

# ROUGH DRAFT

The newsletter of the Phoenix STC Community

April 2006

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## April Showers

April is month of "must do" dates:

- Last chance to renew STC membership
- Vote in STC Society elections
- Vote in Phoenix Community elections--ballots must be postmarked by April 7th
- Participate in CARSEF
- Reflect on your participation in chapter activities and management
- Complete community survey. Your answers are important to us!

## Selling STC to the Boss

Having trouble selling the idea of STC membership to your boss? Get it paid through your corporate training budget.

Dictionary.com defines "training" as follows: "to make proficient with specialized instruction and practice."

- "Training" happens when a community workshop on XML helps you develop superior company documents—faster and more efficiently.
- "Training" happens when an STC Web-telephone seminar teaches you and your colleagues the basics of single sourcing—and thereby streamlines your company's production processes.
- "Training" happens when a technical session at an STC annual conference shows you how to develop a usability plan that returns valuable feedback on your company's product—resulting in a better product and more satisfied customers.
- "Training" happens when an article in *Intercom* or *Technical Communication* shows you how to translate a company Web site to reach an international audience.

If an STC- or community-sponsored event or activity shows you how to improve your company's products or processes, that's "training." Nonmembers often pay significantly more for STC programs, conferences, and workshops than do members. And STC membership provides training with a bonus: a vibrant professional community that offers numerous opportunities for networking.

For information about joining STC or renewing a membership, visit the STC Web site. STC helps you make career opportunities happen.

Reprinted from *Tieline*, *The Society Newsletter*, March 2005

## Also in This Issue

[Tech Writing in the Financial Industry](#) Part two of Sandhya Larsen's (Orange County Chapter) article.

[Tech Comm 2005](#) Our own Aiessa Moyna writes about the Tech Comm 2005 planning process for *Tieline*, *The Society Newsletter*.

[Tooling Around](#) explores the new online collaborative world of wikis. Gloria's introduction is going to have you thirsting for more.

[Seminars, Workshops, Education](#) Clare Turner reports on the new Technical Communications program at ASU.



## Need a little *deadline* help?

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## Last Call for CARSEF!

Judgment day—make that *Judging day*—is coming! Judging for the Central Arizona Regional Science and Engineering Fair (CARSEF)—will be **Wednesday, April 12<sup>th</sup>**, and it's not too late for you to volunteer. This is a one-day commitment in which you will be judging student science fair reports. If you are like most volunteers, you will find it to be a very fun and rewarding event.

CARSEF is for students in grades 5 through 12 who attend school in central Arizona. Last year, over 500 students entered CARSEF. This year will include a similar number of entries, and that's why we can use you!

Again, the details are:

**WHAT:** CARSEF Judging

**WHEN:** Wednesday, April 12th

**TIME:** Approx. 8 a.m. - 5 p.m. (1/2-day participation also possible)

**LOCATION:** Mesa Convention Center

263 N. Center Street (near University Drive on Center Street)

This location is convenient to the Superstition Freeway, Loop 101, and Loop 202.

(See [Convention Center details.](#))

If you would like to volunteer for this event, please contact [Gloria McConnell](#). Also, if you have previously volunteered but have *not* received an email from [Gloria](#), please contact her.



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Phoenix Community News

# Membership News



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## Editorial Blithers

First apologies and thanks to the ASU student who volunteered to be a Reviewer. Somehow your email got misplaced. Please email me again at [rough\\_draft@zorntech.com](mailto:rough_draft@zorntech.com) and we'll gratefully add you to the team. Dr. Stone sent a broadcast email to the Tech Comm students

Recently, I've been thinking about mentoring. For those of use who've been in the workplace for a while, we've been mentored and, in turn, mentored others. The Phoenix community started mentoring programs several times, but never seems to make it an on-going program. The question is why can't we?

One answer may be that we have more members over 35 than under. Understandably, young people are concerned with new marriages and families, establishing a career, and getting on with life. Ergo, no time or interest in STC.

Another answer may be that many of our members don't attend monthly meetings. Certainly we'd like to see you, but there are many reasons given for not attending regularly. And, those who do attend may not need mentoring.

The future of our profession and our organization depends on building our membership and mentoring those who will follow in our footsteps. This month's meeting is one way to share our expertise and wisdom with others, old and new to the profession.

Friday lunch at the conference last November offered networking and discussion opportunities--each table offered a different topic. Several tables offering discussion on going independent and the future of STC were the adult version of musical chairs--if you didn't get there fast, you had to go somewhere else. Our April meeting will offer the same opportunity. Tables will be assigned discussion topics and you can learn or share you knowledge with others. Granted, the program doesn't answer the mentoring question, but maybe it's a start.

See you at the meeting!

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## Technical Writing in the Financial Industry, Part Two

*By Sandhya Larsen, Orange County Chapter*

*This is part two of a two-part article. Part one appeared in the January-February issue of Sound Off! This article was previously published in Steps & Specs, the newsletter of the STC Policies and Procedures SIG, and [TechniScribe](#), the Orange County Chapter newsletter, and is reprinted here with permission.*

### Financial planning and associated writing projects

Generally speaking, financial planning companies sell their services to individual or corporate clients. For an individual client, an analyst uses financial modeling software to evaluate fiscal needs; suggests portfolio additions such as stocks, bonds, or mutual funds; and forecasts potential earnings over time.

For a corporate client, the analyst performs in-depth research and analysis of a wide range of capital investment opportunities, such as securities, venture capital offerings, and real estate acquisitions. Using additional features of the financial modeling software suite, the analyst develops a comprehensive written business plan which may include an audio-visual presentation with illustrated fiscal scenarios, to be delivered to the client corporation in person or online.

The financial software suites provide obvious opportunities for technical writers, and the business plans seem to provide more. For verification, I talked to Michael Fuller, a local expert who formerly held analyst and management positions with financial services, securities, and investment firms. Michael considers himself to be the best technical writer he knows, as well as a subject matter expert in his field. He has advanced proficiency with the standard desktop publishing tools used by technical writers, and routinely submitted the business plans and marketing presentations he wrote to his former managers and attorneys for review.

I asked Michael if he knows of other technical writers in the financial industry, and he answered with a touch of irony: "Yes, but they are attorneys and paralegals! When a wealthy client needs estate planning," Michael explained, "the project is so technical—involving real estate, tax, probate, and investment law—that it must be transferred to an attorney and legal staff who specialize in this field."

"The easiest way for a technical writer to play this game," Michael asserted, "is to become a certified paralegal." Indeed, I was aware of legal research and legal writing, having done some of this in a past life, but the existence of legal and financial cross-functional specialties was news to me!

### What the want ads say

The experts I interviewed did more than hint that writers with subject matter expertise are highly valued in the financial industry, and my frequent reading of the want ads underscored this point. For many months, the major job boards have been running ads from various types of financial companies who require technical writers to have previous industry experience in no uncertain terms. "Just how necessary is this really?" I privately mused. "I can do research, interview experts, and write effectively on *any* subject, financial or otherwise. With software, all I have to do is use it until I understand it, and great documentation then flows fast and furiously."

I was especially piqued by a recruiter's ad for a writer who could independently develop company valuation

documents. This ad, for a Carpenteria investment firm, even stipulated that "experience with documenting finance-related software is not enough to qualify." So I called Jack Molisani, President of Prospring Technical Staffing, who had posted the ad. Jack didn't deny that a competent writer could do this job even without prior industry experience, but he clearly stated that in today's job market, employers can demand an exact match for their requirements. "Why should they accept a close match, when they can get an exact match?" Jack asked. "Employers would rather have someone who is already familiar with their industry and terminology so they won't have to pay for training." "Well then, what kind of writer is actually qualified for this job," I wondered. "Someone who has done the same job for another employer," said Jack. "Someone who has an MBA and writing experience, or has worked for another investment banking company and understands the relevant terminology." But the saving grace came when Jack revealed that two years earlier, he had placed a writer with the Carpenteria company to write software documentation, and now she is writing company valuations.

### Qualifying as a financial writer

The truth is, specialized industry knowledge is a critical factor in the career of every technical writer. Does this mean one is forever stuck with the industry in which one has happened to work for a number of years? Academically speaking, the answer is no. If you want to transition to the financial industry, you can get an MBA in two years, become a certified paralegal in ten months, or explore the other expensive, time-consuming educational remedies that undoubtedly exist. But technical writing experts maintain there is a cheaper, faster solution: volunteer your writing services and add the experience to your resume.

Jack Molisani suggested you find someone who is working on financial documents and offer to help—free of charge, if necessary. You can solicit employers directly or approach independent contractors and volunteer your assistance with their projects. Once you have some experience with financial projects on your resume, you can leverage it to get projects of your own.

Adrienne Escoe, President of Escoe Bliss Communication, suggested putting in some extra time to assist the financial department at your present place of work. If you're applying for a job that requires industry-specific experience, Adrienne advised, you can offer to work one week for free to demonstrate your skills with the new subject matter. Adrienne also emphasized the importance of strong skills with authoring tools such as RoboHelp, and a picture-perfect resume that showcases your excellent skills with the formatting features of Microsoft Word as well as proofreading to eliminate all errors.

I was encouraged when Adrienne told me that Escoe Bliss recently placed technical writers at three prominent Orange County and Los Angeles mortgage companies, two of which did not require previous financial industry experience. All three of the companies did, however, require experience in writing corporate policies and procedures. Some of the writers worked in industry-specific areas including loan origination, loan servicing, and default management. The other writers developed policy and procedure documentation, and wrote content for the company intranet and newsletters.

I was also inspired by these words on the [Writer's Market site](#): "The financial writer [may acquire a basic business sense] through formal education, practical experience, or informal study. Knowledge of the stock market is a common foundation; the writer then develops a financial specialty [that] may take any of several forms...Writers keep current in their field by regularly reading industry publications, union newspapers, *The New York Times*, and *The Wall Street Journal*. They gather economic information from government offices, public relations agencies, and professional societies associated with their writing specialty."

In conclusion, I believe that a technical writer *can* transition from one industry to another by mastering the current authoring tools, acquiring experience through volunteering, taking some form of relevant education, and reading lots of industry publications. The financial industry should be no exception to this rule. I offer my sincere thanks to everyone who made this article possible by answering my questions and providing the necessary information.



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## Basics for Communicating Clearly

by Linda Shacklock

### Plural Nouns

More and more these days, we see an apostrophe mistakenly used to make a noun plural (more than one). Don't do that!

book, books  
bus, buses  
computer, computers  
day, days  
dollar, dollars  
glass, glasses  
Jones family, the Joneses  
story, stories  
yes and no, yeses and nos

### Plural Abbreviations

Although some sources recommend using an apostrophe to make an abbreviation plural, most technical communicators use the clean style of omitting the apostrophe in a plural abbreviation.

ATM, ATMs  
GIF, GIFs  
ICBM, ICBMs  
JPEG, JPEGs  
MBA, MBAs  
PC, PCs  
PDF, PDFs

Collected "Grammar Central" topics: Click [here](#).

Questions or idea for a column? E-mail [Linda Shacklock](#).

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## We Need You!

Your STC Phoenix chapter needs volunteers in many areas. There are current opportunities as well as ones for the upcoming 2006-07 program year.

Why volunteer?

You can practice or enhance existing skills or learn new ones.

You'll meet new people and expand your network.

You'll have fun!

We are currently seeking volunteers in the following areas:

Position/Area	What You'll Do
<b>Hospitality</b> helpers - THIS IS AN IMMEDIATE NEED!	Meet and greet members and guests at program meetings and educational events (A GREAT WAY TO GET TO KNOW EVERYONE!)
<b>Public relations committee manager AND members</b> - THIS IS AN IMMEDIATE NEED!	Tell the world about our profession, our community, and our organization as a whole
<b>Volunteers manager</b> - THIS IS AN IMMEDIATE NEED!	Keep the energy going by finding new and interesting ways to match organizational and member needs
<b>Web committee</b> members	Assist with updates of this key communication mechanism that's full of valuable information for our community and technical communicators as a whole
<b>Program committee</b> members	Help plan and organize our program meetings for the year
<b>Education committee</b> members	Help plan and organize special educational events (1-3 per year)
<b>Newsletter</b> contributors and committee members	Help keep our members informed and/or get yourself published!

To volunteer or to get more information:

Contact Tim Eull or any one of the Administrative Council members.

*Have skills in an area not mentioned above?*

*Not sure of what you want to do or how you can help?*

**LET US KNOW! We'll find a place for you!**

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April 14, 2006 Meeting

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## Collective Wisdom: Sharing Lessons Learned

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Join us for networking and round table discussions of favorite tools, communication techniques, an exchange of the "best lesson I ever learned" working with others. Each of us brings a wealth of experience from the challenges we face as technical communicators. Share what you've learned or bring a problem you face and let "collective wisdom" provide new ideas and perspective.

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### Dinner and Reservation Information

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Networking - 5:30 PM    Dinner - 6:00 PM    Program - 6:30 PM

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**Location:** Radisson Hotel Phoenix Airport North, 427 N. 44th St., Phoenix.  
Exit Loop 202 at 44th Street and head south. The hotel is on the east side of 44th Street.

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**Entrees:** Baked Snapper Veracruz or Beef & Chicken Brochette. Vegetarian option is 44th Street Tortellini. Meal includes garden salad, rolls, coffee, iced tea, & dessert.

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**Cost: Dinner and Program:**

\$20 - Members; \$25 - Nonmembers; \$15 - Student members

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Pay by check or cash at the door. Pay by credit card with the online registration form only. Includes dinner, tax, tip, and program. **Note:** \$5 charge for late dinner reservations.

[Archives](#)

**Program Only** (includes dessert): \$10 for all members, student members and nonmembers

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**RSVP:** Please RSVP with your dinner selection no later than noon Thursday, March 9th. Online registration at [www.stc-phoenix.com/onlinereg.htm](http://www.stc-phoenix.com/onlinereg.htm). Instead you may email [stcphoenix@yahoo.com](mailto:stcphoenix@yahoo.com) or call Norm at 480-963-8102 and pay at the door. **No-shows will be billed.**

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Location map: [MapQuest](#)

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# To Hyphenate, or Not to Hyphenate?

By [Kathy Graden](#)

Do you know when it's right and when it's wrong to hyphenate? The answer often depends on whether a word or term serves as a noun, a verb, or an adjective.

The following table offers punctuation guidelines for some of the most troublesome words and terms found in computer software or hardware documentation. Sources for these guidelines include the *Chicago Manual of Style*, 15th Edition, and the Merriam-Webster Online Dictionary (at [www.m-w.com](http://www.m-w.com)).

Word or Term	Guideline
<b>Database vs. Data Base vs. Data-base</b>	Always use one word with no hyphen.
<b>Double-click vs. Double click</b>	The verb form uses a hyphen ("Double-click the left mouse button.") The noun form uses two words with no hyphen ("A double click opens the file.")
<b>Drop-down vs. Drop Down vs. Dropdown</b>	The adjectival form uses the hyphen ("Choose option A from the drop-down list.") The verb form uses two words and no hyphen ("Let it drop down to the floor.") Note: The same rule applies to "pull-down" vs. "pull down" or "pulldown."
<b>End user vs. End-user</b>	Use two words with no hyphen when "end user" is a noun (as in "The end user is our primary customer.") Insert the hyphen for the adjectival form (as in "end-user knowledge," where the adjective "end-user" modifies "knowledge").
<b>Multi&lt;word&gt; vs. multi-&lt;word&gt;</b>	Use one word with no hyphen. (Examples: multitask, multicolumn)
<b>Onscreen vs. On-screen</b>	Use one word with no hyphen.
<b>Pop up vs. Popup vs. Pop-up</b>	See the Drop-down guideline.
<b>Re&lt;word&gt; vs. Re-&lt;word&gt;</b>	Use no hyphen for most combinations of "re" and another word (as in "revisit," "reoccur," "reengineer," and so on. However, use a hyphen if the compound word is confusing without it.

<b>Run-time vs. Run time</b>	<p>The noun form is two words ("How much run time does it take?")</p> <p>The adjective form uses the hyphen ("The program provides run-time access.").</p>
<b>Set Up vs. Setup vs. Set-up</b>	<p>Use "set up" only as a verb to mean "assemble," "establish," or " put into place."</p> <p>The noun "setup" has several different meanings, most commonly "the manner in which items are arranged, designed, or assembled."</p> <p>The form "set-up" is never correct.</p>
<b>Stand-alone vs. Standalone</b>	<p>Always use the hyphenated form.</p>
<b>Start-up vs. Startup</b>	<p>The noun form is one word ("Read this file at startup.")</p> <p>The adjective form uses the hyphen ("Open the start-up file.").</p>
<b>Sub&lt;word&gt; vs. Sub-&lt;word&gt;</b>	<p>See the Re&lt;word&gt; guideline.</p>
<b>Workaround vs. Work-around vs. Work around</b>	<p>See the Workflow guideline.</p>
<b>Workflow vs. Work flow vs. Work-flow</b>	<p>Use one word with no hyphen.</p>

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## Technical Communication Education in the Valley of the Sun

by Clare Turner

I recently asked Dr. Barry Maid from Arizona State University about technical communication educational opportunities at ASU. Dr. Maid is a member of the Phoenix STC Chapter and of the Academic SIG.

Currently, ASU offers a Bachelor of Science and a Bachelor of Applied Science Degree as well as an Undergraduate and a Post-Baccalaureate Certificate in Multimedia Writing and Technical Communication (MWTC).

The degrees and certificates are offered at the Polytechnic campus in Mesa (formerly known as ASU-East). The Polytechnic campus was the logical place to start a course of study in Multimedia Writing and Technical Communication. It is located on the former Williams Air Force Base in Mesa. When it first opened, the school had 1,000 students enrolled in approximately ten degree programs. The small campus started with two schools -- the School of Technology, and the School of Agribusiness and Resource Management.

Today, more than 5,000 students are enrolled in 30 degree programs at the Polytechnic campus. ASU shares more than 700 acres at Power and Williams Field roads with Chandler-Gilbert Community College, Mesa Community College, Embry-Riddle Aeronautical University, and a Maricopa County elementary school. These entities make up what is known as the "Williams Campus."

The MWTC program was originally approved by the Arizona Board of Regents on June 30, 2000. Courses in the program were first available during the Spring 2001 semester. It is currently possible to complete both the undergraduate major and the certificates entirely online. The program presently has approximately 40 undergraduate students and around a dozen graduate certificate students.

While this may be old news for many Phoenix STC members, the MWTC Program is making progress. In the fall of 2004, they hired Barbara D'Angelo, a specialist in information literacy and a PhD student at Texas Tech University, as a full time lecturer. According to Barry, Barbara has already created several new courses focusing on information issues, including intellectual property and copyright.

In fall of 2005, two tenure track positions were added--one in multimedia and one in medical rhetoric. Claire Lauer, who is finishing her Ph.D. at the University of Arizona, will be a new Assistant Professor in the fall. She will fill the multimedia position. Unfortunately, the position in medical rhetoric was not filled. The will continue the search next year.

With the increase in personnel, Barry is presently drafting a proposal for a Master of Science Degree. More news regarding ASU technical communication opportunities will be included in upcoming issues of the *Rough Draft*.

If you'd like to contact Barry, email him at [barry.maid@asu.edu](mailto:barry.maid@asu.edu).

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## SIG Signals

Reporter needed to monitor SIG lists and newsletters. Clippings or summaries can be submitted. Commitment: 4-6 hours per month. Contact [rough\\_draft@zorntech.com](mailto:rough_draft@zorntech.com).

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## Society News from March 2005 Tieline

### Board Meeting Minutes Posted

The official minutes of the January 2006 meeting of STC's board of directors have been posted to the STC Web site.

### Moving? File Changes with STC

Please remind members who are changing residences to send their new address to the STC office to avoid an interruption to deliveries of Intercom and Technical Communication. Some members assume that informing the post office of their new address is enough to ensure that all of their mail is forwarded. However, the United States Postal Service forwards only first class mail; magazines such as Intercom and Technical Communication are not forwarded.

To file a change of address with STC and ensure continuous delivery of Society publications, members can use the online form.

### Conferences & Events

#### NOW OPEN: ONLINE CONFERENCE REGISTRATION

Online registration for STC's 53rd Annual Conference is now open. To register at the member rate, members must enter their membership number, which appears on the address labels of Intercom, Technical Communication, and all other correspondence from the Society office. Members who want to be reminded of their membership number should call the STC office at 703-522-4114.

The conference Web site also provides comprehensive, up-to-date information on educational and professional opportunities at the conference. The database of technical sessions can be searched and sorted according to keyword, day/time, topic, and session stem. The session information includes brief descriptions of the sessions, locations and times, and the names of the moderators and speakers. As the conference draws near, this information will be updated frequently. Members are encouraged to visit the site often for the latest information.

#### CONFERENCE HOTELS: RESERVE ROOMS BY APRIL 10

STC has arranged for special rates for this year's conference attendees at the Bally's Las Vegas Hotel (\$139 for a single/double room) and the Paris Las Vegas Hotel (\$169 for a single/double room). To take advantage of these rates, attendees must make their reservations by April 10.

Bally's and Paris will host all conference events and technical sessions. The hotels are conveniently located next to each other and are connected by a large shopping area. Members can access the online reservation forms for both hotels from the [STC conference Web site](#).

#### April 6-7, 2006

The Manitoba Chapter STC and Red River College will hold their annual conference, Technology and People: The/Write/Connection, at the Princess Street Campus of Red River College in Winnipeg, Canada. For more information, please contact: Henry Shorr (204) 945-7298.

#### April 12, 2006

William Horton will present an STC Web seminar, Software Simulations: Tips, Tricks, and Best Practices, from

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1 to 2:30 PM Eastern Time. Participants will learn how software simulations can enliven the learning experience by engaging users and adding interactivity. Register at [stc.webex.com](http://stc.webex.com).

#### **May 7-10, 2006**

STC's 53rd Annual Conference will be held at Bally's Las Vegas Hotel and Paris Las Vegas Hotel in Las Vegas, Nevada. Post-conference sessions will be held on May 11.

#### **May 24, 2006**

Neil Perlin will present an STC Web seminar, *Life After RoboHelp—How We Got Here and Where To Next*, from 1 to 2:30 PM Eastern Time. Perlin will summarize the history of Help authoring tools, discuss the major RoboHelp replacement tools, and examine how a move to XML-based authoring tools affects documentation development. Register at [stc.webex.com](http://stc.webex.com).

#### **June 14, 2006**

Paul Prescod will present an STC Web seminar, *Introduction to DITA*, from 1 to 2:30 PM Eastern Time. The seminar will bridge the gap between the high-level hype about DITA (Darwin Information Typing Architecture) and the many detailed technical articles about how DITA works. Register at [stc.webex.com](http://stc.webex.com).

### **STC ANNOUNCES FELLOWS AND ASSOCIATE FELLOWS FOR 2006**

The highest rank that the Society for Technical Communication can confer upon a member is that of fellow. The select few who become fellows are associate fellows who have attained eminence in the arts and sciences of technical communication through service that has distinguished both the Society and the profession.

#### **Fellows**

Thomas P. Barnett, Phoenix, Arizona  
Judith L. Glick-Smith, Cumming, Georgia  
Judith M. Herr, Livermore, California  
Doreen A. Mannion, Bowie, Maryland  
Raymond E. Urgo, Los Angeles, California  
Ann L. Wiley, Auburn, New York

STC recognizes and honors deserving senior members by conferring upon them the rank of associate fellow. Those selected as associate fellows are exceptional individuals who have consistently demonstrated meaningful contributions to the Society and to the profession over a period of years.

#### **Associate Fellows**

Michael J. Albers, Memphis, Tennessee  
Rahel Anne Bailie, Vancouver, British Columbia  
Sandra J. Balkema, Rockford, Michigan  
Michelle Corbin, Cary, North Carolina  
Jackie A. Damrau, Dallas, Texas  
Hans E. Fenstermacher, Andover, Massachusetts  
John P. Garison, Chester, Vermont  
JoCarol Gau, Houston, Texas  
Helen M. Grady, Macon, Georgia  
Rebecca C. Hall, West Chicago, Illinois  
Michael T. Harvey, Raleigh, North Carolina  
Alan R. Houser, Pittsburgh, Pennsylvania  
Robert Krull, Troy, New York  
Karen Lane, Merritt Island, Florida  
Chopeta C. Lyons, Willington, Connecticut  
Stephen W. Murphy, Amherst, New Hampshire  
Elaine F. Randolph, Lake Forest, California  
Ralph E. Robinson, Barrie, Ontario  
Martha K. Sippel, Lone Tree, Colorado  
Jane L. Smith, Sedona, Arizona  
Mary Jo Stark, Highlands Ranch, Colorado  
Thea Teich, Cincinnati, Ohio  
Hugh E. Templeton, Loveland, Colorado

The new fellows and associate fellows will be honored at STC's 53rd Annual Conference, May 7-10, 2006, in Las Vegas, Nevada. An honors banquet will be held on Tuesday, May 9. (A reception will precede the banquet at 6 PM.) Tickets for the banquet and reception are \$40 and can be purchased using the conference registration

form included in the Preliminary Program, which was mailed with the February issue of Intercom, or online.



April 2006

## Membership Survey Your Opinion Counts!

It's that time again, Maura Betler once again has put together an outstanding survey so you can let us know a little about you and a lot about what you want from your Phoenix STC community. Survey results are used by community management and committee managers to design a program year that services our members. We want to know about you and what you want. Go to <http://www.surveymonkey.com/s.asp?u=992791939421> to complete the survey. It will take you less than 20 minutes. After the survey closes, Maura will compile the data and present it to the membership.

Now is the time to tell us what you think. Next year's programs and educational offerings depend on your response!

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# ROUGH DRAFT

The newsletter of the Phoenix STC Community

April 2006

## 2005 Region 5 Conference: STC'S Transformation in Action

By Aiessa Moyna, Associate Fellow, Phoenix Chapter, and Public  
Relations Committee Manager, Tech Comm 2005 Conference

When the Phoenix chapter agreed in 2003 to host the 2005 Region 5 Conference—known as Tech Comm 2005—chapter leaders and volunteers were enthusiastic, but cautious.

In the two years leading up to the conference, the chapter would overhaul its budgeting and planning process, launch a new professional education and development series, serve as a pilot for rechartering under the Society's Transformation initiative, and lead several communities in sponsoring the Southwest Regional Technical Publications, Art, and Online Competitions—all while continuing to deliver its award-winning program of meetings and services for members and other technical communicators across central and northern Arizona. There would be a lot to do in a relatively short time, and a relatively small group of dedicated volunteers to do it all.

Then, inspiration struck. Phoenix chapter member Jane Smith, who also serves as Instructional Design and Learning special interest group (IDL SIG) manager, and STC director Sherry Michaels, who was Phoenix chapter president at the time, wondered what might happen if the two communities joined forces. The Phoenix chapter needed to host a regional conference for technical communicators across the southwestern United States, and the IDL SIG had been looking for an opportunity to deliver more value to its members, apply its financial resources effectively, and help members grow as individuals and as a community. Meanwhile, the Society's Transformation initiative had motivated chapters and SIGs around the world to consider new models for developing community and delivering value to members. Tech Comm 2005 represented a perfect opportunity to put the principles into practice and to help both communities achieve their goals.

Along the way, both the IDL SIG and the Phoenix chapter learned some valuable lessons that will benefit other communities that enter a virtual-geographic community partnership.

### Establish Joint Leadership

Conference co-managers Karen Zorn, representing the Phoenix chapter, and Jane Smith, representing both the IDL SIG and the Phoenix chapter, led the conference planning team. They ensured that the interests of both communities always were considered equally. In addition, the various conference committees included members from both communities, as well as members of other chapters in Region 5.

When the Phoenix chapter hosted the regional conference in 1999, the chapter provided virtually all the volunteer power, essentially delivering the meeting for the entire region. In contrast, Tech Comm 2005 was a true team effort in which the IDL SIG and Phoenix chapter managed the delivery of a meeting presented for the SIG and region by the SIG and region. Never before had a chapter and SIG collaborated on such an event. Planning team members hailed from Phoenix, Mesa, Gilbert, Scottsdale, Sedona, Tucson, and other locations in Arizona. But they also hailed from Austin, Dallas, and Houston, Texas; San Diego and Stanford, California; and New York City (part-time).

Learn from Those Who Preceded You  
Better still: Recruit them for your planning team.

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The small core team that initially formed to begin planning the conference didn't have a lot of experience—a couple of members had never even attended an STC regional or international conference when they volunteered. They got the ball rolling by securing planning resources available from the Society. The team found a great deal of valuable information on the Tieline Knowledge Base and adapted or incorporated some of the annual conference supporting materials into their regional conference planning—the Call for Papers and guidelines on Preparing Your Conference Session provided useful models.

Next, the planning team reached out to members who helped plan the 2004 Region 5 Conference in Salt Lake City and the 1999 Region 5 Conference in Phoenix. They also contacted planning team members for STC conferences in other regions and for non-STC conferences and events. In this way, they learned through the experiences of others what to do...and what not to do.

The planning team got to work filling the committee manager roles and recruiting other team members. First, they asked volunteers who had served in those roles in the past. Many were pleased to receive the implied affirmation of a job well done, and they happily agreed to tackle those jobs again. Others were happy to share their experiences, notes, and samples from previous conferences, but preferred to volunteer for other roles this time around. And even the folks who declined with a polite "Been there; done that" still offered to share whatever materials and memories they had.

As the planning team continued to recruit volunteers, they considered which roles were location-dependent and which could be done virtually. With about 180 members concentrated mostly in a single metropolitan area, the Phoenix chapter was able to contribute volunteers "on the ground" to secure a venue, serve as points of contact for key vendors, and manage the event logistics.

With more than 1,800 members worldwide at the time, the IDL SIG was able to contribute volunteers who could handle "back-office" tasks that didn't require being within easy driving distance of the conference venue. And with years of experience working as a virtual team, the SIG introduced a number of best practices to the planning process, including the use of teleconferences, e-mail, and small-group meetings, rather than frequent face-to-face meetings of the entire planning team.

#### Agree in Advance on Shared Investment and Return

As an established community with strong economics, the Phoenix chapter agreed to manage the conference expenses and income through its checking account, and was prepared to contribute any up-front investment that might be required to deliver the conference. The IDL SIG, with a smaller treasury, was prepared to contribute in-kind goods and services, such as printing of promotional materials, as well as fun items for the gift bags presented to conference attendees.

There was an assumption among planning team members that the Phoenix chapter would absorb the financial loss if the conference failed to break even. (Although for the conference co-managers, that was never a viable option!) However, the two communities never explicitly discussed whether they would share responsibility for a financial loss or would share the proceeds if the conference produced a financial surplus.

When the final receipts were in, it was clear that the conference had been a financial success. It was then that the core planning team quickly proposed granting the SIG a generous share of the proceeds, reflecting the effort that its members had contributed. Because this sum would constitute a rather large disbursement from the Phoenix chapter treasury, however, it required a vote of the chapter's elected council members. The vote had to be called hastily (and handled virtually!) at a time when the chapter and SIG leadership and general membership should have been celebrating their success and getting some much-deserved rest. Afterward the team agreed that, next time, they would decide in advance how to split the proceeds so that they could avoid a last-minute scramble!

#### Benefits of Collaboration

So why collaborate? How might your community benefit from a SIG-chapter partnership? While similar results cannot be guaranteed for all such ventures, the Tech Comm 2005 collaboration was an impressive success on several fronts.

The conference generated a significant surplus that will allow both the Phoenix chapter and the IDL SIG to fund their existing programs and services, plus new initiatives.

It provided the two communities a forum to demonstrate to their own members the value they can deliver. Attendees rated their overall experience 3.6 on a scale of 1 (poor) to 4 (excellent), and the consensus was that the conference delivered a premium educational and networking experience.

More important, the conference provided each community a forum to demonstrate to the other the value it can deliver. The conference represented a unique opportunity for them to market their programs and services

to a receptive audience and possibly attract new members.

Our experience proved the maxim that there is strength in numbers. By joining forces, the communities attracted more than 100 conference attendees, both Society members and nonmembers, and presenters from across the United States, as well as from Canada and Belgium! Alone, either community likely would have had difficulty mounting a conference with such broad appeal.

For more information, or to obtain a copy of the post-conference summary, contact conference co-managers Karen Zorn and Jane Smith.

*Reprinted from Tieline, The Society Newsletter, March 2005*

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## Tooling Around

by Gloria McConnell

### Wiki A, B, C's

"Techwr-l and other lists have been buzzing with comments and questions about wikis and Twikis; [could you] present in an upcoming *Tooling Around*?" wrote one *Rough Draft* reader. Very good topic; without further adieu, here are some basic details about some of that buzz...

[What is a wiki?](#)

[What does "wiki" stand for?](#)

[What about accuracy?](#)

[How about TWiki?](#)

[Who else is out there? What features exist?](#)

[How can a wiki be used?](#)

Although I had used wikis and could give a basic definition before this article was written, much of it is my impression of the information I've found in researching the topic. I've tried to credit my research sources. It's entirely possible that I've misinterpreted something, however; anyone with greater knowledge is invited to set the record straight! Send an email to [gloria.mcconnell@honeywell.com](mailto:gloria.mcconnell@honeywell.com).

### What is a wiki?



According to the Wikipedia (by far the most prominent public wiki), a *wiki* is a Web site where documents can be "written collectively in a very simple markup language using a web browser. Individual pages in this environment are 'wiki pages,' while the entire body of pages, which are usually highly interconnected via hyperlinks, is the wiki." Wiki also refers to the software (the "engine") that facilitates the operation of such a Web site.

Wiki's inventor, Ward Cunningham, called it "*the simplest online database that could possibly work.*"

From the first wiki site, created just over a decade ago and dubbed "wikiwikiweb": "'Wiki' is a composition system; it's a discussion medium; it's a repository; it's a mail system; it's a tool for collaboration... it's a fun way of communicating asynchronously across the network." (<http://c2.com/cgi/wiki>)

Wikipedia includes a very good write-up on wiki fundamentals, and it demonstrates a wiki as it explains, so you do not need me to cover the same territory. If wikis are new to you, see the Wiki entry at that site [www.wikipedia.org/wiki/Wiki](http://www.wikipedia.org/wiki/Wiki).

My research indicates that most wikis exist in the business and academic environments; whether we will see a growth of public wikis like Wikipedia is unclear.

### What does "wiki" stand for?

Wiki is not an acronym or abbreviation; as you can learn from Wikipedia, the name is derived from the Hawaiian term "wiki," which means "quick."

The “quick” in wiki is not about response time or transmission speed; with a wiki, what is fast is the speed with which pages can be created and/or updated. If you are reading a wiki page and see an error, in many cases you can edit the offending page on the spot.

## How accurate are they?

If anyone can edit wiki pages, how do we know they are accurate? We don’t. Wikipedia itself acknowledges the risk: “Its open nature allows vandalism, inaccuracy, inconsistency, uneven quality, and unsubstantiated opinions.” Some constraints exist—typical users cannot delete pages, for example, but the main source of validation is the vigilance of wiki users themselves.

Since its inception, Wikipedia’s accuracy has come under scrutiny. Last year, several issues were raised focusing on both accuracy and bias of certain articles. A study by *Nature* magazine, however, revealed that science articles in Wikipedia are about as accurate as those found in Encyclopedia Britannica. ([Internet encyclopaedias go head to head](#), December 2005)

If necessary, most wiki engines include administrative features that allow you to set permissions for the editing of pages. Limiting who can change a page to specific users is one way to minimize errors.

## How about TWiki™?

TWiki is the trademarked name for an Open Source Wiki platform for “TWikiSites.” Key benefits of TWiki are easy revision control—every change ever made to a page can be tracked—and availability of access control lists. These features make it well suited for corporate wiki sites.

(Side note: The name “TWiki” is capitalized unusually to deliberately distinguish it from “Twiki,” a character from the old Buck Rogers TV series.)

## Who else is out there? What features exist?

In addition to TWiki, many other wiki engines exist (over 200 according to some sources)—*Confluence*, *Dolphin Wiki*, *Moin Moin*, *XWiki*, to name a few. The feature list for them all is significant and varies from wiki to wiki. If you are interested in a summary of products and features, return to Wikipedia and see the [Comparison of wiki software](#) article.

## Features for wiki administration

From an administrative standpoint, many wikis provide the ability to password-protect pages, restrict users, and provide various level of administrative control. Others, however, allow open access to the entire wiki.

Because all wikis are open source, any wiki can potentially adopt features found in other wikis by simply accessing and customizing the source code. Some wikis allow the development and use of plug-ins for specialized purposes, such as enhanced editing, sending of email, and many, many more (depending on the wiki).

## Features for wiki contributors

Most wikis use the same basic page formatting functions (i.e., text editing and image, table, list, hyperlink, and file insertion). Features that are aimed at wiki contributors include inter-wiki linking, link checking, archiving, a “sandbox” area to practice formatting, and user support. Some wikis provide a WYSIWYG editor, spell-check, and/or features such as drawing tools or equation editors.

## Features for wiki users

The following features are primarily for the user who is seeking information, but may not be planning to contribute: a search function (either title or text search may be possible), friendly print capability, page index or topic list, tabbed format providing an article (topic page), discussion area (would say it’s similar to a blog), edit history, and ability to compare selected versions.

The following figure, taken from the footer on the TWiki site, shows some typical contributor and user features.



## How can a wiki be used?

A wiki might not typically be used for traditional user documentation, which is often considered validated information regarding a specific release of a specific product. But think about it... If you post a PDF in a wiki article, you could allow appropriate users to add comments in the article's discussion area. The discussion can be monitored and the PDF updated as needed. (You, the document author, could also explain or defend something you've done.) The wiki's history area tracks each time you update the PDF; it might include specific details regarding changes you make.

Or, you could take the TWiki approach and incorporate document content right into the wiki itself. See [TWiki Documentation](#) for an example.

A wiki can definitely be used as a document management tool. Other possible uses include those listed in the following table. Is this all? Of course not!

Use	Discussion
Company intranet	<p>Because content is maintained by employees, the theory is that outdated and inadequate intranet content can be minimized.</p> <p>The reality may be different. Employees everywhere are busy; wiki organization can suffer; personality issues/disagreements may exist. Formal responsibilities may need to be assigned for the monitoring and update of wiki content; write access to various topics may be needed.</p> <p>For other opinions on potential pitfalls, see the TECHWR-L. For example, technical writer Joe Malin writes "Wikipedia also illustrates the most important part of a wiki: moderation/editing. An unmoderated, unedited wiki will quickly devolve into a morass of unorganized pages with excessive duplication. I have seen at least one internal wiki exhibit this behavior." (<a href="#">RE: Getting started with wiki?</a> February 2006)</p> <p>In fact, keep these sorts of pitfalls in mind when reading the remainder of this table.</p>
Knowledge base or FAQ system	<p>This usage seems like a perfect match for a wiki. With proper organization and monitoring, support engineers can enter information and solutions about the problems they encounter every day. Customers may be allowed to enter discussion groups as well. Instead of all of that knowledge residing in each engineer's head, the wiki makes it possible for all appropriate users to find it when needed.</p>
Software design and documentation	<p>One of the original and highest uses of wikis, because they allow easy collaboration, tracking, and recordkeeping. Here's what Eric Baldeschwieler, Director of Software Development of Yahoo!, had to say:</p> <p>"We use TWiki internally to manage documentation and project planning for our products... Our development team includes hundreds of people in various locations all over the world, so web collaboration is VERY important to us. TWiki has changed the way we run meetings, plan releases, document our product and generally communicate with each other." (<a href="http://twiki.org/">http://twiki.org/</a>, quote from 2004)</p>

Tracking issues (“bugs”) and features	The TWiki Codev site itself is managed this way. Codev is TWiki’s main collaboration area for TWiki development. For a taste, see the <a href="#">Codev home page</a> , and click the <b>Bugs changes</b> link.
Broader collaboration	Follows naturally from discussions above.
Software or documentation archive	Ditto above discussions. Sometimes wiki archiving is compared to programs such as Lotus Notes; wikis are much easier to use.
Internal message board	For example, use a wiki for job listings. That type of message board would definitely need restrictions as to who could post or change information.  What about a company carpooling message board, though?

Hope that this introductory article on wikis has been helpful to you. If you have wiki experience, please send us some info about your experiences!