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Content and knowledge management: an update

by *Leslie Priest*

In the fall of 1989 the headquarters of World Savings and Loan contained a brand-new operations center—a two-story building as big as a football field on San Francisco Bay—where one whole story contained rows of beautiful violet Steelcase file cabinets full of loan papers from 50 years. And then the earthquake: in a few minutes of violent shaking those cabinets and their papers were strewn about the floor. As a result, we began a huge project to scan those loan files into a state-of-the-art image content database. Over a decade later, what is up with image and content/knowledge/document management? I went to the local roadshow of AIIM (The Association for Information and Image Management) in Denver last October 10 to find out.

What an eye-opening experience! The list of vendor exhibits crossed many of the traditional lines of products—from traditional document publication (Adobe, Corel, Documentum) to imaging/scanning systems (Fujitsu, Kofax), to web distribution (Livelihood, Vignette). How are lowly practitioners of the art of communication like us to make sense of these products and guide our clients?

Below is a high-level look at the organizations and products from each technology sector represented. CM and KM are huge topics and this summary is just a toe in the water. Use the links at the end of the article to explore and learn.

The global term used throughout the AIIM show was ECM—Enterprise Content Management. What is the idea of Enterprise Content Management as represented by AIIM? Their website (www.aiim.org) gives us some clues:

"A lot has changed since AIIM was founded in 1943 as the National Microfilm Association...We believe that at the center of an effective business infrastructure in the digital age is the ability to capture, manage, store, preserve, and deliver enterprise content to support business processes. The requisite technologies to establish this infrastructure are an extension of AIIM's core document and content technologies. These Enterprise Content Management (ECM) technologies are key enablers of e-Business and include Content/Document Management, Business Process Management, Enterprise Portals, Knowledge Management, Image Management, Data Warehousing, and Data Mining.

That includes everything plus the kitchen sink, I think. See the Glossary at the end of this article for any vocabulary that may be new to you.

The only products missing from the AIIM mix seemed to be from the knowledge management (KM) crowd. They are holding their yearly convention (KMWorld) at the end of October, blending it with the Intranets 2002 conference. Here is what KMWorld organizers say of their upcoming convention:

Convening for its sixth year, KMWorld is the world's largest and most comprehensive conference and exposition dedicated to Content, Work, Collaboration, Knowledge and Intellectual Asset Management, and Business/Competitive Intelligence.

The two organizations, AIIM and KMWorld, and the products they represent, coordinate subtly under this guideline: the AIIM product core represents the "plumbing," the infrastructure, to capture, hold, and distribute content, while Knowledge Management products seek to make sense of the content in the eyes of the end users. They need each other.

But is the distinction clear? Consider a vendor who is showing at the KM meeting as a confusing example of placement in the pantheon of content and knowledge management systems:

"Factiva introduces Fusion, a content-enhancement offering that categorizes and creates relationships between business content sets.... Factiva Fusion resolves the problems associated with inefficiencies of searching multiple internal and external systems and the challenge of finding relevant information in the myriad results returned by search engines...Factiva Fusion structures content for accurate retrieval and contextual integration into portals, intranets and other business applications. Factiva emphasizes it does not seek to replace existing portals, intranets and content management systems with Fusion, but to complement and enhance their performance by consistently organizing the content within those repositories." (www.factiva.com)

Confused? My advice: Get familiar with these organizations and the technologies they represent, so we can position our work and our confused clients to take strategic advantage of this sweeping array of enterprise solutions.

Technology 1: Content capture and storage

The beginning of content management is to capture content from a variety of resources, make it digital, and store it systematically. The original AIIM group that microfilmed mountains of paper with the aid of scanners are still in business today, but the computer servers and database engines are light years advanced. Vendors' products in this area are the most costly because of the hardware and physical implementation. But the need for this infrastructure is growing.

Technology 2: Content/document management and indexing

This technology encompasses many of our familiar doc/content activities but is

overly complicated if we don't have strategic Technology #1 (content capture) in place. We want to manage content in nearly native format, index it with metadata accessible to search engines, control the content's versioning and lifecycle, and control users' access to it (security and protection were a hot conference topic this year). And we don't want the technology to get in the way of authors. We want the content to be accessible to any authors so they can update it quickly and efficiently and create active communities of knowledge sharers. One vendor's presentation slide summed this up: "Unify, Organize, and Optimize" the content. This is the technology most associated with the XML/structured content/metadata vendors, but most misunderstood by our clients. Without Technology 1 and 2 in place, subsequent technologies will struggle and clients will be frustrated with the results.

Technology 3: Content distribution

Hot, sizzling products emerged from this group of vendors. "Intranet, extranet, hosted solutions, scalability, extensibility, broadcast..." Our clients understand this lingo and want it all. Our enterprise managers know their end users access multiple channels of information flow and have no patience with single distribution methods. But providers are faced with incredible challenges if the infrastructure is not in place to deliver and distribute content:

- Multiple repositories
- Multiple formats
- Multiple user types
- Multiple output devices
- Multiple relationships
- Multiple workflows

From an authoring point of view, this is the business requirement behind "single-sourcing."

Technology 4: User interface, search and retrieval

These scary statistics for 2002 were in every vendor's presentation:

- 40%--the average knowledge worker's time spent looking for information
- 70%--how often content is recreated rather than reused
- 200%--the annual rate at which content volume is growing

In this technology AIIM products coordinate with KM products. What good is plumbing/infrastructure and content management if the end-user community needs are not met? Most strategic proposals should begin with this analysis and then choose the underlying technologies 1, 2, and 3 to fulfill user requirements. An example of how it can go wrong: at Time Warner Telecom IT decided to implement

Documentum doc management, but had not planned on inputting all the native intranet content. Thus, users had to perform Documentum searches of whatever metadata its document base had, plus do external searches of the native document base servers. And as the enterprise changed processes and moved Documentum items around into new user interface search hierarchies, Documentum would not let us adequately hide or delete the former organization. No wonder the users were

upset!

Technology 5: Collaborative content creation and publishing

Content is just a collection of dead, inflexible objects, without a way to interact with it and grow it into a knowledge base to keep it alive. The statistic above—70% of the time we recreate content—comes from our need to add to it, say something about it, share it, connect other content to it, and make it useful for our lives. Even the most traditional authoring products, like those from Adobe, hype their ability to gather collaborative information together to publish richer content and keep it alive overtime. OpenText/Livelink and other collaborative multimedia vendors are redefining this realm of knowledge lifecycles. And it's tough on the structured technologies like XML to keep up with the creativity and flux brought on by collaboration and interwoven content.

Wrap up

So, was this short summary an eye-opening experience for you too? Many of us passionately believe in the world of content and knowledge management. We must aggressively seek to understand these technologies and be able to advise our clients about the net of interwoven communications technologies and strategies that surround us. Ten years from now I hope no one will have to grapple with a football field of scattered filing cabinets and mountains of useless paper.

Resources

- www.aiim.org AIM - Association for Information and Image Management. AIIM has started developing knowledge management (KM) standards to help the industry coalesce around a common process, theory, or philosophy for the way knowledge is managed. In early 1999, AIIM began developing several guideline reports to help organizations initiate KM projects and better manage their knowledge resources or intellectual capital. Those initial projects include a glossary of KM terminology; an introduction to knowledge management; and guidelines for the purchasing of KM tools, technology and services.
- www.KMWorld.com Convening for its sixth year, KMWorld is the world's largest and most comprehensive conference and exposition dedicated to content, work, collaboration, knowledge and intellectual asset management, and business/competitive intelligence. It offers a wide-ranging education program designed to meet the needs of strategic business technology decision-makers, as well as tactical point solutions managers and professional implementers.

KMWorld's online community is

http://organik.kmworld.com/organik/orbital/home/organik_home.jsp

- KMWorld Buyer's Guide
www.kmworld.com/publications/buyersguide/default.htm
An online complement to the popular print version of KMWorld's Buyer's Guide, this electronic resource will shorten your search for a vendor or

simply help identify sources for KM tools. This is an easy-to-use source for KM hardware, software and consultation.

- www4.gartner.com – the Gartner group's Focus pages on knowledge and content management, and e-learning.
- www.doculabs.com Founded in 1993, Doculabs, Inc. is a research and consulting firm that improves the way companies plan for, select, and optimize emerging technologies through project-based services. Provides end-user and vendor consulting services to companies purchasing e-business technologies and to the leading vendors that supply them.
- Knowledge Management Consortium International (www.kmci.org KMCI)—Founded in 1997, KMCI views knowledge management from the organizational perspective, with the goal of providing practical applications of KM. It offers certification through its KMCI Institute, publishes a newsletter and a journal, and offers chapter meetings in Washington, D.C. and Denver.
- Knowledge Management Professional (www.kmpro.org KMPro)--KM Pro, established in 2001, is dedicated to promoting the practice of knowledge management and supporting the professional development of its members. It provides certification training, workshops, articles, and reports about KM, as well as chapter meetings and an innovation lab of KM technologies and services.
- Knowledge Management Roundtables www.icasit.org/km/kmrt In the Washington, D.C. area, KM Roundtable meetings are held approximately every three months in conjunction with Virginia's Center for Innovative Technology, the International Center for Applied Studies in Information Technology (ICASIT) and the Internet Technology Innovations Center. The KM Roundtables seek to advance the effectiveness of KM practice in regional organizations. Recent programs covered KM metrics, the Knowledge Sharing Initiative (KSI) at NASA, and a look at the future of KM.
- www.cms-list.org - Content Management online user community. Cameron Barrett and Phil Suh founded and moderate this list. "We exist to help web professionals help each other learn about content management trends, tools, and ideas," Phil writes. "The cms-list began in July 2000, at the O'Reilly Open Source Convention held in Monterey, CA...Today, the list has over a two thousand members, and is the largest independent gathering of content management professionals online (at least, to my knowledge). Cam and I do our best to keep the discussions free from marketing spam, and focused on the issues, products, and practical experiences..."

Glossary

All terms below from Canadian Forest Service IT web site www.nrcan.gc.ca/cfs-scf/science/prodserv/kmglossary_e.html.

Chief Knowledge Officer: the senior executive responsible for knowledge management and the knowledge infrastructure at the corporate level.

Content value: the economic or social utility of data, information, knowledge, and wisdom.

Digital library: a collection of a very large number of digital objects, comprising all types of material and media, that are stored in distributed information repositories and accessed through national computer networks.

Digitization: transforming data, information, knowledge, or physical objects from various media into digital objects.

Drill down: to access increasingly detailed data or information, starting from a high level of a hierarchical database or information base.

Expert system (ES): an information system that uses codified tacit knowledge in a knowledge base and an inference engine to solve problems that normally require significant human expertise.

Explicit knowledge: knowledge that has been formally expressed and transferred.

Inference engine: rule-based algorithms that interact with a knowledge base to draw conclusions about a set of inputs.

Information: data that has been interpreted, translated, or transformed to reveal the underlying meaning.

Information asset: information viewed as property; a commodity or product with associated costs and value.

Information base: database containing information (e.g., reports, documents, interpreted data).

Information management (IM): integrating information standards, processes, systems, and technology to enable the exchange of information among providers and users in order to support the management objectives of an organization.

Information overload: excess information beyond that desired or needed by a user, which requires nonproductive processing.

Information repository: an electronic database that contains documents or other digital objects.

Information retrieval: finding, accessing, and downloading digital information through networks

Information science: pure and applied science involving the collection, organization, and management of information.

Information society: a society in which people interact with technology as an important part of life and social organization to exchange information on a global scale.

Information theory: a statistical theory that measures information content and the efficiency of human-machine communication processes

Intelligence: an ability to learn and understand new knowledge or reason in new situations.

Knowledge: information from multiple domains that has been synthesized, through inference or deduction, into meaning or understanding that was not previously known.

Knowledge acquisition: eliciting and formally coding tacit knowledge into facts and rules and entering them in a knowledge base.

Knowledge asset: knowledge viewed as property; a commodity or product with associated costs and values.

Knowledge base: a database containing tacit knowledge in the form of formally coded facts and if-then-else decision rules.

Knowledge-based economy: an economy in which value is added to products primarily by increasing embedded knowledge content and in which the content value evolves to exceed the material value.

Knowledge content: the meaning that underlies data, information, knowledge, or wisdom.

Knowledge infrastructure: an integrated architecture of computers, systems, networks, and communication technology that supports horizontally integrated and vertically integrated knowledge management.

Knowledge initiative: building knowledge management capacity in terms of resources, knowledge infrastructure, and content, and developing an organizational context to implement that capacity through leadership, culture, and learning.

Knowledge integration: combining separate knowledge management programs into a more complete whole, coupled with adapting diverse groups into a coordinated knowledge-sharing culture.

Knowledge management (KM): promoting, coordinating, and facilitating knowledge synthesis, preservation, processes, production, and exchange in order to support the strategic goals of the organization.

Knowledge preservation: implementing processes to capture, archive, and protect explicit and tacit knowledge and to maintain accessibility to it as technology evolves for as long as the knowledge remains useful.

Knowledge processes: organizational context, human activities, content value, information systems, and information technology that are used to add value to content by increasing the amount of underlying processing and depth and breadth of meaning.

Knowledge product: knowledge that has been adapted to the needs of specific users.

Knowledge production: acquiring content, transforming it into a higher order of meaning and value, and disseminating it as knowledge products.

Knowledge representation: the framework and methods for coding tacit knowledge in a knowledge base.

Knowledge revolution: the global-scale transformation from an economy based on the value of material goods to one based on the value of knowledge.

Knowledge synthesis: using reasoning to integrate data and information from multiple domains to create a new meaning or understanding.

Knowledge worker: a person who creates information and knowledge.

Tacit knowledge: personal knowledge, gained through experience, that is influenced by beliefs, perspectives, and values.

Leslie Priest (www.roubalmapping.com/lpriest.htm) - 20 years as practitioner of knowledge management in Colorado and California, and member of STC RMC.

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Staying competitive with continuing education

by *Martha Sippel*

I had a continuing education discussion with a friend who works in a small company last night. I asked him, "If others in your company are receiving training, why aren't you?" He answered, "I'm too busy at work and have too much to do to search for courses." I pointed out that the work would still be there when he got back, and asked why he didn't look for continuing education in new topics that would help his career. Again, basically the same response, "I've got too many deadlines before the end of the year and people are counting on me to be here."

This response sounds familiar. At the last company I worked for, we were responsible for charting our own training development. With a limited training budget, it was first come, first served. Some people did not or would not take the initiative to find courses or conferences. Others tried to take as many courses in as many different topics as they could. Some people just do not realize that there are worthwhile things they can learn to help them in their current job or career. What a mistake!

I can't think of a course or conference I attended where I didn't learn anything. Of course, some are better than others, and some I left thinking, "I knew most of the material" or "I could teach that." To me, continuing my education helps to keep me competitive. And, like many others I know, I spend personal time reading technical articles, journals, magazines and novels. I also spend time searching for conferences, courses, seminars, and other events where I might learn new tools and new tricks or tips, or be inspired by new ideas. It takes some time, but don't you believe that you are worth the time and effort?

Two years ago, I was asked to manage a major project in addition to my responsibilities managing people, an intranet, and a department. I seriously considered the consequences and agreed. However, first we negotiated training that would enable me to become a better people manager and time manager so I could successfully add something else to my plate. Relearning how to manage projects effectively and efficiently was extremely important. That training included learning Microsoft Project and attending internal and external time management and project management courses.

I don't pretend to be an expert in either of these subjects (or many others, for that matter), but I learned interesting and valuable things to apply to my everyday work and personal life. I was still able to attend the STC international conference that year, and I gained a lot of education while increasing my responsibilities. Managing that project was a worthwhile experience.

As the October meeting panelists said, technical communicators must be versatile, flexible, and adaptable. They must possess these skills and be more innovative to be employed in this market. To me, that entails continually learning, reading, and discussing issues and challenges with others. STC provides these things for a reasonable price. Membership fees are low, meetings are incredibly cheap (where else can one find continuing education for \$5.00?), and seminar and conference fees are reasonable. If you investigate what other professional organizations charge for dues and meetings, you'll find that STC is one of the most reasonably priced. No, I have not been asked or paid to say this—I truly believe in STC's value for the money.

I also found a mentor to help me along the twisted path to becoming an independent contractor/consultant. Believe me, I tap her knowledge at least once a week! I don't think a week goes by that I don't have at least one or two questions for Linda Gallagher, and she is always willing to help. You simply cannot put a price on receiving good, solid advice from a professional. More on mentoring in a future article.

I can always find something interesting in Intercom, Technical Communication, Tieline, Hyperviews (the Online SIG newsletter), Writer's Digest, and even on the Internet or in the newspaper. I gain even more knowledge by simply talking to other technical communicators, especially STC members. They are a wealth of information. I learn something at every meeting. You don't have the time? Make the time. It is an important step to furthering your knowledge and career.

Here are my seven tips for staying competitive in today's technical communications market:

- Take time to set some new goals each year.
- Make those goals reasonable, measurable, and attainable.
- Seek educational opportunities to help you meet those goals.
- Continue your education in as many topics and ways as possible.
- Invest in yourself by paying for some or all of your continuing education.
- Find a mentor you can work with who has knowledge to share that you desire to learn.
- Take advantage of the resources STC has to offer.

For example, the RMC is sponsoring an XML Seminar on December 6, 2002. For only \$100 (member's cost), you can spend a day learning the basics of XML. This year and next, STC has several telephone seminars that provide training on diverse topics. (By the way, if you or your company is

willing to host any of these for the fee of \$145, and charge a nominal fee for STC members to attend, please email me.) This is another inexpensive way to gain knowledge.

The moral of this story is the importance of spending the time and money to invest in your future. This includes investing in your continuing education and your career. It will help you keep your skills current and add to your resume and portfolio—not to mention your self-esteem! Happy learning!

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Tips from the trenches

by *Deb Lockwood*

Since this is a new column, I think it would be appropriate for me to introduce myself to you. I am Deb Lockwood, a senior member of the Rocky Mountain Chapter of STC, and a senior writer with CSG Systems, Inc. in Westminster, Colorado.

I volunteered to write a column for our Technicalities newsletter, and my proposal was accepted. Each issue's column will contain information about a specific topic—a different topic for each issue. To garner tips, I will send a query to the Rocky Mountain Chapter's e-mail list. I'll compile those responses and publish them in this column. This month, I posed the following question to the list: "How do you get over writer's block?" I received many wonderful replies. Following is a compilation:

- Get away from everything and let the mind relax.
- Exercise or take a walk.
- Read something unrelated: the newspaper, a magazine, a novel.
- Research the topic.
- Ask the following journalistic questions: who, what, when, where, why, and how.
- Brainstorm with another person.
- Divorce yourself from the topic and regain a more objective stance. Once the head is clear, retrace any steps in a process, starting with step #1. Revisit the overall project goals and objectives and rethink the audience and purpose.
- Write the easy parts first. The easiest part is the one that is clearest in your mind.
- If you hate putting your fingers on the keyboard, try a dictation program. One contributor uses Dragon Naturally Speaking.
- One contributor found that, after years of using a typewriter, when he purchased his first PC, his writer's block was actually "typist's block." Once typing became easier, the block disappeared.
- Learn more about the subject matter. One contributor says that going back over the research, talking to another SME, and working with the subject matter usually does the trick.
- Don't try to write the finished product in the first draft. Instead, using a word processor, jot down key ideas, in no particular order. Next, organize those ideas into a logical order and expand them into

complete sentences. Try to resist editing until you've written at least one sentence for each key idea.

- Do the following:
 - Schmooze with a developer or two. If necessary, resort to having lunch with them.
 - Slip in a relevant question.
 - Go back to your desk and write down what they said.
- Don't get bogged down in self-editing as you write. Here's a suggestion from a wise English professor: turn off the computer monitor (so that you can't read the text) and type. Type now, edit later.
- One contributor's writer's block usually occurs when pertinent information is missing or when she is writing about a topic before completely assimilating the information. Therefore, she tries to get away from the computer and think about the topic, assessing whether she has all of the information she really needs.
- Leave early and grab a big margarita.
- Talk to the SMEs, telling them what you are trying to say and letting them free-flow their thoughts while you take notes.
- Look in STC publications to see how other authors have handled a similar subject.
- Give what you have written to another writer or editor, a potential end-user, or a SME, and ask for comments. Ask the reviewer to talk you through his or her comments.
- Change the medium in which you are writing. If you normally write using a computer, pick up a pen or pencil.
- Brainstorm topics using Post-it Notes. Rearrange the notes in different orders.
- Verbally explain the concepts to another writer, asking for feedback and suggestions.
- Organize. Break the piece into a logical writing structure and complete one piece at a time.
- One contributor said he jumps in and writes almost anything that pertains to the subject matter. Once he constructs the draft, however rough, the editing process from that point renders the block issue moot.
- Propose a workflow showing how you will chunk topics and organize chapters. Discuss the workflow with another writer or with the SMEs.
- Hand a marker to a SME and ask him or her to explain the technical concepts on a white board.
- When all else fails, one contributor wrote, remember that writer's block is just a failure of will. That can be a powerful motivator in getting over blocks.
- Go to the following Internet documents, which are published by the Purdue University Online Writing Lab:

http://owl.english.purdue.edu/handouts/general/gl_plan1.html

http://owl.english.purdue.edu/handouts/general/gl_plan2.html

http://owl.english.purdue.edu/handouts/general/gl_plan3.html

Finally, get a copy of the following book: *The Writer's Block: 786 Ideas to Jump-Start Your Imagination*, by Jason Rekulak. And whatever method works for you, keep at it. One good thing about writer's block—it almost always ends, sometime.

Don't worry—you'll get it written!

(Thank you to the following contributors: Emily Armstrong-Cole, Nancy Emmerson, Alida Franco, Ray Harlan, Mary Headley, Debbie Matuskevich, Lisa Metzgar, Diane Plampin, Roy Sargent, Martha Sippel, Elizabeth Staton, Susan Steen, Tammy VanBoening, and Rodger Ward.)

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Writing every day helps keep writer's block away

by *Stephen Wertzbaugher*

Ask writers what terrifies them most about writing and many will reply, voices quavering, "Staring at a blank page." Whether it's a sheet of paper peeking out from a typewriter or the electronic sheet glaring from your word processor, there's something about staring at all of that blank whiteness that turns confident and productive writers to jelly. I would rather chew my own leg off to escape a bear trap than confront the barren desolation of the blank page.

But why does such an innocuous thing as a blank page cause such terror? Fear. Fear of not knowing what to say or how to say it. Fear of writing worthless trash that would make even a first grader turn up his nose. Fear of looking like a hack. And what does fear breed? Writer's block, one of the scourges of the writing profession. Even now, my writing demons are hovering over me, their crimson eyes greedy with the anticipated pleasure of preventing me from finishing this column.

Now that I have you shaking with terror as you sit in your comfortable chair I'm going to tell you how I avoid such writing nightmares. Ready? Are you sure? It's daily writing practice. "Daily what?" you ask. I'll say it again—daily writing practice. And what is daily writing practice? Daily writing practice is a fiction technique like free writing. But instead of starting with nothing and writing anything that pops into your head, you start with a "writing prompt" and then write anything that comes into your head. For example, if my writing prompt is "your worst nightmare," I might write a page or two about documenting the use of a Cray supercomputer with an Etch-a-sketch.

Daily writing practice offers advantages to writers of any ilk. First, you are writing daily. Like athletes, writers must write regularly in order to gain proficiency and master their craft. How long should you practice? Some writers write for a certain amount of time, maybe fifteen or thirty minutes. Others write a certain number of pages. And remember that daily writing practice is just that—practice. You are allowed to make mistakes, goof up, be horrible, write drivel, write a single sentence that spans an entire page, not make any sense. You can write without criticism, either from yourself or from others. You are free to do what you want to do. And that kind of freedom breeds the confidence that will shatter fear of the blank page. Your writing will improve and so will your speed. Practicing daily also helps you find your writing voice. I know I'm writing to technical communicators

here, but writing voice is important, even when documenting how to use a can opener. Dry, boring instructional and technical writing will lose the reader every time, and if we aren't educating our users, then who is? A scary thought, that.

So, how do you begin daily writing practice? One way is to create your own daily writing prompts in advance, write them on sheets of paper, put them into a hat, and then draw one out every day and write from that prompt. Fortunately, you don't have to invent your own writing prompts. One good source for daily writing practice is *A Writer's Book of Days* by Judy Reeves, Writer's Digest Books. Another source is the [Writer's Digest Web site](#), which offers a daily writing prompt as well. Both of these resources were created to help fiction writers improve their writing, but I use them to help me with my technical writing as well.

Terror of the blank page is one of the most prevalent fears among writers. But that fear can be overcome and eliminated with daily writing practice, a technique that not only helps you master your craft, but gives you the confidence and courage to face that white-faced scourge of the writing profession.

For other ways to combat and defeat your writing demons, read Deb Lockwood's article, "[Tips from the Trenches](#)," also in this issue of *Technicalities*.

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What does your HAT do behind your back?

by *Dana Cline*

A recent discussion on the Help Authoring Tools (HAT) list on Yahoo centered on the often poor or bloated HTML produced by some help authoring tools. Some thought their HAT produced clean compact code; others figured theirs produced bloated code. Several help authoring consultants decided to find out exactly what was happening.

We started with a published specification. The spec called for a single HTML topic, specified the actual text for multiple paragraphs, and included information about the styles and layout. The topic was sufficiently complex in that it contained tables, several types of lists, a shortcut, a popup, and several complex styles. Each author then implemented the sample topic in his or her favorite tool, importing only the text from Notepad.

The results of this exercise are posted at consultant David Knopf's web site at <http://www.knopf.com/resources/hatcomp>. Tools we tested include AuthorIT, ForeHTML, WebWorks Publisher, Doc-To-Help, and several versions of RoboHelp. If your favorite HAT was not represented and you'd like to contribute that sample page to the project, there should be information on the web site about how to do so by the time you read this.

As expected, DreamWeaver produced the most compact HTML, at 7k for the sample page. The largest was RoboHelp HTML at 27k. The required CSS style sheet sizes were also all over the map, ranging from .5k for DreamWeaver to over 30k for AuthorIT. The resulting CHM file sizes were interesting – almost all HATs were within about 20k, though both versions of RoboHelp topped out at over 40k. Of all the tools, only DreamWeaver produced both HTML and CSS that passed the W3C validation engine.

All of the results are posted on David's web site, including links to download each tool's CHM file, view the raw HTML, and check the validation results.

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Adding member value: STC's "growing" concern

by Rahel Bailie, Region 7 Director-Sponsor

(Adapted from an article by Bonni Graham, Region 8 Director-Sponsor)

By now, you've noticed that the STC web site has a members-only section, where STC has moved some of the site content. You can get to this content by entering your STC membership number—for members like me who never remember our numbers, look on the mailing label of any publication—and a password that was recently emailed to you by the STC office.

Why did we do this? The short answer is that in January 2001, the STC Board of Directors voted to change our policy to allow chapters to restrict certain informational items to members only. The longer answer is that we evaluated the variety of information available on chapter and the Society web sites, and decided that some of it could legitimately be placed behind a login. The distinction lies in STC's status as a charitable organization.

Bill Stolgitis, in the October 2001 Tieline provided the following background and insight:

"Since 1968, when STC was re-organized as a 501(c)(3) charity, STC has devoted the substantial part of its efforts to activities within the scope of its charitable purposes. These activities (e.g., publications, conferences, research, scholarships) can be found in STC's Articles of Incorporation and its bylaws.

"In keeping with its charitable status, STC has made these services available to members and non-members alike. The IRS, however, recognizes that while conducting the daily business of a charity, there will be some activities essential to the charity's well-being that are not, strictly speaking, charitable in nature. The IRS allows these activities so long as they do not constitute a substantial part of the organization's activities.

"For STC, such activities have included selling advertising (magazine and journal), renting the mailing list, and providing employment information (clearly not within the scope of STC's

charitable purposes). These activities have always constituted an insubstantial part of STC's total activities.

"STC is fully engaged in many activities that are within the scope of its charitable purposes. And these services must be made available to members and non-members alike. As mentioned above, STC is also allowed to engage in activities that are not within the scope of its charitable purposes so long as these activities are "insubstantial" (a minor financial burden). These non-charitable services may be restricted to members only."

The new STC site at www.stc.org has been arranged to better show the value of STC membership. For starters, as a charitable institution, American STC members can claim STC dues as a charitable donation. For all of us, STC membership remains the best value around, and is an investment in our professional development. I call it my "professional insurance": my STC membership is the insurance I need to keep my professional skills up to date.

The web site's "behind the curtain" items are the Society-level job listings and online content of STC publications (for membership enhancement value), and the member directory (to protect your privacy). At the chapter level, you may also choose to limit access to various services you provide, as long as it does not create an undue burden on chapter finances. Bear in mind that events contributing directly the STC's charitable purpose, such as seminars or chapter meetings, may not be restricted to members only, although members may be charged preferential attendance rates. (If you have any questions, your Director-Sponsor can help chapters figure out ways to implement changes at the local level.) Rather than provide rules for chapters to follow, we can provide guidelines, the foremost being this: give non-members a reason to join STC.

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These are my reasons - what are yours?

by Mike Murray, Orlando Chapter President

Recently I received an e-mail invitation from the STC office to renew my STC membership online—and I was able to do so, right away. Renewing was easy for my co-workers and me. Throughout the year, we mention to management STC and how it benefits what we do at our jobs. When it came time to renew, it was just a matter of confirming the obvious. A brief e-mail to our supervisor resulted in an immediate "Yes!"

It really doesn't take much thought to realize why, regardless of how good or bad the economic conditions, severing your ties with STC is a bad move. If my employer had been unwilling to pay my \$125 renewal, I would have done whatever it took to renew it myself - whatever it took! Why?

Lifeline

I think of STC as my lifeline to the technical communications profession. If not for the connections that come from mailing lists, meetings, and publications, I would feel like I'm on a desert island, wondering what wonderful new things were developing in the world around me. I couldn't stand that! I pride myself in delivering the best possible products and services to my customers, and if I'm not keeping in touch, I can never be sure I'm doing that. I owe myself and my customers a lot more!

Networking

I don't know that I ever really valued networking quite as much as I do since joining STC. I've found out again and again just how small this world is as I've met people with similar interests who have energized me and changed my life. I've seen time and again members who have persistently networked and found technical communications jobs that make them excited to get up in the morning and start their work day. You can see it in their eyes in the chapter meetings. It's extremely fulfilling, and I want more!

Friendships

While I certainly expected to develop new friendships in STC, I never ever expected that the friendships I would make in STC would become the best

and richest I would have anywhere. The next time you see me, I invite you to look into my eyes and ask me about the friendships I've made in STC, and you'll know that I'm not exaggerating. I want to hang around these people for a long time, so you can be sure I'll always renew my membership.

Those are my reasons; what are yours? Is it the high-quality publications? I read Intercom cover to cover every month. What a great magazine! Is it the Annual Conference? I think I've been to seven or eight, but who's counting? Is it our chapter meetings with the quality content that you've asked for? Is it the chapter members themselves who are so energetic and who seemingly would do anything in the world they could to help you? Whatever the reason, it doesn't take much thought to know that renewing your STC membership as soon as possible is a "no-brainer."

Whatever it takes...

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Run for office

by Molly Malsam and Marella Colyvas

The last issue of *Technicalities* contained an article with some great testimonials from previous and current council members. The Rocky Mountain Chapter is seeking new officers for 2002 - 2003. As you discovered from reading the testimonials, as an STC officer, you can grow professionally and personally, meet other technical communicators, and serve your profession.

The following describes the elected chapter offices.

President

Note: The vice president automatically moves to the position of president for the year following the election.

The president's responsibilities are to:

- Conduct meetings of the chapter Administrative Council
- Assign duties to officers and appoint assistants or committees as needed
- Help form chapter policy, goals, and objectives
- Supply guidelines for budgets, expenditures, and other fiscal activities
- Speak at chapter meetings and write articles for *Technicalities*
- Share ideas with other chapter leaders and submit reports to the Region 7 director-sponsor

Typical commitment: 7-9 hours/week

Vice President

Because this position leads to the chapter presidency in 2003, the vice president needs all the qualities of the president: enthusiasm, energy, responsibility, and good problem-solving skills.

Responsibilities include the following:

- Help form chapter policy, goals, and objectives

- Assume the duties of chapter president when needed
- Act as liaison with local universities and student chapters
- Attend the Chapter Leaders Workshop at the Region 7 Conference
- Identify possible overall committee managers and develop overall plans for 2002 - 2003

Typical commitment: 3-5 hours/week

Treasurer

Responsibilities include the following:

- Establish and monitor a chapter budget for the fiscal year
- Establish and maintain a checking account, savings account, CD account, and scholarship fund
- Deposit chapter funds and pay invoices
- Prepare monthly reports of chapter income and expenditures and a detailed year-end report
- Maintain all chapter contracts

Typical commitment: 3-5 hours/week

Secretary

The secretary's duties include the following:

- Take minutes at administrative council and other chapter meetings (or arrange for a substitute)
- Prepare and distribute copies of the minutes
- Write brief descriptions of chapter meetings for Technicalities
- Prepare correspondence related to chapter business

Typical commitment: 2-4 hours/week

Nominating Committee

The nominating committee performs the following duties:

- Invite members to run for office
- Evaluate qualifications of possible candidates and announce the slate of candidates
- Prepare the ballot, hold the election, and report the results

Typical commitment: 1-2 hours/week

Remember that Committee Chairs are appointed by the Council, not elected.

To become a candidate or to recommend someone else for office, please contact Marella Colyvas (marella.colyvas@eds.com, 303.736.4044) or Molly Malsam (malsam@ecentral.com, 303.694.3701).

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Where is technical communication going?

This article provides a recap of the panel discussion during the October 2002 chapter meeting. The panel was moderated by Mike Livesy, with chapter members Martha Sippel, Frank Tagader, Linda Gallagher, and Joel Meier comprising the panel.

How do you view the future of tech communication?

Martha: Continuing to add value as a technical communicator entails being flexible and adaptable, and constantly learning new things. These include core skills such as writing, editing, and printed and online documentation.

Frank: Technical communicators must become more adaptable, flexible, and willing to try new disciplines.

Linda: It's important to be flexible. We can transfer our skills to any type of written communication and other related fields including usability, content management, Web design and writing, e-learning, HTML, XML, JavaScript, and more.

Joel: We are going to be writing to and working in domain-specific paradigms again and be asked to do more (not necessarily with less) and know more, and do it faster. We will be writing to a visual rhetoric. For example, we will write more to the visual aspects of knowledge transfer and less to a narrative approach.

What types of deliverables do you work with and how do you see this changing?

Martha: Deliverables: Online, online help, CDs, HTML, print, and PDF. Also, providing usability and testing studies, website design, user interface design, and creating CBT and WBT. Future: I wish I could predict the future!

Frank: Online drives all our deliverables.

Linda: I continue to develop a lot of user guides for both print (usually PDF files) and online use, typically using single-sourcing techniques. I also

write and edit test documentation (including graphics), design FrameMaker and WebWorks Publisher templates, conduct training classes, and resell products.

Joel: I write primarily to online deliverables. I do not see this changing much. I do think that we will see less graphics and screen shots as a result. I do foresee single-sourcing strategies replacing reuse strategies as a result of this.

What tools/languages do you use (e.g., Frame, Dreamweaver, Java, HTML) and how will this change?

Martha: I use Word, Excel, PowerPoint, Adobe Acrobat, Access, HTML, and Doc-to-Help. I have used FrameMaker, Visio, Visual SourceSafe, FrontPage, and Paint Shop Pro. I feel I need to use InDesign, Javascript, VBScript, RoboHelp, Dreamweaver, Fireworks, Homesite, PageMill, Flash, etc. Future: I think we'll need to use XML, Flash, multimedia programs, version-control systems, and content management programs.

Frank: Visio, Project, Excel, Word, J.D. Edwards Content Manager, Trados, J.D. Edwards AutoPilot (scripting tool), HTML, XML.

Linda: My tools of choice are FrameMaker, WebWorks Publisher Professional, and Acrobat. In addition to these, I use many other tools as needed, including Word, Paint Shop Pro, Visio, RoboHelp, Doc-To-Help, ForeHelp, FrontPage, Illustrator, and CorelDraw. In the future, I suspect that I'll be using content management and XML tools.

Joel: I use Visio, Excel, Word, J.D. Edwards Content Manager, and J.D. Edwards AutoPilot (scripting tool). I counted about another 12 homegrown tools that I use a J.D. Edwards. In the future, I foresee that I will need to use Flash and XML.

What types of skills do you see tech communicators using in the future?

Martha: Again, good organization, writing, and editing, skills are imperative. Also, you may be asked to provide project management, team building, and training. You must be versatile!

Frank: Organization, multitasking, good writing and editing skills are the core and will continue to serve you well. Add knowledge of what you are documenting, understand what other fields touch yours, and look at ways of expanding your skill base.

Linda: Our core skills of being able to write well and organize information will always serve us well. Those are the skills that have led technical communicators into other fields, and they will lead us into more fields in the future. Our world is becoming more complex, so these skills will continue to be needed. Skills we will need in the future may include content management, knowledge of XML and databases, creating e-

learning and other "e" technology products, scripting, new tools, and measurement methods such as Six Sigma.

Joel: We will need to be able to program, QA, train, use and design our own knowledge management strategies, utilize push technology—and probably a host of other similar skills.

Do you recommend continuing education and if so what type?

Martha: People learn in different ways and, fortunately, there are many ways to continue your education, such as academic and professional training programs, both online and through colleges or professional organizations. To continue your education in any field you need the core skills of writing, editing, organization, and basic computer skills (knowledge of Word, email programs, Excel, and PowerPoint). You can then select the best method for you.

Frank: Practical skills are great. I sometimes question whether academia is on target with what is happening in the marketplace. Still, I think an education in the humanities is the best basis for being a well-rounded technical communicator

Linda: We must all be life-long learners to survive in today's environment. You have to decide what learning opportunities work best for you. I've decided not to pursue an advanced degree for reasons of the time commitment, the cost, and the ROI. However, I regularly attend STC meetings, conferences, and seminars. I read books, participate in e-mail lists, and use the Web resources that are available to learn about all types of tools and technologies.

Joel: Of course. I just went back to graduate school. On one hand, it has made me realize how wonderful, accessible, and in-depth the world of academia is. On the other hand, it has also made me realize how slow their wheels turn compared to the business world. So, I am torn because I still see that society values the pieces of paper academia hands out, but I also believe, like Linda, there is more ROI in attending STC meetings, conferences, and seminars.

Does there appear to be a trend to move away from technical communication to other communication areas such as usability, content management, grant/proposal writing, marketing communications?

Martha: Yes, I believe there are so many fields that you cannot specialize in just one; however, some people are successful in specializing. I believe that you must be able to complete projects in different areas or industries.

Frank: There are opportunities outside tech comm., but there are ways in which tech comm. is changing. You have to broaden your horizons and wear different hats. Try new things. Your core can be technical communication, but your skills can be used in multiple disciplines.

Linda: We must all be prepared to move into different fields. Here are just a few of the areas technical communicators can and have moved into: usability, e-learning, content management, designing document templates, writing for all types of industries and different types of documents, project management, Web design, graphic design, and many more.

Joel: I do not know if there is a conscious effort by writers to "move away" from tech comm. Sometimes it seems that we are being subsumed by the other communication disciplines, and to survive or thrive many of us are adapting.

What do you see for salary/compensation trends?

Martha: Rates seem to be stable. There seems to be more opportunities to price things according to the insights and value you provide and the deliverables you can create within a client's deadlines.

Frank: Fairly flat right now.

Linda: I've heard from many independents that rates are down across the country, and they've had to lower rates to get work. I've been lucky with several ongoing clients. I've not reduced my rates. I even raised my rates with some new clients in the summer of 2001 and as I renewed contracts with ongoing clients, I raised rates as well. We do have to be flexible, but I think it's a mistake to accept rates that do not reflect your experience.

Joel: Flat for the foreseeable future. I am also afraid that we will be the last to reap the benefits of a recovered economy—unless, we can quantify, quantify, and quantify our savings and maybe even revenue-generation possibilities to management, upper management, whoever is in control of the budgets at our levels. Unfortunately, I am willing to bet the tools and time for developing these metrics will be up to us and on our own time.

Your comments on the advancement of tech comm.

Martha: Advancement of technical communications: Technical communicators will continue to add value in different, innovative ways. There is an extensive list of related organizations on the STC website that provides an insight into what the future may hold for technical communicators. We are being asked to contribute more information about more products and topics in more industries than ever before.

Frank: Technical communication and the skills associated with it will continue to be valued in the workplace. But, the days of being "just a tech writer" are over. You have to be able to adapt to the needs of the market. Continue to grow your skills. Look at educational opportunities. See what values you can bring to areas such as usability, user interface design, and project management.

Linda: I think that we have to work towards finding ways to prove our

value. One such method is Six Sigma. I don't know how we apply measurements effectively to our work, but I think we need to try.

Joel: I think that we have come full circle. We started out by writing to a domain- general paradigm as far back as cave drawings. From 1920s through the 80s, we wrote to a domain-specific paradigm. Today, we are moving back to writing to a domain-general paradigm. We have to. Everything is too complicated.

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September 2002 meeting review: single-source publishing with FrameMaker

by *Linda Gallagher and Joel Meier*

Martin Smith, the creator of VersiText, a help-authoring tool for structured FrameMaker documents, demonstrated how you could use FrameMaker to create single-source documentation for multiple audiences. Martin writes and organizes the information in FrameMaker. He then uses FrameMaker to publish his standard print documentation and VersiText to "cherry pick" information and publish his online versions.

With the release of FrameMaker version 7.0, Adobe has combined the features of standard FrameMaker and FrameMaker+ SGML (used to create structured documents) into a single product. Using the structured functions of FrameMaker 7.0, Martin demonstrated how you can use structured documents and VersiText to produce totally different outputs for your printed and online documentation sets.

Structured documents, such as those created using SGML, have a reputation for being both a complex and an expensive way to manage information. However, Martin made it look fairly easy. Using an Element Definition Document (EDD), FrameMaker 7.0, and VersiText allows you to organize and reorganize the structure of your information.

The key to implementing this method is creating an EDD that contains all of the documentation elements you need and structures them appropriately for your outputs. This process requires a thorough analysis of your users, their needs, documentation content, and more. Martin then customizes VersiText as needed to produce the online output in the format and using the structure you require.

With some planning and setup, you can:

- Produce books for tiered customers. For example, Martin's department uses a single set of FrameMaker files to produce different documentation for their internal users, business partners, and customers. Each documentation set includes only the information required by each set of users. Not only can the content be different,

but the information can be organized differently for each print or online output.

- Ensure consistent formatting. Setting up a single EDD or Style Sheet ensures consistent formatting. You can extend this consistent formatting across your documentation department, even if your department is in multiple locations.
- Ensure consistent organization. Setting up a single EDD ensures consistent organization by requiring a particular organizational structure. For example, if the EDD specifies that a procedure consists of an overview, an introductory phrase, and steps, the EDD lets you add only those elements to a procedure. This consistent organization can be extended across your documentation department, even if your department is in multiple locations, by having all writers use the same EDD.

Using structured elements to organize your content has many advantages. For example, you may choose to organize commands categorically in a manual that documents a programming language. The manual may provide considerable background information about each command, in addition to its syntax and arguments. The structured elements in your EDD let you automatically label the various types of content in the manual, in this case categories, commands, background information, syntax, and arguments.

Having the various types of content labeled this way makes it possible for VersiText to generate an online help system that excludes the background information and reorganizes the commands in alphabetical order.

Martin uses FrameMaker version 7.0 and VersiText in this way to produce printed and on-line documentation for Encorp's generator power control systems. Martin also demonstrated how VersiText can be used as-is to produce HTML-based help and Microsoft HTML Help (compiled HTML help). Custom-engineered output modules (customized by Martin) are also available, allowing VersiText to be customized on a company-by-company or project-by-project basis.

Martin's FrameMaker/SGML/VersiText presentation was excellent, as is his bio: Martin indicated he followed this path to understand more about programming in order to make his job of communicating technical information easier. He also says a thirst for knowledge is healthy and that he constantly strives to learn more about areas related to technical communication.

Obviously, Martin's search for knowledge has made him more marketable in this unpredictable market.

Martin has also worked as an independent technical writing consultant. In May 2001 Martin formed his own software company, GolehTek LLC. GolehTek's flagship product is VersiText.

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Thanks!

by Helen Tuttle

A big **thank you!** to the people who donated door prizes for our membership drive held at the November STC RMC chapter meeting. These STC volunteers deserve a round of applause for their continuing efforts on behalf of the Rocky Mountain Chapter:

- Jo Davies, who donated 15 books from the Adobe Classroom in a Book series
- Linda Gallagher, who donated a licensed copy of WebWorks Publisher WordHelp
- David Garrett, who donated a licensed copy of AuthorIT

Thank you for your generous gifts and actions in making the membership drive successful.

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Technicalities

This site is best viewed with Internet Explorer 5x or newer.

Editorial

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Job Postings

Send job postings to jobs@stcrmc.org

Jobs are posted on the chapter website

(http://www.stcrmc.org/jobs_freelance.jobs.htm), and are emailed to the techcomm-discuss mailing list.

Chapter website

<http://www.stcrmc.org>

STC RMC Council Contacts

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