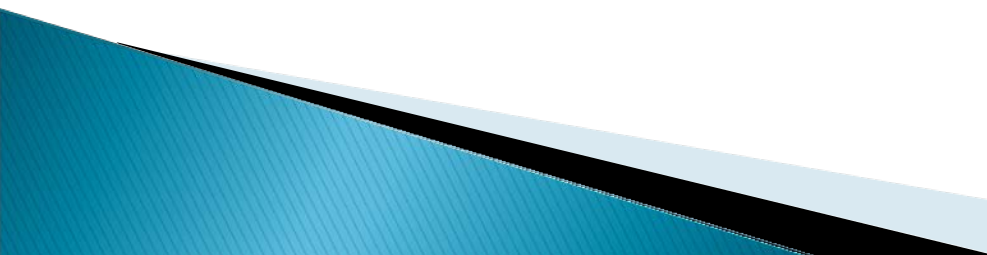


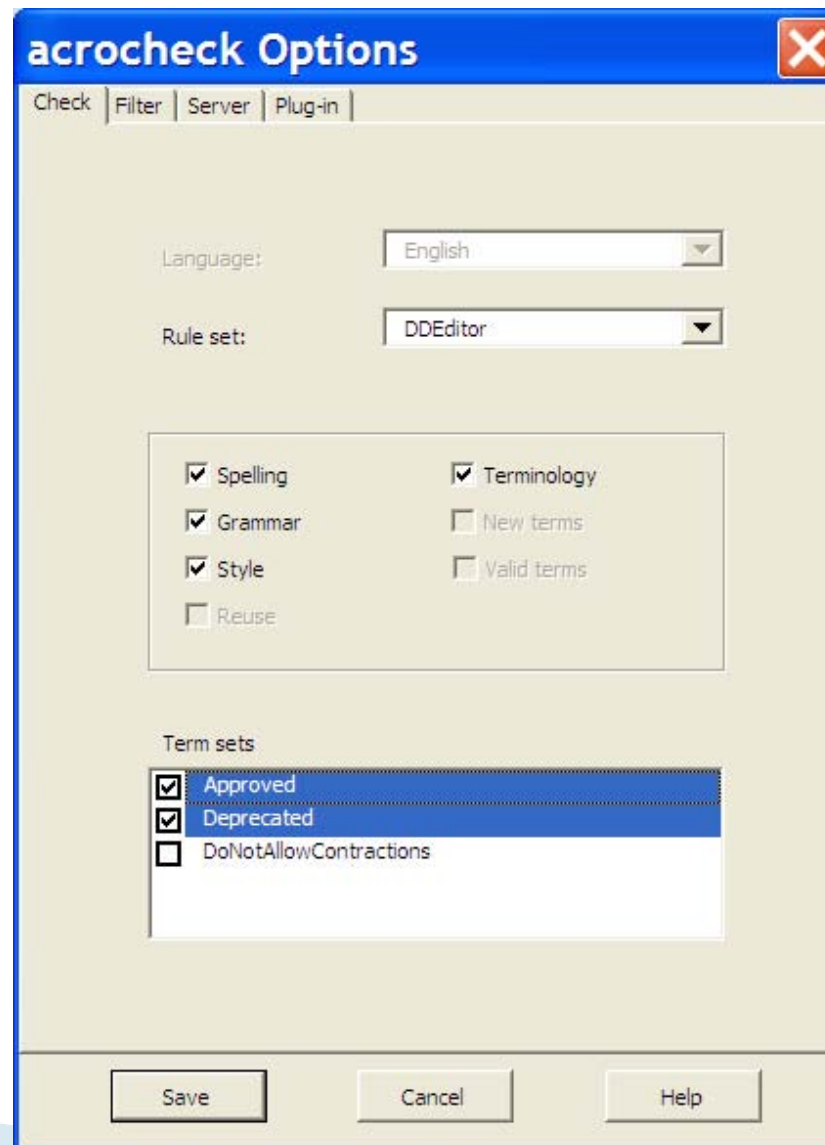
Implementing, customizing, and supporting a controlled-authoring application

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Dr. Sabine Lehmann, acrolinx GmbH

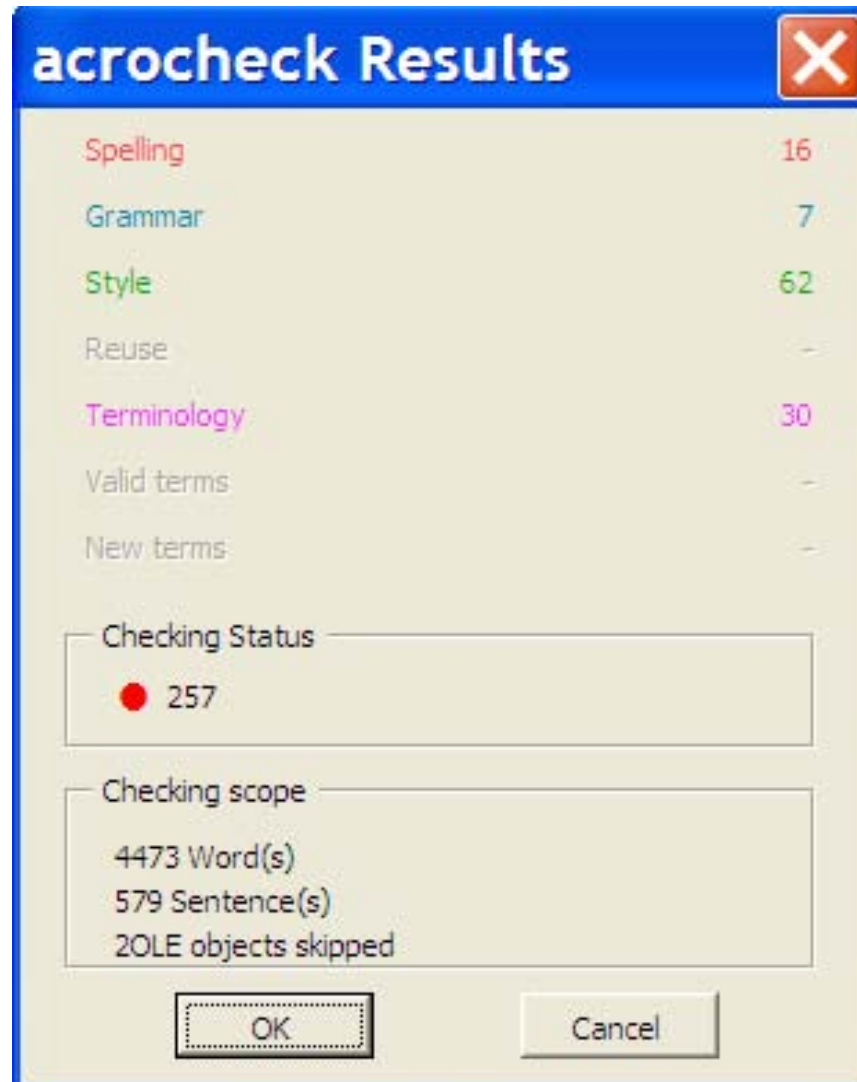
Agenda

- ▶ A quick look at a controlled-authoring tool (acrocheck)
 - ▶ Basic steps in the implementation process
 - ▶ A closer look at linguistic customizations
 - ▶ Support requirements
 - ▶ Q & A
- 

A quick look at a controlled-authoring tool

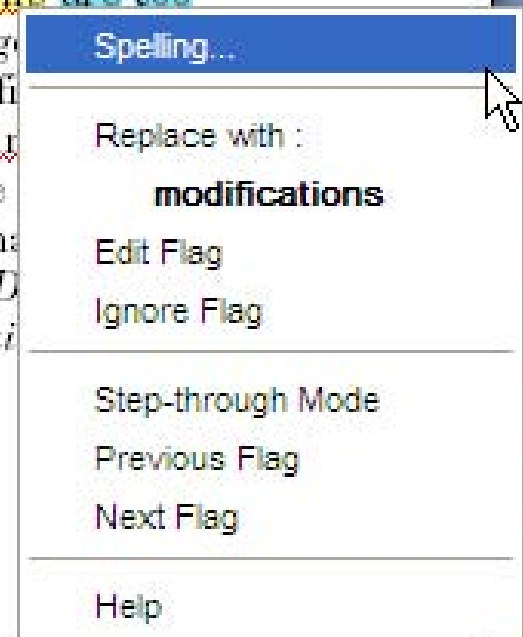


A quick look at a controlled-authoring tool




A quick look at a controlled-authoring tool

Yellow Represents a modified column. A column is considered modified if there is a change in the column attributes, like data length, (increase in column length), format, informat, or label. Most column modifications are too accommodate a larger data value. The most common change is the column length. The column modification itself is identified by a yellow icon. For example, if you click the CampaignCommur dataset, you will see a yellow icon next to CommCode since its length has been increased. For a complete list of column changes, see the appendix about table and column changes in the *SAS Data Store for Banking: Implementation and Administration Guide*.



A quick look at a controlled-authoring tool



acrolinx
TECHNOLOGY FOR INFORMATION QUALITY

acrocheck™ Checking Report

[Settings and Result Overview ▶ Show | hide](#)

[Administrative Information ▶ Show | hide](#)

Spelling ▼ Show | hide

Word	Count	Suggestion	Context
the	1	Repeated Word	Taking a complete backup of the the production environment is also recommended before commencing the upgrade process.
Integrtion	1	Integration	Users should have administrative and programming experience with Base SAS software and SAS Data Integrtion Studio software.

Grammar ▼ Show | hide

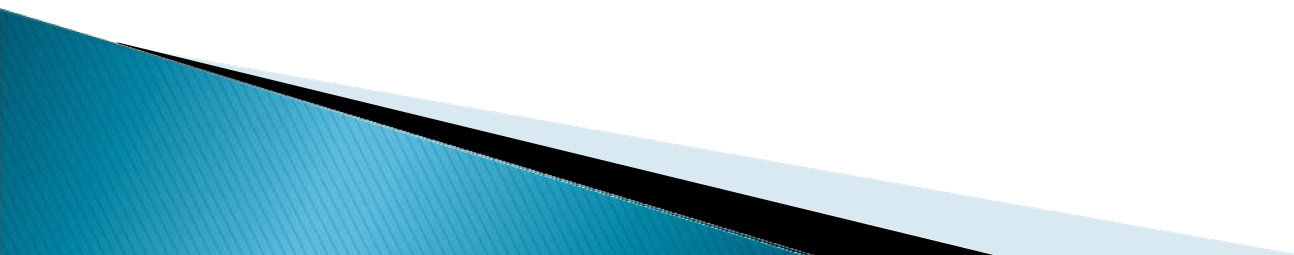
Summary

wrong verb form	1
---------------------------------	---

Details
(Order by rule...)

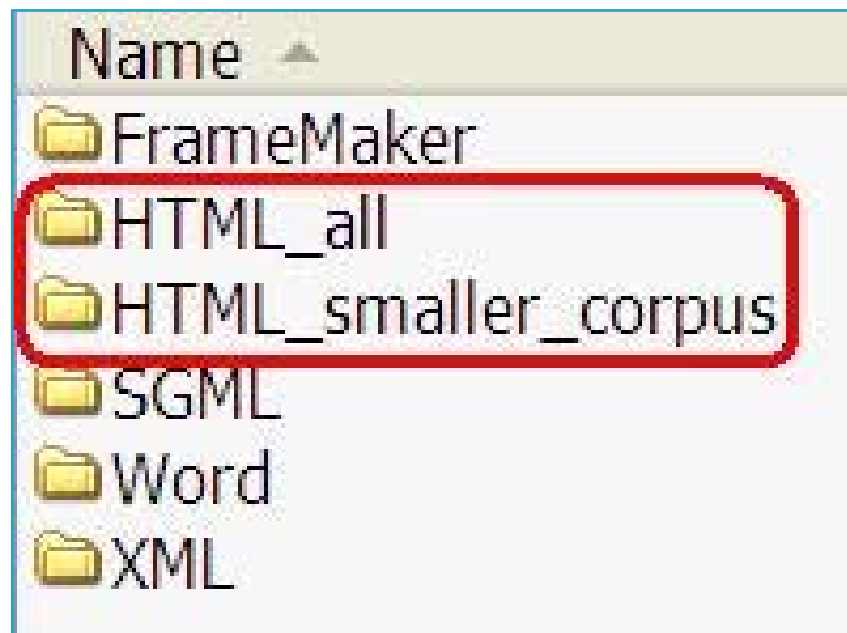
→ [wrong verb form](#)
a description of how the metadata changes **can might** be made during the upgrade process.

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The implementation process

- ▶ Assemble collections of documents to use for testing:
 - one comprehensive collection
 - one smaller (1–2 million word collection)

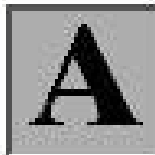


The implementation process

- ▶ Assemble existing company-specific terminology resources and provide them to the vendor.

List of Commonly Used Terms

[A | B | C | D | E | F | G | H | I
| J | K | L | M | N | O | P | Q | R
| S | T | U | V | W | Y | Z]
Numbers and Special Characters



abend or abort?

in the absence of --> if there are no

ACB (Application Control Block)

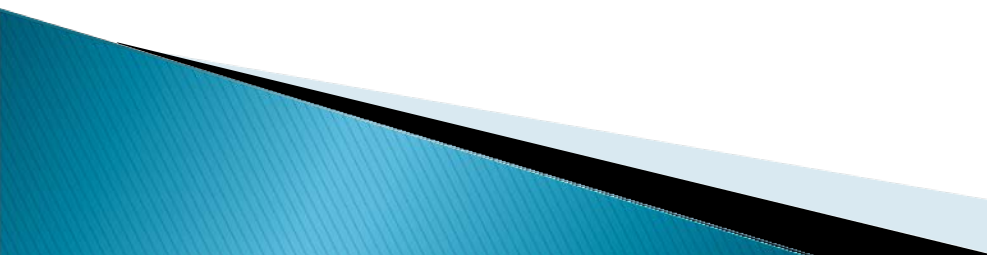
access control list (ACL)

ACF (autocorrelation function)

ACL (access control list)

acute accent (')

The implementation process

- ▶ Decide which of the vendor's standard style rules and grammar rules to implement.
 - Do you care about unnecessary use of future tense?
 - Do you use a comma before the last item in a series? (a, b, or c)
 - ▶ Let the vendor run the rules against your test documents.
 - ▶ Evaluate the output from those rules, and work with the vendor to fine-tune the rules as needed for your documentation.
- 

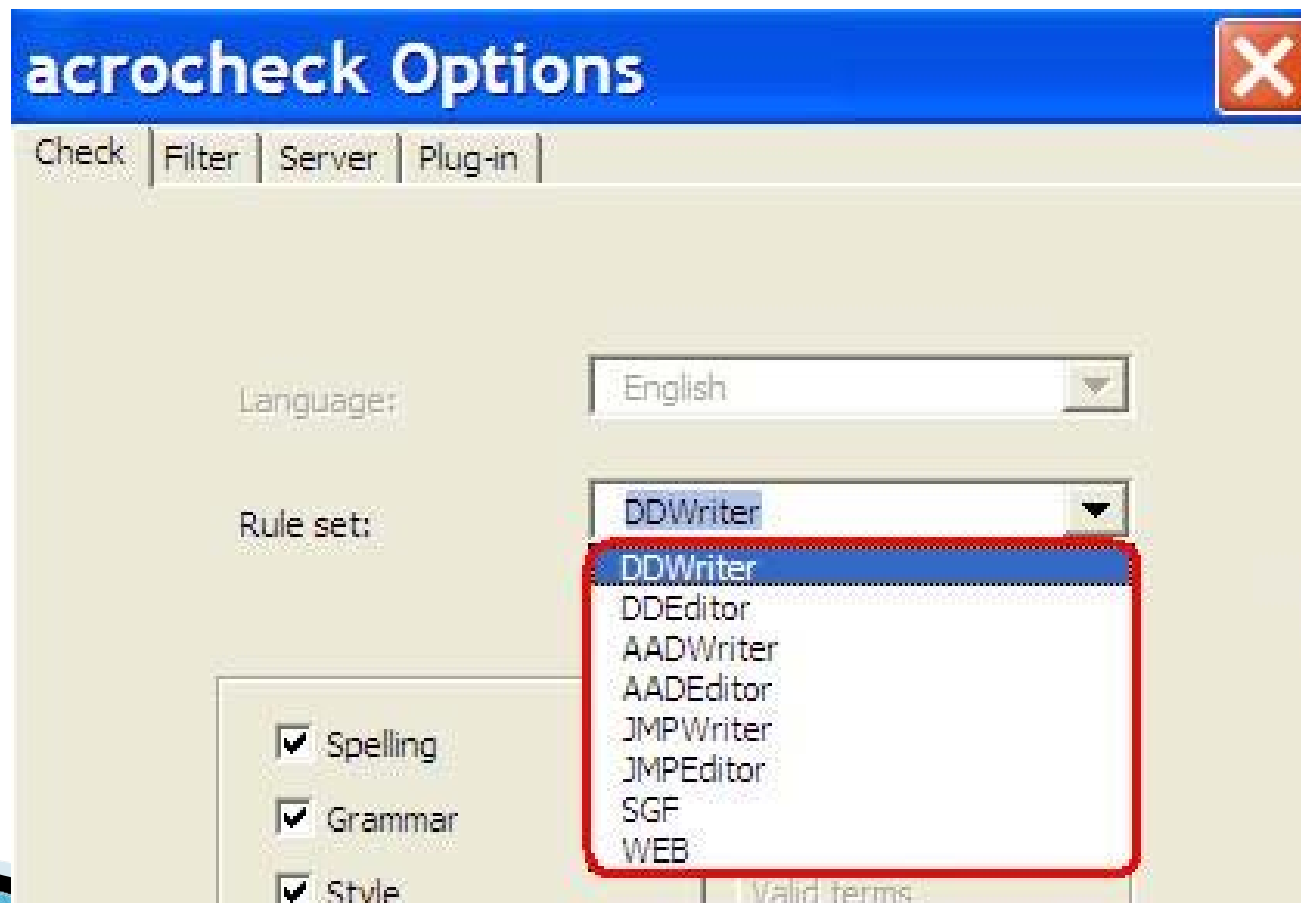
The implementation process

- ▶ Decide whether you want the vendor to develop additional grammar or style rules.

56	SAS Style Rules
69	<u>no adjective after trademark</u>
70	<u>no apostrophe with trademark</u>
71	<u>no hyphen with trademark</u>
73	<u>no slash with trademark</u>
74	<u>put cross reference in separate sentence</u>
77	<u>use period instead of semicolon</u>

The implementation process

- ▶ Decide whether you want to have more than one rule set.

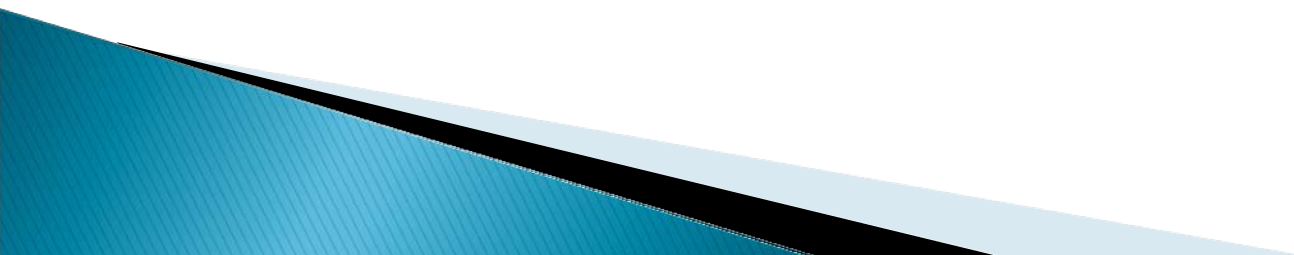


The implementation process

- ▶ Identify valid terms that the tool flags as spelling errors.

1	Spelling Error	Context	Category	Comment
2	Cary	SAS Institute Inc., SAS Campus Drive, Cary , North Carolina 27513.	valid	
3	Catalogue	Chen, J., Sun, D.X., and Wu, C.F.J. (1993), " A Catalogue of Two-level and Three-Level	British spelling	
4	c-charts	Clicking the C button gives c-charts , which display the number of nonconformities	deprecate	The leading C in C-charts should be capitalized. A C-chart is a specific type of Shewhart control chart.
5	Chemometric	Chemometric Methods in Molecular Design.	valid	
10	Communiations	Click the Communiations category.	misspelled	

The implementation process

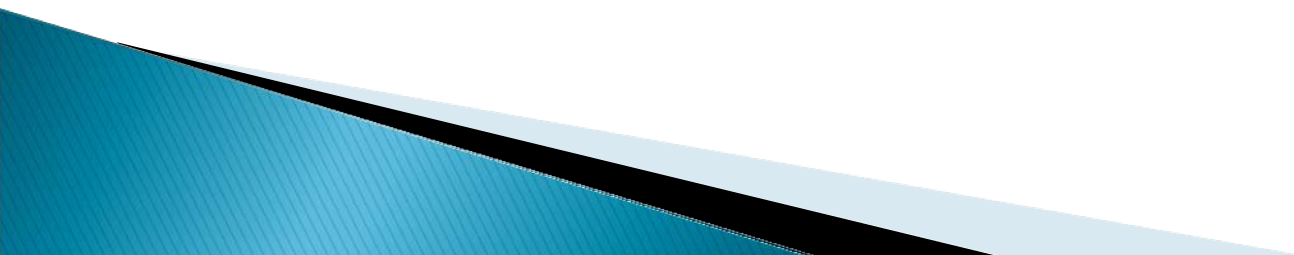
- ▶ Plan and conduct a pilot project.
 - Consider including people whom you expect to resist using the tool.
 - Try to choose participants who will be willing (and will have time) to give you good feedback.
 - ▶ Collect feedback and make incremental improvements.
 - ▶ Roll out the product to additional users.
 - ▶ Time required: 3 to 6 months for the initial implementation.
- 

The implementation process

▶ Considerations:

- You don't have to wait until you have a “perfect,” fully developed system.
- Put an initial system in place so that you can begin to get value from it.
- Refine it and add to it as time permits.

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A closer look at linguistic customizations

- ▶ Typical customizations
- ▶ Unique applications of controlled-authoring technology

Typical customizations

- ▶ Rule customization: a_an distinction rule

	D	E	F
1	Error	Context	Comment
14	A umask	A umask setting of 002 will enable your developers to share files.	pronounced as "YOU-mask"
37	a FLD	The following example issues a FLD call against an MSDB called	pronounced as "field".
38	a FMTSEARCH	Enter a FMTSEARCH option and a LIBNAME statement that are	pronounced as "format search"
49	a HMDA	Each time a HMDA or CRA extract, transform, and load (ETL) job	pronounced as "HUM-duh"

Typical customizations (cont.)

- ▶ Rule customization:
ungrammatical_sequence_of_words

	D	E	F
1	Error	Context	Comment
7	If is	If is a vector, define ABS() to be the largest absolute value of the elements of .	embedded image
49	The from	The From date must occur before the To date.	Exclude this context
61	You subset	You subset the data by using one of the following methods:	Exclude this context. ("subset" is a verb)

Typical customizations (cont.)

- ▶ Rule customizations: Apply some rules to specific contexts:
 - `do_not_use_passive` (e.g., flag only in `<procedure>`)
 - `use_title_case`, `do_not_begin_title_with_an_article`:

You must identify which elements contain titles so that the rule can be customized to apply to those elements.

Typical customizations (cont.)

▶ Spelling Filter (generic)

- Exclude names of companies (followed by Inc., GmbH, LLC, etc.):
 - **acrolinx** GmbH
- Exclude names of streets (followed by St., Street; ending in -str.; preceded by “rue de”, etc.):
 - 10 **Downing** Street
- Exclude words in bibliographic references and citations:
 - “On Analysis of Means,” Advances in Statistical Decision Theory and Methodology, **Balakrishnan** and **Panchapakesan**, editors.
 - Other studies (**Pierce**, 1980; **Bobbit** and **Otto**, 1990; **Buszuwski**, 1987) suggest using enough forecasts to allow symmetric weights for the seasonal moving averages for the most current data.

Typical customizations (cont.)

- ▶ Spelling Filter (customer-specific):
 - Exclude legal references:
 - StBerG
 - 5. Aufl.
 - § 40
 - Exclude names of data constructs (data sets, tables, variables, folders, directories, parameters, etc.)
 - the Dlims data set
 - the Extern folder

Unique applications of the technology

- ▶ Rules for consistent treatment of UI strings
 - Consistent treatment of UI strings provides several advantages:
 - **Translation:** UI strings must be translated according to the translations found in a software glossary.
 - **Presentation:** Often UI strings are presented in a special font. That presupposes that they can be identified unambiguously.
 - **Grammar, Style issues:** UI strings can often create false alarms (e.g., `sentence_too_long` errors). The rules can be modified to exclude false alarms if the UI strings are identified unambiguously.

Unique applications of the technology (cont.)

▶ Consistent treatment of UI strings (cont.)

- A rule that identifies untagged UI strings:

It you want to upgrade from Client Management Suite 6x, you must do the following:

Upgrade your Notification Server 6x to the Management Platform 7.0

Upgrade Client Management Suite

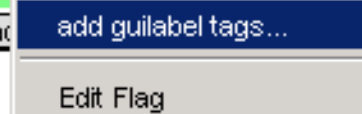
Manage your licenses

About Installing Client Management Suite for the first time

In the Value Provider panel, in the

Name

drop-down



add appropriate option.

Unique applications of the technology (cont.)

- ▶ Consistent treatment of UI strings (cont.)
 - Rules that identify incorrectly tagged UI strings:

`<para> Upgrade your Notification Server 6x to the Management Platform 7.0 </para>`

`<para> Upgrade Client Management Suite </para>`

`<para> Manage your licenses </para> </section>`

`<section>` `<title>` **About Installing Client Management Suite for the first time**

`<para>` In the

`<gui-label>` Value Provider `</gui-label>`

panel, in the

`<gui-label>` `<z_acro_error>` Name `</z_acro_error>`

`<z_acro_error>` drop-down `</z_acro_error>`

use guimenuitem instead of guilabel...

Edit Flag

Ignore Flag

`</para>` `</section>` `</chapter>`

Unique applications of the technology (cont.)

- ▶ Rules that detect “illegal” markup (“tag abuse”: the use of markup to achieve desired formatting):
 - improper_bold_emphasis
 - improper_italic_emphasis
 - improper_monospace_emphasis
 - improper_underscore_emphasis

Unique applications of the technology (cont.)

- ▶ Markup errors can be placed in a special section in the report (not style, not grammar, but markup!).

Markups

→ improper_bold_emphasis

*Press the **OK** button is not a good use of bold.*

→ improper_italic_emphasis

*The **file-name** variable is not a good use of italic.*

→ improper_underscore_emphasis

*The **file-name** variable is not a good use of underline.*

→ improper_monospacing_emphasis

*The **c:\file\name.dita** monospacing is not a good use.*

Unique applications of the technology (cont.)

- ▶ Rules that check complex interdependencies in Excel:
 - If GUI Object contains YNQ, then Master Text must end with a question mark:

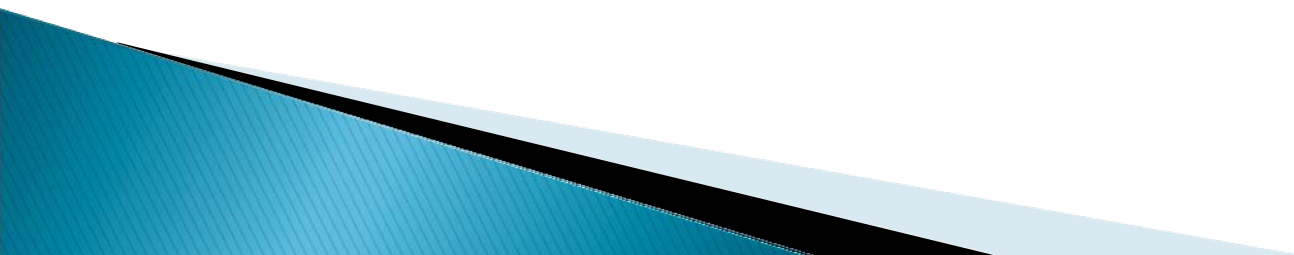
D	E	F	G	H
GUI OBJECT	MASTER TEXT			
YNQ/TCH	Starting session			
YNQ/DQ	Do you know the username of the contact you would like to add?			
s PF/MSG	Add contact			
STANDBY/TF	No new items. Press "Feeds" to configure Web feeds.			

Unique applications of the technology (cont.)

- ▶ Rules that check complex interdependencies in Excel (cont.):
 - If Master Text starts with lower case, then Label Description must start with “Text preceded by”:

	C	D	E
	LABEL DESCRIPTION	GUI OBJECT	MASTER TEXT
_TXT	Message telling the user that device has been added to the device list. Preceded by device_name. Lower case letter at the beginning of the sentence is deliberate.	TF/MSG	added to device list.
		use text preceded by...	Sends the picture via Bluetooth.
		Edit Flag	Format changed, cannot save.
		Ignore Flag	Result: All contacts deleted.
		Step-through Mode	Free service. Normal rates for
		Next Flag	
		Previous Flag	
		Help	

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Support requirements

- ▶ Examples of support tasks:
 - Modifying the vendor's Help topics so that they use examples from your company's own documentation.
 - Writing Help topics for new rules that the vendor develops for you (if any).
 - Providing training and support to new users.
 - Reviewing the release notes for new releases of the software, and deciding when to upgrade.
 - Testing new releases before making them available to your users.
 - Scheduling upgrades and giving users basic training in the new or changed features.

Support requirements

- ▶ Examples of support tasks (cont.):
 - If you roll out to other divisions or to other types of documents, you often need to do the terminology work and rule refinement all over again.
- ▶ At SAS, I support 100 users and do some of my own customizations to acrocheck in 20–25 hours a week.

Questions?

Thank You

Danke!

شكرًا

Gratias!

谢谢

谢谢

Grazie!

Teşekkürler!

당신을 감사하
십시오

¡Gracias!

Спасибо!

Obrigado!

Merci!

ありがとう

Σας
ευχαριστούμε

Dziękuję!

Dank u!