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INTERACTIVE DISCUSSION MEDIUM



FORUM

**TECHNICAL
COMMUNICATORS'
FORUM**

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TC-Forum is supported
by INTECOM



The International Council for
Technical Communication

The next issue will appear again in printed form - and in www.tc-forum.org, too.



Dear colleagues, subscribers to TC-Forum and visitors of our website

It has been a hot summer this year. Perhaps a centenary summer - for us in Europe. At least, here in Germany, we experienced temperatures we had not been used to for a long time. The dream of late summer nights outside, listening to the crickets in the grass, watching the shooting stars at the dark midsummer-night sky - this dream came true for us in Germany this year. Now, at the beginning of September, the weather has changed: dark clouds, rainfalls, strong winds characterize our days – not unusual for this time of the year.

But notwithstanding temperatures or any other feelings: here is your new edition of TC-FORUM.

As you can see, we can offer again some very interesting subjects and look forward to discussing them with you. You will also see that this edition is smaller than the former, paper-printed version of TC-FORUM. This may be because this is the second version of TC-FORUM not printed on paper but in electronic form only. As we said at the beginning of the year, we are running an experiment, and this experiment seems to bear its fruits now.

Until then, please forward us your ideas and suggestions for topics to be discussed. Please bear in mind we will have an edition to issue only if many of you contribute articles and letters to us. Then it will be a success for all of us.

Thank you for your contributions and best regards

Hans Springer

We have gathered a number of interesting opinions about electronic versus traditional paper format of TC-Forum and will report to you about the result in the next edition of TC-FORUM, which will appear in the usual printed format.

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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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Functionalism in TC Training · ET 09

By Ulf L. Andersson, Sweden

Abstract

Analyses of users, functions, situations, risks and cost/benefit, together with functional testing which guarantees that needs are met, provide the basis for the real-life projects which the students of technical communication perform at Karlstad University in Sweden. Tutor support throughout is vital. This article gives examples of such projects from the latest academic year. They show that the students can often demonstrate that technical information is highly worthwhile, as is the value of having a holistic approach to the tasks.

Introduction

University education of technical communicators consists largely of courses in various admittedly important tools (e.g. language and picture handling, use of computer programs, legal aspects). But it is at least equally important to allow students to solve difficult information problems in real-life projects under the guidance of experienced tutors. At Karlstad University in Sweden students can study technical communication in three terms: A, B and C. Each term corresponds to 20 weeks of full-time work. For access to the studies, the students must have

*Studies in
Karlstad
include
real-life
projects in
each term.*

an engineering education or corresponding academic education. The education is also conducted in the form of distance courses in which the 20 working weeks are divided into two terms and where the students study while continuing their ordinary jobs. Project tasks of 5 working weeks are included at levels A and B. At the C level the project task corresponds to 10 working weeks. Here are some examples of projects which were finalized in May 2001:

Usability Pays

You can only compensate for bad design with paper work to a certain extent. That fact came home to nurse Inger Lindahl when, a year ago, she worked on her project for the A course in her education as a technical communicator at Karlstad University in Sweden. The task she chose was to try to make a better instruction than the existing one for a ventilator (respiration aid) which had been difficult to handle at her place of work. Her colleagues at the hospital received Inger's new instruction (slimmed from 45 to 6 pages!) with enthusiasm, but the ventilator still had its difficult handling.

As a five-point B project Inger Lindahl has now redesigned the instrument panel and the setting logistics, produced a computer simulation of the design and tested it on nurses and others. The results are very good. Handling is easy and intuitive. The apparatus does not give the user unnecessary problems and the general handling instruction for the user consists of just five points (there is a more exhaustive one for the medical application of the ventilator).

This is what Inger herself wrote about the original handling characteristics of the apparatus in the report to be prepared for each project in the B course:

"In the original version the control panel of the ventilator is a big problem. Several different functions are hidden behind some buttons. The parameter names round the display are tightly printed and are set in upper case, which makes them unnecessarily difficult to read. As they are placed round the display they come outside the illumination. This means the user must have a flashlight at night if the patient is not to be forced to sleep with a light right by the bed. But the big problem arises when the alarm and parameter settings are to be changed. The time margin is 5 seconds to step up to the right parameter, change the values and confirm. For people using the ventilator frequently this is no problem, but for somebody using the apparatus maybe two or three times a year this is very frustrating. If the user is not quick enough the

display returns to the standard set-up and the whole procedure has to be repeated for all parameters."

Let me quote a part of Inger's risk analysis: "The risk analysis of ventilator and respirator care can be summarised by saying that the consequences of wrong handling or misjudgements can in the worst case be life-threatening. If the apparatus sounds the alarm it must unconditionally be investigated and the error corrected. If the patient is not feeling well, this can be due to the settings of the ventilator. Having a ventilator with a confusing setting panel creates an additional risk factor. For example, if the nurse on duty forgets to confirm an alteration of a setting, the setting will return to the standard one and thus the patient may, for example, not receive the intended air volumes. Besides, the nurse may not even notice this. She may already have turned her back and hurried on ...".

With Inger's new design of the apparatus these problems and dangers do not arise. It remains to be seen if the manufacturer (who was not involved in the project) appreciates the advantages of her design.

Demands on Working Methods

As tutor for the B project, I not only require that the analyses of receivers, objectives and situations are performed and used, but also expect that realistic functional tests on representative test subjects are included as an integral part of the work (Andersson 1999). I also require that the students try to evaluate the potential profits from the project. All too often people count only what the information (or broader humanware) will cost – not the gains it gives when it works. It is not just a case of meeting standardised demands that information is available, but also that it must function well.

The ventilator which Inger Lindahl had as a starting point is intended to be used in ordinary wards, but the personnel often feel uncertain of the handling of the apparatus and instead send the patient to intensive care (with heavily raised daily costs). Some of these patients could even be cared for at home (if the apparatus was easier to handle) with further reduced care costs and improved quality of life. And there would be a greater market for the manufacturer – if usability had been taken into consideration.

Startling Gains

The estimates of information costs and profits made by the students at Karlstad almost always show great profits (so big that they often choose to cut them down so that the calculations will not seem so exaggerated!). If the profits from good information can be big, the losses if necessary information is not used can also be big. The R&D lab where Ulf Kronsell works has a quality manual that does not have the highest status among all users (or at least among non-users). As a B project at Karlstad, Ulf chose to make a more accessible and easy-to-use version that could be made available on the lab's intranet. The project grew as it proceeded and the resulting quality information is now to be used in the entire group of co-operating labs.

Ulf calculated a number of possible profits and losses which could occur and came to a profit of 4 MSEK (US\$ 360 000) for an occasion when the information worked (or a corresponding loss if it did not work). Perhaps he thought that he had made rather a high estimate, but a few days later he happened to come upon a specific example where the calculation turned out to be quite realistic.

Significant profit by good information.

Five Weeks of Full-time Work During Spare Time

A five-point project is to correspond to five weeks of full-time work. At the distance courses in Karlstad where most of the students already have jobs, I encourage them to find a project within

Functionalism in TC Training (cont.)

their own places of work. This often means that the project work is greater than five working weeks. But it can create problems when planned work is put on ice so that the student must look for a project outside the ordinary work (it can be really demanding to perform five weeks of full-time work during a term on top of the ordinary full-time job).

Göran Wallin was unlucky in this way, as the intended project at work was delayed, so that he had to replace it with an external project on top of his ordinary job. (Hopefully, however, he can pick up the intended project and extend it to a ten-point C project during the study year 01-02.) As a B project he instead chose to produce a manual for a special vehicle. In practice each individual vehicle is unique (because there can be a large number of variations of the accessories). The company has no technical communicator and until now the technicians have produced the information themselves.

What an idea: an individual manual for each vehicle!

Now they wanted help in producing something better, something that could become a model for how they were to proceed. Göran has produced a manual for one vehicle, and has sketched out how the employees can continue to produce individual manuals for the vehicles they manufacture. To make things easy for the company he has assumed that they can use a digital camera, computer and colour printer to produce the pages, coat them in plastic and put them in a ring binder. With this do-it-yourself method the company will be able to accompany each vehicle with an individualised manual of paper (plastic coated to resist dirty surroundings) and the same information in PDF format on a CD.

It should be possible to produce each individualised manual for 800 SEK (US\$ 70) including the cost of work (largely through exchanging "modules"). This cost is quite negligible in comparison to the selling price of the vehicle. The company calculates that through increased sales a good manual can raise the annual profits by a half to one million SEK (US\$ 45 000 - 90 000). Their customers should also be

able to profit from good manuals, because a stoppage on this type of vehicle costs at least 700 SEK/h (US\$ 63/h).

Göran functionally tests his information to show up the little mistakes one always makes: "obvious" things that are obvious only to oneself but not to the intended receivers, and information that can be interpreted in another way than intended (you become aware of this other possible interpretation only when you test the information on other people). But there is a risk that in the future the company's own personnel will not consider that they have time for this functional testing. The manuals will, of course, continue to look good – but they will not necessarily function satisfactorily.

Great variation of projects

The B projects in the distance course in technical information at Karlstad University show a wide range of projects. This spring, projects have been presented dealing with simplified handling in the exchange of drawings between consultants and their clients (to be able to function with the client's data base), simplified and standardised handling of samples at an analysis firm, instructions for running machines at a manufacturing company (where the analyses and preparations already pointed at the possibility of simplified working methods), a visualised workshop manual for a gearbox, and an improved section about a difficult diagnosis function for boat motors.

At the full-time course the participants do not have the same possibility to find projects at their own jobs (as they are full-time students). Here, instead, they see what they can find at companies in the region (even if they can get help from the university in looking for project themes). In the spring group they include design of product data sheets for apparatus for the Internet via the electrical power supply, brochures on parts in electric ship propulsion, home page for "cellar workshops" with advanced numeric machine tools and instructions for a newly invented machine for manufacturing o-rings.

But perhaps it is still more important for the full-time students to work in real-life projects and struggle with realistic problems in information work. When they have tested and adjusted and tested again until they have something that works well with the users they will have learnt things that no lectures could teach them.

Conclusions

Students who, with the help of an experienced tutor, have carried out a successful project have far greater chances of applying their knowledge than if they were only subjected to theoretical lectures and exercises within the school. The real-life projects also give them a more holistic view of how problems in technical communication can be solved, not only with information but also by helping hardware and software designers to make the hardware parts of their design more user friendly.

Reference:

Andersson, Ulf-L, *Humanware – practical usability engineering*, Trafford Publishing 1999
(www.trafford.com/robots/99-0031.html)



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Observation by TC-Forum Language Editor

I was immensely pleased to read Ulf Andersson's article, for he has captured the essence of a principle that I believe in implicitly: you can teach technical communication most effectively if you give students opportunities to plan and write documents that are being used or will be used in a real-world setting. They need to savour not only the pain and frustration when a project does not work out as planned, or presents enormous difficulties, but also the immense success and pride that follows when a project is properly executed. You cannot get that kind of experience solely only in a classroom.

I am saddened when I see some well-known organizations focus their efforts on theoretical research, when there is so much to be learned and gained from focusing practical real-world research that has a ready application.

We need more people like Ulf Andersson to be teaching technical communication!

Ron Blicq



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Core Competencies for Technical Communicators

Preliminary Findings

by *Kenneth Rainey, USA*

Editor's Preface

Prof Rainey presents several lists of competencies. These lists were based on a series of 17 focus groups (involving both professional technical communicators and technical communication managers) held in 1995 and 1996 in the states of Arizona, California, Washington in the USA and in Canada.

Maybe you, dear reader agree or not. Send me your comments and, if appropriate, suggest competencies you would prefer to delete or might like to insert.

What you send me by 1st November can be published in the December printed issue of TC-Forum.

Editor.

There are **core competencies** and **enabling competencies**. The competency areas are

Core Competencies distinguish a particular field from other fields

- professional (core)

Enabling Competencies do not distinguish the field but are still required for its success

- analytical, conceptual, and reasoning,
- interpersonal,
- product development and management,
- self-management, and
- career management.

Each competency is defined below.

Professional (Core) Competencies (P)	
Advocacy	Ability and willingness to be an advocate for the user.
Design	Knowledge of information design, presentation of data, language conventions, communication principles and theory.
Execution	Ability and willingness to apply information design, language, and communication models, theories, rules, and standards.
Innovation	Ability and willingness to be open to new ideas without sacrificing usability or accuracy.
Use of Media	Ability and willingness to understand the requirements and uses of different media and to apply them appropriately.
Research Skills	Ability and willingness to gather relevant and accurate information and analyze it for appropriateness.
Use of Support Tools	Ability and willingness to use appropriate support tools, including computer application software.
Usability	Understanding of usability, skill in user and task analysis, and the ability and willingness to provide value to the user of the information.

ET 10

Analytical and Conceptual Competencies (A)

Analysis	Ability to recognize patterns and relationships.
Logic	Ability to identify logical fallacies.
Editorial Memory	Ability to remember the use of words and visual symbols and their meanings and to identify inconsistencies in their use.
Relevance	Ability to ascertain relevance and usefulness.
Synthesis	Ability to integrate relevant discrete pieces of data to form concepts and extract procedures and rules.

Interpersonal Competencies (I)

Inter-personal Communication	Ability and willingness to establish collaborative relationships with people of different backgrounds, status, education, and expectations.
Team	Skill in working with groups and willingness to be a contributing member of a team.

Self Management Competencies (S)

Detail Orientation	Appreciation of the importance of attending to details that affect quality, timeliness, and goal achievement.
Organizational Ability	Ability and willingness to be efficient and not waste time or resources.
Priority Setting	Ability and willingness to set priorities that are more likely to meet goals.
Reliability	Ability and willingness to produce consistently.
Time Management	Ability and willingness to focus attention on tasks that are more likely to meet goals.

Information Product Development and Management Competencies (M)

Project Management	Ability to coordinate and schedule activities, control resources, and manage and mitigate risk.
Process Management	Ability to define or design the processes required to manage and measure the life cycle of an information product.

Career Management Competencies (C)

Staying Current	Willingness to stay up to date with tools, media, subject areas, content; willingness to invest in continuous learning.
Goal Setting	Willingness to set career goals and manage personal risk.
Investment	Willingness to invest time and other resources in one's career.
Technical Knowledge	Ability and willingness to understand the technical content and user's context for applying the content.
Leadership	Willingness to provide leadership about professional issues and promote the profession; having the skill to be politically astute.
Professional Involvement	Willingness to stay involved in professional issues and contribute to the promotion and development of the profession.
Keeping up with Trends	Willingness to stay aware of industry, social, and global trends.



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Medien Campus Bayern · ET 11

*by Gabriele Goderbauer-Marchner,
Germany*

MedienCampus Bayern e.V. was founded in 1998 as a registered, non-profit-making society composed of leading institutions of the media industry in co-operation with the Free State of Bavaria. The main reason for its foundation was the demand for a qualified, flexible and well co-ordinated education and training in the media industry, which is of utmost importance for this constantly growing media location.

Erwin Huber (Secretary of the State of Bavaria), Head of the Bavarian State Chancellery and Chairman of the Board of Management of MedienCampus Bayern e.V., writes: "Professional education and training in the media sector are the most important driving forces for Bavaria as a flourishing media location. Only if we offer excellent education and training in media sciences at our universities, institutions of higher education, academies and similar institutions, will people working in the media industry be able to meet its high demands."

*Professional
education and
training in the
media sector.*

Due to the extremely rapid development in media education and training, the courses and opportunities offered have to be reviewed on a regular basis. MedienCampus Bayern e.V. wants to take an active part in this. Its primary goal is a sensible and clear structure of media education and training in Bavaria. With the help of MedienCampus Bayern e.V., Bavaria wants not only to consolidate its leading position but also to safeguard it.

The society's activities concentrate on seven areas:

1. Information centre for people interested in professional training or university studies.
2. Advisory board for the Bavarian State Government regarding state grants.
3. Advisory board for our members.
4. Discussions with media enterprises and the respective job centres.
5. Information for those of the public who are interested.
6. International contacts to institutions of media education and training.
7. Closer contacts and co-ordination among members.

Members of the MediaCampus Bayern are the 40 leading institutes of media education and training; a list with their web-addresses is available at www.medien-campus-bayern.de



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Forum 2003 – First Announcement

Ron Blicq, Canada

Planning is already in progress for the next "Forum" Conference. After the success of Forum 95 in Dortmund, Germany, and then Forum 2000 in London, England, the INTECOM delegates recommended holding the next Forum conference in three years, rather than the customary five years. Their reason: technology evolves so quickly today, that five years has become too long a space between conferences.

The planning committee is already making plans and has tentatively set June 2003 as the month (the exact dates will be announced shortly) and Milano in Italy as the venue. The same societies that coordinated Forum 2000 have agreed to coordinate Forum 2003:

- tekcom, of Germany, will be responsible for overall administration, and will chair the conference. (Chair: Michael Fritz)
- The Institution for Scientific and Technical Communication (ISTC), in the UK, will be responsible for the program. (Chair: Anke Harris)
- The IEEE Professional Communication Society (PCS), headquartered in the USA, will be responsible for publicity. (Chair: Ron Blicq)
- The Society for Technical Communication (STC), also in the USA, will be responsible for publications. (Chair: Jeffrey Hibbard)

Michael Fritz and I will visit Milano in mid-October to evaluate prospective sites. The same week we will then meet with the whole planning committee, in Zurich, to have our first formal meeting.

Circle June 2003 on your calendar (it's only 21 months away!), and keep reading both the print and online versions of TC-FORUM for information as the program and plans develop.

For specific questions, please drop me a line at ronblicq@cs.com.



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Professional Events

SECOND CALL FOR PAPERS

29-31 May 2002;

Workshops: 27-28 May and 1-2 June 2002

Las Palmas, Canary Islands (Spain)

LREC 2002: Third Language Resources and Evaluation Conference

The Third International Conference on Language Resources and Evaluation is organised by ELRA in cooperation with other Associations and Consortia, including ACL, AFNLPA, ALLC, CLASS, COCODA, ORIENTAL COCODA, EAFT, EAGLES/ISLE, ELSNET, ENABLER, EURALEX, FRANCIL, ISCA, LDC, ONTOWEB, PAROLE, TEI, etc., and with major national and international organisations, including the Commission of the EU Information Society DG, DARPA, NSF, and the Japanese Project for International Co-ordination of East-Asian Spoken Language Resources and Evaluation. Co-operation with other organisations is being sought.

With support of TELEFONICA Foundation (of Spain) and support sought from the Commission of the EU and other institutions.

The detailed second Call for Papers for the Third LREC conference is available on the Internet at www.lrec-conf.org

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