



The XML Strategist

Casting a critical eye on the Next Big Thing in technical publishing.

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When Is XML the Wrong Answer?

BY SARAH S. O'KEEFE, *Senior Member*

Welcome to the first installment of "The XML Strategist." If you have followed France Baril's "Working with XML" column over the past two years, you probably already have a reasonable understanding of the extensible markup language (XML).

My primary responsibility as a consultant is to ensure that our customers make good decisions—but not by telling them what to do. Instead of dictating, I ask a lot of questions. In this column, I hope to help you frame relevant questions as you evaluate what role, if any, XML should play in your publishing workflow.

I welcome your comments and questions. You can reach me by e-mail at xml-strategist@scriptorium.com.

XML: The Cons

XML-based publishing challenges authors to convert from the familiar desktop publishing routine to new tools, technologies, and processes. The lengthy, difficult, and expensive implementation process requires compelling justification. This article discusses six reasons not to implement XML.

Print Is a Top Priority

If you print full-color documents with elegant typography and complex layouts, many of XML's supposed benefits become liabilities. When content follows a predictable pattern, and formatting is derived from this pattern, XML is quite useful. But if you are designing your layouts page by page, without much consistency or repetition, the automation that XML offers is of little use.

The publishing industry has been slow

to adopt XML because XML solves low-priority problems. Magazine publishers are not as interested in automatic online information delivery as they are in maintaining complete control over print formatting.

As a result, magazine and newspaper systems are print production tools that may also provide XML support. XML is extracted after the print version of the content is finished (see Figure 1).

No Content Localization Needed

If your content is delivered in multiple languages, localization costs represent a significant part of the overall content development effort. Localization cost savings through improved processes and automated formatting are among the most common justifications for XML implementation. Many companies use outside vendors for localization. As a result, localization costs are well understood, and cost reductions are easy to track.

If your organization does not localize

content, the simplest business case for XML is not relevant to you. There are, of course, other issues that may make XML a sensible choice, but without localization costs, your cost argument may not be compelling.

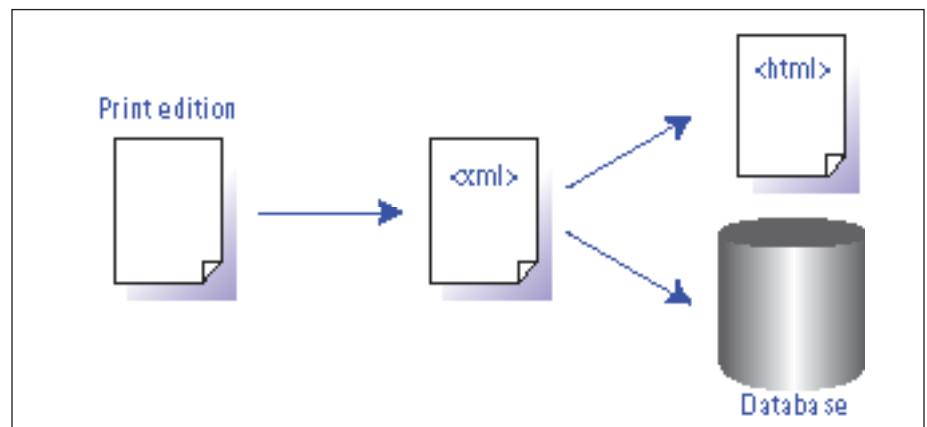
Domain Knowledge Held Hostage

Many writers (perhaps most people) dislike change. Prying authors away from their favorite authoring tool and moving them into a new, unfamiliar content creation process usually causes some complaints. Is your author population extremely sensitive to change? Will it fight any change on general principle? If your authors have domain knowledge that makes them indispensable to your organization, they have an effective veto over any changes to the authoring environment because you cannot afford to have them leave. The combination of critical domain knowledge and extreme change aversion means that you should proceed with extreme caution—or perhaps not at all.

Content Contributors in the Wild

In traditional technical writing departments, all the technical writers report to a single manager. An effective manager can lead writers into a new authoring environment with relative ease. With more complex reporting relationships, how-

Figure 1. Simplified workflow in print-intensive publishing.



ever, you can expect difficulties. For example, in some organizations, technical writers report to engineering managers, with no central documentation group. In this scenario, an XML implementation would need the support of all the engineering managers, rather than that of just a single documentation manager.

Even more difficult is a situation in which content contributors are completely outside the organization's management structure. For instance, a professional journal editor is probably delighted to get content on time, in whatever format. (I was nearly canonized for turning in this article a few days early. I assured the editors that it was a complete aberration and wouldn't happen again.) Contributors are often recruited for their expertise and not for their cooperation with journal standards. From the contributor's point of view, different journals may have different rules, so the contributor falls back on the lowest common denominator (often Microsoft Word). The journal staff then converts the delivered document into another format. The journal editor has little or no leverage to enforce a preferred format on the authors.

In this scenario, the potential automation benefits of an XML implementation may be outweighed by the difficulty of converting files of questionable pedigree into the required structure (see Figure 2).

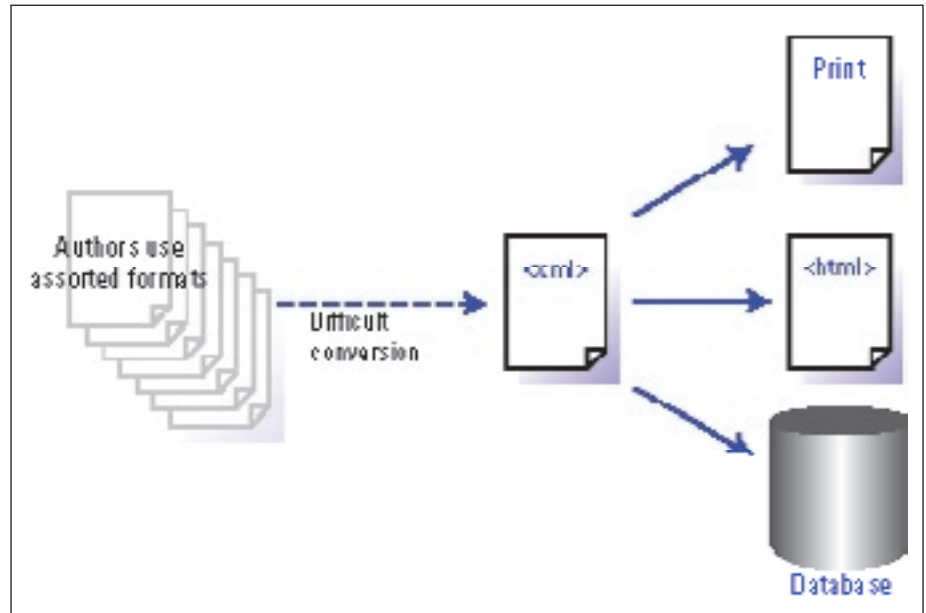
No Interest in Scalability

When divided by a large number of authors, the high cost of implementing XML suddenly looks almost reasonable. But what if you have a small operation with no plans to scale up? If one or two authors can handle the workload, if you have little or no content reuse, and if there are no requirements for multiple outputs or localization, then the benefits of a robust environment such as XML are minimal.

If It Ain't Broke, Don't Fix It

XML offers some interesting features, but are they of value to your workflow? If you are happy with your current authoring and publishing system, and nothing is compelling you to move to XML, why

Figure 2. Undomesticated authors make XML an expensive proposition.



make the effort? The XML tools are not as mature as “traditional” desktop publishing tools. Over time, the cost of implementing an XML-based workflow will drop, and your business case will look more attractive.

What Problem Are You Trying to Solve?

Now that I've convinced you not to implement XML, let's discuss the long-term case for XML. In today's environment, most organizations are moving toward XML to support immediate cost reductions gained from increased content reuse, automation of publishing (usually to multiple formats and/or languages), and overall efficiency.

In addition to these immediate concerns, however, consider XML's place in publishing technology. Prior to XML (and SGML), the development of technical documents might best be described as a craft. Authors spend years learning the intricacies of their tools and technologies, and best practices are developed in small groups.

A workflow based on XML no longer resembles a medieval guild with a store of arcane knowledge. Instead, document creation becomes more of an assembly-line process—each step in the process is well understood and authors are expected to conform to the standard.

Many authors are uncomfortable with this new approach. Instead of writing, formatting, and publishing an entire document, authors are now expected to contribute modules of information that are automatically assembled into a larger deliverable. The loss of ownership over individual deliverables is painful. Furthermore, an automatic formatting process means that authors can no longer fine-tune their pages. Awkward line breaks and imperfect copy fitting are common, and for those of us who have done final book production, the results are somewhere between embarrassing and humiliating. You want to add a disclaimer to the book (“Really, I know how to do this better, but the software won't let me”).

The assembly-line approach, however, means greater efficiency. Handcrafted products, whether books or chocolate, are higher quality, but only a few consumers are willing to pay the premium if the assembly-line version is “good enough.”

For technical publishing, XML is still in the early stages of adoption. Implementation is expensive and difficult, the tools aren't mature, and best

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possible. As for our client's customers? Well, they will have to decide whether to utilize the lending service or not. *Caveat emptor*, you know."

Finally, Mark put the situation in a most personal context for Lisa: "You know, I've told you that I have a steady stream of work for you—but not if you bail on this project. Bail now and you put me in an awkward position with my client. Not only will I be sending no more work your way, I won't be able to pay you for what you've already done on this job because, of course, someone else will have to redo what you've already done. Think about it." ❶

Questions

1. What should Lisa do: complete the site as contracted, or refuse to finish it?
2. What is the responsibility of a contract employee to the ultimate—even if quite remote—user of her services?
3. Do Mark's attitude and explanations provide reassurance or even greater cause for concern?
4. Do Lisa's own vulnerable financial circumstances and her responsibility for her children affect her ethical responsibility in this situation?

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practices are not well understood. If you are going to launch your organization down this path, you need a compelling cost justification. ❶

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(bōō-tēk')

Etymology: French, shop; probably from Old Provençal *botica*, ultimately from Greek *apotheca*: storehouse.

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