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INTERACTIVE DISCUSSION MEDIUM

TC FORUM

TECHNICAL COMMUNICATORS' FORUM

IN THIS ISSUE:

TC-Forum is supported by INTECOM

INTECOM

The International Council for Technical Communication

EDITORIAL

Dear colleagues,

with this issue TC-FORUM finishes its 4th volume – which provides a good opportunity for me to thank all those who have contributed to it:

- The authors of papers, comments and letters, who made TC-FORUM a real Forum, a marketplace for technical communicators to exchange their views and experiences world-wide.
- The colleagues of our small TC-FORUM-team who work together to produce and distribute TC-FORUM.
- The generous sponsors who enable us to produce and distribute 2000+ copies four times a year free of charge for our subscribers. We urgently need new sponsors to continue distributing the paper version in future years.

Looking at the content of TC-FORUM, we can see that the topics dealt with since 1997 are very consistent; very few have been added that lead to new developments. One new topic is, however, emerging: Knowledge Management (KM). I consider the first paper on KM - printed in this issue - to be a stimulus for a wider discussion among TCs. With the evolving globalization of products and services, KM will become a must for TCs – at least in larger organizations that offer a wide palette of products/services. Who, other than TCs, will have or already have been collecting and creating knowledge for different users and forms of presentation effectively? This is a significant new challenge for TCs.

As a means of exchanging knowledge about professional organizations for technical communication in other countries, we have started a series of papers under the general heading of "Technical Communication in <your country>". I invite those who have not yet contributed to it, to describe their organization in an upcoming issue, whether or not they are members of INTECOM.

And, finally: TC-FORUM will soon start informing you on the next FORUM conference to be held earlier than previously, in 2003.

Best wishes for the New Year

Hans Springer

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* Each Topic has a two-letter abbreviation, for example
- KM for Knowledge Management
- RU for Readability / Quality / Usability
- TR for Translation Issues
- ET for Education and Training
- SA for Special Aspects

The contributions (articles or comments) are numbered consecutively through the different issues of TC-Forum. When commenting to any of the contributions, please refer to these "codes" for ease of understanding.

IMPRESSUM

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- June 2001 (deadline 20 April)

TC-FORUM – a Forum Made by Communicators for

By Hans Springer, Germany

Preface

New subscribers to the paper version of TC-Forum and visitors to our website might ask "Why is there another magazine for technical communicators?" – Here is the answer.

The Idea

The original idea of TC-Forum goes back to the Forum conferences, the international conferences for technical communicators. Forum conferences take place every five years, the first one being organized in 1975. They gather more than 350 technical communicators from more than 20 countries in the world. And they follow a most unique formula with a large variety of active and interactive discussion possibilities so that conference delegates become active participants rather than passive listeners.

At the closing session of Forum 95, the keynote speaker Patricia Wright requested the delegates "to take the forum process home into their respective countries" and "to keep the communication process running" rather than waiting another five years to meet at the next Forum conference.

Following this, a small group of active communicators decided to continue this "forum process" in the form of a discussion media on paper where technical communication professionals could discuss their subjects and find answers from readers in other parts of the world without traveling far distances.

Thanks to generous sponsoring of Mercedes Benz AG (nowadays Daimler Chrysler) and some financial means from Forum 95, the first issue of TC-Forum was published and distributed free of charge in January 1997.

TC-Forum Today

The Paper Version

Since 1997, TC-Forum has been published four times a year. Currently, about 2300 copies are distributed into 34 countries free of charge. This has been achieved by a honorary "micro-team" that does the editing and organization (Hans Springer, Ron Blicq, Wolfgang Buchholz, and Brigitte Beuttenmueller) and by means of sponsors paying for services like production, printing and distribution: Daimler Chrysler Stuttgart, Reinisch GmbH Bretten, InfoSatz Stuttgart, transline Reutlingen, all in Germany; and Foss Electric in Denmark, ISTC in the UK, RGI in Canada, TechWriters of India in India, IBM Watson Research Institute in the USA and TechStyle in Israel. A generous sponsor was STC in the USA in 1999 when they bridged a financial gap at that time.

All contributions in TC-Forum are made without any payment by subscribers, so that TC-Forum has truly become a forum made by communicators for communicators.

TC-forum is the only independent communication media for technical communicators worldwide. It does not depend on membership in any of the professional organizations and there is no subscription fee.

INTECOM, the international umbrella organization which has professional organizations as members, supports TC-Forum.

The graph illustrates the worldwide distribution of TC-Forum.

Since TC-Forum is made by its readers, the subjects discussed in TC-Forum are those of most importance to them. To give you an overview, here are the main topics:

Note: The figures in brackets, e.g. (97 – 21) mean: the topic has been discussed since 1997 and has produced 21 contributions since then.

Communicators.

34 Countries:

Europe:
Austria
Belgium
Denmark
Estland
Finland
France
Germany
Greece
Irland
Italy
Luxembourg
Norway
Portugal
Poland
Russia
Slovenia
Spain
Sweden
Switzerland
The Netherlands
Turkey
United Kingdom

America:
Brasil
Canada
USA

Africa:
Kenia
South Africa

Asia:
China
India
Israel
Japan
Korea
Singapore

Australia

- Controlled Language (97 - 21)
- Translation Issues (97 - 18)
- Readability / Usability / Quality (97 – 22)
- Consulting (97 -7)
- Graphics / Illustrations (97 - 2)
- Tools (97 - 13)
- Education & Training (97 - 5)
- Special Aspects (99 - 17)
- Mailing List Discussions (99 - 3)

In addition to these topics TC-Forum offers three "Special International Services":
- Information about Forum conferences
- News from INTECOM
- International Professional Events

The Electronic Version

TC-Forum also has its own website where the full paper versions can be downloaded. There are two main reasons for having the website:

- To reach more readers than those who have actually subscribed to the paper version.
- To overcome the long time interval between dispatch in Europe and arrival in long distance countries, e.g. India and Australia, since TC-Forum can only afford second class postage.

The Mailing List tcf-gen
Finally, TC-Forum has accelerated international discussion by operating an electronic mailing list called TCF-GEN. This mailing list has currently about 430 subscribers, it has no moderator, is open to all subscribers of the paper version, and discusses mainly the same topics as the paper version.

TC-Forum in Future

TC-Forum has developed from the original idea of bridging the five-year gap between Forum conferences into a communication forum for technical communicators on its own – independent of membership to an organization or business. As intended at its early beginning in 1997, it is and will remain a "forum made by communicators for communicators". TC-Forum contributes to the globalization of technical communicators in their daily work.

Motivated by the high appreciation of the paper version, the TC-Forum team will continue to deliver the magazine free to subscribers provided there will be enough sponsors.

Hans Springer, editor TC-FORUM
Springer.H@geod.geonet.de

Knowledge Management – Challenge for Techni

By Wolfgang Sturz, Germany

Knowledge management – is it a challenge for technical editors? Shouldn't knowledge management be more than just taken for granted in technical editing? And isn't the technical editor also the knowledge manager, per se?

Who is the Technical Editor?

The way that technical editors view themselves must be gone into detail before the challenges or things taken for granted within the job outline of the technical editor can be discussed. There are time and again astonishing deficits: Technical editors are often considered by the outside world as the henchmen of the inventor and builder of machines and equipment. "Editors", you hear quite often, "are a strain on the budget that bring no added value".

Technical communicators do add value to a product.

Unfortunately many technical editors have taken this view downright to heart and then do their job with this same limited view. As a matter of fact, it should be the other way: Without communication between the inventor and user or between the builder and repair specialist the value and use of every machine or piece of equipment would be dramatically reduced. It is exactly this type of communication for which the technical editor is responsible. Technical documentation represents - as long as it is correctly done - an essential added value for every technical product. Technical editors' view of themselves should also be correspondingly high.

What is Knowledge Management?

What does knowledge management have to do with the communication about how a machine functions? To answer this question, knowledge management must first be defined.

Knowledge management has two main tasks:

1. The organized collection of facts.
2. The organized collection of information about knowledge carriers.

Based on these two tasks, those responsible for knowledge management can be readily identified. The organized collection of data and information applies best of all to technical editors. They have the necessary knowledge but in fact neither developed it by themselves nor really prepared it. However, due to their education and qualifications they must be able to obtain (or ask for) knowledge, organize it, and pass it on in an orderly as well as informative fashion so that anyone looking for information can quickly find what they are looking for.

Some consulting companies employ well-aimed editorial teams for the organized collection of consultants' knowledge. Their job is to dissect the factual knowledge from the project teams and give it back to them in a structured manner. However, positions in these editorial teams are even today only in the rarest cases occupied by technical editors. Quite often the team members come from other fields and acquire the necessary knowledge through trial and error. These positions would be the ideal match for qualified and educated technical editors who, in the meantime, already have the information required to correctly practice their profession.

A particular area of knowledge management, on which technical editors most likely will not have too much influence, is the structural collection of the knowledge carriers. This is a really delicate situation, because the information involved has been passed on from insider's experience to their colleagues. Often it is perceived that if one passes on one's knowledge it could give the other person a competitive advantage and therefore may jeopardize a knowledge carrier's career. In reality, passing on knowledge greatly increases the availability of knowledge within a company: "I give you a piece of knowledge, you give me a piece of knowledge, and when we are done we both have two pieces of knowledge." This way of thinking is, however, not logical in the conventional way of doing things. To break up the old structures, management has to ensure that changes are made to the corporate structure.

cal Editors · KM 1

Knowledge Management – Challenge or Taken for Granted?

Knowledge management is not a challenge for the technical editor; from a professional perspective it should be taken for granted. Nevertheless, knowledge management is rarely a topic for technical editors today because very few editors trust themselves to look over to the other side.

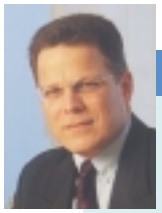
Instead of a challenge, or just taking it for granted, it should be seen as a technical documentation opportunity. Involvement in knowledge management offers every technical editor the chance to work themselves out of the narrow responsibility for the communication between the developer and customer, and into a much more open field where they can also distinguish themselves.

Knowledge Management and Economic Feasibility

Knowledge management should never be pursued just for the sake of pursuing it. While foreign companies put an emphasis on what benefits new management concepts have to offer, German companies are more inclined to jump to the new catch words without putting much effort into what the concrete benefits may be.

Both your own company and – this must be emphasized – your customers benefit. Only when the criteria "Bringing benefits to the customer" is fulfilled is it worthwhile to discuss knowledge management and the new challenges or opportunities for the technical editor.

Dr. Wolfgang Sturz has been involved with issues concerning global communication and knowledge management for over 20 years. Dr. Sturz is the editor of specialized books for technical writing as well as the German magazine Wissens-management, which covers knowledge management topics.



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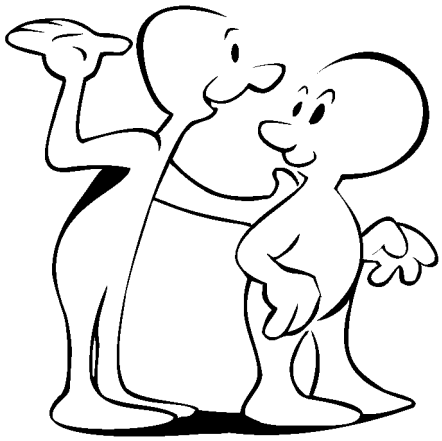

Problems with Colors – and the Solution: Color

By Ulrich Thiele, Germany

The profession of the technical editor is rapidly changing, from the pure text manufacturer to a data manager, which leads inevitably to intensive occupation with the production of the final product: the technical documentation on paper or online. The color matching reproduction on the local screen or printer plays a new, important role. Particularly since the meaning of color in documents increases rapidly.

No Document Without Color

A multiplicity of reasons forces the editor to use color in documents consistently. The advantages in the efficiency of knowledge transfer from author to reader are outlined in figure 1.

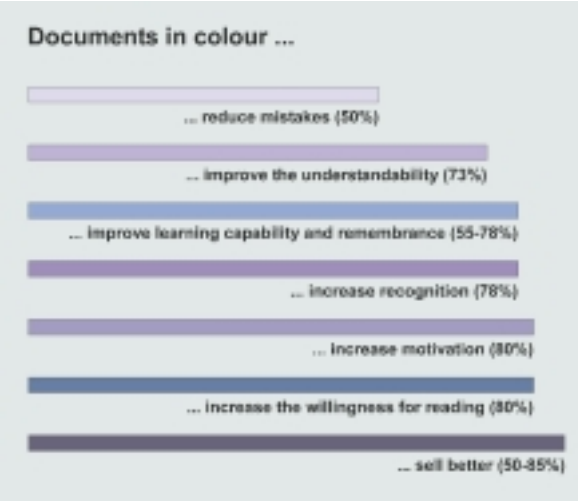

Figure 1
Reasons for using color in documents
(after: Publishing Praxis/Tektronix)

Problems with Color

Often a scan or a digital photo looks at the monitor "beautifully multi-colored", but unfortunately quite different from the original photograph. With the printout on the color printer or from the printing press one receives even more unexpected color variations.

Often not only photos are concerned, but frequently also computer-drawn diagrams and illustrations. With "trial & error" one wastes valuable time, until the company logo on an overhead transparency at least comes close to the corporate design guideline colors.

Increasingly, data from different sources are to be linked as part of automated database publishing systems. If superordinate systems do not provide for color consistence, even color deviations are difficult to avoid within one single document.

The Solution: Color Management

Color management is a technique that will become generally accepted within the near future in each communication area. Color management systems achieve two substantial targets:

- Color consistent representation of diagrams and photographs, independent of the source and the output device
- Exact color reproduction without any effort or additional knowledge on color management by the user

Color management takes up the problems from two sides:

- Input and output devices, as well as monitors, reproduce colors in a nonlinear manner, depending on their physical concept or by construction. Even two identical models from the same manufacturer don't reproduce color in exactly the same way. It is possible, however, to locate the deviations by using suitable measuring procedures, and to store these device-dependent faults in standardized device profiles (ICC profiles).

Management · RU 25

- The devices which are part of the document-creating process operate based on different physical concepts – from the standardized printing inks of offset printing presses to the CCD chips of the digital camera over the x-ray tube of the color monitor. Each process has a typical color space, whose representable colors are limited and – of course – are not compatible with color spaces of other devices within the production chain. In the entire chain from the camera to the printout the original color space of the picture is inevitably reduced and cut smaller and smaller.

Figure 2 shows all colors distinguishable by the (average) human eye as a shoe-sole shaped area. You can find, drawn in as a triangle, the delimitation of the idealized RGB color space as an example for scanners, digital cameras and tube monitors with their three basic colors: red, green and blue. The pentagonal area embedded into the RGB triangle shows the idealized surface of those colors, which remain after the CMYK transformation – which color lasers, offset printing machines and ink jet printers use.

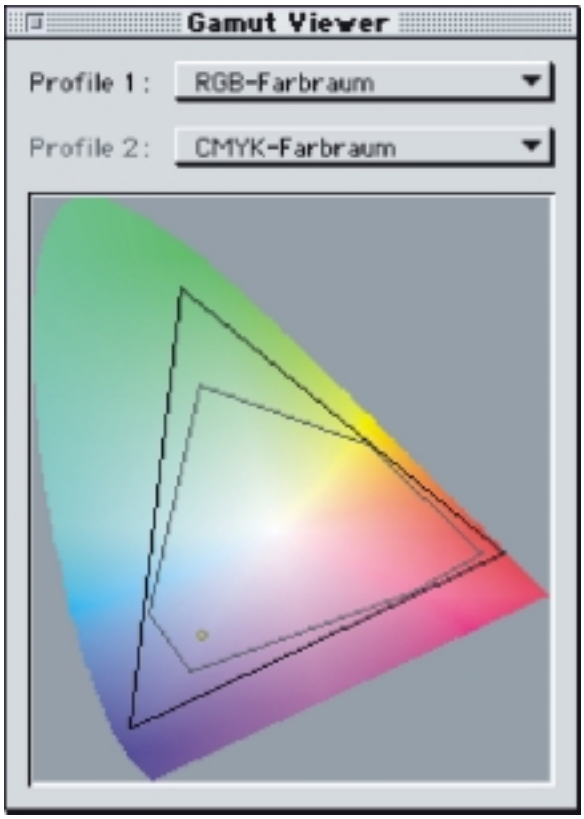

Figure 2
RGB and CMYK color spaces as polygones compared to the whole of all visible colors (so-called shoe-sole)

Color management systems correct the device errors behind the scene of the operating system and execute the conversions of the colors between the different color spaces in such a way that the final result comes close to reality – with consideration of physical boundaries.

Figure 3
Color space transformation between device dependent color spaces and work color space over device profiles

Cost Efficiency of Color Management Systems

Color management systems, which include all workstations that are part of the document management process, offer the following advantages:

- Higher efficiency during the creation of documents by color consistency, without filling wastebaskets with expensive misprints.
- Consumables can be saved – particularly by the avoidance of expensive new exposures of offset films and the appropriate proof prints.
- Expensive proof prints can be replaced by color matching, low-priced soft proofs, which need less time to produce.
- The creator of a document can concentrate on contents; pedantic color corrections and multiple printouts can be omitted.
- Time-critical printing productions can be calculated better, since color problems can be eliminated.

Problems with Colors (cont.)

For the implementation of a color-management system in terms of hardware, no investments are necessary. The calibration of the critical input and output devices and monitors is usually offered by service bureaus as the most economical solution. A prerequisite is, however, that the application programs used are basically suitable for color-consistent operation.

The training of the employees of a documentation team is limited to minimum procedures, since color management systems are usually maintenance-free after the basic installation.

The State of the Art

Color management systems for color-consistent monitor reproduction and for printing are already economically applicable. However, even if no major secrets are involved in implementing and operating a color-management system, there are nevertheless reasons why color-management "by experience" is still used in many companies:

- The mechanism of a color management system on the one hand makes color specialists dispensable, on the other hand it requires competent service bureaus, which are still quite rare.
- Certain quality management procedures are to be modified or even redefined, as far as interfaces to typesetters, digital printers and layout studios are concerned.
- There are technical restrictions: some application programs still don't support color management in a perfect way, or need additional plug-ins or utilities to perform within a color-management system.

However, color-management systems are in a rapid development phase, so that solutions for the remaining problems can be counted on shortly.

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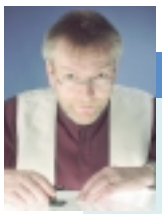

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Advantage of a Rainy Summer – Experiences from Acquisition of a New Lawnmower · RU 26

By Åke Rullgård

This article deals, despite the title above, with aspects on handling and checking of technical documentation. I consider these aspects as part of the functionality of documentation besides more conventional functionality such as factual correctness, layout, combination of figures and text. Here is the story.

My old lawnmower had come to an end and I bought a new one. The summer of year 2000 was, however, very rainy and while waiting for better weather so I could use the new machine, out of curiosity, I took the time to thoroughly study the supplied documentation. That was very interesting, because I was able to make some observations relevant also to documentation of other types of equipment.

My observations mainly concern the ease, or rather difficulty, in how the user handles the documentation. It is a well-known fact, and a problem, that documentation supplied with machines, apparatus, etc, is seldom studied by the user. The reason may partly be that the documentation is delivered in an inconvenient form. Technical writers should consider it as a part of their profession to advise producers of lawnmowers or any other devices on how to arrange the documentation so that it facilitates handling by user.

I will now describe my observations and suggest improvements. The documentation for my lawnmower consists of the following booklets:

1. Safety instructions
2. User´s handbook
3. Address list of service workshops
4. Separate user guide for the engine from the manufacturer, a sub-supplier
5. Guarantee clauses
6. Video cassette without speech of about ten minutes showing assembly and use of the lawnmower

The content of the documentation is generally good, with a nice layout, obvious figures and symbols. All the documents are also supplied in 14 languages. The German version contains, however, suddenly a note in Swedish, (avsnitt saknas), which means section missing. The missing section concerns, by comparison with other versions, a note that the user should consider possible local safety regulations. Due to poor proof-reading, this important piece of information is not conveyed to one large market! This case shows clearly that careful proof-reading is very important. The absence of this particular note concerning safety could cause a heavy penalty for the supplier in case of personal injury. It would be interesting to know how long it will take for the supplier to correct this omission.

In order to save space in my binder for user manuals, I wanted to extract the Swedish version of each part. This is practical not only in case of documentation for lawnmowers. Very often, though, I meet some practical obstacles:

1) All language versions are printed on sequential pages in the booklets and therefore it is not possible to extract one or a few versions without getting also a page from another language as part of the selected sheets. The booklets should be printed in such a way that only one language appears on each sheet. Then it would be possible to take out just the desired language version. It would also be possible to extract several complete versions which, according to my experience, often is necessary when compiling documentation for industrial plants. Even if this way of printing requires that some pages are left empty, the supplier should offer this possibility as a courtesy to the end user as a reward for not having delivered only the user's particular language.

2) All booklets, except the user´s guide for the engine, are in A5 size. However, the left margin is so narrow that holes punched for filing the papers in binders extinguish part of the text. (The narrow margins are probably caused by reduction of A4-size originals to A5, to save paper.) Text damaged by punched holes can usually be restored, but when figures in a table are turned into confetti problems may arise. Consequently, technical writers should make sure that their documentation is not

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Advantage of a Rainy Summer (cont.)

mutilated by poor printing and editing procedures. Failures like this usually are not unveiled until the documentation has to be used, e.g. for repair work, and then ambiguous figures may be fatal.

3) A positive experience was that all booklets carried complete bibliographical data, i.e. document id-number, revision code and date. However, this data was printed only on the first page of each booklet and hence can be lost if a particular language version is extracted. All bibliographical data should be present as a footnote on each page, and technical writers should remind the supplier about the need for such footnotes.

4) I am sorry to report that the documentation did not contain a list of contents specifying all items of a complete documentation set. Therefore, users cannot check whether they have received all documents intended for the product. The lack of a list of contents can be harmful to both end user and supplier. The end user will not be informed what the complete documentation set contains. If safety instructions are missing, the user will not be aware of it and the supplier will not be able to prove that safety instructions were supplied. In case of personal injury, heavy legal costs may be the result. Only the booklet describing the engine stated the product model for which the documentation was applicable. This information is probably omitted so the same documentation can be applied to several models. The paper describing the guarantee refers to a form to be filled out by the seller, but this form was not found anywhere in the documentation set, which indicates poor checking for completeness of the documentation by the supplier.

The above example, a lawnmower, is indeed not a very complicated piece of equipment. The supplied documentation will in most cases not be studied by the users, a fate that occurs equally often to more complex devices and installations. The problems described here can, however, be easily overcome if the supplier carefully considers the situation for the end user and the intermediate parties who compile the documentation for the system. Similarly, the technical writers producing the documentation should consider the entire chain up to the end user, and urge the supplier to provide good documentation by giving advice as to handling and checking aspects. The problems indicated above will, if not resolved, rapidly develop into larger problems in the documentation for large industrial installations, where each documentation set requires many meters of shelf space.

Of course, it can be said that future documentation will be delivered in digital form on CD and hence problems such as too narrow margins will not occur. This may be true, but for a long time documentation will continue to be delivered in paper form, particularly for consumer products like lawnmowers, video recorders, etc. And even then, documentation delivered on CD will require that each end user is informed about the specific documents valid for each particular delivery. This is especially important for documents on CD because this medium will in many cases contain documents covering all models produced by the supplier. Documentation on CD also requires a means for easy navigation through the vast amount of information stored on the CD, which corresponds to efficient and convenient organization of documentation on paper.

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Comments on "Facilitate Reading" (RU 24) · RU 27

By Chris Curwen, South Africa

For more than twenty years, I have been teaching participants in my Technical Writing courses, and in my various seminars, not to hyphenate words unnecessarily as it makes reading more difficult, particularly for people who are not English speaking. At the same time, I have been teaching them not to justify their text.

So, it was with some interest that I read the comments on hyphenation presented by Amo Fuchs, Amy Bryant, and Udit Chaudhuri in TC-FORUM 03/2000. However, like many things, the subject of hyphenation cannot be dealt with in isolation. Without a complete understanding of the process that gave rise to the use of hyphenation, any discussion tends to be purely subjective. So, any discussion must also include the subject of justification, as this is the process that caused the unnecessary use of hyphens in the first place.

To Justify or not, that is the real question!

Justification is a process that was required by the original Gutenberg printing process. In this process, more commonly known as Letterpress printing, separate characters were mounted into a frame, called a "forme", from which the pages were printed. To ensure that the characters did not fall out of the frame during printing, each of the lines of type had to be exactly the same length. And, to achieve this, the compositors varied the word spacing and hyphenated words.

Although varying word spacing and hyphenating words made reading more difficult, there was no choice. The printing process that was used had that limitation.

However, as long ago as 1920, the Lithographic printing process largely replaced the Letterpress process. And it is the Lithographic process that we use today. Because there are no separate characters in the Lithographic process, there is no need to make each line of type exactly the same length. As a result, there is no need to vary word spacing, or to hyphenate words unnecessarily.

So, my advice to all Technical Writers and Authors is to make sure that your text reflects a modern image of you, and the company or organisation you work for. Show your readers that you have indeed progressed beyond the 1920s and the limitations of the Letterpress process. To do that, switch off both justification and hyphenation. That way, each line of type will contain complete words, not fragmented text. And you will not have the "... many fjords ..." that Amo Fuchs seemed to fear.

Let your text reflect a modern image of you.

What about TC-Forum?

My congratulations go to Hans Springer and his colleagues on the standard they have set in the production of TC-Forum. Their removal of unnecessary hyphens in TC-Forum 03/2000, together with unjustified text, has shown a dramatic improvement over previous issues. That is the way to go. Please do not go backwards by looking for some ridiculously expensive, and probably useless, hyphenation program.

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The Use of Capitals · RU 28
(Summary of a Mailing List Discussion)

collected by Elisa Gavieiro-Villatte, France

The question to the list-subscribers was

I am looking for studies dealing with the difference between small letters & capitals. Are small letters easier to read? In France, road signs are written in capitals but it is not the case in the US or Canada. How come? Subsidiary question: Could you tell me how road signs are presented in your country?"

These questions generated many answers. Here is a representative selection of the answers received:

What list members replied

In general, the answers show that it's hardly possible to give a general answer; the answer depends on many parameters, such as

Many parameters influence the use of capitals.

(1) the readability, which is the most often mentioned parameter, but there are differences. For example, in Document- and Logo-Design, where the recognition of the logo is of high importance.

(2) the purpose of the text: whether it's in a letter, a book, a handbook (to be read under difficult work conditions, a dictionary (to be used in good reading conditions), a traffic sign (readable during day and night and during high speed traffic), and so on.

(3) the culture and tradition, which differ between languages (German uses more capitals than English; American English uses more capitals than British English; and so on.

In detail some contributions say:

(1) Readability

Lower case (small) letters are easier to read in continuous text. The eye and brain are more used to this type of reading and can construct the phrase ahead of the point of eye contact.

The reason that the use of upper and lower case letters support easy reading is that they make the text be perceived as a picture instead of reading it letter by letter. Small letters have lines upwards and downwards, plus the capital in the beginning, and that makes the picture. Words in upper case (capitals) have all the same height, so they are psychologically associated with headlines or titles.

Research has shown that our eyes scan the top of the letters' x-heights during the normal reading process, so that this is where the primary identification of each letter takes place. The brain assembles the information and compares it with the shape of the word's outline. ..." (in Stop Stealing Sheep & find out how type works; Erik Spiekermann & E.M. Ginger / Adobee Press Books / Prentice Hall Computer)

An interpretation of the above shows that there is no difference in x-heights and no such outline with CAPITALS, which is why in general, regardless of culture, legibility is reduced. Culture has to do with typeface-preferences. "If a culture uses CAPITALS for street signs, this only means that somebody in that culture did not have any idea of legibility."

(2) Purpose / Genre and (3) Culture and Tradition

The preference for upper- vs lowercase seems to differ greatly from country to country. In fact, the perception of upper- vs lowercase lettering seems to vary, too, which is unfortunately not taken into consideration when dreaming up product names. For example, independent printing companies as well as newspapers and gazettes for years have been the sole rulers for the use of characters. They have created many fonts, some of which are being used today as de facto standards, and have defined typesetting rules according to their respective country.

The genre has an influence (use in highway signs, airport signage, security warnings, for example):

- Different typefaces (the question seems to assume that any typeface-uppercase can be compared to any typeface-lowercase)

- There are different types of use (fast reading at high speed, comfortable reading without external pressures, searching).

Some answers given to the subsidiary question "Could you tell me how road signs are presented in your country?"

- Unfortunately the road signs in Sweden are written in capitals (which are not easy to read), but local signs have started to be written in lowercase text.
- In the UK a capital letter is followed by lower case letters.
- In India most traffic signs are in capital letters below the official graphic symbol, unless there is a long sentence e.g. NO ENTRY (Axles above 3 Tonnes) or PARKING RESERVED (Staff Only).

Conclusions

It is hardly possible to provide a general answer to the question whether texts set in capitals are easier or more difficult to read than texts set in lowercase type. Here are a few considerations:

- Most lowercase texts contain some capitals,
- There are differences between languages (German uses more capitals),
- There are cultural differences (American English uses more capitals than British English)
- These considerations are not exhaustive, but they show that it would be difficult to give a generally valid answer to your question.

Document design, Trade Marks, Logos, etc, offer different problems. For years a small group of native English translators living in Germany has butted heads with "layouters" and advertising agencies because they proceed on the mistaken notion that graphic design is universal. Sometimes they go so far as to ban the use of italics in texts, either because they don't think it looks good or because some CD manuals prohibit their use. That creates problems in English, where italics are frequently necessary for linguistic or grammatical reasons. The use of other types of character formatting also seems to vary from country to country, as does the preference for sans serif vs. serif typefaces and justified vs non-justified text.

My thanks to everybody who has contributed. I've received a good handful of replies from tcf-gen, and was glad to see that these questions were of interest to many of us.

Proposed bibliographical references:

A famous study is on British road signage. The story of this development has been reported in. Eye 34, 1999, pages 26-36 by Phil Baines. Ole Lund reported in his 1999 PhD-thesis about the validity of the experiments related to the legibility of road signage undertaken by A.W. Christie and K.S. Rutley in 1961. (See: Design, no 151, August 1961, pp 59-60 'on road signs'). The specific typefaces, sign-layout, testing method, colours, etc, make it very difficult to generalize from this specific study.)

British road signage is a science for itself.

The *Imprimerie Nationale* is publishing periodically a small handbook giving an overview of the common French typesetting rules: 'Lexique des regles typographiques en usage à l'imprimerie nationale', 1990. isbn 2-11-081075-0. (It contains no specific motivations for the use of either uppercase or lowercase. This publication seems to be based on 'common & good practice for book-design'. It is unlikely to be generally applicable.)

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Machine Translation - 2001 has Already Arrived ·

By Elisabeth Bauer, Germany

Slapstick, Science Fiction or Realistic Application?

The easiest way to cope with existing language barriers undoubtedly is the use of translation programs, electronic helpers that translate texts automatically. However, with high expectations meeting poor quality translation results in the past, press media regularly concluded that users had better learn the language themselves or employ at least a human translator. Yet a closer look at modern machine translation (MT) programs allows a more subtle view.

Indeed, the major problem automatic translation actually has to face is the ambiguity arisen by linguistic phenomena such as homonyms and polysemy. As human language consists of the single elements of word, phrase, sentence and text, the number of identification possibilities even explodes with elements combined. To resolve such ambiguity, additional pragmatic/semantic knowledge is needed, which is provided by human knowledge. Software, however, is not yet able to really understand text. But, because what counts is what the user needs, MT programs don't necessarily have to be able to interpret the whole range of human expressivity.

Personal Translator 2001 – a New Generation of MT

Personal Translator by linguatec is the leading translation software in the German market for the language pair English/German. The new version PT 2001 has just been released. In general, PT offers various application modi; the full text translator includes some useful tools, such as PT Web which translates complete web sites, and PT Direct which allows the user to look up words in the system's dictionary or translate whole text with a single click of a mouse. Additionally, the huge and well-prepared inventory of specific terms and idioms helps to cope with the ambiguity problem. A sentence archive (translation memory) stores already corrected sentences for future translation. For large-scale use there is an intranet solution in networks. And, for specialized purposes, additional vocabulary can be added on subjects such as Medicine and Automotive Technology.

Apart from its acknowledged easy-to-handle user interface, PT 2001 can handle subtleties of translation earlier systems only could dream of. A closer look at the system's performance in a late beta stadium proves that essential grammatical phenomena can now be mastered. Indeed, as quality of translation is a rather fuzzy and difficult term, it is best and most objectively measured by the correctness of grammatical phenomena.

Correct syntactic analysis is a major factor that decides grammaticality. If you keep in mind that basically computers do translations by exchanging words it is evident that an all to literal translation must produce translation errors. Thus it is essential to add a well-developed dictionary all along with highly refined analyzing methods to the translation process to cope with advanced texts.

Another difficult issue in English/German translation is the use of the German article. "Sie ist Mutter und Hausfrau." would be translated literally, word by word, as "She's mother and housewife." PT 2001 transforms this into "She's a mother and a housewife."

Another classical source of errors is the English progressive form. Literal translation of "Ich ziehe mich gerade an." would be "I just get dressed." whereas PT 2001's translation here makes it a correct "I am just getting dressed." Furthermore, a refined context analysis allows better stylistic adaptation, as shown by the various uses of the German adjective "bestimmt":

a) "Es gibt bestimmte Fragen...,"
   -> "There are certain questions...."
b) "Er spricht mit einem bestimmten Ton."
   -> "He speaks with a firm voice."
c) "... Medikamente zu bestimmten Zeiten einnehmen."
   -> "... take medicine at particular times."

These improvements show how essentially minor differences can decide grammatical correctness.

TR 19

Opting for the Future

Human translation actually is more of an interpretation in a foreign language. This is, bluntly speaking, impossible for the machine. After all, keep in mind that computer programs are not intelligent. But, especially in business life, they can help us cope with a wide range of professional texts. The big advantage in machine translators is that they create useful raw translations while saving time and money. Especially when dealing with large amounts of texts it is useful to get a quick overview of their contents. On the other hand, when creating texts in another language, machine translation can help when doing a basic translation, even if some manual polishing is still necessary concerning stylistic and grammatical issues. But as PT proves, the last word in MT questions has not yet been spoken.

Personal Translator can be tested online: www.personal-translator.de

Further reading:

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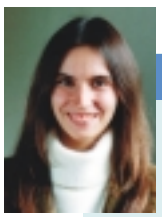

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Comment on "Cross-Cultural Transformation... for the Chinese Market" (TR 18) · TR 20

By Yiqin Wang, Germany

I would like to comment on the paper by Stefan Just.

The level of native language is not a cultural factor which needs considering in transformation of technical documentation in China. There are several reasons:

1. Even though the Chinese language covers altogether about 70 000 characters, one can basically master 7000 characters after 9 school years of education (6 years of elementary school and 3 years of secondary school), and with 7000 characters one can read and understand reference books without problems.
2. Most mechanics have the educational level of vocational school (2 additional years after secondary school), and some of them have even graduated from a technical college (3 years after high school). That is, apart from the basic characters, they have also mastered vocational terminologies in relation to the various majors such as automobile mechanics, and so on.

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Postgraduate Program in Technical Communication

By Hanna Risku, Austria

The first postgraduate programme in Technical Communication was established in 1997 at the Danube University located in Krems, near Vienna. It is the only course of this kind in Austria. Since it is part-time with blocks of teaching, and only takes three terms to complete, it is especially suited for people who already work in relevant fields such as technical writing, illustrating, translating, usability engineering, software localization, information management, information design, web design or project management.

Course Design and Syllabus

The course aims to impart the skills necessary to produce technical documentation that is user-friendly, fit for the purpose, and conforms to current standards. The next program will begin in March 2001, starting with an overview of the relevant skills, occupations, information sources and associations. This will be followed by legal and psychological/pedagogic foundations of documentation, and by basic management know-how including project management, work organization, and the production and use of an editing manual. Since Technical Communicators can be both freelancers, employees and employers, participants learn how to set up their own enterprise or to run a documentation centre.

After acquiring a solid theoretical base the participants go on to implement various practical documentation projects which includes the following activities:

- Target groups are analyzed, designs drawn up and experts are interviewed.
- The participants compose, write and edit texts, visualize materials, optimize the layout and manage information.
- Discussion of the requirements of different media of publication and dissemination (e.g. CD, print, WWW).
- In-depth treatment of software documentation, which includes documenting the development process and the product(s), e.g. through manuals or online help menues.
- Examining web design, which has become an important activity for many Technical Communicators. The special skills and tools required are therefore included in the training.

Multilingual aspects play a major role in Technical Communication. This involves translating and editing texts, developing multilingual terminology and generally coping with the challenges posed by intercultural communication. This implies that the requirements and conventions of different languages and cultures have to be taken into account right from the start. It might be advisable, for example, to divide the product and its documentation into a culturally independent core plus parts that have to be adapted to local conditions. Experts in intercultural communication are involved at an early stage.

Practical Relevance

As a result of recent austerity measures many traditional universities have cut down on guest lecturers, who in many cases provided the main link to the world of business. The Danube University, however, has always pursued a policy of combining theory and practice in its teaching and research. A variety of measures contribute to the practical relevance of the programme:

- Lecturers tend to be experienced practitioners in their relevant subject areas.
- Placements or internships allow participants to put their newly acquired skills into practice.
- Participants have to write a final paper – the master thesis – which allows them to specialize on a particular topic in the field of technical communication and documentation.

at the Danube University Krems · ET 6

The program has a maximum of 25 participants, who come from a variety of professional backgrounds (including translating/ interpreting, technology, graphic design, quality management, and technical writing) and thus reflect the diversity of the field. Since the course encourages sharing of know-how and experience, the course promotes the formation of a round of experts for knowledge transfer. In between seminars and after the programme a mailing list and follow-up meetings make sure that participants and lecturers, as well as supervisors, stay in touch. Each course is supported by a scientific advisory committee that draws its members from industry and academia.

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New Challenges Require New Skills

The professional profile of Technical Communicators has seen a profound change and is in constant flux. The job opportunities in Technical Communication are growing rapidly: Many businesses have founded their own communication divisions and many freelance technical writers have seen an increase in assignments. The tasks are manifold: e.g. restructuring the whole documentation system to meet the challenges of the modern multilingual multimedia communication landscape. But even "traditional" services, such as the writing of manuals, instruction leaflets or product descriptions, require new skills because of the advent of new technologies, and because new products and updates have to meet current standards and need to be delivered quickly and on time.

The Technical Communication program at Krems does not only aim to respond to these changes but to participate in and shape the developments in the fields of information and communication.

Technical Communicators - Experts or Laypersons

By Ingrid Fuckner, Germany

Camille Johnson (CJ) in Forum 02/2000 (SA 16) indicates that a TC (Technical Communicator) can work on (almost?) any subject without any special training. I am dismayed by the frightening carelessness of this statement! Naturally, I am only presenting my opinion on my favoured subjects and on German conditions. Nonetheless, there are several indications that we may run into similar trouble on other subjects and in other countries.

I am a natural scientist working as a TC for scientific applications. Prospective clients have often told me: "Outsourcing did not work, because we could not find scientifically trained TCs. Therefore, the manuals were too expensive and the TCs needed too much time and help to complete the job. Moreover, sometimes the results were absolutely unusable."

The Problems

Let me cite one example: I was asked to translate the English manual for an analytical instrument. A Technical Writer, who obviously interviewed the experts carefully, wrote the English manual.

The problem was that the author had no corresponding scientific background, with the result that the manual contained a highly dangerous instruction and some very irritating inconsistencies. The dangerous instruction caused the instrument tp explode after about 20 minutes. They were lucky this time: no one was hurt.

The above example is alarming. However, it is by no means an exception. Similar cases indicate that

- instructions are
  - wrong or incomplete,
  - sometimes nonsensical and aimless, or
  - even dangerous;
- specialized vocabulary is used in a misleading way;
- important warning messages, precautions, and safety instructions
  - are missing, or
  - are described in a nonsensical manner.

What is the reason for these shortcomings? The response is fairly simple: the TCs of the manuals were not SMEs (Subject Matter Experts).

Trouble arises in Technical Documentation when common sense and the experience of an intelligent adult no longer suffice for coping with the subject. A TC needs specialized knowledge, at least for some special subjects.

The Path Through the Jungle of Information

CJ indicates that excellent interviewing skills (and common sense?) are the only really important skills needed to get all the necessary information. Let's explore what a "Lay-TC" (TC without special education on the subject) will achieve via careful inquiry.

Step 1: Ask the User

The TC asks the user. Well done! But, generally, the user cannot provide information on details such as correct vocabulary or safety matters. Moreover, the users are looking for someone who can tell them about possible dangers, before they even think of them. A problem? The TC seeks out a SME (Subject Matter Expert).

Step 2: Find a SME

Will interviewing only one SME satisfy CJ? But which SME is the right one? Let's go back to my example:

- The scientist has the ideas for the instrument,
- the engineer and the designer turn these ideas into reality,
- the programmer handles mathematics and the firmware, and
- the service engineer performs maintenance and repair.

The problem is that the TC may become confused regarding some topics by apparently inconsistent information. In the example cited earlier, several

? · SA 23

chapters contained inconsistent explanations of the instrument's features.
The result is that it will take a lot of time and help from the experts for the Lay-TC to understand each topic and express it correctly. The Lay-TC may possibly not even recognize there are contradictions.

► Specialized Vocabulary

It is a given fact that experts communicate in their own specific jargon. Sometimes, this vocabulary is undeniably erroneous and unclear, but it is used repeatedly in the manuals because the TC wrote what was told to him or her. What else could a Lay-TC do?

The problem is that the TC needs to find the right vocabulary. Even though all of the client's experts use the same jargon, no one tells the TC that every time they say, for example, "standardize", they really mean the TC should write "calibrate". The user cannot tell you the correct words, and the experts forget to tell you!

Let's be honest: do you check the entire vocabulary? The manuals show me: "Certainly not!"

Inconsistencies can also arise when the same word has different meanings when used in different subject areas.

► Understanding the SME

There are some topics that even an extremely intelligent layperson cannot understand without an appropriate educational background. You don't believe me? Just think about your computer for a moment and then try to understand how it works, beginning with electrical power. How many years will you need to truly solve this task? Sometimes, this kind of insight is essential to track down hidden dangers.

Other problems can arise when a Lay-TC learns something incorrectly, and thinks it is correct because he or she has misunderstood the expert. You may be aware that even experts sometimes do not understand each other and some of them are poor teachers. Here, again, asking the user will not help the TC in any way, because something wrong will not become right just because the user prefers it a certain way!

Consequently, a Lay-TC's knowledge can be riddled with errors. The Expert-TCs (who are educated on the subject) have their own knowledge. They can check, review and monitor everything they learn. Lay-TCs cannot do anything but believe what they are told.

Step 3: Selection

Shortcomings in the Lay-TC's knowledge surface in the manual.

The TC must select and explain everything the user needs to know. The problem is that the TC often has to complete the job in a very short time. The result is that errors in the Lay-TC's knowledge surface in the manual and, in the worst case, even an expert has to be a clairvoyant to decipher the correct information.

You may ask: could this happen to a conscientious TC? The manuals show me that it happens time after time!" Collaboration between the Lay-TC and the SME entails a lot of work and risks. By contrast, the Expert-TC has to confer with the SME a lot less.

Step 4: Finding All of the Necessary Information

Think about a child who has never seen fire. Unsuspectingly, the child reaches for a candle flame and gets burned. This is exactly what can happen to a Lay-TC. Just like the child, the Lay-TC does not ask the essential question because he or she will not know there is something very important to ask about the "candle flame" of the instrument. The manuals show me: "the user gets burned!"

► Experts and Safety Matters

Experts are usually not especially trained in safety matters. Some experts think that the users will not do this or that, and that they will perceive intrinsic dangers. My goodness, no! Some users do exactly what is written in the instructions!

>

Technical Communicators - Experts or (cont.)

Usually, in safety matters there are no experts available, and the available experts are relying on the TC! This is reality. The problem is that TCs who lack specialized knowledge are like a child without appropriate experience. They do not realize there are hidden safety problems. The example cited above is utterly typical for my work.

Economy

How long will it take for a Lay-TC to ask all the necessary questions? And who is going to pay for it?

How much of an expert's competency is required until the Lay-TC can implement the facts in the manuals? Who is going to pay for that?

Who is living under a rock?

Compared with an Expert-TC, a Lay-TC can only solve safety-related problems on a much lower level of competency. Who, then, is going to pay for that? Which user is likely to get hurt? Now, tell me, who is living under a rock?

If the client's experts

- can explain each topic of a subject, so that a layperson really understands it, and
- **do** regard safety matters in an applicable way,

then the experts can, and maybe they should, write the manuals themselves. I energetically disagree with CJ! Experts can learn all they need to know about technical writing in a very short time. The TC is not wiser than the SME. The TC is solely an expert on another subject.

Summary

CJ indicates that the TC needs no educational updating on the subjects and Technical Writers only update their own writing skills. I disagree!

I believe that a good TC should not be the unsuspecting one who reaches out for a candle flame as the user might do. A good TC needs to be a foresighted expert with well-trained awareness of safety matters, errors, inconsistencies and usability. A good TC needs to be like a bloodhound tracking down hidden problems.

The TCs knowledge can never be extensive enough to meet this requirement, because the TC needs to be a person who saves the user from causing damage, and so protects the client from liability for damages.

If a subject's topics minimally exceed the experience of an intelligent adult, the TC may no longer remain a layperson, because the TC's job is not merely to ask all of the vital questions; questions that users and experts do not even visualize. If the client has not established a special department for documentation, then no one else but the TC can provide the correct answers! How could a layperson do this?

One also needs to bear in mind that even a bright TC does not become an expert within three months. It will probably take about three years.

Postscript

Experts who specialize on many subjects realize that we are not omnipotent beings.

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Not a Bad Life: Notes from Under the Desert · SA 24

By Dan Goldstein

I manage a small (six-member) technical writing firm; we call ourselves "The Text Store". In addition to the usual types of documentation (manuals, online Help, Web-based Help, etc.), we also design and host Web sites. We are proud of our products, we enjoy our work, and we are doing well financially.

We do have one little secret: We're located on Kibbutz Ketura, a small, isolated commune in the Arava desert near the southern tip of Israel (close to the southern seaport of Eilat). Since I'm writing for writers, I must be more precise with my prepositions: We're actually located under Kibbutz Ketura, in a converted bomb shelter.

Working in a bomb shelter on a kibbutz.

What's it like being a technical writer on a kibbutz? One obvious difference is the money. I do manage the business, but I don't own it -- The Text Store is part of the kibbutz and, as such, is owned jointly by the kibbutz's 125 members. As a member of the kibbutz, I get a monthly allowance instead of a salary, so the money I earn from technical writing goes straight into the kibbutz's bank account. My only reward for landing a big contract is my co-workers' congratulations (we usually celebrate with ice cream).

On a kibbutz we share all sorts of jobs.

Another difference is the hours. We usually arrive at the office by 7:30 AM, once we get our kids off to school and to the day care centre. Since our homes, the school bus stop, the kindergarten, and the office are all within a 200-yard radius, it's an easy commute. We work until about 4 PM, when most people go home to their kids and spouses. In the past few years, there were only a handful of times I didn't leave the office on time -- but there were hundreds of nights that brought me back to the office after 9 PM, once the kids were in bed.

We all have extra duties, in addition to our regular jobs at The Text Store. Each of us, a few times a month, must help serve supper at the communal dining hall or go to milk the cows. We occasionally substitute for gas station attendants, day care workers, and so on. Life on a traditional kibbutz (and Ketura is one of the few traditional kibbutzim left in Israel) involves sharing all sorts of jobs.

Not a Bad Life (cont.)

You may be wondering about that bomb shelter: Don't we need it in case there's a war? Well, we have it because Israeli law requires shelters in border settlements, but our neighbors (Egypt and Jordan) are pretty quiet, and our shelters have never been used in wartime. Since office space is at a premium, we chose the bomb shelter. We installed new flooring and recessed lighting, hooked up the computer network connections, and presto: instant high-tech office. The view isn't much, but it keeps us out of the hot sun.

In the era of Internet, it doesn't matter where your office is.

As you all know, one of the advantages of the Internet is that it doesn't really matter where you are. Our Israeli clients think of Ketura as you might think of Tierra del Feugo -- the ends of the earth. But we download their applications via FTP and we deliver our products by e-mail, which makes geography irrelevant. We even have a client in the US. When we need to visit a client in Tel Aviv or Jerusalem, we fly from the nearest airport in Eilat.

Inside the office, there isn't much to distinguish us from our colleagues in Boston or London, aside from our casual dress. But when we climb that long staircase to daylight, we get a terrific view of Ketura's gardens, the date plantation out in the valley, and beyond that -- the red Edom mountains in Jordan. We can also hear our kids playing (or screaming at each other) nearby. Not a bad life.

You can see us on our Web cam at:
http://textstore.co.il/webcam/

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