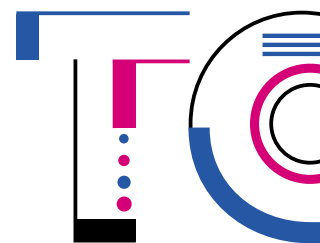


MARCH 2002

01/2002

INTERACTIVE DISCUSSION MEDIUM



FORUM

**TECHNICAL
COMMUNICATORS'
FORUM**

IN THIS ISSUE:

INTECOM

Special Aspects

Readability / Usability / Quality

Professional Events

TC-Forum is supported
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The International Council for
Technical Communication



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

2002 will be a year of further developments for TC-FORUM:

Closer to INTECOM

At the INTECOM Annual General Meeting in October 2001, the attending delegates agreed to provisionally accept TC-FORUM as a communication partner of INTECOM, starting in 2002.

Following this decision, TC-FORUM will introduce some internal changes. In addition to the overall editor, who will now be known as the TC-FORUM Coordinating Editor, TC-FORUM will install "topic-editors". Their purpose will be to better cover, and widen, the spectrum of topics dealt with in TC-FORUM. At the same time, they will alleviate the considerable workload of the Coordinating Editor. The existing TC-FORUM Team and the President of INTECOM have already initiated a search for topic-editors.

Increasing the TC-FORUM Team

Following this development, TC-FORUM started its 6th year with a larger team. Johan Näsström has become Coordinating Editor and Chris Curwen has become the new

language editor. (Johan and I will work together for the first year, to ensure a smooth handover.) Johan divides his time between Sweden and southern France, and Chris is in South Africa. Johan will have several special topic-editors working with him; the first is Nicholas Hill of STD in Finland. (details can be found in the Archive of our website www.TC-FORUM.org)

We feel that the spectrum of topics which we have dealt with in the past five years needs to be updated to include more current topics (such as mark-up languages like XML) and other tools technical communicators (TCs) are confronted with as time progresses. This means that we need volunteers to fill the topic-editor roles and to work with the Coordinating Editor. I assure you that the task of a topic-editor will be interesting and not a burden: you will communicate with the TC-FORUM team and with the authors of probably no more than three or four papers every 3 months. So, please, consider applying for one of the topic editor positions (you are still able to choose at this point in time). All communication will be done by e-mail.

Still a Question: Financing

Over the past five years we have received some valuable sponsoring, but not always enough to print four copies per year. To continue distributing TC-FORUM free-of-charge, we need more sponsorship of either the printing or the postage. I should mention that, with the exception of STC, all previous sponsoring has been by generous German enterprises. So I address my request to potential sponsors in other parts of the World: we want to keep communication among communicators running. This, in turn, will improve the flow of information between clients and providers of highly-sophisticated services. If you cannot be a sponsor yourself, can you suggest an organisation that might? Please contact Johan or me with your ideas.

With best wishes

Hans Trünger

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- SA for Special Aspects
- RU for Readability/Usability/Quality

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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- ▶ September (deadline 10 August)
- ▶ December (deadline 10 November)

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Communications Award Named After INTECOM President

The Professional Communication Society of the Institute of Electrical and Electronics Engineers Inc. (IEEE) has honoured the INTECOM president by naming an IEEE award after him. The award is known as the **Ronald S. Blicq Award for Distinction in Technical Communication Education**.

Each year the award will recognize an innovative educator who has significantly influenced how technical communication is taught in universities, colleges and high schools, both in North America and worldwide.

40 years contributing to the teaching of technical communication.

PCS Awards Chairperson Muriel Zimmerman wrote in the *PCS Newsletter*: "In naming the award for Blicq, the IEEE and the Professional Communication Society are acknowledging the 40-year contribution he has made to the teaching of technical communication. Through his books, educational video programmes, and personal teaching

he has helped thousands of undergraduate and graduate technical professionals become more effective communicators. He has also worked extensively with teachers to help them develop innovative teaching programmes."

Blicq was a technical editor with the Royal Air Force in the UK, and technical editor/training coordinator with CAE Industries in Canada, before he joined Red River College in 1967. There, he developed the curriculum, and led a team of instructors who taught the courses, to provide an in-depth coverage of technical communication in the college's Engineering Technology programmes.

In 1990, Ron "retired" to form his own company, and has since taught communication skills to technical professionals in the U.S., Canada, and Europe. His newest project is a Web-based course on professional communication techniques (<http://www.rgilearning.com>).



Ron Blicq

Blicq has developed a wealth of award-winning learning materials, ranging from eight textbooks (one published in Russian and another in Estonian), six educational video programmes, and the curriculum for teaching technical communication in high schools. He has also published an account of his experiences as a child growing up on the island of Guernsey, in the English Channel, and his evacuation from there in the hold of a cattle boat in June 1940. He is a Member of the ISTC in the UK and a Fellow of both the STC and the Association of Teachers of Technical Communication (ATTW) in the US.

The recipient of the first Ronald S. Blicq Award for Distinction in Technical Communication Education was **Ann Laster**, who retired recently from three decades of teaching technical communication at Hinds Community College in Raymond, Mississippi, USA. Since 1972, Laster has co-authored several books designed to help technical students communicate more effectively, and for 20 years starting in 1980 co-chaired the annual Institute in Technical Communication held in Raymond, Mississippi, a week-long course designed to help college and high school teachers teach technical communication more effectively.

The award to Ann Laster was presented personally by Ron Blicq at the Professional Communication Society conference in Santa Fe, New Mexico, in October 2001.

INTECOM Plans 2003 Conference

By Ron Blicq, Canada

Mark the date on your calendar: The next "Forum" Conference will be held in Milan, Italy, from June 30 to July 2, 2003. The Forum 2003 theme will be Meeting the Cross-Cultural Challenge.

Previous INTECOM conferences have been held at five-year intervals, in Sweden, Norway, Denmark, Germany and, most recently (2000), London, England. The Seventh Conference will break with tradition: It will be held after only a three-year interval, reflecting INTECOM delegates' awareness that Technical Communication technology is advancing so rapidly that a five-year interval between conferences is too long.

Participants who have attended previous Forum conferences will welcome Forum 2003, for they already know about its unique format and the admirable opportunities it provides for interaction between presenters and delegates. "Idea Markets" will again be a cornerstone of the conference. Developed 30 years ago by Ulf Anderssen and Lars Forslund in Sweden, INTECOM's Ideas Markets have become recognized as the ideal way to present and exchange information. Rather than have delegates sitting in docile rows listening to a speaker deliver information in a one-way setting, in an Idea Market everyone participates in an interactive exchange of ideas. It's exhilarating and refreshing!

As in recent Forum conferences, Forum 2003 is being sponsored jointly by four INTECOM member societies:

- Conference administration is being handled by Germany's tekomp, with tekomp's Executive Director Michael Fritz as conference chair (m.fritz@tekomp.de).
- The conference program is in the hands of the ISTC in the UK, with Anke Harris as chair (harris@mapline.com).
- Publications are being coordinated by the STC in the US, with Mary Wise as chair and Jeff Hibbard and Tom Warren as publication coordinators (mwise@manu.com).
- Publicity is being handled by IEEE/PCS, with Ron Blicq as chair (ronblicq@cs.com)



The conference site-hotel

Forum 2003 will be held at the Hotel Palazzo Delle Stelline in central Milan, within easy walking distance of major tourist sites, shops and restaurants. Delegates will be able to choose from several hotels close to the conference site. Milan is a wonderful choice for the conference, for several reasons:



INTECOM Plans 2003 Conference (cont.)



The cathedral (Il Duomo)

1. It is easily accessible, either by air or by rail.
2. It is centrally located, making travel to additional mid-Europe and Mediterranean destinations fast and easy to achieve.
3. It offers a significant range of attractions.
4. Its climate is ideal.

*Breath in
the spirit
of Milan –
experience
the art and
culture of
Italy.*

There are numerous points of interest and we will write about them in a future news release. We particularly recommend the Cathedral (Il Duomo) and Cathedral Plaza, the La Scala Theatre and theatre shop, and numerous museums and art galleries. Within 100 metres of the conference hotel is St. Maria delle Grazie Church, with Leonardo da Vinci's famous painting of The Last Supper (painted between 1494 and 1498) on a wall of the Dominican monastery. Because it is difficult to get tickets to see the painting, your conference committee is arranging to book visits for conference delegates in advance.

This initial news release is intended to whet your appetites, and to remind you to mark your calendar with a big "F2003" as a reminder that a major technical communication event will be occurring next year.

For more information about the conference or the programme, please contact your INTECOM delegate, one of the chairs listed above, or me: ronb@rgilearning.com.

Further information by



RON BLICQ

Ronblicq@cs.com

Project in Partnership Across Borders - Bridging the Communication Gap · SA 31

By Anke M Harris, United Kingdom

Learning More by Learning Together

1. Introduction

International Business and International Relations

We have recently started a documentation project, working in partnership with a German and a Brazilian company, as well as several American companies.

International business, especially where joint ventures are involved, is fraught with difficulties. Apart from practical and technical problems (to which solutions are often readily found), national psychology and characteristics frequently interfere at the executive level, where decisions tend to be more complex than the practical accords reached between engineers and other technicians. Determining national characteristics is treading a minefield of inaccurate assessment and surprising exceptions.

Yet, global business has undergone a fundamental transformation in the past decade. Aggressive foreign investment combined with domestic restructuring has dramatically changed the workforce of many companies; and the new reality is a highly diverse workforce of many companies and cultures.

I think the whole process and structure of globalisation is still very fragile indeed. As international business and international relations converge, businessmen will need to learn much more about diplomacy and diplomats will need to become more knowledgeable about business.

Too often, firms bring in "cultural experts" to talk about different national values. Certainly we are not able to afford that, and I believe these programs can be entertaining, but they ultimately fail, because they do not require to examine the firms' own culture first.

It is increasingly clear that the creation of knowledge and competencies is a management priority. So, the co-operation of partners in a consortium, like in our project, means sharing knowledge and information and also provides access to established technology and associated knowledge that may be quite new for a partner.

But this formed organisation provides also an opportunity to improve its current strengths and to develop new competencies through the support of its partners.

Cross-Cultural Management and Leadership

Like I said earlier, my company, an SME, is working in partnership on a documentation project in the aerospace industry across borders. Which means dealing with changing workforce multinationals. So, managing 'diversity' has come into the frame; unfortunately, it is not always clear what is meant by that.

*Managing
"diversity"
with changing
workforce.*

We have brought an English speaking, technically very experienced team together, they are based in our German office, within our customer's facilities. One Documentation engineer is based in Brazil, in the quest for efficiency and effectiveness.

We have found over the last few months communication problems with our customer. Our team is facing the differences in culture, manifested in styles of management, attitudes towards hierarchy, approaches to teamwork, ways of expressing agreement and disagreement, participation in decision making and so forth. This is shown by our German customer as lack of understanding, lack and not enough communication.

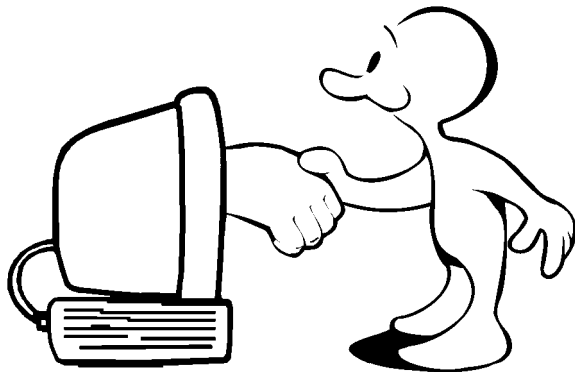


Project in Partnership... (cont.)

I have learnt over many years, that we have to be aware of our own and other cultures, and the unwritten rules that shape our daily communication.

- Our team does not only have to write their tasks and adhere to their technical software and hardware skills, a lot of money is at stake within the project. They have to learn about the cultural backgrounds of co-workers and customers – the difference in customs, values and perceptions of the work process.
- Understand how different communication styles can invite or discourage the response you want in daily "interactions".

Cross border communication with workforces is notoriously difficult given different employee cultures, values and beliefs. Our problems need serious attention!



Different Languages, Different Worlds

Comparisons of National Cultures often begins by highlighting differences in social behaviour.

Japanese for example, don't like shaking hands, they bow when greeting each other and do not blow their nose in public.

Brazilians form unruly bus queues, in fact they ignore queues in total, remembering when I was there, in a store shopping. The Brazilians prefer brown shoes to black and arrive two hours late for cocktail parties, that I have experienced as well.

French people wipe their plate clean with a piece of bread, and throw pastry into their coffee.

British tip their soup plate away from them. Eat peas with their fork upside down and play golf in the rain.

In fact I ask myself sometimes, when eating in our customer canteen, being surrounded by - I don't know - hundreds of German people, there I am, fighting with my fork and peas up-side-down, where everybody else scoops them up, and probably thinks, who watches me, funny woman, peculiar way of eating peas. And I desperately try not to be impolite, I say to my inner self, and somebody from Rolls Royce may sit on the next table... Well..

Appearance and Reality

These various manners and mannerisms cause us great amusement. We smile at foreign eccentricity, congratulating ourselves on normality.

If we stay in France a while we are sooner or later happy to dunk our croissant and make a mess; I have discovered the unhurried delight of turning up outrageously late in Brazil. We can become French or Brazilian for an evening, but what goes on in our head remains a private, well protected constant, we are on show for others.

2. Strategies for Managing Diversity

Managing Advantages and Dis-Advantages of a Diverse Workforce

The most obvious benefit of a diverse workforce is that it represents a local face to the customer. Operating successfully in a national market calls for a workforce that speaks the local language, understands traditions and rules of behaviour, and interact effectively with customers, public officials and other stakeholders.

Let's look at some of these points:

- Cultural diversity is not something that is going away tomorrow, enabling us to plan our strategies on the assumption of mutual understanding.
- People of different cultures share basic concepts but view them from different angles and perspectives.
- It can lead them to behave in a manner which we may consider irrational or even in direct contradiction of what we hold sacred.
- Other benefits of a diverse workforce are internal to the firm and concern the best use of talent and creativity.

They include:

- Improved knowledge sharing and creativity

A diverse workforce includes people with different worldviews and experience. Making the most of diversity, means forging a working environment that facilitates the sharing of ideas and the exchange of insights, inspiring novel solutions to problems. This working environment must include the customer or customers who are involved in this project.

- Fully developing and promoting talent

A diverse workforce offers a broader pool for the scarcest of all resources - talented managers.

Providing developmental opportunities for all employees is, in turn, an advantage when attracting new employees. Offering local employment is very intense. Simply offering a higher salary is not a good long-term solution; they will soon leave for more money.

Providing opportunities for development and career advancement is often a better bet to attract the best new talent.

The Challenge of Diversity

A multinational project confronts diversity in a number of dimensions. For a start, they content with differences in language, and communication at its most basic level among employees may be problematic.

They also face differences in culture, manifested in styles of management as we have mentioned earlier.

Moreover, employees in different countries may operate in markedly different economic, legal and educational systems and Labour markets.

These many dimensions present the multinational partners with a bewildering problem. So, is diversity on all of these dimensions expected to be a source of advantage?

Can we really imagine that more diversity on all these dimensions will be helpful? Or might the differences on some dimensions be a source of fragmentation and conflict?

Of the dimension we can identify, which are the worthiest of attention - language, culture, education, race, gender, age, religion or some others?

Faced with this complexity, it is hardly surprising that many firms make broad pronouncements about the benefits of diversity, but do not take real steps, since action demands judgement about which dimensions are most important.



Project in Partnership... (cont.)

Intercultural Training - Getting to Know Each Other

Intercultural training will help us to become better communicators. We both speak English, why don't we understand each other? Speaking the same language does not guarantee good communication, when people come from different cultures.

In daily work interactions, different perceptions and communication styles can cause roadblocks to effective team performance and productivity.

An overseas assignment, not being informed about local customs, values and appropriate behaviour, can seriously handicap a project.

- Become aware of their own culture and the unwritten rules that shape the daily conversation.
- Learn about the cultural background of co-workers and customers, difference in customs, values and perception of the working process.
- Understand how different communication styles can invite or discourage the response you want in daily interactions.

Handicaps with an overseas project

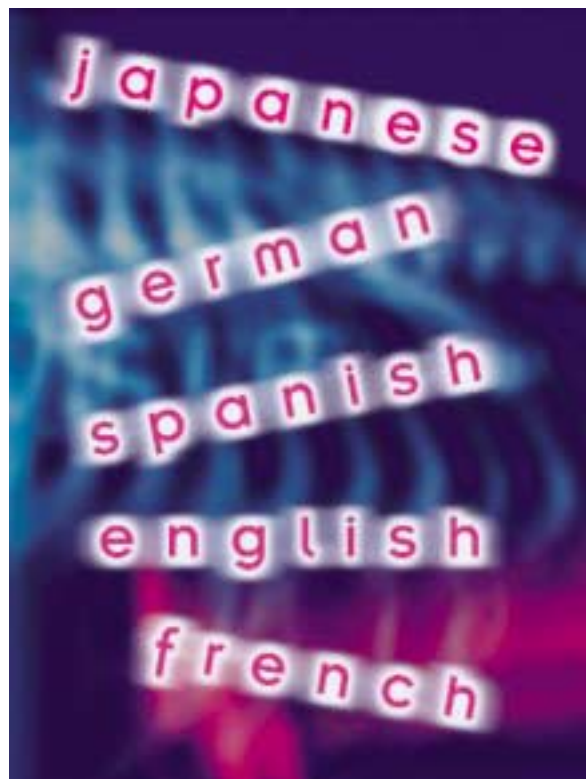
3. The Multicultural Workplace

Multicultural Workforce - Highly Diverse Workforce-Cultures

Culture, in the sense that it represents one's outlook and world view, is not, however, a strictly national phenomenon. In some countries regional characteristics can prevail to the extent that they relegate the 'national type' to second positions.

Perhaps the greatest cultural divide is not national, religious, corporate or professional, but that based on gender.

Whatever the culture, there's a tongue in your head. Some use it, some hold it, some bite it. For the French it is a rapier, thrusting in attack; the English using it defensively, mumble a vague, confusing reply; for Italians and Spaniards it is an instrument of eloquence; Finns and East Asians throw you constructive silence. Silence is a form of speech, so don't interrupt!



Understand Different styles of Communication

One of the factors leading to poor communication is often overlooked: the nationals of each country use their language and speech in a different way.

Language is a tool of communication, delivering a message - but it is more than that - it has strengths and weaknesses which project national character and even philosophy.

How do the French use their language? Like I said earlier, like a rapier! French is a quick, exact, logical language and the French fence with it, cutting, thrusting and parrying, using it for

advantage, expecting counter thrusts, retorts, repartee and the odd touché against them.

French is a good tool for arguing and proving one's point. It is fair play for the French to manipulate their language, often at great speed, to bewilder and eventually corner their opponent, leaving the latter breathless and without reply.

The English use their language differently - to its best advantage certainly, but they are not quick to attack with it. They will lean heavily on understatement and reservation; they will concede points to their opponent early on to take the steam out of the argument, but their tone implies that even so, right is on their side.

They know how to be vague in order to maintain politeness or avoid confrontation, and they are adept at waffling when they wish to procrastinate or cloud an issue. (It is impossible to waffle in French, as each word has a precise meaning). The English will use a quiet tone to score points, always attempting to remain low key.

Germans, like the French, rely to a large extent on logic, but tend to amass more evidence and labour their points more than either the British or the French.

They come in to, say, a negotiation with heavier armour and have usually thought through the counter arguments. The splendid German language is heavy, cumbersome, logical, disciplined and has such momentum that is invincible in any head-on-collision with another language. But that momentum can be deflected by a sensitive negotiator and all parties benefit.

Well, where are we now with our Project?

We are in time two-thirds through our multinational documentation project. Taking stock, what should we have done different? As technical communicators, speaking the English language in the project: have we developed more understanding, in our daily work interactions, so that the different communication styles don't become 'show-stoppers' to effective team performance and productivity?

Without the team member in Brazil, our writing task, understanding and sorting problems on the front, would have been 'Mission Impossible'! We selected the members of our team that works in our German office carefully, the technically skilled aspect was the most important aspect. We now know, whilst the technical skills are important for the project, but equally a willingness, flexibility and a certain 'empathy' for the cultural differences are critical.

To be continued.



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Safety Risks in Mechanical Engineering

Risk analysis – a long standing, but rarely practised obligation · SA 32

By Andreas Walther, Germany

TC-Forum thanks the transline-group and its founder Dr. Wolfgang Sturz for permission to reprint this article.

According to the European guideline "Machines", 98/37/EG, "Manufacturers are obliged to perform a risk analysis to determine all dangers associated with their machines. They must then take this analysis into consideration while designing and constructing their machines". This has been in effect since 1 January, 1995.

Therefore, a risk analysis is a prerequisite for the CE designation of a machine. Also, the introduction of a machine to the market, without a risk analysis having been performed, is prohibited. However, in general practice such risk analyses are often missing or have been insufficiently performed and documented.

According to present estimates, mechanical engineering companies in Germany can prove that a risk analysis has been carried out on much less than 50 % of the machines and installations they have sold since 1995. And this is despite the 1,62 million on-the-job accidents that occurred in 1999, of which 957 ended fatally (Federal Administration of Industrial Safety (Bundesanstalt für Arbeitsschutz). What are the reasons for this?

Unclear stipulations prevent consequent action

Looking for the reasons for negligent handling of the risk analysis, we have been given two main ones:

- It costs too much and achieves nothing.
- The manufacturers are not sure how they should perform a risk analysis.

The latter is not unjustified. It is true that in Germany the requirements of the European machine guidelines have mostly been converted into national law, within the framework of the device safety laws. These state: "Work equipment may only be introduced into the market when it fulfills those technical safety requirements and other prerequisites contained in the statutory instruments according to this law, respective to its introduction to the market, and the life or health (...) of the user or third parties is not endangered during its correct operation." (Sec. 3, para. 1).

In contrast to the EU machine guidelines, a risk analysis is not explicitly required - it is merely implied. It is sort of "read between-the-lines", based on the requirements for mechanical safety. It is a rather blurry area, in fact, without any distinctive obligations or responsibilities! In addition to that, in the machine guidelines themselves, no direct instructions for the performance and documentation of a risk analysis can be found. The machine manufacturers or constructors are largely left to decide things for themselves.

Even if they do decide to perform a risk analysis, the process will probably be time consuming and expensive, using the numerous practical guides, advisory works, or loose-leaf works. When studying the statements on the subject of standards in general, one realises that there are numerous methods to perform a risk analysis. However, not a single one of them is so well standardised and documented that they could implement it immediately and directly. It becomes even more difficult with the so-called risk evaluation, the execution of which is rather vague. And the purpose of the process is not clear. According to Klaus Pietrock, who knows this from experience: "Nowhere is it specified how one must proceed or who is to perform the analysis. The result: no-one does it." Mr. Pietrock is a technical editor working for transline Deutschland GmbH, an international language service provider with its headquarters in Reutlingen. He is a specialist in risk analyses.

The cause for the careless handling of possible dangers is not so much unwillingness, but rather the lack of know-how. There are no standardised and well-documented processes that are simple to implement and use.

Intention and Purpose

The intention and purpose of the risk analysis is clear: a risk analysis should determine what dangers are emitted by a machine and whether these can be eliminated through changes in the design. For this, each of the operational steps must be defined first. Then, the legal standards and regulations, for example on the minimal safety distances or allowable operational temperatures, are assigned to each of these steps. The possible dangers, their causes, and their consequences, can now be analysed. This also includes identifying the legal status of a recognised danger: is this danger legally relevant or not? For example, receiving a burn blister would not yet be legally relevant. Furthermore, one must also investigate whether the imminent danger can be recognised before it occurs, such as steam escaping from a gasket indicating a risk of overheating. In a further step, the probability of a danger occurring, the meaning of the consequences, and the possible recognition before the occurrence, are evaluated. Finally, the required safety measures must be defined in a solution description.

These should, where possible, consist of constructive measures to eliminate the source of danger. If this is not possible, then there must be technical protective measures performed, such as the mounting of a protective grill, or something similar. Only when this is not possible, does the danger become a residual danger. That means, there must be warning signs attached to the machine, and the user manual must contain the relevant safety warnings and notices needed to draw attention to the danger. "If certain dangers are prevented by the setting-up or attachment of work equipment, then adequate attention must be drawn to this when the equipment is introduced into the market. If certain rules have to be observed to prevent dangers during the use, completion, or maintenance of work

equipment, then appropriate instructions must accompany the introduction of the machines to the market." (Sec. 3, para. 3)

Proceeding Systematically

To conscientiously achieve the requirements set out for a risk analysis, one must proceed systematically and orient oneself using the following:

- A list of the so-called life phases, meaning the main phases that a machine or installation goes through between its delivery and its disposal. Here we include 'transportation', 'set-up', 'assembly', 'commissioning', 'operation in different types of operations', 'trouble-shooting', 'cleaning', 'maintenance', 'repairs', 'disassembly', and 'disposal'. For each of these life phases, one should document all actions that have been performed on the machine or in connection with it.
- A list of all dangers that can normally emanate from the machines and installations. Such a list can be found in appendix A of the European standard EN 1050. Detailed descriptions of the dangers can be found in part 2 of EN 292.
- One or more forms to document the dangers that could occur during certain procedures in each of the life phases. Each of the dangers determined must be assigned a solution description on this form. All relevant standards should be specified. And the solutions should be checked for their conformity with the valid standards.

The Risk from Negligence

"The performance of a risk analysis, not only according to the requirements of the EU machine guidelines, but also according to the device safety law, is the personal responsibility of the manufacturer", explains Adrian Heinzl, the director of the special services 'Product Safety' on the Industrial Inspection Board in Tübingen. "This means, initially, that we must assume that the manufacturer followed all relevant regulations



Safety Risks in (cont.)

and considered all needed safety measures". Within the framework of a regular observation of the market, such as during fairs, the Industrial Inspection Board performs random tests during which they also check how, and to what degree, the safety regulations were taken into consideration during construction. It is good for the manufacturers if they can simply lay a well-documented risk analysis on the table.

Nevertheless, the associated risk from not performing the risk analysis appears to not really be too high for most of the machine builders who may have performed a few random tests. But, the non-performance of a risk analysis can become quite expensive for a machine manufacturer. At the very least, in the case of accidents on, or caused by, machines, the authorities such as the Industrial Inspection Board, the Trade Association, and, in the case of serious accidents, the Public Prosecutor may demand the presentation of a legally performed and documented risk analysis. Any risk analyses that were not performed due to the lack of time or personnel, only serve to considerably increase the liability risk of a company. The consequences could be considerable indemnities and high fines, not to mention the resulting associated damage to the company image. The reasons for careful performance of the risk analysis speak for themselves.

Risks from not performing risk analysis.

The question remains: Who?

A risk analysis needs to be performed as early as possible in the development of the product. It demands close co-operation between the development and documentation sections – because the execution of the analysis itself must be well documented. And here is where the problem lies: only in the rarest of cases do the designers have the time to perform thorough, time-consuming, risk analyses. "Many of our customers in machine construction are in a dilemma: they recognise the need for the analysis, but do not possess the required personnel and time capacities, defined processes, and standards", admits Wolfgang Sturz, Founder and General Manager of transline.

A possible way out of this dilemma is to allow technical editors to perform risk analyses conforming to CE standards – in close co-operation with the designers. "Of course, the designers know the machine. But a risk analysis is best performed from the view of the users. And our technical editors know the users", explains Wolfgang Sturz. Besides this, the risk analysis has a meaningful influence on the safety and warning notices that need to be included in the user manual. The technical editor must in any event – either sooner or later – begin to deal with the results of the analysis.

Klaus Pietrock also highlights the case for using a technical editor, when he says: "An important component of the risk analysis is its complete documentation. Here is where the technical editor is the specialist. He is no specialist in comparison to the designer when it comes to the machine itself. But he is not operationally blind. He can recognise many dangers that the designer could possibly overlook or underestimate – before it is too late!"

Further information on the transline group can be found on the Homepages:

www.transline-group.com

www.transline.de

www.doculine.com

www.wissensmanagement.net

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Comments on "Give them Printed Documentation, too!!!" · RU 31

By Chris Curwen, South Africa

In 1987, I presented my first public seminar dealing specifically with the writing of User Documentation for Computer Hardware and Software. Since then, I have repeated the seminar on many occasions, both at public and in-house sessions. One of the important issues I discuss in my seminar is the question of on-line (electronic) documentation, and its advantages and disadvantages. My conclusion was, and still is, that the disadvantages of on-line documentation far outweigh any possible advantages. And for that reason, I recommend that companies prepare proper printed manuals.

So, it was with considerable interest that I read the excellent article presented by Mike Starr in TC-Forum 04/2001. He has succeeded in putting across many of the arguments against on-line documentation. But I believe there are certain other important points that also need to be stated.

On-line documents make readers less productive

One important point that Mike appears to have missed in his article is the whole question of productivity. What so many people forget is that one of the most important reasons for writing manuals, and other kinds of documentation, is to make readers more productive. And most of the principles we teach to writers and illustrators are aimed at doing just that - making their readers' jobs as easy as possible. What logic is there, then, in putting a lot of time and effort into producing a manual that is easy to read and easy to use, and then publishing it in a form that we know makes reading more difficult? And reading from a computer screen is more difficult than reading the same information on paper.

You are probably wondering how I can make that statement. But the answer is simple. Research has shown that it takes people from 20 to 30% longer to read the same material from computer screens than it does from paper. Not only that, but problem-solving is slower using information

presented on computer screens rather than on paper. And readers of manuals are continuously trying to solve problems. That research was carried out some years ago, and was reported on by the Document Design Center of the American Institutes of Research in their journal "Simply Stated" of February 1986. The same piece of research also showed that the quality of the screen had little effect on the difficulty that people had reading from it.

Some 15 years later, these limitations are still valid, despite the many improvements in screen design. Even respected organisations like the Microsoft Corporation recognise these limitations, as this extract from their manual "Microsoft Publisher 97 Companion" shows:

"... (It's important to proofread the printed publication. Research shows that people catch far more errors on a printed page than they do on screen.) ...".

So, it's not just your readers who have problems with on-line documents. Editors and proofreaders will also have problems and will become less productive in the process.

What about updates?

The argument put forward by many people for using on-line documentation is that it is easier to keep up-to-date. The same people argue that their readers will always be working to the latest copy of the document as it can be downloaded instantly. However, the reality is very different. Most people will, in fact, be more likely to be working with out-of-date documentation. And the reason for that is because they make a print-out of the on-line document, because it is too difficult for them to read on screen. Having done that, they now have an uncontrolled copy of the document that will probably never be updated.



Comments on ... (cont.)

What about the costs of documentation?

Another argument put forward by many people for using on-line documentation is that they will be saving money. However, such an argument ignores, once again, the realities. The largest cost in producing any manual is the writing, editing, and illustrating of it. And this cost is the same, regardless of whether you publish the manual on-line or print it. So, the only money you save is the printing cost – a small portion of the overall cost.

But, have you really saved that expense? In most cases, the answer is "No". All you have succeeded in doing is passing that cost from yourselves to your customers. And you will have increased their expense in the process.

If we use the figures that Mike quoted in his article, we can see how that happens:

Cost of printing 10 000 manuals = \$65 000, or \$6,50 each, a matter of a few cents per page. That is because bulk printing is still one of the cheapest methods of publishing information. But if that same manual had been supplied on a CD, or published on the company's Intranet or on the Internet, the customer would have had to print out individual copies of it on a laser or ink-jet printer. And the cost to the customer would then be at least double, probably more. So, the \$6,50 manual ends up costing the customer at least \$13 per copy.

*The customer
to pay for
the printed
manual?*

What about people who don't have computers?

Much of this discussion has revolved around documentation for computers and software. Obviously, the readers must then have access to, or be using, a computer. But what about documentation for other products? What about a situation we see so often where a manufacturer of an item of equipment, like a piece of heavy earth-moving machinery, has decided to make all the manuals electronic? Such a decision ignores the needs of the customers. Their customers may be operating the equipment

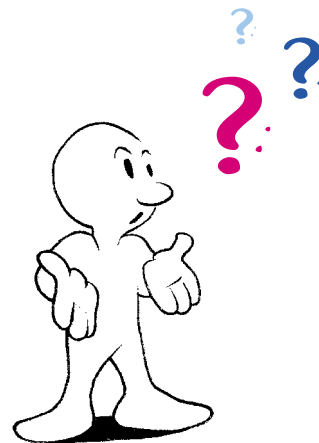
anywhere in the world, including some of the most desolate regions in Africa. Suddenly, they are faced with a breakdown. The fitter is called out to rectify the problem and, knee-deep in mud and filth, he starts to investigate the problem.

Unfortunately, he is not too familiar with the workings of the machinery. So, he tries to find a workshop manual to help him. But there isn't one. So, he wastes time trying to identify the possible fault on a trial and error basis. Having decided what he thinks is causing the problem, he decides that he must order some spare parts. But the only parts list available has been published on a CD, and he does not have a computer. Not only does he not have a computer, he has no intention of getting one as it would be completely impractical for him to use one in his job. What he needs is a printed workshop manual and a printed parts list. Without those manuals, the fitter cannot do his job properly.



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The Practice of Indexing for Technical Writers

By Melanie Doulton, France

Indexing has been a passion of mine ever since I began writing technical documentation. An index is the key to a book, and without one a technical book cannot be used fully.

There are scores of books on technical indexing that are really useful in teaching us how to create an index the right way, with the least amount of stress, while keeping up with the documentation development lifecycle. This is, of course, when you do not have the luxury of a full-time indexer. That, so far, has been a dream in the various companies I have worked at and not a very coveted one at that.

Usually it is left to the writers to put whatever indexing skills they have into practice. The theory goes that it is best to index as you write. Usually this is feasible, with the embedded indexing features that are provided with packages such as FrameMaker, Word, and so on. But even being an indexing enthusiast, like me, does not always guarantee that this will happen. From experience, you tend to get so caught up in the process of writing, structuring, organising, and reviewing documents, that taking time out to index breaks your train of thought.

However, this is not true for projects that involve only updating specific parts of a book. Adding documentation for new functionality tends to be limited to adding precise chunks of information in various parts of a book or documentation set. This makes it easier to index as you complete each chunk. On the other hand, writing a new book where information is never stable and needs to be constantly reorganised, makes it difficult to get a handle on the structure of an index. It also reduces motivation to create an index that will need a lot of rework later.

Last-minute Indexing Plan of Action

The practice of indexing tends to be left until the technical and editorial review phase at the earliest, or the copy-edit phase at the latest. This tends to put a lot of pressure on the writer, and sometimes on other team members. So here are a few tips to minimise the stress and pressure, while still producing a good, usable index.

1. Budget some extra time for indexing during the last part of the project if this is not already part of the delivery process. For example, I usually tend to do a full copy-edit and proofread my book once the book is stable and most of the reviews are complete. So I plan for more than the required time to copy-edit to give me time to incorporate an index in my book
2. Create draft entries on paper as you edit. This usually helps you decide the structure of the index. During the copy-edit process, you are better able to correlate entries that need to be linked. However, the actual fleshing out of the index can be done when you start to index the book. The following are some tips to aid you while creating draft index entries during the copy-edit:
 - Use vocabulary that appears in the book.
 - Create a list of first-level index entries as you go along. Match capitalisation and spelling to that used in the book.
 - Make a note of the wording and types of phrases used while you are copy-editing and creating draft entries.
 - If you have time, match this list to the indexes of other books in the same documentation set.



The Practice of Indexing... (cont.)

Indexing Quick Tips

Once the basic index has been created, the remaining steps to polish your index are standard. The following are some quick tips:

- Create a maximum of three levels of index entries.
- Create concise entries. Do not create phrases or clauses as entries.
- Make sure no entries begin with a preposition or article. Eliminate unnecessary adjectives.
- Index only major instances of a topic. Do not index every instance as you would for a concordance.
- Index synonyms and competitor terms for actions and terms used in the book to further aid users.

Finally, do not forget to edit the index itself. Edit with the following in mind:

- Check at least five to ten percent of the index entries to make sure they point to the correct page.
- Add See and See also cross-references if necessary.
- Make sure that you do not have two separate entries because of different casing. For example:
indexing, practice of, 3-5
Indexing, practice of, 3-5
- Of course, run a spell check.

Further Reading

- Bonura, Larry S., *The Art of Indexing*, 1994, ISBN: 0-471-01449-4
- University of Chicago, *The Chicago Manual of Style*, 14th Edition, ISBN: 0-226-10389-7
- Brusaw, Charles T., Alred Gerald J., Oliu Walter E., *Handbook of Technical Writing*, 5th Edition, ISBN: 0-312-16690-7
- Mulvany, Nancy C., *Indexing Books*, ISBN 0-226-55014-1



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The European Year of Languages and the World's Biggest Multilingual Dictionary

As a contribution to the European Year of Languages the Logos Group has updated, re-organised and enlarged its online Multilingual Living Dictionary.



The Dictionary, which is freely available to all web users at www.logos.it, now offers nine million terms in 195 languages and dialects. The dictionary is in continuous expansion thanks to the voluntary efforts of more than 2,400 collaborators from all parts of the world.

Responding to calls from many national and international bodies to safeguard the diversity of world languages, Logos has made a particular effort to include regional languages and dialects in the current version of the Dictionary. So users can now find terms not only in mainstream languages such as Spanish or Swedish, but also in Asian languages such as Vietnamese or Thai, Polynesian languages such as Maori, African languages such as Bantu or Zulu, and European regional languages such as Catalan or Welsh, but also dialects such as Bolognese or Neopolitan.

As part of the re-organisation of the Dictionary Logos has simplified the procedure for inputting translations of new entries by users and the volunteer collaborators. Every user can now choose his or her own search engine for connection to the dictionary. In accessing the dictionary or in replies users can also use the language of their choice.

The online Dictionary is now linked to another Logos initiative, the online library Wordtheque (www.wordtheque.com) which offers a growing selection of works of literature. Words can now be looked at in context. For example, a user can check how American authors might have used the word *crusade*, which was recently the subject of controversy when used by President George W. Bush.

Also in celebration of the European Year of Languages Logos has doubled the scope of the Children's Dictionary (Dizionario dei Bambini) at www.logos.it/bimbi/, increasing the number of languages involved from 50 to 99. This dictionary provides sound and pictures to accompany the text.

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