

# First International Professional Basic Training for Documentation Specialists 2015

Beijing, April 20–24



## China Association for Standardization (CAS)



CAS was established in 1978 with a legal status approved by the Ministry of Civil Affairs as a nationwide public society consisting of organizations and individuals engaged in standardization based on voluntary participation. Led and operationally guided by the General Administration of Quality Supervision, Inspection and Quarantine of China (AQSIQ) and Standardization Administration of the People's Republic of China (SAC), CAS is one of the important members of China Association for Science and Technology.

Since 2006, CAS has been committed to domestic and international standards and technique exchange and promotion in the field of technical communication, such as product instructions. Four international symposiums and a few training sessions focusing on technical communication have been successfully held in China. In early 2014, the Technical Communication Research Center of China Association for Standardization was founded in order to carry out related services.

Gao Jianzhong  
Secretary-General, CAS, China

## Gesellschaft für Technische Kommunikation – tekom e.V.



The Gesellschaft für Technische Kommunikation – tekom e.V. is the German Association for Technical Communication, founded in Germany in 1978. As the largest professional association for technical communication worldwide, tekom represents and connects more than 9,000 professionals who are active in technical communication and related fields. The main task of the association is to represent the interests of creators and users of user information and training.

In Germany, the longtime work of tekom led to the development and establishment of over 30

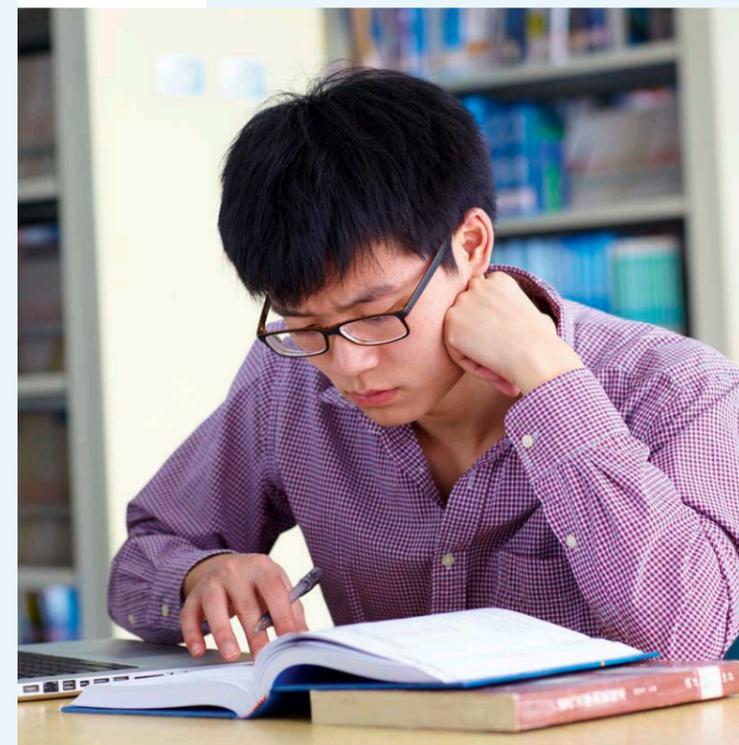
academic programs on Bachelor's and Master's levels. In the international field, tekom has designed TCTrainNet, an international online training and certification program for technical communication.

tekom experts are involved in projects on professional skills and competencies on behalf of the European Commission. In addition, the association issues the tekom certificate, which represents a formal and objective proof of qualification as a technical writer at an advanced level recognized by companies.

Dr. Michael Fritz  
Chief Executive Director tekom/tcworld GmbH

## First International Professional Basic Training for Documentation Specialists 2015

Beijing, April 20–24



### Benefits for Your Company:

- ✓ Assure Legal Compliance of Your Product Documentation
- ✓ Optimize Your Structure and Comprehensibility Competencies
- ✓ Minimize Documentation Risks
- ✓ Improve the Skills of Your Documentation Specialists
- ✓ Chance to Receive a Nationally and Internationally Recognized Certificate

TRAINING & CERTIFICATION

# First International Professional Basic Training for Documentation Specialists 2015

Beijing, April 20–24

## Course Description

China Association for Standardization (CAS) and the German Association for Technical Communication (tekomp) offer a professional entry course in Technical Communication. It is designed to meet the growing demand for more effective communication of technical material through manuals, reports and online documentation.

This five-day classroom training course provides an integrated curriculum covering principles and practices commonly used in technical environments. Participants in this certificate program will learn the skills, techniques and strategies to effectively communicate technical information in many different forms to meet specific audience needs.

## For Whom Is the Course Designed?

The program is designed for

- Those who are already working as technical writers and want to professionalize their work, improve their skills, optimize the editorial processes, or benefit from competitive advantages in the job market.
- New entrants and career changers in the field of technical writing.

- Specific occupation groups:
  - ◆ Product and layout designers
  - ◆ Technical communicators
  - ◆ (Technical) translators and localization specialist
  - ◆ Software developers
  - ◆ Information developers
  - ◆ Engineers
  - ◆ Marketing staff

The course of study will focus on	
1 <sup>st</sup> Day	Introduction and Legal context
2 <sup>nd</sup> Day	Safety instructions
3 <sup>rd</sup> Day	Structuring (Analysis manual types, target audiences, etc.)
4 <sup>th</sup> Day	Standardization
5 <sup>th</sup> Day	Design and Analysis

Please find the detailed program of the course on the following two pages.

## What Will Your Documentation Specialist Learn in this Course?

During these five training days, answers will be given to central questions such as:

- What are the legal requirements on instructions for use in worldwide markets, and how can they be researched and fulfilled?
- What do compliant safety messages look like, and how do I decide which warnings shall be given and which not?
- How is a good structure for an installation manual or a quick reference guide developed systematically by taking into account the informational needs of the target groups?
- How are instructions for use developed efficiently and consistently in an authoring team and which methods should be used to standardize structures or formulation patterns?
- How is a readable document created, incl. terminology process and quality assurance?

## Why Invest in This Course?

To make sure that products (such as equipment, machines, software or service products) are used safely, users must obtain the appropriate information. The producers must ensure the usability of this information during the whole lifecycle of the products. This information should be developed by qualified persons with professional training.

Armed with the know-how of this training course, your employees will have the basic knowledge to

develop and improve the technical documentation of your company.

Companies with skilled technical communicators profit from high information quality and effective instructions, fewer liability risks, less effort expended in creating standardized documentation and rule-based writing, higher customer satisfaction and, therefore, competitive advantages and business success.

## Certificates

The successful participant will receive two certificates acknowledged on a national and international level. The certificates are issued by CAS and tekomp.

These certificates prove that

- a trainee has completed the training course and successfully passed the exam.
- a trainee has reached a certain professional level where he or she can manage national projects effectively and efficiently.



# First International Professional Basic Training for Documentation Specialists 2015

Beijing, April 20–24

## TRAINING & CERTIFICATION

	Day 1 – April 20 INTRODUCTION AND LEGAL CONTEXT	Day 2 – April 21 SAFETY INSTRUCTIONS	Day 3 – April 22 STRUCTURING	Day 4 – April 23 STANDARDIZATION	Day 5 – April 24 DESIGN AND ANALYSIS
	<b>Introduction to Technical Documentation</b>	<b>Safety Notes and Warning Messages</b>	<b>Manual Types</b>	<b>Introduction to Standardization</b>	<b>Typography and Layout</b>
<b>09:00–10:00</b>	Role, typical tasks and competencies of a technical writer  Plenum: What are your tasks? How do you organize your technical communication = What is good, what could be better?	<b>09:00–09:45</b> Requirements on safety notes and warning messages • The important difference between safety notes and warning messages (IEC 82079-1) • Important standards: the ANSI Z535 series  <b>09:45–10:30</b> How to write safety notes and warning messages • The SAFE principle • Signal word panel • Distinguishing between type and consequences • Source of hazard and measures • Formulation patterns	<b>09:00–10:15</b> Typical types of manuals and instructions for use in different branches • Standard structures • Examples • How to use "brief instructions" • The most important characteristics of an Online Help • How to use different media simultaneously • Look-out: Mobile documentation  <b>10:15–10:30</b> Exercise	<b>09:00–09:45</b> The Method of Functional Design • What is the function of a sentence and visualization? • Example: functional elements of an action sequence • Rules for functional formulation – IEC 82079-1 sec. 6.1.3  <b>09:45–10:15</b> Exercise: Building an action sequence  <b>10:15–10:30</b> Hints on how to achieve short instructions	<b>09:00–10:30</b> How to achieve a readable documentation • Examples • Different layout types: Lift, Top, Sandwich, Pair • Factors of readability and the recommendations of IEC 82079-1 • Letter size (requirements from standards, too) • Hints on how to develop an appropriate design
<b>10:00–10:15</b>	<b>Short Break</b>	<b>10:30–10:45</b> <b>Short Break</b>	<b>10:30–10:45</b> <b>Short Break</b>	<b>10:30–10:45</b> <b>Short Break</b>	<b>10:30–10:45</b> <b>Short Break</b>
<b>10:15–11:25</b>	Process steps of a technical documentation project (IEC 82079-1)	<b>10:45–11:05</b> Exercise: Write warning messages for the prepared examples  <b>11:05–11:30</b> Discussion of the solutions	<b>10:45–11:45</b> <b>Target Group Analysis</b>  How to perform and how to use a target group analysis • Requirements of the IEC 82079-1 • Methods and examples • How to start • Who knows something about the user? • Improving with empirical examinations  <b>11:45–12:15</b> Plenum: Developing a user's profile	<b>10:45–12:00</b> <b>Information Types and Sequence Patterns</b>  Structures and rules for typical information types • Technical data • Product and component description • Functional description • Screen description • Troubleshooting • Maintenance plan  <b>12:00–12:15</b> Plenum: Developing a standard structure for an information type	<b>10:45–11:45</b> <b>Consistent Terminology</b>  • What is terminology? • Rules for word formation • How to fulfil the requirements of the IEC 82079-1 • Terminology process and quality assurance  <b>11:45–12:15</b> Exercises
<b>11:25–11:45</b>	Exercise: Describe your as-is process (or read the prepared description) • Which requirements are fulfilled, which are not?	<b>11:30–12:15</b> <b>Pictograms</b>  How (not) to use safety pictograms • Standards and examples • Understandability of pictograms • Developing your own pictogram (ANSI Z535.3)			
<b>11:45–13:00</b>	<b>Break</b>	<b>12:15–13:30</b> <b>Break</b>	<b>12:15–13:30</b> <b>Break</b>	<b>12:15–13:30</b> <b>Break</b>	<b>12:15–13:30</b> <b>Break</b>
	<b>Legal Requirements and Product Safety</b>	<b>13:30–13:45</b> Exercise: Choose a pictogram and explain it	<b>13:30–15:00</b> <b>Planning a Manual</b>  How to achieve a "good" manual structure • Task analysis as a basis for the instructional part of a manual • Which information is required for the descriptive parts of a manual? • Techniques for building up a content structure (mind map) • Table of content • The "introduction" chapter	<b>13:30–14:30</b> <b>Authoring Guideline</b>  How to achieve the required consistency with a practical guide according to Functional Design Information types and sequence patterns  <b>14:30–15:00</b> Exercise: • Write a chapter for the authoring guide • Derive appropriate rules for quality assurance	<b>13:30–14:00</b> <b>Analysis of a manual</b>  A quality map for the analysis of a manual  The method „problem typology“ for the evaluation of information and instructions  <b>14:00–14:30</b> Exercise: Analyze the example  <b>14:30–15:00</b> Discussion of the analysis results
<b>13:00–13:20</b>	Understanding the legal framework: product safety, product liability and contractual requirements				
<b>13:20–14:20</b>	Understanding the EU legal system for product safety as one of the most important, complex, influential and copied systems in the world • Standards research • Vertical and horizontal requirements, which are relevant for technical documentation • Requirements on operation manuals from the machinery directive – a milestone for machine safety and for technical documentation	<b>13:45–15:00</b> Requirements on safety labels on the product • International versus US standards: ISO 7010 and ISO 3864-2 versus ANSI Z535.4 and .2 • Design of "harmonized labels" • How to explain product safety labels in the manual			
<b>14:20–14:30</b>	Quiz: Questions and Answers to improve understanding				
<b>14:30–14:45</b>	<b>Short Break</b>	<b>15:00–15:15</b> <b>Short Break</b>	<b>15:00–15:15</b> <b>Short Break</b>	<b>15:00–15:15</b> <b>Short Break</b>	<b>15:00–15:15</b> <b>Short Break</b>
	<b>Civil Law and the Need for Risk Assessment</b>	<b>15:15–16:05</b> <b>Safety Notes and the Safety Chapter</b>  Safety notes – the champion's league for technical writers • The title and sequencing of a safety chapter • Examples from different branches • "Intended use" in a manual • How to describe minimum target group competencies in a manual  <b>16:05–16:25</b> Exercise	<b>15:15–16:45</b> Exercise: Build a structure for a user's manual for the prepared product	<b>15:15–16:30</b> <b>Pictures and Illustrations in Manuals</b>  • Text and illustration – a dream team • Advantages and disadvantages of illustrations • Types and functional use of visualizations • Is an understandable text-free manual possible? • Look-out: Animation and video instructions	<b>15:15–16:15</b> Test (Multiple Choice; all topics)  <b>16:15–16:45</b> Solutions
<b>14:45–15:15</b>	Understanding civil law: product liability and law of contract • How civil law influences your documentation				
<b>15:15–16:05</b>	From risk analysis to warning message • What you must know about IEC 12100 • Proceeding and content of the risk assessment as required by IEC 82079-1				
<b>16:05–16:15</b>	Exercise: Test of understanding	<b>16:25–16:45</b> Discussion of the solutions	<b>16:45–17:05</b> Discussion of the solutions	<b>16:30–16:45</b> Exercise	
	<b>End of the day</b>	<b>End of the day</b>	<b>End of the day</b>	<b>End of the day</b>	<b>End of the day</b>

# First International Professional Basic Training for Documentation Specialists 2015

Beijing, April 20–24

## Trainer



**Roland Schmeling** is senior consultant and managing director of Schmeling + Consultants GmbH (Ltd.) ([www.schmeling-consultants.de/en](http://www.schmeling-consultants.de/en)), which he co-founded in 2007. His company provides consulting on information quality, content management, information processes, training, and IT. Roland has advised industrial enterprises on technical documentation since 1999, with focus on standardization, structuring, compliance, and usability of documentation, as well as on information management.

Roland studied physics and philology. He worked as a technical writer and project manager in a leading service company for many years as well as for many companies in different industries, e.g. machinery, energy, medical devices, software, and consumer goods. Now he is an expert process auditor of technical documentation at TÜV SÜD, a leading inspection company, where he has established a test laboratory for technical documentation.

Since 2004, he has been giving lectures on quality assurance as Adjunct Professor at the Hochschule Furtwangen University (HFU) and is also co-author of several books on technical documentation, e.g. on instructional safety and rule-based writing. His lectures and training sessions are favored by many technical writers and information managers.

Roland is a recognized expert in European technical law and instructional product liability. He is a voluntary member of the standards board of tekomp, and member of the IEC international standards committee JWG16 developing the standard IEC 82079-1, the most important horizontal standard for technical documentation worldwide.

As an expert in technical writing, he is co-author of guidelines on rule-based writing and dedicated to the development of the standardization method Functional Design, a state-of-the-art method especially for technical documentation.

**Roland Schmeling**  
Managing director of  
**Schmeling + Consultants GmbH (Ltd.)**  
E-Mail: [r.schmeling@schmeling-consultants.de](mailto:r.schmeling@schmeling-consultants.de)

## Venue

China Association for Standardization (CAS)  
No. 33, Zengguang Road,  
CAS Building,  
Haidian District,  
100048 Beijing, China

## TRAINING & CERTIFICATION



## Contact person:



**Liu Lu**  
Project Executive  
Phone 010-68481976  
E-Mail: [ll@china-cas.org](mailto:ll@china-cas.org)



**Han Tao**  
Vice Director &  
Technical Director of CAS  
Technical Communication  
Research Center  
Phone 010-68481806  
E-Mail: [ht@china-cas.org](mailto:ht@china-cas.org)

## How much is the Course Fee?

For the Professional Basic Training for Documentation Specialists including the national and international certifications the price per participant is **370 EUR/3,000 RMB plus taxes.**

## How to Register for the Course?

For registration to this course you will need to complete the attached application form. Please send the completed and signed application form to **010-68488776 by fax** or [ht@china-cas.org](mailto:ht@china-cas.org) before **Feb. 6, 2015.**

For further information please follow the Contractual conditions in the attached application form or contact us.