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Best Practices - Migration

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Agenda

- Why should we care?
- Two cases
  - Different industries, culture, toolsets
- Similar requirements
  - Single sourcing, topic-based
- Different solutions
- Conclusions / take-aways

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Are We On-Topic?

- Carrying on from Mike's keynote yesterday:
  - The move to topic-based writing
  - Single-sourcing
  - Technological and cultural considerations
  - Workflows to flatten the learning curve

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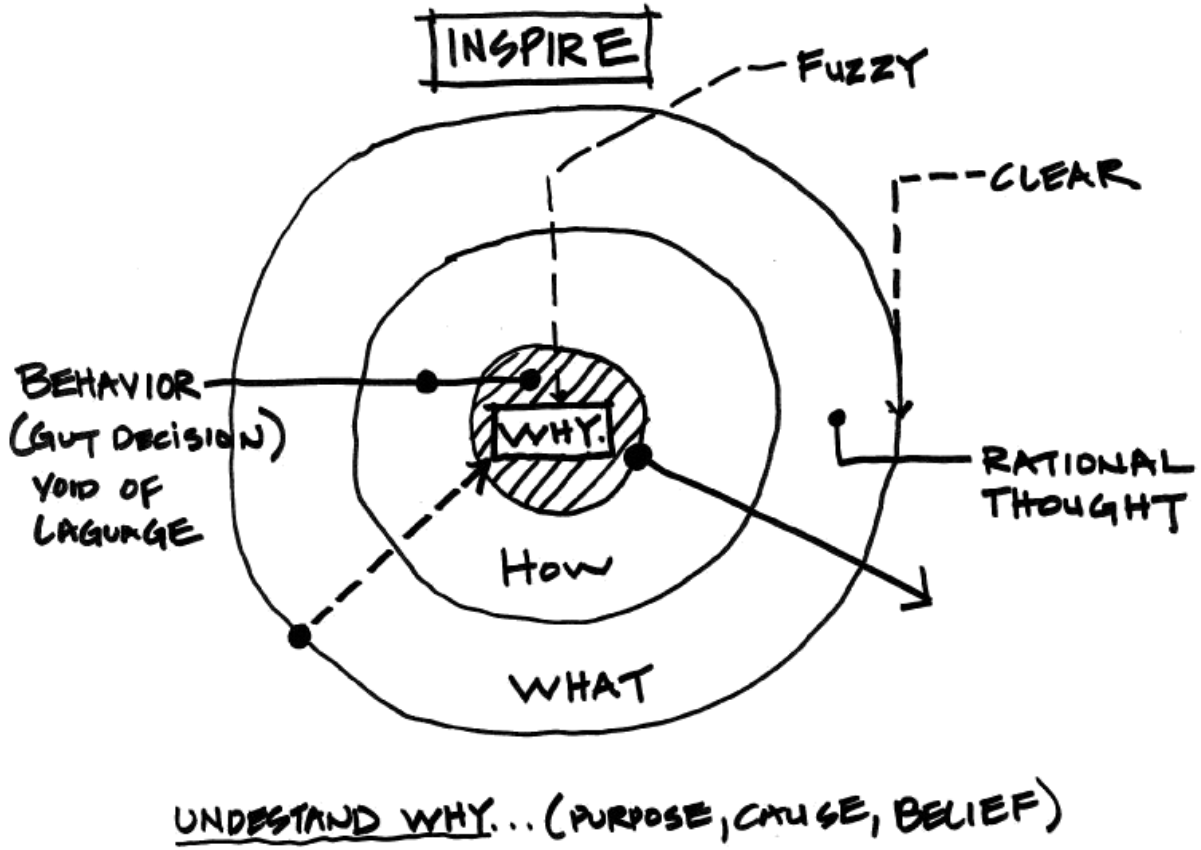
Why?



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Why Migration Projects?

- An opportunity
  - For us to engage with the customer
  - For the customer to reevaluate tools and process
- Few customers have successfully made the transition to the single-sourcing/topic-based paradigm
- The transition involves a cultural, as well as a technological and process change
  - It's not just about the toolset
  - It's about a re-evaluation of information management, and the value/cost of information provision and maintenance
  - It's about getting buy-in from management and the doc team

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Two Customers

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Customer 1

- Global player in the software industry
- Large, distributed documentation team
- Documentation seen as a central requirement
  - Large number of documents
  - Originally used FrameMaker to produce PDFs
  - Pressure for documentation to become more agile, and more closely aligned with the development cycles
  - Documents are mainly aimed at internal Professional Services teams, and at partners who perform deployment, configuration, and troubleshooting

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Customer 2

- Global player in the engineering industry
- Relatively small documentation team, based at head-office
- Documentation seen as a central requirement, particularly Operations and Maintenance manuals
  - Large number of documents, with many variants
  - Originally used Word, then migrated to FrameMaker to produce PDFs
    - FM migration stalled – leaving some documents in FM, some in Word
  - Pressure to update a large backlog, and to keep up with R&D producing new models
  - Documents aimed at the ultimate users in the field

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Requirements

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Requirements 1

- Migrate to an environment that will:
  - Support easy collaboration by distributed teams
  - Ensure consistency across teams and authors
  - Support rapid conversion of existing documents
  - Enable transition to topic-based writing and single sourcing
- Output to initially remain PDF
- 3rd phase - output to HTML5 (responsive layout)
- Ensure compatibility with corporate IT standards

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Requirements 2

- Would like to implement single-sourcing and topic based writing, due to small team, growing load, and backlog
- Output will continue to be printed output, for the foreseeable future (due to the deployment locations and users)
  - No current plans to go to online output
- Would like to revert to Word if possible, as skills are more easily available
  - Location of customer makes recruitment of tech authoring candidates challenging
- Would also like the look-and-feel of 2nd generation documents (FM) to be retained

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Solutions

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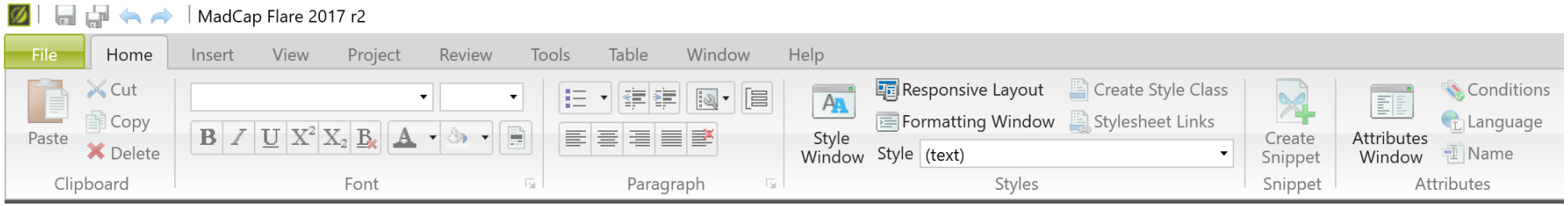
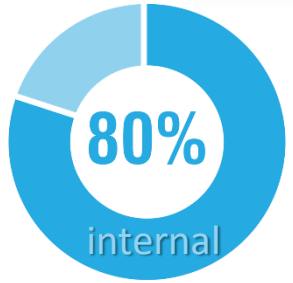
Solution 1



SharePoint



- Phased migration to Flare
- Phase 1
  - Lead team goes through training
  - Experiments with migration of FM documents and with Flare templates
  - Lead team writes the manual on how to clean up FM documents and perform imports
- Phase 2
  - Remaining teams are trained
  - Technical authors perform imports on all documents, with coaching

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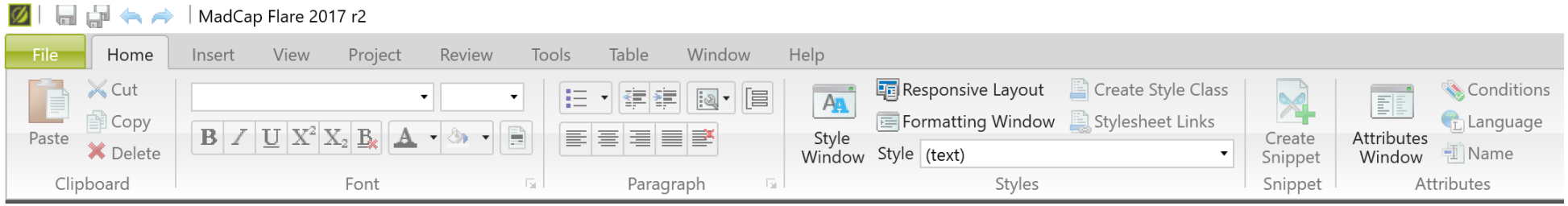
Solution 1 (continued)



SharePoint

- Phase 3
  - HTML 5 targets, skins and master pages designed
  - Mega-project created - includes all document projects
  - Information redesign along topic-based principles (to facilitate reuse and single sourcing)
  - Publication to internal SharePoint sites
- Phase 4
  - Publication to SharePoint partner extranet

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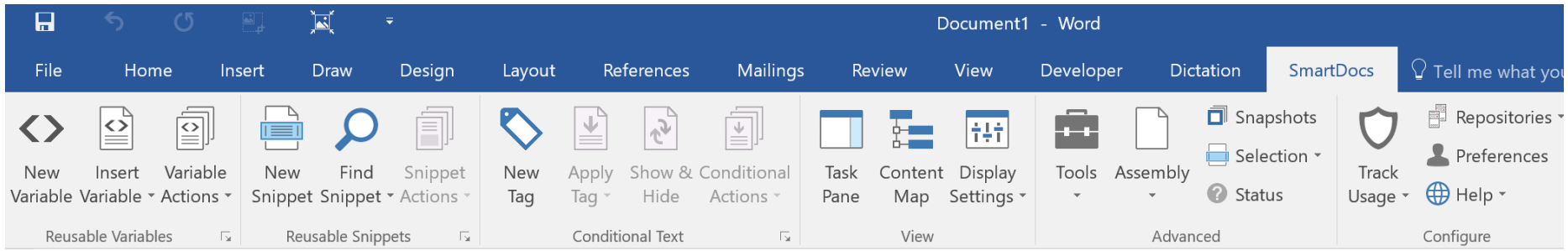
Solution 2



- Phase 1
  - Create Word templates that emulate FM look-and-feel
  - PoC using a small subset of documents
- Phase 2
  - Deploy SmartDocs with Office 365 back-end
  - Train internal users on using variables, conditions, and snippets
  - Use a subset of the documents to rearchitect the information along single-sourcing and topic-based writing principles
- Phase 3
  - Rollout to remaining document backlog and new documents

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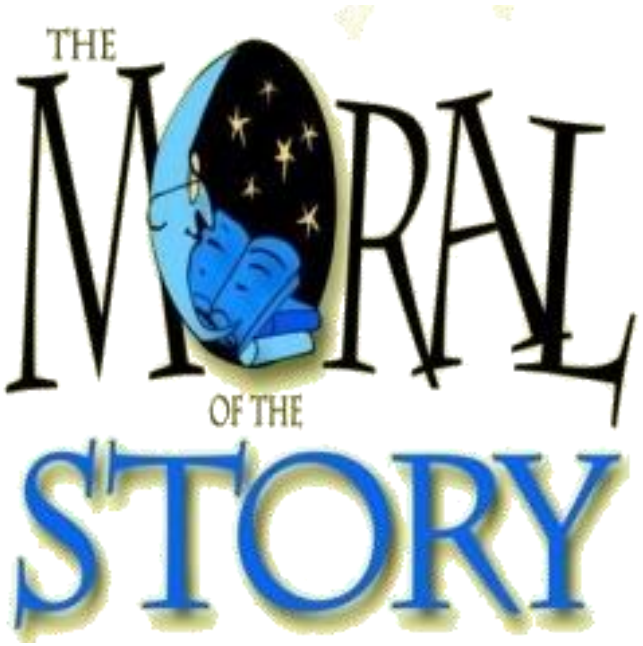
Take-aways



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Conclusions

- There is no “one perfect solution” for all (duh…)
- The optimal solution needs to be driven by:
  - The customer’s current needs
  - The customer’s future vision (some may need help here)
  - The budget in terms of money and time
  - Internal and external resources available
- For any given solution now, there will be a limited lifespan
  - The “perfect horizon” moves
  - That’s not a bad thing…

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Conclusions (2)

- There's going to be pain
  - Even if you help the customer get to an optimal solution
  - Technology needs to change
    - Authoring tools
    - Information/content management
    - Output transformations
    - Interaction with SMEs will be impacted
  - Learning curve - can be flattened some, by prioritizing the changes
  - Comfort-zone
  - Refocusing on business value

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Conclusions (3)

- Don’t make this about religion
- It’s about what works best for the customer now
  - Provide a relatively smooth transition
  - A good upside on the business value
- Any migration is a chance for the customer to really leverage the benefit of single-sourcing and topic-based writing

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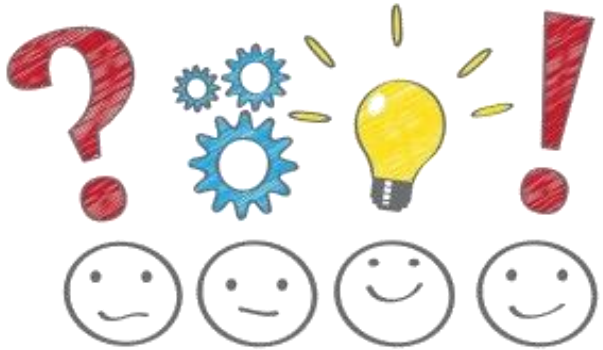
Thank You

We hope you are having a great conference



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