



There must be a better way!

But do my clients agree...?



Alison Peck

- Technical author with over 20 years' experience
- Fellow of the ISTC
- Trading as Clearly Stated since October 2004
- Work for multiple concurrent clients
- Experienced user of:
 - Microsoft Word (since Word 6)
 - Adobe Technical Communication Suite (since TCS 2) and FrameMaker since version 7.2)





Background...

Client A

- Web-based and desktop management applications + command line configuration
- Users typically use a suite of the products
- Content developed in FM 9 and RH 8
 - PDFs and **individual** (no linking) web help pages installed locally
 - No option to customise the help for different applications
- Client-driven developments:
 - Update multiple applications
 - Shared components

Client B

- Web-based applications
- Users typically have access to a small part of one application
- Content developed in Word
- PDFs uploaded to website
- Project-based new developments:
 - Update multiple applications
 - In an ever-changing sequence!





Why change?

- Client A:
 - Must upgrade (tools virtually obsolete)
 - Using some single-sourcing concepts, but generating output is cumbersome
 - Need to do what they are already doing, but more efficiently
- Client B:
 - Re-use opportunities exist, but not possible with Word
 - Want to incorporate video and simulations
 - Need more flexibility in the authoring process



- And if I can use one tool instead of 3 or 4, I



Requirements

Requirement	Client A	Client B
Share content across product suite	✱	
Reuse content for different purposes		✱
Generate PDF documents (full manuals)	✱	✱
Generate PDF documents (subsets)		✧
Incorporate video/multimedia		✱
Tailored output (by user/group)		✧
Minimal steps for others to generate output	✱	✱
Store source files in source control	✱ (SVN - manual process)	✧ (TFS - hopefully automatic)
Others can make minor changes	✧	✧

✱ = Essential - they have this capability now and don't want to lose it!

✱ = Required - they have already stated they want to do this

✧ = Bonus/selling point: something I've proposed as an added incentive





Why Flare? (Client A)

Easier to share/single-source

Before

- 1) Check out of SVN
- 2) Find and open correct 'book'
- 3) Ensure conditional text settings and variables correct in 'Title' file
- 4) Import conditional text settings and variables from 'Title' file to entire book
- 5) Update book to rebuild cross-references, contents and index file
- 6) Get 'unreconciled cross-reference' messages
- 7) Contact me – usually not a problem!
- 8) Generate PDF

After

- 1) Check out of SVN
- 2) Right-click on target and build it





Why Flare? (Client B)

Improve efficiency/customer experience

Before

- Training department 'rewrite' user manual but with different formatting
- Videos (old ones) hosted separately on website
- Large (10MB +) PDFs as documentation – at most, each user needs $\frac{1}{4}$ of the total

After

- Conditional text to re-use content, with formatting changes handled by stylesheet
- Videos accessed via links in the online documentation (or embedded in it)
- PDFs can still be created – smaller subsets for each user group, plus one big one for systems administrators





So, I had to learn how...

- Downloaded a trial (late 2016) and ‘played’ to get a feel for it
- Downloaded another trial (early 2017) and ‘played’ some more to check what was possible
- Took the plunge and purchased a licence for MadPak Professional:
 - Flare feels OK – a bit like RoboHelp, a bit like plain HTML, a bit like XML...
 - Mimic is OK – but I still find Captivate easier 😊
However, no e-learning component required...
- Now certified MAD for Flare
(would like something similar for Mimic)





Issues and decisions

- How much rewriting/restructuring to do?
 - **Client A:** It's still effectively going to be a book, so can follow existing structure. Must identify elements for online help pages.
 - **Client B:** Importing from Word is 'interesting'. Resulting topics (split on Heading 2? Heading 3?) either result in many topics that are too complex – covering too much – or are too fragmented.
- I've discovered I am actually writing in self-contained topics, but:
 - A new topic may start at a level 2 or at level 3 in the existing material
 - I may want to reuse a chunk that is at level 3 in one place at level 2 in another





Issues and decisions

- Global project or one large project?
 - **Client A:** Global project for 'global' components (stylesheet, cover images, etc) but a mix of product-specific projects and 2-product (or even 3-product) projects where there is significant overlap – will need careful management 😞 ... but at least by me!
 - **Client B:** Each product has its own project (there is no overlap) with a 'global' project holding stylesheets, master pages, front matter (icons, glossary) 😊



- Links to projects are absolute, not relative





Issues and decisions

- PDF format
 - **Client A:** Styles are more “technical” and less “pretty”, so straightforward 😊
 - **Client B:** Would like formatted numbers and bullets as before – can do, but the most effective seems to be to format the whole list and nest a paragraph 😞
- Need to brush up my CSS skills – I know I can do it!
The example below is what I’m aiming for...

- List item one
- List item two

- 1 List item one
- 2 List item two





From TCUK

- Global project or one large project?
 - **Client A:** Maybe one huge project with automated builds?
 - Reduce human resource requirement
 - Increase technical resource requirement
 - **Client B:** Each product has its own project with a ‘global’ project holding stylesheets, master pages, front matter (icons, glossary)
😊
- Links to projects are absolute, not relative!
- But apparently, this can be ‘fixed’ 😊





From TCUK

- Define your topic types (Neil Perlin and Mike Hamilton)
 - Create the templates
 - Simplify the process
- Needs will evolve (Yuri Kolber)
 - What is best for now may not be best in the future...
 - Try to make sure you don't make the next migration too difficult!





From TCUK

- Consider (more) training (Neil Perlin)
 - Don't want to waste time working out for myself if someone can tell me quickly
 - BUT... not necessarily on the tool (for me) - more about the process
- Follow standards (Neil Perlin)
 - Your own or industry...
 - Coding or stylistic...





From TCUK

- Assemblies (Robert Kratky)
 - Combine some topics into workflows?
 - Doesn't matter if I repeat them...
- Hide the vegetables (Alison Turner) and offer, don't push (Neil Perlin)
 - Background information available when needed
 - Not forced to read if don't need





Where are we now?

- **Client A** has put together a business case... it should go through:
 - Need to upgrade anyway
 - Like that they can see the file content in a text editor
 - Fits with their release engineering processes
- **Client B** a much bigger organisation – with the baggage that entails:
 - Told me (2 weeks ago) that their website is going to be managed using Wordpress... can I publish to that?
 - Many stakeholders to consult...
 - Still waiting for a decision





The sequel...

- I'm interested in any feedback or opinions – does what I'm trying to do make sense?
- If you're at TCUK next year, ask me how it went. If I think there's enough of interest to tell you, I may submit a proposal.

