselves up over errors. One of the most important qualities an intern can bring to an

internship is confidence. Believing that they are capable of succeeding is a large part of feeling relaxed enough to ask questions, work outside their comfort zones, demonstrate initiative, and contribute to the team effort. During the orientation, remind interns that you have confidence in their abilities, that they were hired because they have skills the company needs.

Coworkers should expect a few false starts and mistakes, as any new employee frequently will make. Mistakes are not indicative of failure or incompetence; even individuals who have worked in their positions for years will still make mistakes occasionally. Treat any slip-up as a learning experience and move on. Emphasize in the orientation that interns should be open to constructive criticism. When interns begin, some might find themselves overwhelmed with feedback and conclude that they made a mistake even accepting the internship. Make it a point to help your interns effectively use constructive feedback. Focus on how all feedback—the good and the bad—can help them to improve their work and develop their skills.

In conclusion, as intern supervisors you have the privilege of introducing

students to our profession. A successful introduction to your company and our profession begins with a well-thought-out intern orientation. Done correctly, these orientations help interns contribute to your company's bottom line, develop new abilities and skills, gain lifelong colleagues and mentors, and become a member of the technical communication profession. **i**

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The New Norm: STC's 2010 Dues Structure and Membership Benefits

BY CYNTHIA C. CURRIE, *STC President*

Ever since we announced at the Summit in Atlanta in May that STC is experiencing an unprecedented financial challenge, the Board of Directors, chapter leaders, key committees, and staff have concentrated on finding an appropriate solution. I'd like to share that solution with you here.



We Have Cut the Budget to the Bone—and Then Some

Cutting an already tight budget is not easy. I want to acknowledge the efforts of the staff and the Finance and Investment Committee for their extreme diligence in closely examining our financial reports, cash flow, and budget papers. They cut close to \$1M USD in expenses during the last half of 2008 and

throughout 2009. In preparation for the 2010 budget, every expense, every revenue source, and every activity was examined. We used a zero-based model to develop our 2010 budget and essentially built it from scratch. It is realistic, sustainable, and includes only those benefits and programs that we can afford during this economic downturn. It is definitely “bare bones”—and balanced!

I also asked chapters to plan their programs through 2010 and to develop associated zero-based budgets, and then, if possible, to forward their surplus funds to headquarters to help cover the anticipated shortfall in the fourth quarter. This approach allowed the chapters to “take care of themselves first” and *then* to help the Society through the financial crunch time. I'm happy to report that of our 100-plus chapters, almost all have now responded with a program plan and budget, and many with surplus funds. I am sincerely grateful to them for their understanding that STC is one organization and, that by working together, we will come through this financial crisis. A few chapters have asked for a little more time to complete their budgets, and we are actively communicating with the remaining few to complete this phase of the recovery.

2010 Dues and Realignment of Prices

STC spends, on average, just under \$250 to provide services to a member, yet dues rates have been well below that amount. As I mentioned earlier, for sev-

eral years the revenue generated by the annual conference and our earnings from invested reserves have covered the difference—until now. We need to change our business model and adopt a pay-as-you-go approach.

In 2010, dues will cover basic member benefits with a la carte pricing for additional features. The core benefits remain, but with some changes. Basic dues **do not** include membership in a chapter and SIG. You are encouraged to take advantage of the many local and virtual benefits offered by chapters and SIGs by purchasing a la carte membership for \$25 USD and \$10 USD, respectively. All members will receive the electronic version of our publications. Print subscriptions to *Intercom* and *Technical Communication* are available for \$30 USD and \$75 USD, respectively. The 2010 membership fees, approved by the Board of Directors, are:

Basic Membership	\$215 USD
Students	\$ 75 USD
Retirees	\$145 USD

A split payment plan for dues is offered so that members can make four payments using a credit card. Details are explained on the STC website.

STC will also offer a limited number of **Gold Membership packages** at \$395 USD. The Gold package will include membership in one chapter and one SIG, plus registration for seven webinars and one online certificate course, the Salary Survey, and a Premium listing (50-word description) in the Online Buyers Guide & Consultant Directory. The value of this package is \$1,458 USD.

STC will continue to give discounted membership rates to persons located in low- and lower-middle-income countries as classified by the World Bank. A Basic Membership in these countries will be \$160 USD, and students in those countries will pay \$60 USD. And, as you can see in the earlier list, the membership rates for students and retirees remains unchanged.

Some of our activities will also require fees, which we will implement in stages. New this year are administrative fees for

A Little History

I can't tell you how many conference calls in the past four months have been devoted to examining the finances, cash flow, budget, and services for next year, because I lost count after 30 or so.

As I have outlined in previous emails and columns, the shortfall is primarily due to the negative impact the recession has had on our two main sources of revenue—membership dues and the annual conference. The revenue generated by these two sources provides the funding for most of the member benefits and Society activities. The 2009 conference *was* successful, but it did not generate the surplus that it has in the past. Similarly, the recession left us with a loss of about \$400,000 USD in principal and interest from our investments, which have traditionally been used to provide support for activities that have, as yet, no revenue source, such as the Body of Knowledge and other key committee work.

The recession brought to light underlying weaknesses in our pricing structure that now force us to change the way we provide benefits. For years, STC has been adding and expanding services and activities to benefit members and the profession without taking a hard look at how to sustain those activities. And with only periodic, modest increases in fees, the costs to sustain those services and activities have outpaced our dues and total revenue to the point that the Society has actually been subsidizing these activities.



DESTINATION: DALLAS

BY ELISA MILLER, Senior Member

applying for the Fellow and Associate Fellow honorary ranks. All entries to our international competitions will continue to pay a fee, with some modifications to the existing fee structure likely for the 2010 competitions.

In an effort to increase revenue sources, STC will offer *nonmember* subscriptions (print only) at much higher rates to *Intercom* and *Technical Communication* (the journal has permitted institutional subscriptions for years).

As we go forward, we are leaner by necessity, more efficiently organized, more focused on up-to-date service delivery, and ready to move into the future as a financially stable organization far less prone to economic impact.

Help for Those the Recession Has Hit the Hardest

STC will offer unemployed and underemployed members a lifeline to their profession in the form of membership grants and scholarships for the live web seminars and the Job Seeker Boot Camp. The Board has approved a limited number of Recovery Packages, partially funded by the Marion Norby Scholarship Fund. Details on selection criteria and application process are currently being developed by a task force and will be posted on the STC website soon.

This has been a very intense period for all of us. A great deal of time, talent, energy, and scrutiny have gone into building a balanced budget and program plan that will not only get us through 2010, but lay a solid foundation for a strong future—one where STC is viable, sustainable, and relevant.

I thank you again for continuing to be part of this great organization during these turbulent times, and for your trust in and support of the leadership team. 📍

The 2010 Technical Communication Summit will be held 2–5 May 2010, in Dallas, TX. The Dallas–Fort Worth Metroplex is full of great attractions that offer something for everyone. In the next few issues of *Intercom*, we'll be looking at places to go and things to see. Consider coming to the area a few days early to check out some of the wonderful and uniquely Texas activities.

The first stop is Dallas.

The Sixth Floor Museum (www.jfk.org/go/visit) is located in the West End of Downtown Dallas (not too far from the hotel). This museum is dedicated to President John F. Kennedy's ill-fated trip to Dallas. While Texans have always had a hard time dealing with the fact that the President was shot and killed here, we have created a wonderful museum in his honor. Prepare to spend several hours going through the exhibits.

The Dallas Museum of Art (<http://dallasmuseumofart.org/index.htm>) recently celebrated 100 years of connecting art and people. Established in 1903, the museum features an outstanding collection of more than 23,000 works of art from around the world, from ancient to modern times. The museum also provides varied and dynamic programs, events, and exhibitions to engage visitors more fully with the art. For information on upcoming exhibits, see the museum's website.

Nasher Sculpture Center (www.nashersculpturecenter.org) is one of the city's newest treasures (open to the public since October 2003). The Nasher Sculpture Center is one of the few institutions in the world devoted to the exhibition, study, and preservation of modern sculpture. Conceived as a serene urban retreat for the enjoyment of modern art, the Sculpture Center is the new home of the renowned Raymond and Patsy Nasher Collection of modern and contemporary sculpture.

Fair Park (www.fairpark.org) is a cultural and entertainment center located two miles east of downtown Dallas. Fair Park is home to nine museums and six performance facilities, including The Women's Museum. This National

STC International Competitions

Each year, STC chapters organize dozens of technical communication competitions with awards given for Distinguished Technical Communication, Excellence, and Merit. In 2010, at the international level, there will be two main categories: technical publications and online communication.

Entries that achieve awards of Distinguished Technical Communication or Excellence in a local competition may be entered in the Society's international competitions. There will be a change in judging for the international competitions during 2010. International judging will be held on Saturday, 1 May, just prior to the start of the STC Technical Communication Summit, 2–5 May in Dallas, TX.

Lists of local and regional competitions will be posted to the STC website at www.stc.org/comp/internationalCompetitions01.asp. Entrants should use the posted information to obtain applications and entry guidelines.

STC chapters that plan to hold art, publications, and online communications competitions should send contact information and deadlines to Lloyd Tucker, Director of Education & Membership, at lloyd.tucker@stc.org. 📍



Historic Landmark has the largest collection of 1930s Art Deco exposition style architecture in the United States and is located on 277 acres of beautifully landscaped grounds. While you're on the center's website, be sure to look into the Fair Park Passport, which gains you entry into all of the Fair Park museums with a 40% discount on admission fees.

The Women's Museum: An Institute for the Future (www.thewomensmuseum.org) In association with the Smithsonian, this is a comprehensive national American women's history museum. Located in Fair Park, The Women's Museum's programs and 20,000 square feet of exhibits provide a place where people can honor the past and explore the contributions of women throughout history.

The Museum of Nature & Science (www.natureandscience.org) The Museum of Nature and Science's Victory Park location will be named the Perot Museum of Nature and Science, in honor of Ross Perot Sr. and his wife Margot. The Victory Park building will contain the major galleries and space for large traveling exhibitions that can't be accommodated now. If you bring your family to Dallas, this is a **great** place to take the kids. The museum has both an IMAX theater and a planetarium.



For Sports Fans

Texas Rangers Baseball (http://texas.rangers.mlb.com/index.jsp?c_id=tex) is only the start of baseball. The Rangers play at Ranger Ballpark, which is in Arlington, TX, right between Dallas and Fort Worth.

Frisco Roughriders (<http://web.minorleaguebaseball.com/index.jsp?sid=t540>).

Just north of Plano (which is just north of Dallas) you can catch the minor league Roughriders.

Dallas Cowboys (www.dallascowboys.com). Although the Cowboys won't be playing, you might want to go to Arlington just to check out the new stadium. Not just for football, many concerts have already been held at Jerry Jones' palace, and some people go for a tour, just to check out the largest big-screen monitors anywhere.

Dallas Mavericks (<http://www.nba.com/mavericks>). The Dallas basketball team has made the early rounds of the playoffs the last few years and, if they are still playing in May, you'll be able to catch them at the American Airlines Center (AAC). **The Dallas Stars** (<http://stars.nhl.com>) (NHL hockey) also play at the AAC. You can check their websites for schedules and tickets when it gets closer to conference time.



Dallas: Where Shopping is Considered a Sport!

For those who consider shopping a contact sport, Dallas is a mecca for you. Frommers online says, "In Big D, shopping isn't merely a mundane chore necessary to outfit yourself, your kids, and your home. Shopping is a sport and a pastime, a social activity and entertainment. Dallasites don't pull on sweats and go incognito to the mall; they get dolled up and strut their stuff. So if you're a shopper, and come from a place less rich in retail mania, you've got your work cut out for you."

Northpark Center (www.northparkcenter.com) has one of the largest Neiman Marcus stores. Newly remodeled, Northpark boasts one of the largest selection of high fashion stores and boutiques.

Dallas Galleria (www.galleriadallas.com)

is home to the first Nordstrom store in Dallas. The Galleria also recently completed its own major remodel. If you are a little hot because of the Texas weather, you can ice skate here at one of the first indoor mall ice skating rinks.

Willow Bend (www.shopwillowbend.com) was originally established as a boutique mall, but it opened right about the time of the dot.com bust and has continued to reinvent itself. It is a beautiful mall with several nice places to eat.

Shops at Legacy (located at the Dallas North Tollway and Legacy). This outdoor area is home to my favorite bookstore: Legacy Books—a locally owned and operated bookstore, home to many book groups (www.legacybooksonline.com). There are plenty of restaurants as well as an Angelika movie theater.

There is plenty of boutique shopping around Dallas as well:

- **Stanley Korshak**. Known for their couture collection, this upscale store is near downtown and provides all kinds of shopping services.
- **West Village**. Located at Lemon and McKinney, this area has many boutiques and restaurants, as well as the Magnolia movie theater. It's a really nice place to spend an afternoon walking around.
- **Preston Village**. Located at Mockingbird and Preston, this is a nice area for outdoor shopping and it boasts one of my favorite little burger places, Who's Who Burgers, which features a Kobe beef burger (yum).
- **Greenville Ave**. South of Mockingbird, this area is home to many funky shops and restaurants. Parking can be challenging, but on a nice afternoon, this is a nice place to explore.

The STC Lone Star Chapter will have a booth at the conference with lots of information about other places to see. We'll be selling our famous t-shirts, too. For more information, contact me at volunteers@stc-dfw.org. 

Elisa Miller (emillerstc@gmail.com) is the immediate past president of the Lone Star Chapter and the local conference coordinator. She is an information architect/usability specialist.

Tips About SIGs

By KAREN MARDAHL, *STC SIG Advocate*

With the annual STC membership campaign upon us, many members consider the prospect of signing up for a SIG for the first time, adding more SIGs to their membership, or swapping old SIG memberships for new ones. With that in mind, the STC's community of SIG leaders thought this would be an opportune time to answer some frequently asked questions.

What is a SIG?

SIG is the popular abbreviation for special interest groups. At the Society level, STC currently has 22 SIGs. By nature, they are online communities, meeting on the web to share and discuss ideas that focus on a common theme.

What are the STC SIGs?

A complete list of SIGs is available at <http://stc.org/membership/sigLinks01.asp>.

Click the SIG name in the list to learn more about that particular SIG—including a brief description of the SIG, the address of the SIG website, and the names of the people who manage the SIG. Clicking over to the SIG websites themselves will help you find out what resources they offer to their members, including (but not limited to): blogs, newsletters, discussion lists, LinkedIn groups, Facebook groups, Twitter feeds, webinars, podcasts, and more.

How do I join an STC SIG?

Joining SIGs at STC renewal time is the most typical (and practical) time. But many STC members don't know that they can join a SIG at any time during the year. Just follow the instructions on the form at http://stc.org/PDF_Files/membershipChangeForm.pdf.

When can I participate in my new SIG?

Technically speaking, right away. The SIG usually contacts you first after your membership is registered in the STC data-

base and propagated onto the SIG's membership roster. The turnaround time for contact varies from SIG to SIG: SIGs are staffed by volunteers, and each SIG has a unique style of management.

If you are eager to contact your new-found SIG and can't wait for them to contact you, use the SIG contact information to get in touch with them, using <http://stc.org/membership/sigLinks01.asp> as your starting point. Each SIG page found on STC.org has the contact names and email addresses for the SIG management team. All SIGs have a website; the page on STC.org includes the web address (URL) of the SIG. The SIG websites often include details about joining the SIG discussion lists, which is a typical starting point for meeting your new community.

How do I get SIG discussion list emails?

Most new SIG members don't realize that joining a SIG and joining a SIG's
(Continued on page 34)

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This column addresses media subjects for technical communicators. It discusses graphics, audio, animation, video, and interactive media, as they relate to technical communication. Please send questions, comments, and topic suggestions to marc@mlmultimedia.com.

So What's Up with Screen Captures?

BY MARC LEE, *Member*

This is my first column on the topic of multimedia for technical communication. I have been both a technical writer and, in the last decade, a multimedia developer. I am a strong believer in the use of media to make technical communication products work better for the user.



By fostering an understanding of media, I expect this column will help you get a feel for and an interest in expanding the repertoire of media in your work.

Screen Captures

I've selected screen captures as the topic of the first column. They're a great tool for technical documents, but also the source of a lot of headaches for writers. Hopefully, we can clear some of those up.

Figure 1 shows part of a screen from a program on the State of California website. I'll use this example to illustrate some principles of screen capture use.

For the captures shown in this article, I've used Windows' built-in PrintScreen and Alt-

PrintScreen keyboard commands and TechSmith's SnagIt. There are many other freeware and commercial capture tools available, plus the equivalent built-in feature on Mac OS X. I've also used Adobe Photoshop and Microsoft Word and have worked with others to replicate the examples in Adobe Framemaker.

Main Issues with Captures

Based on recent threads in our local tech comm discussion list and from my own experience, the most useful topics for getting better results with screen captures are:

1. What can be done to maintain or improve image quality?
2. How can I change (formal term: "manipulate") the capture image to fit my need?
3. What file types are best to use?
4. How do I minimize file size to the extent possible to optimize download time and data storage (with the least reduction in quality)?

Quality

The good news is that, using PrintScreen or SnagIt, we start working with the capture with perfect quality. The capture program captures exactly the data in the video RAM for the part of the screen being captured. The trick, then, is to treat our initial data intelligently, understand when we are changing it, and move any quality-changing manipulation as close to the final step as possible. If we follow those simple principles, the full process will yield results that are acceptable in most cases.

In my experience, the most persistent quality issues concern resizing and printing.

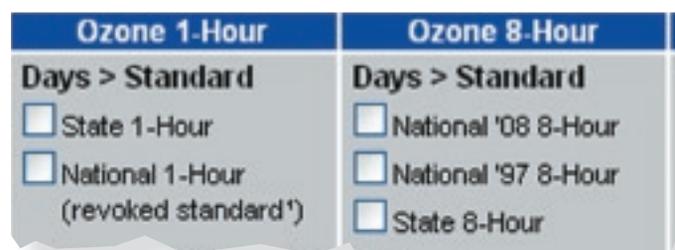
Since a printer with 300 dots per inch (dpi) resolution will have about three times the resolution of a monitor with 96 pixels per inch (ppi) resolution, it's

easy to see that the data going in is not going to satisfy the printer's needs; therefore, something other than the exact replica of the original screen will be produced. Depending on the technique used, the printer hardware, and even the paper, you might get remarkably good results, but it's still not the same as publishing your capture to the screen at the end of the process. As we'll see, even though printing poses challenges, it's possible to manage the process so that you can bring as much data integrity to that step as possible.

File Manipulation

By "manipulation," we mean making a change to the appearance or specifications of the capture data such as resizing, scaling, resampling, cropping, or reformatting. Yes, there may be some specific meanings

Figure 1. Typical Screen Capture of Part of a Web Page Form.



for these terms, but some are used interchangeably.

The first rule about resizing is: Don't. Almost anything you do in resizing a capture will reduce the overall image quality. That said, if you want to resize or need to, at least understand what you're doing.

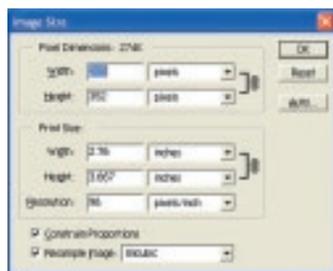
I think Adobe Photoshop's "image size" tool gives us the best mental picture of what's happening with the image's data when we resize an image, so I'll reference that tool for the resizing tips. While not the only possible tool for image manipulation, Photoshop is one of the most widely used and best tools for this type of work. I recommend every writer at least get familiar with it.

After initial capture of the image, we move the data from the clipboard into a new Photoshop file and click on Image|File Size. You get a window of data like the one in Figure 2. The data shown, incidentally, is from the image in Figure 1. And it's all the representation we'll really need to help us with our resizing step.

There are two areas of data in this window—the pixel dimensions of 265 by 352 and the print size data of 2.76 by 3.667 inches. For our example, we just need the pixel data.

Since our goal is to preserve the original data, you have to understand that resizing at this point would change that data. There is some mythology out there that says it's okay to reduce the size of an image but not increase the size...but let's think about that a bit. Say we changed the width from 265 to 530 pixels (with a proportionate increase in height). That would double the length of the edges and quadruple the

Figure 2. Image Size Data From Photoshop.



overall data size (2 squared, right?). To do this, Photoshop has to "invent" a pixel for every horizontal row to fit in between every original-data pixel in that row. That's what "resampling" refers to—a software routine has to figure out the color specification of every new pixel using some advanced statistical math. Net: quality is compromised. But if you think about it, a similar thing would happen if you decided to *decrease* the size of the horizontal dimension from 265 to 133 pixels—except in this case, Photoshop would have to throw out every other pixel in each horizontal row in order to get to the size you asked for. Again: data lost.

File Type

So what file format is best for screen captures? Since a screen capture is just pixels on a screen like any other computer graphic such as a graph, line art, or photograph, there is no specific screen capture file format. My opinion is that the following file formats will be acceptable

Figure 3. Successive stages of one detail from a screen capture.



for most situations:

- Windows Bitmap (BMP) and Portable Network Graphic (PNG) are two good, generally supported formats.
- Joint Photographic Experts Group (JPEG or JPG) files are considered the standard for HTML pages.

You can make a workable screen shot image in all these formats.

Test Case

To illustrate the steps used in capturing and using a screen shot, I've put together a test case that puts the capture process under a microscope. The image in Figure 3 is the successive stages of a very small part of a screen capture—the "e" at the end of the word "ozone" at the top of Figure 1. In this view, we are looking at the individual pixels of that part of the capture magnified 16 times over the original using Photoshop's powerful zoom. From left to right, the four e's are:

- A blow-up of the original capture.
- A blow-up of the image saved as a BMP file.
- A blow-up of a capture image when the BMP is inserted in a Word document (using Insert|Picture|FromFile).
- A blow-up of the Word document when "distilled" as a PDF (using Acrobat 4.0).

We get three out of four steps through the process with our original data untouched. What I think this shows is that, by keeping a close eye on your data and minimizing resizing, you can preserve quality most of the way—but, in the end, there will be some loss or corruption of the original data. That's because the final stage—whether printer or PDF—is a transition to a different domain. The same is also true, and would look about the same in the final step, if we magnified a JPG file to be displayed in an HTML page 16 times. My colleague, Al Kemp, of our local chapter, tells me that merely substituting Framemaker for Word in Step 3 would result in a better final step. This sounds plausible.

File Size

File size is, in some ways, the flip side of quality and may outweigh the importance of quality in documents where download speed is important or where there are high numbers of individual captures. In those situations, there are some basic Do's and Don'ts.

- Rule 1. DON'T—Crop or resize the image after it's been imported into the document. Word, for example, makes it easy to grab an image handle and resize it. You should avoid doing this in most cases; it fails to reduce file size and will cause Word's display engine to manipulate the data so that quality is lost.
- Rule 2. DO—Resize an image, instead, by using a good graphics program such as Photoshop prior to inserting the image in a document. Again referring

(Continued on page 34)

Through this column, we will share information about accessibility requirements and techniques, and introduce standards and policies that might affect your products. We also plan to explain how to design and validate accessible information products. No longer a so-called specialized concern for specific sectors of the global economy, accessibility now affects all technical communicators because, beyond just the mandates of expanding disability laws and policies, meeting the accessibility needs of aging workers now is ultimately enlightened self-interest. To suggest future topics, contact us at lerober1@yahoo.com.

Accessibility—Good Business, Best Practice

BY LINDA ROBERTS, *Senior Member*, AND LISA PAPPAS, *Associate Fellow*

Welcome to our first column on the accessibility of information technology (IT). Software is accessible when it can be used by people with disabilities. This can include people with visual disabilities, such as blindness, low vision, or lack of color perception; auditory disabilities, deafness, or partial loss of hearing; motor disabilities limiting the dexterity required to use a mouse or keyboard; and many others, including cognitive disabilities such as dyslexia or attention deficits. Disabilities might be congenital as well as acquired, such as someone who loses their sight through macular degeneration or who can no longer use a mouse due to carpal tunnel syndrome.

Why does accessibility matter to technical communicators? Because making information products accessible increases their usability for *all* users. Some organizations disregard accessibility, believing that it only affects a small portion of consumers. However,

around 10% of the world's population (650 million people) lives with a disability. Statistics show that people with disabilities comprise a significant market sector in our global economy. Consider the following:



- The US Census Bureau reports that “in 2002, 51.2 million people (18.1 percent of the population) had some level of disability and 32.5 million (11.5 percent of the population) had a severe disability.” Among this population, “approximately 7.9 million people aged 15 and older had difficulty seeing words and letters in ordinary newspaper print, including 1.8 million people who reported being unable to see.” [9]

- Surveys in the European Union (EU) show that “14.5% of the population of the 15 Member States (with the exception of Sweden) of working age (16 to 64) reported some form of disability.” [1]
- In Canada, “approximately

4.4 million [of the country's 30 million] people... have disabilities, representing 14.3% of Canada's population.” [3], [6]

Not only does accessibility affect a significant user base, but it also can directly affect a company's bottom line. In the last decade, laws and policies requiring accessible IT have expanded and the penalties for not complying have increased, particularly in the government and public education sectors. With more government services delivered via the Internet, constituents with disabilities must have equal access. Disability rights laws, such as the Americans with Disabilities Act (ADA) and the UK's Disability Discrimination Act (DDA) compel employers to accommodate employees' diverse functional needs.

When you pair that significant population with the proliferation of browser-based applications, an increased reliance on “e-Government” to deliver public services, and an aging workforce, you see the business case for accessible information.

This tells us that websites should not ignore this segment of the population—or their substantial buying power:

- The US Department of Labor notes that people with disabilities enjoy \$175B USD in discretionary spending. [8]

- The UK Employers' Forum on Disability estimates that people with disabilities control £80B in spending power. [2]
- The Conference Board of Canada notes that the disposable income of Canadians with disabilities is \$25B CAD annually. [10]

For anyone involved in e-commerce or online information publishing and distribution, especially where advertisement revenue is desired, that “small portion” is worth accommodating. And they tend to be those elusive “sticky” users:

“Remember, customers with disabilities will continue to patronize businesses that welcome them, are helpful, are accessible and provide quality products and/or services at competitive market prices.” [8]

Not working in the public sector? Simply writing end-user documents? Accessible information is still relevant, particularly as disability rights laws are applied in e-commerce and employment settings. Last year, retailing giant Target settled a web accessibility lawsuit, paying more than \$6M. [5] Similar lawsuits or structured settlements have been settled against hotels, travel sites, and banks.

And, in a mid-summer's dream come true, on the 19th anniversary of the Americans with Disabilities Act (ADA), US President Barack Obama reversed prior US policy, signing a proclamation in support of the United Nations Convention on the Rights of Persons with Disabilities. The treaty

protects people with both physical and mental disabilities from discrimination in employment, education, housing, public transportation, and other areas of life. (At the time this article was being edited, the US Senate had yet to ratify the treaty.) In his support, President Obama stated:

“This extraordinary treaty calls on all nations to guarantee rights like those afforded under the ADA....It urges equal protection and equal benefit before the law for all citizens. It reaffirms the inherent dignity and worth and independence of all persons with disabilities worldwide.” [7]

As technical communicators, we can support this global treaty by fulfilling portions of our Code for Communicators:

- Satisfy the audience’s need for information.
- Hold ourselves responsible for how well our audiences understand our messages. If we strive to make our information products accessible, we can both fulfill these readers’ need for information and provide a means for their understanding it. ❶

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(Continued from page 30)

discussion list are separate actions—joining a SIG does not automatically subscribe you to its discussion list. This is because not every SIG member wants to be involved with the discussion list, and the ones who do subscribe don’t always want to subscribe with the same email address that they have on file in their STC member record. To find out how to subscribe, check your SIG’s website (likely in its members-only area) for instructions. In absence of that information being published on the website, look for email links to the SIG manager or discussion list/ mailing list manager and contact them for subscription instructions or help.

What if I don’t hear from my SIG?

If you follow all these steps, and you still don’t make contact with your SIG, contact the SIG Advocate at stc-sig-advocate@stc.org for help in connecting with your new SIG. This applies only to the Society-level SIGs. For any issues concerning the chapter-level SIGs, contact the specific chapter. ❶

(Continued from page 32)

to Figure 2, you can change the pixel width and height by entering values into those fields. If you have an original image that’s 300x300, that’s 90K pixels. If you reduce that image to 100x100, that’s a 90 percent reduction in file size (90,000 to 10,000 pixels).

- Rule 3. DO—Maintain aspect ratio when resizing (what Photoshop calls “constrain proportions” in Figure 2). If you must break Rule 1, hold down the Shift key to maintain aspect ratio when you maneuver the image handles.
- Rule 4. DO—Save the file to a more economical file format. For example, Figure 1 is a BMP file of about 230KB. A PNG file, which is indistinguishable visually, is 12KB. The limitation may be that every output device or browser may not be able to display a PNG. Also, when using Windows bitmaps, there’s such a thing as indexing. An indexed BMP is about one-third the size of the unindexed version because we make

8 bits of color data simulate the usual 24.

In particular, Rules 2 and 4 can make a huge difference if you’re PDFing a document with 100 screen captures. In the case of saving the captures as PNGs versus 24-bit BMPs, you’re talking about a 1MB file versus a 23MB file...with virtually no loss of quality!

Conclusion

The main point to take away from this column is that, in the end, a screen capture is—as with any computer image—just data. If you view the process of screen captures as just data management, your results will improve.

(Thanks to Senior Member Al Kemp and STC Fellow Linda Gallagher—both of the Rocky Mountain (Denver) Chapter—for their valuable help testing the examples in this column on various platforms and tools.) ❶

where

F.Y.I. lists information about nonprofit ventures only. Please send information to intercom@stc.org. For STC's complete calendar of events, visit www.stc.org/edu/relatedEvents01.asp.

1. Wiesbaden, Germany

2. Portsmouth, VA

3. Vancouver, British Columbia

4–6 November 2009

1.

The **tcworld conference and tekcom-Trade Fair** will be taking place 4-6 November at the Rhein-Main-Hallen in Wiesbaden, Germany. For more information, contact: tekcom
<http://www.tekom.de/tagung/tagung.jsp>

4–7 November 2009

2.

The **Association for Business Communication (ABC)** will hold its 74th annual convention at the Renaissance Portsmouth Hotel in Portsmouth, VA. For more information, contact: Bob Stowers
robert.stowers@mason.wm.edu
<http://businesscommunication.org/conventions/index.html>

4. San Diego, CA

5. Beijing, China

6. Philadelphia, PA

7. Dallas, TX

6–11 November 2009

3.

The **American Society for Information Science and Technology (ASIS&T)** will hold its annual meeting, titled “Thriving on Diversity—Information Opportunities in a Pluralistic World,” at the Hyatt Regency Vancouver in Vancouver, British Columbia. For more information, contact: ASIS&T
asis@asis.org
<http://asis.org/Conferences/AM09/>

7–10 November 2009

4.

The **Public Relations Society of America (PRSA)** will hold its 2009 international conference themed “Delivering Value” at the San Diego Marriott Hotel & Marina in San Diego, CA. For more information, contact: PRSA
+1 (212) 460-1400
www.prsa.org/IC2009/

16–19 November 2009

5.

The **Localization Industry Standards Association (LISA)** will hold its conference, “LISA China Focus: China as a Global Development Center,” in Beijing, China. For more information, contact: Alexandra Kulikova
+1 (312) 881-7318
events@lisa.org
www.lisa.org/Beijing-2009.1134.0.html

19–22 November 2009

6.

The **National Council of Teachers of English (NCTE)** will hold its 99th annual convention, themed “Once and Future Classics: Reading Between the Lines,” at the Pennsylvania Convention Center and the Philadelphia Marriott in Philadelphia, PA. For more information, contact: NCTE
+1 (217) 328-3870
<http://ncte.org/annual>

2–5 May 2010

7.

The **Society for Technical Communication (STC)** will hold its 57th Technical Communication Summit at the Hyatt Regency Dallas in Dallas, TX. For more information, contact: Lloyd Tucker
+1 (571) 366-1904
lloyd@stc.org
<http://conference.stc.org/>

Romancing the Reader

BY TARA EBRAHIMI, Assistant Editor

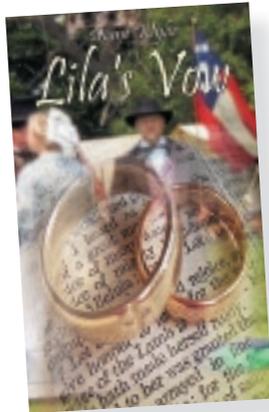


Diane Wylie is a writer, not only of the technical variety, but also of the romantic variety. With three historical romance novels in print right now (and more on the way!), Wylie has taken her passion for writing in a different direction—and has seen a great deal of success.

After her children grew older, Diane discovered she had a lot of extra time on her hands. An avid reader, she devoured many books, her favorite being historical romances. Of her jump into *writing* a historical romance, she said, “I came across a few badly written pieces and thought I would try my hand at writing. After all, I was a technical writer. How hard could it be? I found it was a fun kind of mid-life crisis.”

Flash forward to the present. Diane has three novels published by Vintage Romance Publishing, all set during the American Civil War. Her first, *Secrets and Sacrifices*, tells the story of Charlotte, a young woman who disguises herself as a boy to join the Confederate Army. Her next novel, *Jenny’s Passion*, is a love story between enemies; Southern belle Jennifer Winston falls for an injured Yankee soldier she discovered on her father’s plantation. Her

third novel, *Lila’s Vow*, is the story of a married couple that must learn to cope with long periods of separation and the effects of post-traumatic stress disorder. Of all her novels, *Lila’s Vow* is Diane’s favorite. “As a lady married to a veteran myself, I find that I empathize the most with [those characters],” she said.



Writing novels is very rewarding, but like most rewarding endeavors, it takes a great deal of time and dedication. Diane spent two years writing her first book, and about one year on each of her subsequent books. Because the novels are based on historical events, a lot of research is required. Every detail needs to be accurate, including the characters’ clothing, what they eat, their language, and more. Once the book is completed,

finding a publisher is almost more time consuming than the actual writing!

“Inspiration can come from anywhere for me. It can come from a book, from the Internet, from a TV show, or from the news,” Diane said. “For example, I started writing *Secrets and Sacrifices* around the start of the Iraq war. Like so many others, I anxiously followed the story of Jessica Lynch, the female soldier who had been captured and rescued by her fellow soldiers. Jessica was the inspiration for [Charlotte], my female Confederate soldier.” She also finds inspiration from and admires the writing of authors such as JK Rowling, Janet Evanovich, and Diana Gabaldon, for their successes in their chosen genres.

Diane loves the genre of historical romance because you can learn about various time periods and cultures while still being entertained. She considers historical fiction “a painless history lesson presented in a way that brings the people of the time to life.” This is what she hopes to achieve with her novels. One of her readers was so taken with the way a character escaped from Fort Delaware that he took his family for an outing there.

For Diane, this is a sign that she has succeeded.

Diane is a technical writer at the U.S. Army’s Edgewood Chemical Biological Center on the Aberdeen Proving Ground in Maryland. The chemists perform experiments while Diane writes and edits the technical reports that document their findings. In her opinion, the nuts and bolts of writing a novel aren’t that different than writing technical documentation. The difference lies in the source. “The same rules of grammar, punctuation, and all of that still apply to fiction, but the writing itself comes from within me, instead of an external source,” she said. “By that, I mean that in my technical writing career someone else has always directed what to document. With my novels, I decide where my characters go, and what they say, feel, and do.”

Diane’s advice for all the fledgling writers out there: “Remember, no matter what you write, whether it is a hardware manual, online help, technical report, or romance novel, there is a reader at the other end. They are our mission.”

For excerpts, check out Diane’s website at www.dianewylie.com. 

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