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Managing Implementation of Structured Authoring

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Agenda

- About the presenter
- Building a business case
- Understanding the implementation effort
- Avoiding implementation traps




About the presenter

- Consultant
- Author of several books
- Currently focused on XML and structured authoring
- Founder, Scriptorium Publishing




Building a business case

- Management cares about:
 - Saving money
 - Improving time to market
 - Improving quality (maybe)
- Management does not care about:
 - Things that are cool
 - Things that are fun
 - Things that are good for your resume
 - Things that interest you




The business case — Time

- XML can save time by:
 - Automating content exchange
 - Automating extraction of information from databases
 - Reducing content duplication and reusing information
 - Removing formatting responsibilities from writers (and automating them)
 - Reducing repetitive DTP in house and in translation





The business case — Quality

- XML can improve quality by:
 - Reducing content duplication and reusing information
 - Processing information based on structure and metadata
 - Improving formatting consistency
 - Improving compliance with required document structures





The business case — Money

- XML can save money by:
 - Automating content exchange
 - Reducing content duplication and reusing information
 - Automating and streamlining production tasks formerly done manually
 - Using low(er)-cost authoring tools





Implementation costs

- Building the system
 - Consultants
 - In-house resources
- New tools
 - Licensing
 - Installation
 - Configuration
- Content migration
 - Building a conversion system
 - Pushing documents through conversion



Implementation costs

- Training
 - Tools
 - Technology
 - Company-specific processes
- Reduced productivity while learning new system



Building your business case

- Why do you need XML?
- How will this save time, save money, or improve quality?
- How much will it cost to implement XML authoring?
 - Effort
 - Money



Implementation effort (a twelve-step process)


1. Identify implementation goals.
2. Define roles.
3. Establish timelines.
4. Perform structure analysis.
5. Create structure definition files.
6. Set up legacy conversion process.
7. Set up output paths.
8. Develop documentation.
9. Deliver training.
10. Convert legacy documents.
11. Create change management process.
12. Provide transition support and validate implementation.



Identify implementation goals

- Deliverable requirements
- Tool-specific requirements
- Content-level workflow
- Production-level workflow
- Measurable success criteria





● ● ● **Deliverable requirements**

- Print
- PDF
- HTML
- ...


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● ● ● **Tool-specific requirements**

- In FrameMaker, it's a good idea to use a specific type of table structure.
- XSL-FO has layout limitations.


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● ● ● **Content-level workflow**

- Who writes?
- Who reviews?
- Who approves?


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● ● ● **Production-level workflow**

- How do files go from author to production-ready?

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● ● ● **Measurable success criteria**

- Productivity
- Consistency
- Reuse
- Localization savings
- Develop metrics that measure your priorities

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● ● ● **Define roles and responsibilities**

- Education
- Development
- Review
- Approval

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● ● ● **Education**


- “Selling” the implementation to:
 - Management
 - Authors
 - Peers
- Training/knowledge transfer



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● ● ● **Development**


- Creation of content model, structure files
- Delivery of training
- Development of documentation
- Technical experts
- Expect tension between pubs and IT



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● ● ● **Review**


- Technical review
 - Does it meet the specifications?
 - Does it meet identified objectives?



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● ● ● **Approval**


- Management rather than technical staff
- Tied to project milestones and perhaps consultant payments



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● ● ● **Establish timelines and milestones**


- Schedules create accountability.
- Consultants should tie payment to milestones.
- Help determine project scope.



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● ● ● **Perform structure analysis**

- Analyze existing files.
- Consider future requirements.
- Develop metadata.
- Develop taxonomy for your content universe.
- Balance precision and simplicity.
- Analyze match between your requirements and available structures.





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- ● ● **Analyze existing files**
- Common organizational features
- Variation or deviation?
- Document types
- Section types
- Paragraph types





- ● ● **Future requirements**
- Predict additional requirements.
- Design so that new structure can be added later.
- Accommodate future plans
 - Content management
 - Reuse
 - Content model deviation





- ● ● **Develop metadata**
- Descriptive information about your elements
- Unique to each environment
- Critical for finding and identifying chunks



- ● ● **Metadata examples**
- Platform: Mac, UNIX, Windows
- Output medium: print, help
- User level: beginner, intermediate, advanced
- Release: 1, 2, 3
- Security level: user, admin



- ● ● **Create structure definition files**
- Implement structure definitions (DTD, schema).
- Set up configuration files.





- ● ● **Create legacy document conversion process**
- Create structured documents for testing.
- Identify inconsistencies in legacy documents.
- Begin working on automation of process.





● ● ● **Set up output paths**

- XSL for other electronic markup formats.
- Print with XSL-FO or a commercial solution.





● ● ● **Develop documentation**

- Structure definitions
- Formatting and formatting algorithms
- Technical background for developers
- Authoring documentation





● ● ● **Deliver training**

- Authors and developers have different needs.
- Developers will support authors.





● ● ● **Author training**

- General structured authoring and XML concepts
- Rationale for implementation
- Structure definitions specific to your organization
- Using the designated authoring tool





● ● ● **Developer training**

- In-depth understanding of the structure
- How to implement and test changes
- Technical training on the output paths and how to maintain them




● ● ● **Convert legacy documents**

- Automation up to 95 percent is the best-case scenario.
- Some manual cleanup will be required.
- Formatting overrides cause huge conversion headaches.
- For larger quantities, invest in automation.



● ● ● **Create change management process**


- Many similarities to software development projects
- Bugs and enhancements
- Must manage change, but be sufficiently flexible to ensure that structures meet the writers' needs



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● ● ● **Provide transition support and validate**


- Ensure that in-house resources can maintain and extend the implementation.
- Evaluate implementation against goals.



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● ● ● **Implementation traps**


- Choosing a standard structure even though company content model doesn't match
 - Build your content model first.
 - Then decide whether any available structures match.
- Free versus commercial tools
 - Free is not necessarily low-cost.
 - Commercial is not necessarily better.



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● ● ● **Implementation traps (continued)**


- Resistance to change
 - Authors who don't follow templates probably won't follow structure.
 - "That's the way we've always done it."
- Executive sponsorship
 - If you don't have any, don't bother.
 - They provide funding.
- Management support
 - You need day-to-day management support to make decisions stick.



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● ● ● **Implementation traps (continued)**


- Sloppy or incomplete content modeling
 - Content analysis is critical.
 - Make time for analysis; don't jump into production work.
- You can't please everyone.
 - Trying to do so results in a meaningless content model that allows everything.



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● ● ● **Implementation traps (continued)**



- Choosing the wrong structure for the wrong reasons
 - "It's free."
 - Conflict avoidance
- Making constant, incremental changes
 - This is not your father's formatting template.
 - Develop a release schedule.
 - Use software-development techniques, such as enhancement requests, bug fixes, and versioned releases.



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● ● ● **Implementation traps (continued)**

- Recognize that any tool will impose specific requirements on your workflow
 - Understand each tool's limitations
 - Try to work with the tool rather than against it
- Too Many Cooks syndrome
 - XML is of interest beyond just tech pubs
 - IT vs. pubs





● ● ● **Implementation traps (continued)**

- Single point of failure
 - Need a support *team*
 - Cannot hold implementation/structure hostage to a single staff person
- "It's really cool" is not a business case.





● ● ● **Summary**

- Allow at least six months, probably more, to get implementation done.
- Plan or fail. It's your choice.
- Ignore content modeling at your peril.





● ● ● **Summary (continued)**

- Better management of information.
- More mature approach than free-form writing.
- New skills required.
- Major change in mindset required.
- Implementation is a huge project but can be phased in.




● ● ● **A small thank you...**




● ● ● **Q & A**





Resources

- XML white papers:
www.scriptorium.com/papers.html
- *XML Architecture for Customized User Assistance*:
www.winwriters.com/articles/xml/
- DITA: www.oasis-open.org/committees/tc_home.php?wg_abbrev=dita



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