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Overcoming the 'fear factor'

Maxwell Hoffmann from Adobe shares his thoughts about migrating to XML/DITA.

Why hasn't XML adoption progressed more swiftly?

We have all read articles and reports, have attended conference presentations that predict 'migrate to XML or die.' Despite these dire warnings, many of us (technical communicator content creators) have yet to take the plunge.

The benefits of topic-based authoring are obvious:

- Dramatic increase in content reuse through referenced cautions, warnings, etc.
- Reduced translation/localisation costs
- Automated, context-sensitive formatting
- Guided editing to ensure that files have all the required components
- Authors can concentrate on creating content and largely ignore layout and format distractions.

Despite these evident benefits, a large segment of technical content creators have yet to adopt a structured authoring solution for XML and/or DITA. Why is that?

Common reasons for avoiding XML and structure

The following list is my unscientific collection of common reasons why many teams who *need* XML have postponed or avoided migration to this structured format:

1. Fear of high price tags and seemingly endless consulting fees
 2. Fear of complex codes and attributes
 3. Fear of long implementation time for training and adoption
 4. Fear of endless conversion of legacy data.
- Let's examine just how 'scary' each of these

four scenarios really are, when approached in a sensible fashion.

1. Fear of high price tags and seemingly endless consulting fees

XML and DITA-based solutions used to be more expensive than authoring solutions currently available today. Only a few years ago, there was a much smaller talent pool for potential team members who understood the dynamics of XML, or even how to approach initial document analysis of your existing projects.

With all 'new' technologies or workflows, during the first few years of adoption, self-proclaimed experts will present at technical communication conferences and promise to lead you through the process. However, this also occurred with new technologies in localisation and other fields, not just XML. Fifteen years into the 21st century, we are finally moving away from this unhealthy trend.

Because XML is inherently code-based, many early adopters were either engineers or subject-matter-experts with a penchant for working with code. In other words, about 3-5% of the population made up the early adopters who introduced us to the benefits of XML. This coloured and influenced early books, white papers and presentations on how to 'move up' to the exciting new world of structured authoring. For several years, DITA and XML were definitely presented as a 'no fun' zone where you needed extensive guidance to 'find your way.'

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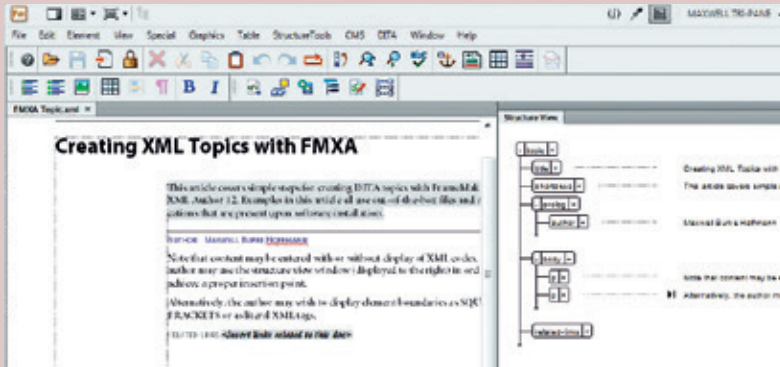
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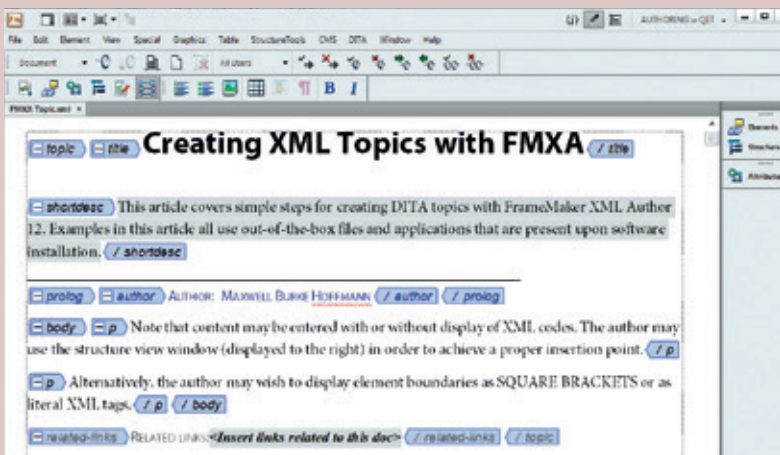
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How things have improved

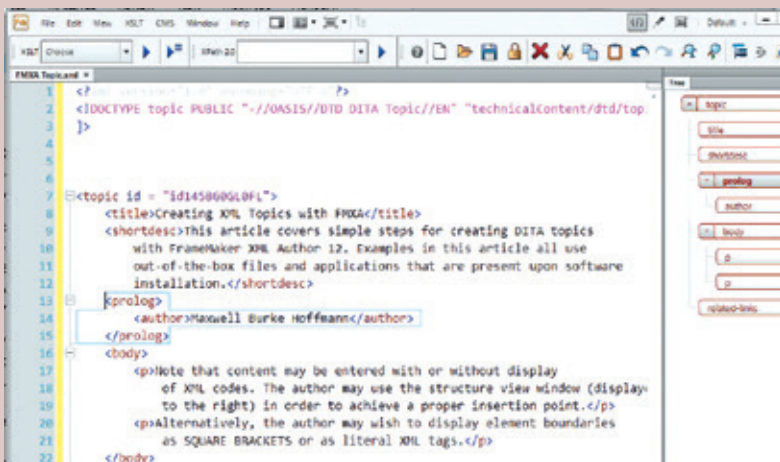
XML and DITA adoption has spread widely enough so that many authoring software vendors (including Adobe) have improved their products (like FrameMaker) to offer a much more complete solution out-of-the-box. So today, you can benefit from the pioneering work done by others who migrated to XML a few years back. And, for the benefit of customers, product price points have also been reduced.



a. Working in Page View Mode with Codes turned off



b. Working in Author View with XML tags displayed



c. Working in XML Code View with an element selected

Figure 1. FrameMaker XML Author 12 different views

2. Fear of complex codes and attributes

Again, a few years back, nearly all XML authoring solutions involved hours per day of viewing fairly 'ugly' codes bracketing your beautifully written text. Many authoring solutions required insertion of visible codes and only provided a semi-functional 'preview' mode for visualising and approximation of publishing to either HTML or print.

One of the most powerful aspects of XML is the ability to insert potent metadata via attributes down to a sentence or word level. This is all well and good, but many pioneers in this area got carried away. Many commercial enterprises may only need a dozen or so common attributes at a topic or subtopic level to improved search results and integrate easily with content management. Most early introductions to codes and attributes were the equivalent were hard to learn.

Progress has occurred in this area also

Thankfully, revamped XML authoring solutions like FrameMaker have improved means of handling attributes. In addition, full FrameMaker, or FrameMaker XML Author 12, gives you three ways to view your content:

- With no codes (like a piece of paper)
- An 'author view' with no headers/footers and reduced formatting or
- An XML-code view, in which you see all codes and attributes.

Each view will suit a different type of team member and provide useful advanced access to XML codes during pilot-testing and troubleshooting.

FrameMaker (full or XML Author version) allows alternate 'workspaces', which present only the tools necessary to the task at hand. When using FrameMaker XML Author 12, many menu clusters (like 'Format') disappear entirely, as all formatting is driven by invisible files and format rules.

The FrameMaker XML Author 12 screen shots in Figure 1 show working in:

- a. Page View Mode with codes turned off
- b. Author View with XML tags displayed and
- c. XML Code View with an element selected.

3. Fear of long implementation time for training and adoption

Again, early presentation of XML authoring solutions planted the fear factor in many of us with regard to the training curve. Some early software solutions were made by vendors who took a heavily code-based, traditional approach to authoring. These required considerable training and often extensive consulting with 'hidden price tags' associated with project implementation. As a result, some eight years or so ago, many of us heard of 'horror' stories that involved six-figure price tags to complete relatively modest pilot

'proof-of-concept' approaches.

Before the 2008 recession, many solution providers took a 'travel agent' approach: they would do all the research for you, provide 'sensible' choices, and allow you to take a 'trip of a lifetime' into the magic world of XML. Today, there are a few full-time travel agents who provide a worthwhile service, and for a fee can perhaps provide a better travel experience than you might achieve with your own web-based or App-based book. But the Internet has put the vast majority of travel agents out –of business.

Shrinking revenues in translation/localisation spurred by improved Machine Translation even led some localisation providers to offer XML and content management system consulting as additional services.

As a result of improvements in many XML authoring solutions, training and consulting time can be considerably reduced. With less-expensive products, you may still need to invest some considerable consulting time (or tie up internal staff resources) in crafting an extensive series of style sheets to anticipate nearly any display you wish to achieve. Through highly disciplined selection of templates and boilerplates, subject matter experts and team members can achieve satisfying results with less training than would have been necessary three to five years ago.

Why training time has been considerably reduced

Extensive usability improvements with both XML versions of FrameMaker have eliminated hours of training by:

- Reducing choices to achieve desired results
- Providing very focused workspaces and
- The addition of 'wizards' like Intellipromptⁱ (display only legal elements or attributes at insertion point) and the Quick Element Toolbar, which enables insertion of nested lists and more by clicking logical icons.

Another route to vastly reduced training time is DITA customisation. If your organisation does not have a need to exchange content structure with outside agencies, you have the opportunity to customise DITA by renaming generic elements such as [Title] [Body] [OL] to self-evident, purpose-driven topic names such as [Training Course] [Objective] [List of Materials].

Before my Adobe days, I was contracted by a major consulting agency via structured FrameMaker for a State government agency in the American Southeast to provide the training on a project. A wise consultant had created very 'literal' element names that nearly acted like 'self-documentation' for creating training

courses for a state agency. I had only five days to train a dozen course instructors on:

- FrameMaker,
- Customise-DITA and
- Sysadmin aspects of expanding customisation. All members of my class were Microsoft Word users *who had never seen FrameMaker before*.

The DITA customisation and methodology for authoring XML in FrameMaker were so effective that by the fourth day, there were almost no questions. The client had purchased 100 hours of help desk support from my agency. Within the next nine months, they only used 12 billable hours of help desk time. A year later, they won an industry award for excellence in the training courses created by Word users who were totally new to both FrameMaker and DITA.

4. Fear of endless conversion of legacy data

While working in the translation/localisation industry, I worked with many customers who did make the commitment to migrate to XML. A key issue for them always involved time and cost for migrating legacy data into XML. Often, a basic question not answered during the discovery phase of a migration project was; 'does this particular legacy project *need* to be in XML?' If the question had been asked, the answer often would have been 'no.'

I witnessed some clients who spent needless hours and money converting entire legacy projects into XML, when the legacy files were for a discontinued product that had only occasional, slight updates distributed to a tiny customer base. In such cases, it would have made more sense to keep the aging project in its original format.

The most compelling reason to migrate older, legacy projects into XML is if at least 60% of the content is reusable in documentation for an active or future product line or service.

Does legacy file migration into XML have to be painful?

No. Not really. If legacy files have relatively consistent 'structure' and formatting, conversion tables can be easily generated that should produce initial results in XML that are at least 90% 'finished.' Due to the nature of random format overrides and 'one-off' paragraph styles of formats that invade some documents, there will always be some manual adjustments to legacy files that are converted into XML.

Actually, this is the case with FrameMaker, which fortunately has decent tools for generating an initial conversion table based on common style formatting patterns. You may wish to use the shortened URL here to go to a blog, which has links to a seven-part recorded webinar series on all aspects of first

ⁱ Intelliprompt is a system that displays coding suggestions as you type, providing code auto-completion.

converting legacy data, and then setting up an initial structured FrameMaker project:
<http://adobe.ly/1quqTM5>

Note that this seven-part series was created three product releases ago, when more steps were required in FrameMaker XML project setup than is the case with the current release, FrameMaker 12.

A writer's reward for migrating to XML

Whether or not moving into XML is the right thing to do, many content creators may have a 'what's in it for me' attitude when the prospect is brought up. If using standard DITA 1.2 topics in either FrameMaker 12 or FrameMaker XML Author 12, be sure to have your writers experience the joys of automated, context-sensitive formatting. Once content creators discover that they can promote or demote a nested list and automatically have bullets change into dashes or whatever, they are 'sold' on the prospect.

Another key reward to working with XML is achieving content reuse via conrefs or integrations with a content management solution. Write once, edit/update everywhere is a joy to use for cautions, warnings and other repetitious bits of text.

The joys of fewer choices

Many writers and SMEs are used to working with 50 to 70 different paragraph styles to 'structure' traditional documents. DITA and XML will substantially reduce the number of Element 'tags' used. In addition, any decent XML authoring software will have enforced structure, which will present elements that are 'legal' at insertion point. In addition, your solution should also indicate if your structure is incomplete (for example, a [topic] may need to be followed by a [concept] containing ordered lists, and so on.) All writers appreciate having the burden of unnecessary decisions eliminated so they can focus on what they do best: write. **C**



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Terminology

DITA. The Darwin Information Typing Architecture (DITA) is an XML data model for authoring and, with the DITA Open Toolkit, publishing. It is a standard that is defined and maintained by the OASIS DITA Technical Committee.

http://en.wikipedia.org/wiki/Darwin_Information_Typing_Architecture (accessed May 2014)

OASIS. OASIS is a non-profit consortium that drives the development, convergence and adoption of open standards for the global information society.

www.oasis-open.org (accessed May 2014)

W3C. The World Wide Web Consortium (W3C) is an international community that develops open standards to ensure the long-term growth of the Web.

www.w3.org (accessed May 2014)

XML. XML stands for EXtensible Markup Language. It is a markup language much like HTML but one that was designed to carry data, not to display data. You must define your own tags, as they are not predefined. It is a W3C Recommendation.

www.w3schools.com/xml/xml_what.asp (accessed May 2014)

Resources

FrameMaker Return-On-Investment XML Calculator:

<http://adobe.ly/PZ3RtS> (accessed May 2014)

Adobe microsite for XML Authoring:

www.authorxml.com (accessed May 2014)

Aldous T (2014) 'Classic 7-Part Aldous series on "Unstructured to XML" webinar series republished' Adobe

<http://blogs.adobe.com/techcomm/2013/06/classic-7-part-aldous-series-on-unstructured-to-xml-webinar-series-republished.html> (accessed May 2014)

Videos: FrameMaker XML Author 12 Features:

<http://adobe.ly/1hPnzUI> (accessed May 2014)