“Technical writing is about the technique of writing, and not just writing about technical stuff.”

Joaquim Baptista
Consultant

Daniel Bofill
SISCOG

The 7th Report
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What happened?

After the class at FCSH last month, professor Rute Costa praised the event to her colleagues. Some students did not attend the first class because of scheduling conflicts, so Rute asked us to go back for a second class. We set a new date. Unfortunately, Rui Diogo Serra could not return on May 20th due to professional conflicts.

The room was nicely filled with 15 students from the masters of Writing and Text Edition, plus the professors Clara Nunes Correia and Antónia Coutinho. Although they went to the trouble of requesting a larger room to leave space for outsiders, we had a single outsider.

Joaquim Baptista started by explaining the major difficulties and evolution of technical writing in Altitude Software between 1997 and 2014, including details of the hiring and coaching processes. Then, he explained all the different tasks that a technical writer can do, actually a summary of the tasks he did during his work at Altitude Software. This vision forms the basis for his new consulting business.

Daniel Bofill explained the complexity of SISCOG products, especially their customization. He added details of the project to systematize all documentation, which was approved one month ago. He stressed that he was presenting the problems at SISCOG, and that he is still searching for the solutions.

Answering to a question, Daniel Bofill explained his view that technical writing is about the technique of writing, instead of writing about technical stuff.

Nine persons returned their public reports, mostly filled with curiosity and kind words.

There was some initial misconception in class that “Technical Writers @ Lisbon” was a commercial enterprise, and that misconception was only dismissed near the end of class. Some of the comments reflect that initial confusion.

I would like to thank professors Rute Costa, Clara Nunes Correia, Antónia Coutinho, and all the attendees for their attention and their questions. We certainly felt welcome.

— Joaquim Baptista, px@acm.org
Joaquim Baptista

Joaquim starts 2015 as an independent consultant. He draws on his extensive experience to offer effective solutions with the sophistication that typically requires a whole team of consultants.


He adopted and refined agile practices since 2004, and published the 2008 practices at ACM SIGDOC’08 under the name uScrum. He continuously adapts the agile practices to suit the needs of an evolving team and evolving workload.

Before tackling documentation he worked as trainer, programmer, system administrator, and academic researcher.

Joaquim “px” Baptista

Effective Knowledge for Effective People.
Your flexible consultant for knowledge management.

Learn what your company should know!
Learn where you stand to plan for the future.
Your company cannot manage what it does not know.

Manage with agility!
Discover and deliver incrementally.
Remove annoyances, manage risk.

Optimize the flow of your company knowledge!
Structure the company knowledge for consumption and maintenance.
Have a place for everything.

Make your knowledge easy to consume!
Write clear thoughts in clear words.
Inspire with illustrations and comics.
Explain APIs with code samples.

Design effective training and demos!
Create inspiring demos.
Create hands-on lessons or tutorials
with guaranteed learning objectives.

Craft your company software!
Capture requirements precisely.
Design the customer experience.
Streamline decisions for everyone. Automate.

Protect the future with open formats!
Embrace flexible tools and open formats
that adapt to the growing needs of your company.

www.p qx uim.com — px@acm.org — +351 91 784 2996
20 Years of Technical Writing

Major points, after 20 years

- Learn before writing. “Clear thoughts in clear words.” Then, learn better, write better.
- No formal training on technical writing.
  1. Hire English, wits.
  2. Train on product.
  3. Train on writing.
  4. Innovate.

(Learning) Operations

- Unique concepts.
- Business variation.
- Operational implications of technical decisions.

(Learning) Systems

- 21 services.
- 26 applications.
- 6 telephony gateways.
- ... 1000 small parameters.
- Also, third-party systems.

(Learning) Telephony Gateways

- Unified telephony model, but...
  - varies with switch.
  - varies with switch configuration.
(Learning) Scripting

Proprietary language with unique concepts, (or your choice of language)

Several words to coordinate. Specific roles to fulfill.

(Learning) Curriculum Development

Lesson

00:30 - 01:00 - Practice

Chunking. Hands-on exercises.

Learning to Illustrate

Patricia Magrinho

Effective Tools

Operations

- Books in HTML
- Books in CHM
- Contact Center Operations
- Telcoms and Reports

- Window Insets
- Window Layout Editor
- Java Swing
- Debugger

- 1360k words.
- 6800 topics.
- 1075 slides.
- 3600 images.
- 170 maps.

Hiring Technical Writers


English. Technically minded. Phone call?

Write procedure. Rewrite confusion. Change program?

Whole team. Writing samples? Additional test?

Training Technical Writers

101 book, product training Coaching Expert books? 33%

1 Year 25% 2 Years 25% 3 Years 17%

People and Innovation

Professional learners (not just writers).

- Technical writing (for lack of formal training).
- Product (unique, vast).
- Audience background (several of them).

What has helped?

- Audience profiles.
- Improved training.
- Writing patterns.

“Everything is hard until someone makes it easy.” – skcc.com/1349
Effective Knowledge for Effective People

Joaquim Baptista

Effective Knowledge for Effective People

Joaquim “px” Baptista

1982–1988
FCT/UNL
Computer Science.

1989–1996
FCT/UNL
System administration. Research in programming languages and robotics.

1997–2014
Altitude Software

2015
pxQuim.com?
Knowledge Management consultant.

Explain

Write clear thoughts in clear words.
Explain APIs with code samples.
Inspire with illustrations and comics.

Problem?

Make sense of knowledge.
Apply knowledge.

Learn

Study + Enquire + Enumerate + Consolidate.
Facilitate. Survey. Ethnographic interview.

Structure

Structure for consumption and maintenance.
Have a place for everything.
Show
Create inspiring demos.
Create hands-on lessons or tutorials with guaranteed learning objectives.

Automate
Capture the requirements precisely.
Streamline decisions for everyone.
Design the customer experience.

Open
Embrace flexible tools and open formats.
Adapt to growing needs. Protect the future.

Agile
Discover and deliver incrementally.
Remove annoyances. Manage risk.

Effective!
Online presence: site, apps, social, email.
Intranet, extranet: order and process.
Documents, training: complete, readable, updated.
Software: useful and usable.
People: customers, employees, suppliers.

www.pxquim.com
It’s time to manage the intangible assets as well.
Daniel Bofill

Daniel Bofill is a technical writer at SISCOG.

Born and raised in South Africa, he moved to Portugal in 1994 and found that his knowledge of English created the perfect opportunity to learn and explore the new culture, meet new people and share and develop ideas while learning the new language.

Starting off as a technician for plastic card personalisation machinery, his enthusiasm for understanding why things work the way they do quickly led him to coordinate the production and logistics of smartcard loyalty programs. After a short incursion into home design and teaching, he returned to the technical world where he led a team of specialised technicians in taking care of card issuance centers for the banking industry and access control systems.

Having documented and translated countless machine and configuration manuals, he now works hard to create and deliver software user manuals. He continues to teach English and is always up for a game of tennis.

About SISCOG

SISCOG is a software company that provides decision support systems for resource planning and management in transportation companies, with special experience in the field of railways.

Founded in 1986, SISCOG uses a combination of Artificial Intelligence and Operational Research technologies, resulting in state-of-the-art optimisation software.

SISCOG addresses the biggest challenge of companies nowadays — productivity.

The business drivers for increased competitiveness and the more stringent customer demands for punctuality, product flexibility, and network expansion are the main issues for companies who are expected to meet these requirements while cutting operating costs and maximising revenues.

By understanding transportation companies needs, regardless of their size or complexity, and by speaking their language, SISCOG offers planners and company executives the tools to quickly, effectively, and accurately optimise their resources and daily work.
Assembling the User Manual Puzzle

SISCOG
Software company
- Founded in 1986
- Working in the railway domain since 1988

Specialized in planning and management of resources (infrastructure, vehicles, staff)
- Products
- Systems based on products

Offering powerful optimisers
Helping railway and metro operators around the world

Our Clients
- London Underground
- Lisbon Metro
- Suburban trains of Copenhagen
- Dutch Railways
- Finnish Railways
- Norwegian Railways
- Danish Railways
- Portuguese Freight Railways

The company with largest number of systems in production in the rail domain
Oldest system has been in continuous operation since 1998

Solutions for the main resources
- ONTIME
Planning and Management of Timetables (Track & Time)
- FLEET
Planning and Management of Vehicles
- CREWS
Planning and Management of Personnel

Complete integration, for all phases and resources

General overview
- Developed according to client’s reality:
  - Specific knowledge and strategies.
  - Customised interface.
- Stable, reliable, tested.
- Decreases costs and development time.
- Incorporates different perspectives.
- “Live” system.
A single system

All systems united

Layers

Product Core
- The base of all our content.
- Interface, architecture, concepts, behaviour.

Features
- A switching mechanism (On/Off).
- Close attention must be paid to know who has what.
- Functionalities, extra operations, modes and levels of operation.

Layers

Customisation
- Still on the product level, which system uses customisation points.
- Domain-specific rules, behaviour...even architecture.
- Includes interface, language, integration to external systems.

System-specific development
- System-specific add-ons.
- Reports, data visualisation, some interface.
- Importing and exporting.

Layers

Usable → Searchable → Reusable

Usable
- Terminology touches upon:
<table>
<thead>
<tr>
<th>Organize</th>
<th>Create</th>
<th>Localize</th>
<th>Publish</th>
<th>Consume</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outputs</td>
<td>Assign</td>
<td>Select Files</td>
<td>PDF/Print</td>
<td>Read</td>
</tr>
<tr>
<td>languages</td>
<td>Write</td>
<td>Export</td>
<td>Review</td>
<td>Browse</td>
</tr>
<tr>
<td>Terminology</td>
<td>Terminology</td>
<td>Terminology</td>
<td>Terminology</td>
<td>Search</td>
</tr>
<tr>
<td>Architecture</td>
<td>Review</td>
<td>Import</td>
<td>Review</td>
<td>Search</td>
</tr>
</tbody>
</table>
Usable

- Facilitates:
  - Inter and intradepartmental communication.
  - Client or potential client communication.
  - Understanding concepts.
  - Learning-curve of new recruits.
- Reduces redundancy.
- Transmits credibility.
- Usability leads to relevant and easy searching.
  - Coherence helps when searching.

Searchable

I don’t know if the information exists
= Frustrating and inefficient.

Interesting would be
- Content appears by “suggestion”
- Content is contextual, according to the search terms and/or my profile.

Reusable

The practice of using content components to develop new content.

- Reduces development and maintenance costs.
  - Example: The author must create 10 new topics.
  - A: Each topic is created from scratch.
    10 topics x 2 hr/topic = 20 hr
  - B: 7 out of 10 topics have some reusable content.
    3 topics x 2 hr/topic = 6 hr
    7 topics x 30 min/topic = 3.5 hr (searched and reused)
    Total = 9.5 hr
    20 hr – 9.5 hr = 10.5 hr saved through reusability

Reusable

- Reduces the effort in revision and approval.
  - Example: Review 1 topic in 10 documents.
    - A: Topic was copy/pasted in each document.
      10 docs x 1 hr/doc = 10 hr
    - B: Topic was reused in each document.
      1 doc x 1 hr/doc = 1 hr
      9 docs x 0.1 hr/doc = 0.9 hr
      Total = 1 hr
      10 hr – 1 hr = 9 hr saved on review

No need to reinvent the wheel

- There are a lot of resources out there that we can tailor to our specific needs.
- There is standard-based technology for metadata and architectures that can be used as a strong foundation.
- There are hundreds of tools that handle workflows, authoring, editing, reviewing, approval, collaboration ...and more!

Technical Writers @ Lisbon — FCSH, May 20th, 2015 — The 7th Report
Public notes

All participants received a questionary with the following questions:

- Ideas, doubts, comments, reflections?
- What did you like the most?
- How could we improve? What could we do differently?

The participants were promised that their answers would be published in a final public report.

The following pages have the notes returned by 21 participants, transcribed or translated to English.

The anonymous notes correspond to participants that did not check the “publish?” box.

André Carvalho

Comments? This was a very useful presentation. The methodologies are easily adaptable to any company. The part concerning teaching the working practices to another person was especially interesting.

The second session provided basic concepts in terminology which I wasn’t familiar with. There was not many information regarding writing itself but the information was useful for complementary purposes.

I also enjoyed the teachings to improve efficiency in a company.

Like? The use of simple images to illustrate the presentation.

Improve? There was lack of information regarding linguistic/localization issues.

Catarina Duarte

Email? cduarte.92@hotmail.com

Comments?

The presentations enabled me to understand what was technical writing, something that I only knew vaguely before. They allowed me to understand how technical writing is applied and used.

It is an important and relevant area for companies, which I think that not everyone is aware of, and that might deserve further divulgation.
Like? Showing practical examples of the usage of technical writing in companies.

Improve? It would be interesting to see in which ways can technical writing be used, and in which areas, besides software.

Marisa Campos
Email? mariza_c92@hotmail.com

Like? The practical example from the company ‘SISCOG’; it is important to understand how and where can you apply the theoretical frameworks.

Anonymous #4

Comments? The presentation of practical and concrete cases is very interesting and useful, because it helps us to realize how things happen at the workplace.

Like? The presentation draws attention to aspects that we had never considered, such as the importance of the «structure» of a script that has a very large number of pages.

Tânia Fonseca
Email? taniasfonseca@gmail.com

Comments? Good presentation!

I am a technical translator in a small translation company and I always have been into technical writing. I also watched the videos of the online free course of Stanford University (writing in sciences). Very interesting.

I am glad to hear for the first time of this technical writer’s group in Lisbon. That’s a great idea to exchange thoughts and experiences. Everybody has to learn, think on the problems/ideas to be able to explain it clearly (according to the target-reader).

I see that it’s not easy to work in this field.

Like? The explanation of the content’s structure.

Anonymous #6

Comments?

The system is really interesting, but I think that it should be more understandable to the entire audience.

I would like to know how technical writing contributes to the communication of the company itself.
Anonymous #8

**Comments?** Everything was presented in a clear way.

**Like?**
- “Effective tools” (I did not even know that there were so many tools)
- The topic in general, because I did not know much about “technical writing”
- The useful advice.

**Improve?**
- More keywords in the slides
- Larger summary.

Anonymous #9

**Comments?**

Is it useful for writers without experience in technical manuals? Is it expected a learning curve/training for a purely potential candidate, only interested in developing new aspects of writing?

What business opportunities does this initiative promote?

**Like?** The existence of a community to share professional experiences. This works ideally to refine positive and challenging aspects of the profession and to try to understand how you should work and what to expect from a technical writer.

**Improve?** Start to publicize the project. It might be useful if this worked as a source to put professionals talking about the profession with customers.
Institutional support

About EuroSIGDOC

EuroSIGDOC is an ACM SIGDOC European chapter.

SIGDOC is the Association for Computing Machinery's Special Interest Group (SIG) on the Design of Communication (DOC).

EuroSIGDOC is a group of researchers and practitioners wanting to pursue the SIGDOC mission in a European context.

Like SIGDOC, EuroSIGDOC focuses on the design of communication as it is taught, practiced, researched, and conceptualized in various fields, including technical communication, software engineering, information architecture and usability.

Since 2010, EuroSIGDOC sponsored the following events:

- **OSDOC 2010** — Workshop Open Source and Design of Communication (eurosigdoc.acm.org/osdoc2010);
- **OSDOC 2011** — Workshop Open Source and Design of Communication (eurosigdoc.acm.org/osdoc2011);
- **OSDOC 2012** — Workshop Open Source and Design of Communication (eurosigdoc.acm.org/osdoc2012);
- **OSDOC 2013** — Workshop Open Source and Design of Communication (eurosigdoc.acm.org/osdoc2013);
- **ISDOC 2012** — Workshop Information Systems and Design of Communication (eurosigdoc.acm.org/isdoc2012);
- **ISDOC 2013** — International Conference on Information Systems and Design of Communication (eurosigdoc.acm.org/isdoc2013)
- **ISDOC 2014** — International Conference on Information Systems and Design of Communication (eurosigdoc.acm.org/isdoc2014)

Several seminars were sponsored by EuroSIGDOC (eurosigdoc.acm.org/seminars.html), and now the TWL (Technical Writers @ Lisbon).

— EuroSIGDOC Board
**About APCOMTEC**

**APCOMTEC: uma associação interdisciplinar**
Desde a sua criação, em 2006, que a APCOMTEC, Associação Portuguesa para a COMunicação TECnica, com sede na UA, tem vindo a promover e divulgar a prática profissional, formativa e de investigação em Comunicação Técnica (CT), em Portugal. Nos últimos anos, procurou dar a conhecer o seu trabalho e divulgar esta área, recente em contexto nacional, tanto através da formação, da organização de eventos, das redes sociais e da Newsletter.

**Missão e objetivos**
APCOMTEC tem por missão o desenvolvimento, a promoção e a representação da Comunicação Técnica em Portugal, bem como dos respeitivos profissionais. Dos objetivos dos atuais órgãos sociais fazem parte o diálogo próximo entre o meio académico e o meio empresarial, a promoção da interdisciplinaridade inerente à CT, nomeadamente com a Tradução, a Terminologia, a Engenharia Informática e a Divulgação de Ciência, bem como o fortalecimento da presença e o reconhecimento da CT a nível nacional e europeu. APCOMTEC é associada da TCeurope – associação que representa os interesses da comunidade de Comunicação Técnica a nível europeu.

**O que temos feito**
Enquanto agente divulgador e mediador de experiências, conhecimento, informação, produtos e serviços sobre e de Comunicação Técnica, a APCOMTEC tem dinamizado eventos de informação e formação em CT, nomeadamente através das suas Jornadas e do Colóquio Internacional de Comunicação Técnica 2012.

Foram três as Jornadas já organizadas em diferentes pontos do país, desde 2011: no DLC/UA, sobre Comunicação Profissional e Design de Informação, na ESTGA, dedicada à Comunicação Profissional e Planeamento na Documentação Técnica, e no ISCAP, coorganizada com o Centro Multimédia de Línguas (CML), sob o tema “Comunicação Técnica: como traduzir negócios em sucesso”.

O objetivo destas Jornadas consistia em reunir especialistas e profissionais, na área da Comunicação Técnica (CT), e dar a conhecer o seu trabalho a futuros especialistas, indo assim ao encontro dos próprios objetivos da APCOMTEC.


O Pré-colóquio permitiu debater acerca da estreita relação entre a Comunicação Técnica, a Terminologia, a Tradução e a Engenharia Informática, que inequivocamente contribui para um desenvolvimento mais preciso, adequado e eficaz, assim como para a criação de documentação mais personalizada e intuitiva.

Quanto ao Colóquio TCeurope, o seu objetivo foi fornecer uma visão geral do estado-da-arte de um tópico tão vasto e desafiante como é o público-alvo em Comunicação Técnica, bem como explorar os diferentes e emergentes meios de comunicação aqui utilizados, trocar informação relativa à comunicação técnica e às suas aplicações, avaliar as vantagens e desvantagens dos diversos formatos de edição e produção, assim como as utilizações, as necessidades e as exigências provenientes da e-sociedade.

Este conjunto de eventos contribuiu certamente para o crescimento da associação, tanto a nível do número dos seus associados como da projeção que conseguiu dar a esta área recente do conhecimento, tendo-se este último facto refletido nos inúmeros contactos de qualidade que a APCOMTEC teve com as empresas e instituições, essencialmente a nível nacional.

Já a nível europeu, o esforço da associação em manter a ligação à TCeurope tornou-se particularmente profícuo aquando da organização conjunta do evento internacional antes mencionado, assim com nas reuniões de trabalho subsequentes, tendo a última acontecido em Bruxelas, em abril de 2013, onde a APCOMTEC esteve presente.
About CLUNL

Centro de Linguística da Universidade Nova de Lisboa (CLUNL) is a research unit that has as its main objectives the advancement of research in Theoretical and Applied Linguistics, the advanced training of researchers and the promotion of the publication of scientific data in those domains concerned with the nature and structure of languages and texts.

This unit is financed by FCT.

The Centro de Linguística da Universidade Nova de Lisboa (CLUNL) was founded in 2000, in the sequence of a restructuring of the Centro de Estudos Comparados de Línguas e Literaturas Modernas (CEC). CEC, founded in 1979 and financed by the Instituto Nacional de Investigação Científica (INIC), integrated the Núcleo de Estudos de Linguística Contrastiva (NELC), whose members advocated the existence, in FCSH, of a research program in Linguistics.

At the Universidade Nova, the planning of the early research work in linguistics began in 1975, in the area of Línguas e Literaturas Modernas (Modern Languages and Literatures), thanks to the interest of Professors Maria de Lourdes Belchior and Maria Emília Marques. The theoretical approaches of the team members (comprising the domains of Sociology, Computer Sciences, Sociolinguistics, Psycholinguistics, and Language Teaching, within a contrastive and interdisciplinary approach) were presented at the Primeiro Encontro Nacional para a Investigação e Ensino do Português, in 1976.

In 1979, NELC published, in the first issue of Letras Soltas, a number of articles integrating some of the domains that would later be developed in CLUNL: Lexicology, Text Theory, Theoretical Issues and Pedagogical Praxis, branching into Sociology of Education and Bilingualism. The second issue of Letras Soltas was edited by Professor Maria Henriqueta Costa Campos, who pioneered publishing in the domains of enunciative semantics and relational grammar.

Since its creation, in 2000, the work developed at CLUNL has made an important contribution to linguistic studies in Portugal in the areas of Acquisition (L1 and L2), Discourse Analysis, Text Theory, Lexicography and Terminology, Syntax, Morphology and Historical Linguistics. CLUNL’s present research is based on different conceptual and theoretical models. This characteristic is a reflection of the work developed in the Unit throughout the years and it is also what gives the Unit its identity.

Between the years 2000 and 2006, CLUNL was directed by Teresa Lino. Maria de Lourdes Crispim was director between 2006 and 2010, together with Maria Lobo, Fernanda Menéndez and Maria do Céu Caetano.

Previous directory boards have established CLUNL as a competitive and relevant Research Unit, which is attractive to both national and foreign young researchers.