

# Ragged Left



Volume 18, Number 6  
January/February 2005

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## November Meeting Wrapup \_\_\_\_\_

### If I Only Had Two More Weeks: How to Effectively Manage Your Documentation Projects

by Greg Thompson

Whether we are working or recreating, there is always one thing we wish we had more of: time. We always wonder where it goes, as if it were an object on wings that just up and flies away without our permission.

As tech writers, what would we give to have more time in the front end of our schedules to do that exhaustive audience and task analysis or, on the back end, to do a rigorous copy edit of our documentation just before it reaches the eyes of our customers?

Well, you don't have to give up something as significant as your first born child or the deed to your home to be able to effectively manage your documentation projects.

Joan Braun, Manager of Technical Publications at Xilinx, has a number of suggestions, taken from years of experience as a documentation manager and from Joan Hackos' book *Managing Your Documentation Projects*. She shared these suggestions to us at the November Berkeley STC meeting during her presentation "If I Only Had Two More Weeks."

Her presentation was divided into two main sections:

- Understanding the Problem
- Setting Clear Expectations

#### Understanding the Problem

Bratun believes that publication teams want to deliver complete, user-friendly, and accurate information for every release. However, development teams cause problems for writers when the teams unexpectedly alter the schedule, thereby compressing the information development cycle which can compromise the quality of the documentation. Engineers and project managers who change product specifications or add new features to products also contribute to the crunch we have all felt as technical writers working at the end of a project.

Because of these concerns, Bratun notes that "writers may be forced to put work out there that isn't the best and they get demoralized." She feels that managers can help by setting standards EARLY and coaching development teams on expectations.

#### Set Clear Expectations

Bratun showed that setting clear expectations involves five key components:

- Scope your projects
- Write a documentation plan
- Manage the project
- Support your team

**Scope your project.** To determine how much time a writer needs for a project, Bratun's team uses a formula described in Joan Hackos' book *Managing Your Documentation Projects* to estimate the project. This estimate, published by the writer for other member of development team in the form of a resources spreadsheet, includes the number of person weeks or months it takes to complete the project. The formula

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TECHNICAL COMMUNICATION is the bridge between those who create ideas and those who use them. Conveying scientific and technical information clearly, precisely, and accurately is an essential occupation in all sectors of business and government.

THE SOCIETY FOR TECHNICAL COMMUNICATION (STC) has approximately 25,000 members worldwide. Its members include writers and editors, artists and illustrators, photographers and audiovisual specialists, managers and supervisors, educators and students, employees and consultants.

STC strives to

- Advance the theory and practice of technical communication
- Promote awareness of trends and technology in technical communication
- Aid the educational and professional development of its members

### MEMBERSHIP

Membership is open to everyone. Regular membership is \$155/year, with an additional \$15 enrollment fee the first year. Student membership is \$56/year. To receive additional information and an application form, via mail or e-mail

- Send e-mail to membership@stc-berkeley.org
- Send mail to Berkeley STC, PO Box 1007, Berkeley CA 94701-1007

### INSURANCE

Members of STC can apply for health, disability, and other insurance at STC group rates. For more information, contact STC office at stc@stc.org or (703) 522-4114.

### WORLDWIDE ACTIVITIES

STC's annual conference brings together more than 2,000 technical communicators from around the world for educational programs, seminars, and workshops conducted by experts in the field. Upcoming annual conferences: Seattle, May 8-11, 2005; Las Vegas, May 14-17, 2006. In addition the STC sponsors many regional conferences, which feature the same sorts of programs, seminars, and workshops on a more intimate scale.

STC sponsors international and regional competitions in all aspects of technical communication.

STC Special Interest Groups (SIGs) bring together members with common experiences and interests to share their skills and knowledge. STC SIGs include:

- AccessAbility
- Canadian Issues
- Education and Research
- Illustrators and Visual Designers
- Environmental, Safety, and Health Communication
- Consulting and Independent Contracting
- Quality
- Marketing Communication
- Scientific Communication

STC sponsors research grants and scholarships in technical communication.

STC publishes the quarterly journal *Technical Communication*, the newsletter *Intercom*, and other periodicals, reference materials, manuals, anthologies, standards, and booklets.

Formed in 1953, STC has today become the largest professional society in the world dedicated to advancing the theory and practice of technical communication.

### LOCAL ACTIVITIES

The six northern California chapters of STC conduct a variety of individual and joint activities. See page 6 for contacts for these chapters. See page 7 for a list of other local organizations in which STC members may be interested.

### SUBSCRIPTIONS

This newsletter is free to members of the Berkeley chapter.

### ADVERTISING RATES

The *Ragged Left* is not accepting advertising at this time.

### SUBMISSIONS

*Ragged Left* publishes original articles and illustrations. We edit them to meet our needs. You retain copyright but grant every STC publication royalty-free permission to reproduce the article or illustration in print or any other medium. Please talk with the editor for details of how to submit articles and illustrations.

The deadline for unsolicited submissions is the fifteenth of the preceding month.

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considers such factors as the degree of difficulty of the material, the type of document you have to produce, and the number of writers assigned to the project to come up with an accurate estimate.

**Write a documentation plan.** The documentation plan allows you to reach an agreement with your stakeholders who are other members on the development team. When creating the documentation plan, Bratun states that you should “at all times ask yourself how is what we are doing supporting the corporate goals and vision.” Key elements of a good documentation plan include:

- A brief overview
- Project scope and priorities
- Task analysis
- Audience analysis
- Type of documents to be created
- Schedule
- Contact information for and availability of SMEs
- Contingency plans for delays, feature creep and inadequate specifications

**Manage the project.** Writers who are part of a product team need to manage their projects by checking with their stakeholders on a regular basis through product review team meetings. In these meetings they can discuss issues like shifting schedules and change requests. Writers should be willing to review and to update their schedules and document plans regularly. In short, according to Bratun, it is important for writers to “communicate communicate communicate.”

**Support your team.** Bratun believes that, as a publications manager, there are a variety of ways you can support your writers in the documentation development process. You can support your writers by:

- Setting clear objectives
- Regularly reviewing and updating the objectives
- Stressing accountability and setting clear standards
- Ensuring that top customer needs are addressed, as noted in the documentation plan
- Encouraging your team to add documentation to each project team and meeting agenda
- Getting feedback from your writers by asking them if their needs are being met along with the needs of the stakeholders
- Attending project team meetings to stress schedules and deliverables, if necessary

Hackos suggestions work. I was able to use them in a previous job in which I designed a documentation process for a web-based financial services company that had no technical writing department before my arrival. These suggestions have worked for Bratun too, as she insists that time and time again, after many releases both major and minor, she is able to “celebrate success.”

Greg Thompson is consulting technical and freelance writer who is also currently working on his MFA in Creative Non Fiction.

## *Letter from the Editor* \_\_\_\_\_ by Joe Devney

This issue of the *Ragged Left* has only one meeting wrapup because the chapter had no meeting in December. But we do have a contribution from far afield: in “First Person,” Peter Szabo of the STC Southwestern Ontario chapter talks about streamlining his workflow in the wake of a company downsizing.

We would like to add more locally produced content, though. We are always happy to get articles or article ideas from STC Berkeley members. The easiest way to start out is to volunteer to write up the monthly meeting presentation, as Greg Thompson did for this issue.

And we have a special request if you are in a position to know about emerging technologies. As I have mentioned before, the March/April issue of the *Ragged Left* will focus on the technologies that our members may be writing about in a year or two. If you have insight into what these might be—maybe your employer is inventing one of them now—please let me know.

*Ragged Left* editor Joe Devney can be reached at [newsletter@stc-berkeley.org](mailto:newsletter@stc-berkeley.org).

## *Director’s Letter* \_\_\_\_\_ by Beau Cain

### Looking Back, Looking Ahead, Looking Around

This time of year, I feel like examining my recent past and seeing how it might help me foresee the near future, perhaps like the Roman deity of portals, Janus, whose two faces looked into the past and into the future simultaneously. Here’s my attempt at that for December 2004 and January 2005. I hope you’ll read it and consider whether I, as Region 8 Director,

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am delivering what you expect of me.

## Looking Back

Since I took office as Director of Region 8 in May 2004, I've done the following:

- attended Board of Directors meetings in Baltimore and Montreal
- met chapter leaders and volunteers at the STC SoCal Leadership Forum in Chatsworth
- directed the resolution of the 2004 Regional 8 conference (my trial by fire, I sincerely hope) with guidance from hearteningly dedicated and humbly knowledgeable volunteers and leaders
- deliberated how to produce a technical communication competition with STC NorCal chapter presidents at a charming French bistro in Berkeley
- represented the Board and presented at the Region 5 conference in Salt Lake City
- addressed chapters and councils about the Transformation Initiative and about the current Rechartering in Berkeley, San Francisco, Sacramento, and Honolulu
- presented at chapter meetings in Berkeley, East Bay, Orange County, Sacramento, San Francisco, San Luis Obispo, Santa Cruz, and Silicon Valley

Along with gratitude for all the kindness my colleagues lavished on me during my travels, I feel most impressed by the dedication and competence of the leaders and other volunteers who gave their time, effort, and expertise to keep our operations running. More than anything else, I'm looking forward to collaborating with these and other leaders and volunteers throughout the rest of my term of office.

## Looking Forward

The rest of my term of office is two and a half years long, which seems rather a lot to prognosticate. So instead, I'll write about what I'm looking forward to for the next six months, which should take us as far as the upcoming 52nd Annual Conference in Seattle in May 2005.

By the time this article is published, I'll have enjoyed both the San Francisco chapter and Silicon Valley chapter's end-of-year holiday gatherings. Both are significant. This will be the first time in a few years that Silicon Valley chapter has offered a

chapter meeting in December, and it will be a social event rather than a presentation, a very rare event for Silicon Valley chapter. I hope the event proves popular enough to produce again next year.

More poignant is San Francisco chapter's holiday gathering, which will be their last one at the intriguing London Wine Bar. The chapter has been meeting in the cellar of the historic watering hole for many years. The current president of the Silicon Valley chapter, Marie Highby, tells of romantic rendezvous there that she and her husband Paul enjoyed years ago. I'm sure there are other stories of pleasant evenings shared with friends at the London Wine Bar.

Susan Becker, San Francisco chapter president, I salute you and your chapter's officers as an era passes on your watch.

January 11th, I expect to present at the Los Angeles chapter's meeting, and also to present a half-day workshop for the Houston chapter January 29th. As well, I'll be semi-sequestered with your Board of Directors in Houston the weekend of January 21st for my third Board meeting. However, it won't be as onerous as it may sound. I was a member of the Houston chapter for seven years, and I'm certain there will be some happy reunions with long-time friends while I'm there.

March 12th is the date for STC NorCal's Leadership Event III, which I may be MCing. If this one is as successful as the first two, then STC NorCal will move into the future providing improved inter-chapter collaboration among the six STC Northern California chapters.

## Looking Around

After that, the only clear STC plans that I have are to remind chapter officers on a more timely basis to submit Chapter Activity Reports, PR Award, Newsletter Award, and Chapter Achievement Award applications, and nominations for Distinguished Chapter Service Awards and Associate Fellowship. Pursuing recognition is a good way to ensure that our chapters provide value for their members. I've set repeating reminders in my computer's calendar program, so that should help keep us on schedule in the future.

Things I'd like to do between January and May, 2005, either as Region 8 Director or as a technical communication professional:



*First Person* \_\_\_\_\_

## How we reduced formatting time at low cost

by *Peter Szabo*

I have weathered several layoffs in our Documentation Department, leaving me with one Intermediate Tech Writer and myself to update about 3,000 pages of software documentation twice a year. Although our company is on more stable ground, it has strong reservations about investing in human resources, so I'm continually looking for ways to be faster with the existing people and resources. Our biggest time eater is formatting the rough draft content that we receive from our subject matter experts (SMEs). At this point, they write in Word with a template that we've provided, and the template styles map to the styles in our unstructured FrameMaker documents. However, despite our best training efforts, we can't keep them from modifying styles, adding new ones, or using the styles poorly. And so we spend time simply applying formatting in FrameMaker (although to be fair, the templates have reduced this time).

I thought that if I can get all of our content files into a common file format that is independent of formatting and with enforceable writing standards, then we can exchange files, or "round-trip," with little formatting effort. XML appears to be the panacea, offering a way for us to create structure and even enforce it within XML editors. And we get all sorts of other benefits like versatility in our publishing options for different document audiences, and the ability to chunk our content down into more content-specific chunks.

We already had FrameMaker and have worked through the EDD (Element Definition Document) development and read/write rules to export the XML, so now we can just open and edit XML files within Frame, while using the familiar and flexible formatting option that Frame offers to produce nice PDF outputs.

The catch came when our software developers insisted on a WYSIWIG editor. Even though they spend all day writing code, they didn't want to write documentation in code. And they wanted to *see* the bulleted and numbered lists, and headings and subheadings, to help them better organize their

thoughts.

And so my quest for the Holy Grail of XML WYSIWIG editors began.

### Schema requirements

Since Word 2003 requires a schema, rather than a DTD, we created a schema. We used XMLSpy to convert our FrameMaker DTD to a workable schema. We decided not to use DocBook because we had some very specific content naming needs and we decided it was easier to create our own DTD/schema than to apply our own definitions to the DocBook DTD elements.

### XML enforcement

Since it's important for us to reduce time spent formatting, I decided that we should look for a solution that forces our SMEs to write within specific guidelines and use a file format that does not rely on styles and formats. Therefore, any XML editor we use would ideally enforce the DTD/schema, meaning it would prevent the writer from adding elements where the logic does not permit.

I asked a colleague, "Although Word stops me from saving the file, because it validates the XML against the provided schema, is there a way to enforce the schema as you write? In other words, is there a way to prevent writers from adding an invalid element or just randomly inserting text without any element wrapper?"

I found that lots of XML editors validate against a DTD or schema, and some even provide helpful lists of elements that are available to add after any element in the document. But Word 2003 it's really just an XML editor with schema validation feature. And although it's pretty good at providing mouse-over error correction pointers for schema invalidations, it doesn't give direction or, better yet, restrictions about what elements can be inserted where during the writing process; so most Word users will just create invalid, poorly constructed XML documents (which we would then have to clean up).

### Is Word 2003 a WYSIWYG editor?

Yes and no. With the Microsoft WordML schema, paragraph styles are mapped to elements, so as you edit the XML text, there are styles that display the text in a layout hierarchy.

However, when you use your own schema, there is

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## Director's Letter *continued*

- attend the next STC SoCal Leadership Event
- present workshops on Oahu and Hawaii
- meet with officers of the Sierra-Panamint and Southern Nevada chapters
- make a significant contribution to the Board committee to examine regional conferences
- become better acquainted with leaders of the Australia and New Zealand chapters
- publish my first book, "Building Books With Microsoft Word"

### Other STC chapters in Northern California

#### East Bay

<http://www.ebstc.org/>

#### North Bay

[www.stc-northbay.org](http://www.stc-northbay.org)

#### Sacramento

[www.stcsacramento.org](http://www.stcsacramento.org)

#### San Francisco

[www.stc-sf.org](http://www.stc-sf.org)

#### Silicon Valley

[www.stc-siliconvalley.org/](http://www.stc-siliconvalley.org/)

## Upcoming STC Berkeley Meetings

### Creating Context-Sensitive Help Using Single-Sourcing

Speakers: Debjani Sen and Roger Dearth  
January 12, 2005

### The Art and Science of Table Design

Speaker: Kathy O'Donnell  
February 9, 2004

### Macromedia's "Contribute"

Speaker: Eric Lerner  
March 9, 2004

SEE THE CHAPTER WEB SITE FOR MORE  
DETAILS.

[WWW.STC-BERKELEY.ORG](http://WWW.STC-BERKELEY.ORG)

- see all my friends and colleagues at the Society's 52nd Annual Conference in Seattle

Have I learned enough in my first six months to help me be successful in my second six months? Am I addressing my constituents' needs as I serve the Board of Directors? Let me know what you think.

I thank you for helping me bring 2004 to a satisfying close, and I wish everyone a happy new year!

## President's Column

by Joe Devney

In the November/December issue of the *Ragged Left*, I wrote about STC Berkeley's cooperation with the San Francisco chapter of IABC, the International Association of Business Communicators. This was the first in what I hope will be a series of connections with other Bay Area writers' groups.

In December, I took another step in that direction. I met Naomi Ruff, president of the Northern California chapter of the American Medical Writers Association, and Ron Irion of the Northern California Science Writers' Association. We will keep in touch, and find ways to cooperate in the future. It may be mutual discounts, as we have with SFIABC, or possibly work together on an event that will attract Bay Area writers of different stripes. I will keep you updated via the *Ragged Left*.

Incidentally, there is already some overlap with these groups. I met both Ron and Naomi at a NCSWA event.

If you would like to get involved in this outreach to other writers' organizations, please e-mail me.

## Chapter Elections

Here is an early warning about STC Berkeley elections. We have five elected officers in the chapter: President, VP of Programs, VP of Membership, Treasurer, and Secretary. These all have one-year terms, July through June.

I encourage all Berkeley STC members to consider running for office. As an officer, you would have some say in what goes on in the chapter, and you are more aware of what goes on at the Region and Society levels. (It can also add some weight to your résumé.)

SCT President Joe Devney can be reached at [president@stc-berkeley.org](mailto:president@stc-berkeley.org).

## STC Elections Coming

Elections for officers at the Society level and changes to the Society by-laws will be held in March and April 2005. Election materials will be sent out in March to members who have paid their dues by the end of February, and all ballots are due by April 15.

The nominees and bylaw changes are listed below. More details will be provided with your ballot.

### Offices

**President.** Suzanna Laurent

**First Vice President.** Mike Bates

**Second Vice President.** Linda L. Oestreich, Deborah F. Sauer, Paula Berger

**Treasurer.** William C. (W.C.) Wiese, Douglas C. Woestendiek

**Nominating Committee (Two to be elected, each for a two-year term).**

Joanna Castner, Michelle A. Didier, Lori J. Klepfer, Martha K. Sippel

### Proposed amendments to the STC bylaws

1. Change Article IV, Section 3. Duties of Board Members, Item C. Second Vice President, to read, "The second vice president acts for the first vice president when the occasion arises. The second vice president also performs such other duties as the president or the board may assign."
2. Change Article IV. Section 3 Item G. Directors, to read, "Directors attend all board meetings, serve on Society committees, and perform such other duties as the president or the board may assign."
3. Remove STC Bylaw Article IV, Section 5. Regionalization: "The Society is divided into eight regions; each region includes all chapters, members-at-large, and other affiliations that exist in that region. Those members assigned to a region elect one director who represents that region."

### First Person *continued*

no apparent way to map paragraph styles to your elements. So you can apply styles and formats as you would with any Word document, but those styles aren't saved with the data (as they shouldn't be). When it comes round-tripping through FrameMaker for the next doc updates, Frame will dump raw XML and the SME will open it in Word but all styles will be gone again. And some things in Word, such as tables, are especially troublesome because they are really formatting elements.

### Transforming XML documents

Another colleague, Dorothy Hoskins, has offered some very interesting options (too technical to include in this article) for transforming XML documents that I will need to explore further. If that doesn't lead to a solution, my best option is a WYSIWYG XML editor from Europe called XOPUS <<http://xopus.comindex.html>>, which ArborText is using as the base for its XML editor, Contributor.

Isn't it strange how we in Documentation are forced to run around in circles, and spend time and effort to keep software developers happy?

Peter Szabo is Manager, Technical Publications for Checkfree and Program Manager for the STC Southwestern Ontario Chapter.

## Meetings

Our chapter holds a dinner meeting the second Wednesday of each month at the Shattuck Plaza Hotel, 2086 Allston Way, just west of Shattuck Avenue in Berkeley. The Hotel is across the street from the BART station at Allston and Shattuck. The cost for dinner and meeting is \$18 for members, \$15 for student members and \$21 for non-members. For those attending the meeting only, the cost is \$12 for members and non-members, \$10 for students.

- 6:00 Check-in, conversation.
- 6:30 Dinner.
- 7:15 Chapter business and announcements. Anyone can announce jobs that they know about.\*
- 7:39 Formal program. Usually we have a speaker or panel of speakers on a topic related to the business or technology of technical communication.
- 9:00 Conversation, offline questions for the speaker, follow-up on job announcements
- 9:30 Clear the room. Move conversations to the sidewalk.

\*Recruiters are welcome to attend meetings, place literature on a designated table, and talk with attendees one-on-one during the informal parts of the meeting. We ask them not to announce specific jobs during the formal announcement period, but they are free to stand up and identify themselves. Similarly, we ask anyone else with commercial announcements to confine themselves to calling attention to the availability of literature on the designated table.

### Other Organizations

**American Medical Writers Association (AMWA) of Northern California.** Meets periodically at various Bay Area locations. <http://www.amwancal.org>

**American Society for Training and Development, Mount Diablo Chapter.** Meets monthly in Danville. <http://mtdiablostd.org/>.

**American Society of Indexers, Golden Gate Chapter.** <http://www.asindexing.org/site/chapters.shtml#golden>

**Association for Women in Computing, San Francisco Bay Area chapter** <http://www.awc-sf.org/>

**International Association of Business Communicators, San Francisco chapter.** A network of professionals committed to improving the effectiveness of organizations through strategic interactive and integrated business communication management <http://sf.iabc.com/>

**National Writers Union (UAW).** A labor union for freelance writers of all genres. <http://www.nwu.org>

**Northern California Science Writers' Association.** Quarterly meetings and other events. <http://www.ncswa.org>

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Networking 6:00 Dinner 6:30 Program 7:15  
**Agenda**

Allston Way at Shattuck Avenue, Berkeley  
Shattuck Plaza Hotel  
**Location**

Wednesday, January 12, 2005

context-sensitive help.  
once and re-using it many times) for creating  
The single-sourcing solution (writing information

# Context-Sensitive Help

January Meeting

The Society for Technical Communication  
Berkeley Chapter  
P.O. Box 1007, Berkeley CA 94701

# Ragged Left

### By BART:

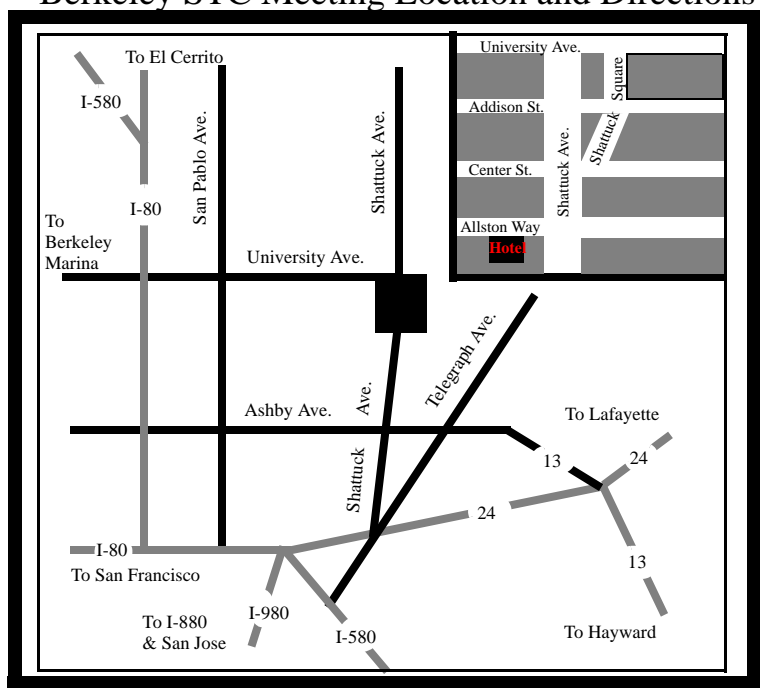
Get off at the downtown Berkeley station (Richmond line) and walk south to Allston Way, the first street. Cross the street and turn right.

### By Car:

From north of Berkeley on I-80, take the University Avenue exit (east). Turn right on Shattuck Avenue. Allston Way is three blocks south.

From south of Berkeley, take 880 north from San Jose. Continue through Oakland on 880. Follow the highway as it curves sharply to the right (where traffic merges in) and becomes 980. Continue on 980 to Highway 24 (toward Berkeley and Walnut Creek). Take the first exit from 24 (Martin Luther King Jr./51st). Turn right on 51st and make an immediate left onto Shattuck. Proceed north on Shattuck 2.3 miles to downtown Berkeley. Allston Way is immediately before the BART station.

## Berkeley STC Meeting Location and Directions



*Walking to your car or BART?  
We can't guarantee you an escort, but we'll try.*