

## CAN YOU AFFORD TO DO IT TWICE?

# KNOW WHEN TO USE EXPERTS TO HELP WITH YOUR DITA IMPLEMENTATION

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Moving to a new source format, such as DITA, is a major project and one to not be undertaken lightly. It changes not only the tools in which you create and manage your content, but also the manner in which you plan, create, and aggregate the content to produce deliverables. When companies that are fiscally constrained approach a move to XML, their teams should understand when to utilize expert assistance.

The following areas are important tasks that you need to perform and are candidates for using expert assistance:

- Understand and communicate the business implications
- Manage resources for appropriate roles
- Determine appropriate information architecture
- Set up the technical environment

**Understand and communicate the business implications.** One of the first considerations is to understand how the implementation project will impact the business. You must also be able to accurately communicate that information to all stakeholders, including upper management, instructional design, subject matter experts, deliverable production, IT, marketing, Web services, and sales. If this is the first time your company has made a source and delivery change, it's difficult to understand how this project will interrupt and change your business.

- **Budget.** The move to another source format is expensive, and not just in terms of purchasing and deploying new tools. You must also consider the cost of analyzing the content and deliverable structures, defining the new architecture, documenting the new guidance, training all stakeholders, and converting your current content. If you do not allocate the necessary funds, the project will suffer.
- **Process.** Because DITA is a topic-based architecture, you cannot continue to plan and produce deliverables in whole units; instead, you must move to a more modular structure and this change takes time, discipline, and practice. It starts with a thorough content and deliverable analysis to determine what content can be reused, the appropriate topic type for each type of content, and the necessary map structure to generate the desired deliverables. If you plan to integrate or drive your process with metadata, you must also identify the appropriate metadata values, determine how to store and manage them, and specify how to apply them to the content.

- **Technology.** If your business goals are to efficiently produce deliverables from a single source of content and easily distribute deliverables via multiple online delivery platforms, then you will have an increased reliance on technology. For some organizations this will be a major change and it means that you not only have to invest in the tools for the technology, but also resources to manage and maintain the tools. In addition, you will need to help all stakeholders become more comfortable with the technology and its proper usage and dependencies.

It is useful to have expert assistance from someone who has done this before in order to accurately set expectations, share the appropriate information at the proper time, and engage the necessary stakeholders. The support an expert can provide ranges from consultation for communication strategy to full messaging materials, workshops, and presentations.



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**Manage resources for appropriate roles.** The biggest risk most teams encounter is allocating the necessary funds and people to the project. Because your current work requirements and responsibilities do not miraculously cease when you embark on the DITA implementation, you must staff for the additional work. You may have people that can perform the work listed for each role, but they cannot do the DITA project in addition to their usual responsibilities. Do yourself and your team a favor: accurately estimate the amount of work to be accomplished and schedule it realistically for the resources you can commit to the project. If you have people with the correct skills but you cannot commit them to the project, consider either bringing an expert in to help with the DITA project, or bringing in more resources to take over the person's existing work and then reallocating the

person to the DITA project.

Because this is a major initiative, you must identify resources to perform specific roles. Note that these are roles based upon responsibility and authority and that they may not correspond to corporate titles and/or specific individuals. This means that more than one person may perform a role and, conversely, one person may perform multiple roles. Here is the minimal set of roles to consider:

- **Project manager (PM)** – creates schedules, assists with workflow analysis, manages resource allocation, and manages contract negotiations for tools and services.
- **Information architect** – analyzes content and deliverable structure to create the appropriate DITA content model, develops content usage and aggregation best practices, and identifies metadata and content management requirements. In an educational organization, this role may be performed by an instructional designer or other person who understands how content is structured.
- **Production manager** – defines deliverable creation requirements for architecture, tools, and processes, as well as manages the implementation of the new production processes.
- **Production editor** – contributes to use cases and requirements for content creation and deliverable aggregation and generation, provides insight on process changes, and helps to test the transforms.
- **Technical lead** – specifies transform requirements for each deliverable, defines tool requirements, and manages tool deployment, integrations, and customizations.
- **Technical resources** – configure, customize, and manage tools, such as authoring tools, component content management system (CCMS), publishing systems, learning management system (LMS), digital asset management system (DAM) and taxonomy management system (TMS). This role must develop transforms for publishing the XML.
- **Conversion vendor** – converts content to specified requirements.
- **Subject matter expert (SME)** – provides input to process for required tools and architectural support.

- **Conversion project manager** – schedules content for conversion with product team and conversion vendor, packages content, submits package for conversion, receives converted content, and coordinates conversion testing and content update to required standards.

You probably have people in your organization who perform these roles or tasks similar to the ones listed. In many cases, teams can utilize existing resources to take advantage of the in-house product knowledge and augment the missing expertise with external resources.

**Determine appropriate information architecture.** For teams that already have a strong culture of planned deliverables based on business needs, clearly defined and implemented instructional design principles, and consistently adhered to production processes, the information architecture work will simply be a natural next step. However, for teams where the Subject Matter Experts (SMEs) control the content and deliverables, the deliverables are each structurally different, and the production process is more of a guideline than a code, the information architectural work will be a challenge.

For example, your team may already plan and create instructional materials based on the instructional design principle that each learning unit supports a single learning objective and the unit follows a consistent structure. In this case, architectural planning for DITA is simply identifying the appropriate topic types to use for each portion of the learning unit, defining the structure for aggregating the units for a deliverable, and the strategy for defining, reusing, and relating the learning objective to the unit. If your team does none of these things, then you will need to do all of the above as part of adopting DITA.

Also, with the increasing demand for customized and dynamic content delivery, it is becoming more important that you can accurately and consistently apply metadata to the content and the deliverables.

**Set up the technical environment.** Your new architecture may require a new tool set. This means that you need to clearly identify the tool requirements for each of the stakeholders, then purchase and deploy an integrated set of tools to meet those requirements. If your IT group already has a preferred



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technology platform, then they can help you with the requirements. Unless you have in-house expertise on DITA XML tooling, it is important to have guidance on defining and prioritizing the tool requirements and custom deployment.

Here is a list of tools that you need to consider:

- **XML authoring editor (one or more)** – this is a tool for creating and updating content; it may also be the tool in which you have SME review or contribute to the content. Some teams have a web-hosted authoring editor with a simplified interface for SMEs and another for production editors and other expert users that provides greater functionality.
- **Review tool** – this may be a dedicated review tool with reporting and comment management or simply a tool that publishes a deliverable format to which reviewers can apply comments.
- **Management system** – this is a tool for storing and managing content and deliverables. If you need workflow management, complex version control, support for translated content, and robust search capabilities, consider a component content management system (CCMS). Important considerations are integration with other tools, such as a DAM, LMS, TMS, translation services, or delivery platforms.
- **Publishing support** – although the DITA Open Toolkit provides publishing capabilities, you may need additional publishing support for translated content or specific delivery platforms.

Regardless of whether you out-source the transform development or do it internally, you must plan for time and resources to integrate transforms and test the generated deliverable output. To adequately test the output, you must have a robust set of sample files and test files. The sample files are actual XML content files that provide output for stakeholders to review and approve. The test files are XML files that include every variation of element combinations to verify that the transform can generate the appropriate formatting.



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**Summary.** Most people do not do a perfect job the first time they perform a task and this holds true with the implementing DITA. I can speak from experience; the first time I helped a team implement DITA, we read the DITA specification and then implemented what we understood to be the proper set of elements and applicable architecture. Needless to say, we had to revisit our implementation within the first year and make substantial updates and revisions. Because we were implementing DITA while it was a beta at IBM and we were one of the first teams to implement, we did not have a choice as to whether we used experts to assist us – there were none yet. You do not have to make the same choice; now there are many qualified experts who can help you implement DITA right the first

time and do it more efficiently. Basically, if you can't afford to do it twice, then get expert guidance. The key is for you to know in what areas you will need assistance and to find the proper organizations to meet your needs.

## Publishing

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To publish a deliverable from XML content, you must generate the deliverable with an engine and a transform. DITA provides the DITA Open Toolkit as the base processing engine, but you will still need custom transforms to generate deliverables. Unless you have XSLT or XSL-FO programmers in-house, plan to contract external resources to create the transforms for you based on the requirements that your team documents.

**DITA Strategies** provides information architecture support of the DITA implementation process for learning and training, technical content, customer support, and marketing content across a range of industries.

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