

TECHNICAL WRITING TEAM ONBOARDING & GOVERNANCE GUIDE

Fast-Track Operational Standards for Structured Adobe FrameMaker & DITA 1.3 · Owen Thackeray

PURPOSE & GOVERNANCE SCOPE: This guide provides documentation managers and lead technical writers with a ready-to-deploy onboarding curriculum for incoming technical communicators. It standardizes catalog hygiene, single-sourcing condition discipline, Structure View validation, and headless preflight verification across enterprise engineering publications.

Module 1: The Three Golden Rules of Catalog Discipline

- 1. **Zero Local Formatting Overrides:** All paragraph styling must derive from catalog formats. Never apply ad-hoc bold, italic, or font changes from the toolbar; use dedicated Character Catalog styles (e.g., UI-Bold, Code-Inline, Emphasis).
- 2. **No Rogue Paragraph Tags:** All production documents must match the master paragraph catalog from kestrel-template.fm. Run find-rogue-pgf-tags.jsx prior to submitting book updates to eliminate foreign tags introduced by copy-pasting.
- 3. **Master Spread Geometry Preservation:** Never manually drag text frame margins on body pages. Layout geometry modifications must be executed on Master Pages (Left, Right, First) and applied book-wide via **Format > Page Layout > Master Page Usage**.

Module 2: Structured XML & DITA 1.3 Authoring Workflow

- 1. **Element Structure Validation:** Keep Structure View (``esc v s``) open at all times. All structural elements must resolve without red-border required-child flags. Run Element Validation (``esc v v``) before checking topics into version control.
- 2. **Portable XML Applications:** Verify that structapps.fm uses \$STRUCDIR and \$APPDATADIR portable variables. Never hardcode absolute Windows drive letters (C:\ or D:\) into DTD, schema, or read/write rule paths.
- 3. **DITA Map & Conref Protocol:** In DITA maps, enforce keyref indirection for dynamic product naming. Content references (conrefs) must point to dedicated reusable component files (``reusable-warnings.dita``) rather than cross-topic peer files.

Module 3: Single-Sourcing & Conditional Text Hygiene

- 1. **Marker & Reference Tag Synchronization:** When placing cross-reference markers inside conditional text, ensure the cross-reference source marker and the referencing phrase share identical condition tags to prevent unresolved xref errors when variants hide.
- 2. **Build Expression Locking:** Use saved conditional build expressions (e.g., Model-200 AND Print) rather than manual checkbox toggles. Store active build expressions in book build scripts to ensure deterministic outputs.

Module 4: Pre-Release Preflight & Automated Build Verification

- 1. **Headless Build Automation:** Validate unattended batch builds using build-book.cmd. Confirm that ExtendScript parameter FS_AlertUserAboutFailure is set to 0 to guarantee build agents never hang on modal dialogs.
- 2. **Section 508 & Accessibility Sign-Off:** Verify that **Generate Tagged PDF** is enabled in PDF Setup. Ensure all graphic containers include non-empty alt attributes and all tables declare repeating header rows (`<thead>`).

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