

TCANZ study: Using InDesign as a Technical Communication Tool

The following is a summary of information that resulted from a questionnaire that TCANZ sent out on Friday 16th April 2010. It asks our members how effective they think Adobe InDesign is as a technical communication tool.

Note: InDesign CS4 onwards includes a cross-referencing and conditional text capability. CS5 will be available in New Zealand at the end of April.

1. In what ways do you use InDesign when doing technical writing?

- One member suggested investigating the following link which demonstrates the strengths weaknesses of many SW packages. <http://hat-matrix.com>
- We use InDesign CS3 for laying out all our educational resources including training manuals and workbooks. We also use it for a wide variety of marketing collateral. Large documents are written in Word and then copied into InDesign; however it is possible to work directly in In-Design without any problems occurring.
- My company is currently evaluating InDesign as a possible tool of choice for developing user guides and other types of manuals.
- I prepare teaching manuals, midwifery journals and story books.
- I use it for layout of newsletters, brochures, and booklets and then turn the documents into PDFs for distribution to the audience, or for printed output.
- We use In Design when handling clients' translation of technical manuals and promotional materials in this format. It's good for handling ongoing updates due to interface with industry standard translation memory tools and good for both text heavy as well as "fancy-looking" materials.

2. If you do use it. Do you need to translate the documents, and if so, how? Do you use the layers palette, one layer for English and another for the translated text?

- Layers are great for controlling elements (images, text, etc) that may be required for one doc but not another and can be turned on and off.
- We do not translate our materials; however we do use the layers palette and find it useful. You can place word documents 2003 and 2007 into a document. Rather like installing Holland blinds and pulling them up and down.
- Perhaps InDesign using the layers palette for translations might work well if you are making brief colour printed manuals. My previous employer uses a similar approach was done using Quark XPress on Macs for translations. The colour artwork was pre-printed and the black text was overprinted and edited to fit. The publishing industry does this for titles like cooking books, to share the colour printing costs between languages and publishers. It puts a strain on the translators and DTP operators to make the text fit though.

- When setting up InDesign documents for translation it's important the original documents are "ready" for localisation (translation). A typical good localisation-ready document has clear structure (chapters, section, heading and etc.), clear and distinctive use of Paragraph/Character Styles set with less manual overwrite (i.e. make as much Styles as possible to cover all the text styles), and enough space for possible expansion of translated text. Lack of text space is a major source of problems when translating a document into languages such as German, French, Scandinavian and etc. Please consider possible text expansion and its consequence when making the English original.

3. Would InDesign be a better choice than FrameMaker? Why (or why not)?

- We have no experience with FrameMaker. However the following links may be helpful (if you haven't already seen them). They compare the functionality of FrameMaker and In Design.
 - www.adobe.com/uk/products/framemaker/comparison.html
 - <http://iconlogic.blogs.com/weblog/2008/05/adobe-framemake/html>
 - http://forums.cnet.com/5208-6136_102-0.html?threadID=191661
- InDesign is far superior.
- InDesign has got fantastic colour control, which Author IT doesn't have, putting print through Word. So to me it's a toss up between InDesign for colour control, Author IT for localization, and FrameMaker for really big books. I currently use FrameMaker to produce a mammoth 2,000+ page operating system reference that I wouldn't dream of doing in InDesign or Word, but I would consider using Author IT if it didn't get printed.
- The difference of InDesign and FrameMaker is mainly in image manipulation and cross referencing capacity.

FrameMaker is easier to work with when creating a text heavy technical manual with screenshots and such but no background image or decorative aspect to page template. Also FrameMaker is better when you are using lots of cross references in the document (i.e. "For detail, please see chapter XXXX on page XX" kind of cross reference). It can create cross references across different files (under a book) and updating xref info is a matter of click or two. Putting Index markers, Variables, and making TOC is also easy. FrameMaker is easier to deal with when you don't have to manipulate image or text styles. Perhaps it is better when you are writing a huge book with lots of chapters because you can make them as separate files and store them under a book structure while keeping all the index/cross references maintained.

InDesign has got a definite advantage when creating a document requiring more detailed image manipulation and layers, and also it has got better capabilities when manipulating text with individual manual overwrite (i.e. kerning, paragraph/character based styles). You can make separate chapters and store under a book structure just like FrameMaker, but it doesn't have cross reference function like FrameMaker. It can create TOC and Index, but not cross references across separate files.
- I use InDesign for my brochure work and use layers for the number of different languages. I know there are specialized tools out there for language translation and single sourcing etc... but so far as utilizing a base template and layering this is for me the easiest option and a professional choice.

4. How would you rate InDesign as a single-source tool for producing different types of output?

- The main file type we output to be PDF. At times we output to JPG and EPS.
- InDesign has offered me everything I have needed. Images wise you can use raw files from Photoshop, Illustrator, Fireworks plus all the compressed files gif, tiff, jpg, etc and also pdfs can be placed on a page.
- I think I'd need to know a lot more about the application to comment further. If its colour consumer docs for mass market products then flashy colour manuals to make an easy to use product easier to use is the way to go. But if the docs are for technical users who need a lot of information maintained accurately and regularly then I doubt colour printed books that are too brief are the way to go unless you want to annoy the users.
- Good for PDF, print, has web capabilities, and has excellent integration with other products in its suite.
- Very good. One of the best for sure when creating print materials. Press quality file, PDF, image...the latest (CS5) can even make Flash swf. It says CS4 can make a sort of HTML output, but personally I've never tried it (and most likely, I would rather use HTML editor to make one).

5. If we only wish to produce hard-copy manuals (and PDF) would InDesign be a good choice, compared to Microsoft Word or FrameMaker for example?

- Depends on whether you are treating your products as documents or publications. If they are documents then by all means use InDesign or MSWord. If they are something heavier then use a heavy-weight processor. Depending on where you want to go depends on how you start. It does seem to me that your firm is thinking and asking the right things. It also sounds like they are prepared to work through a full publication and production philosophy for the company. Something I applaud--it can only be good.
- Yes InDesign will be great for that. It is an excellent programme for all publication design/layout. Microsoft Word is very limited for layout and the final product tends to look much less professional. InDesign also has many more options when outputting to PDF, i.e. low res/high res/crop marks/paper size which makes quality easier to control.
- The unique feature of InDesign is that you once your manual is completed you package the file; meaning it takes all the fonts you use, the images, diagrams, pdfs, etc that you have used in creating the manual and put it in a unique folder. Now your document is totally transportable between computers, printers, etc.
- A definite yes, if you do not have cross references. If you have cross referenced document in mind, FrameMaker may prove to be a better choice. Microsoft Word is not a proper DTP application and you can have more problems than solutions. We don't recommend Microsoft Word for substantial manuals.
- Base your decision on:
 - Cost effectiveness
 - Learning curve value
 - Frequency of editing and outputting
 - Management and size of the documentation project
 - Resources available

- Use InDesign for a professional looking manual – great document layout tool, great to turn on and off those layers. This is an industry standard tool for graphic designers.
- Don't use Word for Manuals; don't use Word for online help.

6. Are there options available for producing online help from InDesign (equivalent to WebWorks Publisher for FrameMaker)?

- You have the ability to create print ready PDFs (with printers requirements), or to suit your in-house printer, and also the option to create small file PDFs which you can email.
- Adobe's Technical Communication Suite ships with FrameMaker and RoboHelp to make print and online docs. FrameMaker does have good conditional text functionality for producing multiple outputs from a single source.
- Check out <http://hat-matrix.com/> before you go much further...
- Not that I know of. In Design has got an export function (to XHTML for Dreamweaver) but that's the only HTML/XML related I know of.

7. Do you have any comments on the strengths and weaknesses of the product?

Strengths:

- I build websites and like creating cascading style sheets to have uniformity on the web pages InDesign also controls paragraph and object styles, colours and strokes, tables, text wrapping and a zillion other things to ensure consistency throughout your manuals. Most versatile and capable DTP software I've ever used. For me it's like a hybrid of Illustrator and FrameMaker. Paragraph/Character Style is very capable and logical with lots of controllable details. It can handle most of all languages except Indian languages (Hindi and such) and Right to Left (RTL) languages such as Arabic and Hebrew (you will need Middle Eastern version of In Design to work on RTL language).
- InDesign is the graphic design industry standard for publication layout and we highly recommend it. We enjoy using it and find it to be easy to use (although we are trained graphic designers). It is great for small and large documents. It is a comprehensive programme with many capabilities so if you do not have experience with it, you will probably need some training to use it effectively. It works well across platforms (PC/MAC) and is compatible with other Adobe products such as Illustrator and Photoshop. If you are familiar with either of these programmes, you should find it easy to use InDesign as the elements are similar.

Weaknesses:

- Doesn't have cross reference. It tends to be uncomfortably heavy when creating a document with 100s of pages. You will need all the linked items ready and set to work on a document, or it'll be extremely slow to load.
- Pray you never need to ask for help on something that's not working. I've found the Support side of Adobe nothing short of abysmal, and have had to figure out most things by myself.