Communicator

The Institute of Scientific and Technical Communicators
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Marking your territory

Do your colleagues break your documents?
This is more about your standing than their lack of knowledge says Andrew Peck.

Throughout history there have been ways to mark territory as 'off limits'. For many animals this is done by scenting trees near the edge of the territory, for others a collection of bones is left outside the cave. For humans it started with gore-encrusted heads on sharp sticks and has transformed down the centuries into 'customs and passport control'. Being territorial isn't just about the wider world, it's about the workplace and anywhere else we're surrounded by others. Just like a nation state, you can monitor your borders to see how well your territory is marked.

How often – if you're using Word – do you get a file back from a colleague, a reviewer or a customer to find that it's inexplicably broken? If the answer is 'all the time' then your borders are 'open' and it's time to get territorial about your work and profession.

Recognise the issue

Recently, I attended a meeting with a project manager who was adamant he didn't want FrameMaker – even though his predecessor had suggested it – as when my contract is up, he wants an engineer to 'handle the documentation'. As a contractor, apart from pointing out the potential pitfalls and making recommendations, there isn't a lot I can do. I have to respect his decision.

In the meantime though, I don't want my time on site to be centred on 'fixing' documents. I want to raise my profile and that of my profession, and part of that is preventing others thinking of me as a glorified typist. This is easier with a dedicated technical communication tool: a side benefit is that the different application ring-fences your work without any effort on your part. However, even when we're using a tool as ubiquitous as Word, there's a lot you can do.

Why does it happen?

Why are your documents getting broken? On a technical level – broken cross references or odd layout – it may be because non-specialists lack an understanding of how Word really works. Some of the settings we use to make our life simpler confuse those with a lower level of expertise. As a result,

if given access to the source material, they introduce errors that see the list of styles in the document ballooning as they repeatedly click the buttons on the ribbon without understanding that the underlying document has a structure that meshes the visual appearance with the content like well-oiled gears. For those of you who, like me, work with the 'hidden' formatting markers showing, the on-screen effect of the 'improvements' can resemble a rather complex treasure map with multiple arrows (tabs and line breaks) and different types of paragraph and section breaks following one after another. If you make field shading visible too, this is sometimes overlaid on a patchwork of grey areas where whole sections have been inadvertently incorporated into a cross-reference.

Whose fault is it?

At this stage, a common response is to blame the people who have done this to your document. You'd be wrong to do that because the documentation is your territory, and the real problem is that you haven't made sure they know and respect that fact.

If you think this is a little extreme, ask yourself what the consequences would be of you walking into another section of the business and pressing buttons or using equipment without checking with the person responsible. The answer is usually 'it wouldn't happen because I'm not the chef/engineer/surgeon'. In the same way, it should also be apparent to others in your organisation that you are the professional communicator.

Stop correcting their errors in silence, or one day the damage will be severe, and you will struggle to correct it in time for an essential deadline. I've been there, and it's not funny. While mounting the offender's head on a stake is a bit primitive, you already know enough to maintain good border control.

Here are some ideas that might work for you. They'll make your job easier in the long run, and may also boost your professional standing with your colleagues.

Lock the styles

I'd expect a technical communicator

using Word to have the 'Developer' tools activated, this gives you a whole new option on the top menu. There's a big padlock icon in there called 'Restrict Editing', which gives you the option to 'limit formatting to the styles you created when designing the documentation and the style-guide.

Someone – possibly your own inner voice – will ask, 'but what if the reviewer needs a style that I haven't included?' The answer to this is two-fold: first, such requirements should have been picked up when the template was reviewed; second, the documents are yours, and others should talk to you about any changes they want. In all likelihood they really haven't thought through why they need 'Heading 23 – Bold – Indented - Superscript' and are really just trying to recreate body text.

Educate your colleagues

You're not just a 'writer' you're a professional communicator. Schedule a presentation about your work. Walk them through the style-guide and sell them 'how much easier it will make things for them and the clients' if the structure and language used are consistent.

It'll get everyone on-side, and may raise both your profile and the profile of technical communicators in general.

You'll probably be back…

For some clients, using Word works well. While they may not want to write a whole document, minor updates do not represent a challenge.

For others, you just know you'll be back. The patchwork nature – not just of the formatting but also the content, reading as if it has been cobbled together from a number of sources – reaches the stage that you receive a plea to 'come back and sort us out'. **C**

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