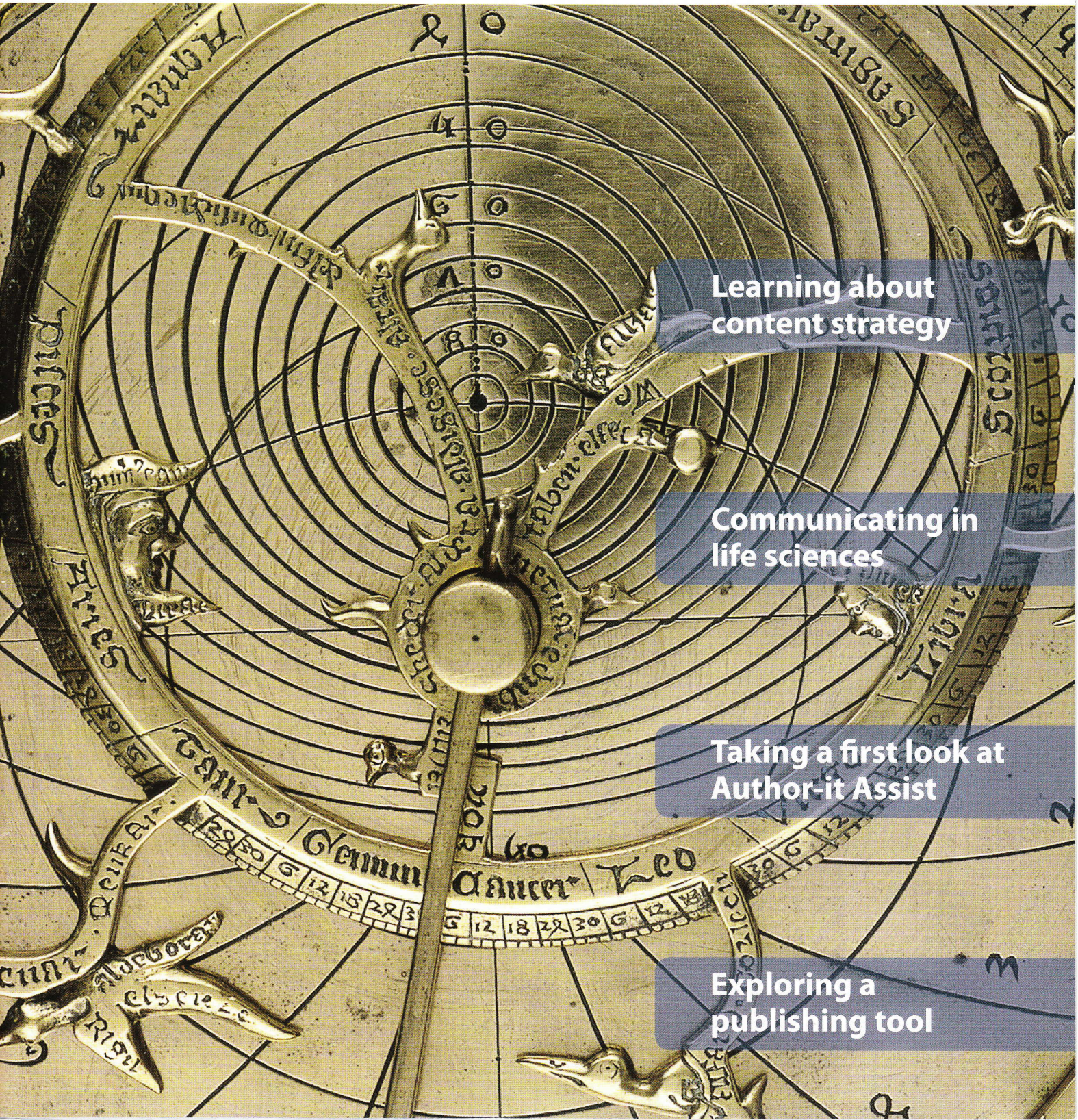
A 14th century must-have gadget

An instruction manual for an astrolabe by Chaucer

Communicator

The Institute of Scientific and Technical Communicators
Autumn 2010



Learning about content strategy

Communicating in life sciences

Taking a first look at Author-it Assist

Exploring a publishing tool

Developing a documentation strategy

Richard Truscott describes the challenge of developing a documentation strategy where none existed.

Established over 100 years ago and an early adopter of IT, the not-for-profit organisation I work for has a large portfolio of back office IT applications. Its public facing organisations use these IT services to operate with its customers around the globe.

However, (until 2009) it had never employed a Technical Communicator to support the IT portfolio. This, together with the organisation's long-standing history meant there was a backlog of work and the need for a cultural change within the organisation.

I work in the IT Support & Development department; my main tasks are:

- Provide documentation for the IT support staff.
- Provide end user documentation.

The name of the organisation is irrelevant as the challenges it faces are similar to those of a great many older institutions that are in the process of discovering what a Technical Communicator can do for them.

This is the first of a series of articles explaining how the work progressed. It covers the period from the start of work, to the achievement of the first goal of a proof of concept trial. This article is a review of the work done between January 2009 and June 2010. I hope to write other articles about future progress.

Producing the strategy runs alongside my day-to-day job of producing technical documentation. This means that progress is often slow.

What is the overall plan?

By the nature of the organisation and in its current state of flux the plan has to be flexible and be allowed to evolve to meet the known circumstances. At the beginning the plan was to:

1. Carry out a preliminary investigation into how IT support staff find and acquire the knowledge they need to do their work.
2. Use a consultancy company to look at the organisation's content needs.
3. Produce a report on the way forward.
4. Carry out a proof of concept trial.

Preliminary investigations

'I often say that when you can measure what you are speaking about, and express it in numbers, you know something about it...'

Lord Kelvin.

The first thing to do was to talk to people to find out what they knew and how they knew it.

It became clear that there were a number of different systems for storing knowledge used to support IT systems. Because of the way the organisation is structured, each team had produced its own solution.

Information sources survey

I designed an 'Information sources survey' to find out:

- What information sources the support and development staff used.
- How often they used these sources.
- How often the source gave them what they wanted.
- How difficult it was to find specific information.

I used Adobe LiveCycle Designer to create a survey form for distribution to the recipients by e-mail. When the recipient had completed the form, they returned it by e-mail, which I received as an XML file. I used LiveCycle to import the returned surveys into an Excel spreadsheet for analysis.

Used sources

The respondents said that the most used sources were:

- Their own notes.
- Wiki contributions by themselves and colleagues.
- The original design document.

The respondents said that the least used sources were:

- Sources stored using SharePoint™.
- Service delivery documents.
- Test plans.

Useful sources

The respondents said that the most useful sources were:

- Their own notes.
- Wiki contributions.
- Project meetings.

The respondents said the least useful sources were:

- Service delivery documents.
- Sources stored on SharePoint.
- Test plans.

Easy to use sources

The respondents said that the easiest to use sources were:

- Their own notes.
- Wiki contributions.
- Project meetings.

The respondents said that the least easy to use sources were:

- Documents stored on the networked disc drives.
- Documents stored on SharePoint.
- Service delivery documents.

Having carried out the sources survey and published its results, I had some idea of the problems and could propose some solutions and recommendations.

Delivering the documentation report

At this stage, I concentrated on how IT Support used information sources although a wider remit could have looked at how the whole business used its information. Due to internal boundaries and time constraints, the report was limited to IT Support. This report contained a SWOT analysis.

Strengths:

- Lots of the documentation needed by Support is available.
- The Wiki has lots of useful information resulting in it being widely used.
- The organisation has a Technical Communicator to work on the support documentation.
- The organisation has invested in Microsoft Word.
- SharePoint is available.

Weaknesses

- Although the documentation is there, it is not easily found.
- There are 'privately' held sources of documentation (information that is not on the Wiki, networked disc drives or SharePoint).
- Some key applications are undocumented.
- Some Wiki information is out of date; it stays out of date because there is no procedure for reviewing the Wiki.
- Word is an unsuitable word processor because it will not allow:
  - Single sourcing.
  - Conditional text (however, there are plug-ins for this).
  - Structured authoring.

Opportunities

- Develop metadata to classify the available documentation.
- Update, complete and correct the documentation.
- Using the structured nature of DITA to ensure the collection of all necessary information.
- Use the Wiki as both a source and a repository for any future technical communication solution. Content must be interchangeable between the solution and the Wiki.
- For GUI driven applications, produce HTML help or context sensitive help.
- For non-GUI applications, produce PDF manuals.
- Develop a help centre to improve documentation accessibility.
- Word can be adapted with interface and plug-in software to meet the good documentation principles of separating content from presentation, using structure, re-use and re-purposing.

Threats

- It is difficult to know if documentation is out of date.
- Some information needed by support is not available.

Recommendations

The principal recommendation to come out of the first report was that the Information sources survey should be verified using another source.

Mekon Content Strategy Audit™

At this time, Mekon (www.mekon.com) approached me about conducting a Content Strategy Audit (CSA). The Senior Management Team decided to verify our information sources survey by asking Mekon to do the first stage of their Consulting and Implementation Process, the Mekon Content Strategy Audit.

Carrying out the CSA

Mekon's Consultant visited two of the organisation's sites to carry out the CSA. I set up the interviews between the consultant and a cross section of the organisation's technical people including: software design leads, quality assurance, operations and software test staff. It was a full day and included a visit to my organisation's Data Centre. Please see the article on pages 27-30 for further details.

The CSA report

The CSA report recommended:

- A more in-depth survey of content types and sources, because the survey had only covered some of the IT department. For example, training had not been included for any of the public-facing organisations.
- Adopting structured authoring using DITA and XML.
- Adopting a Component Content Management System (CCMS).
- Making documentation a deliverable in all projects.
- Monitoring and measuring costs and business metrics at each stage of the roll out, if the recommendations of the CSA were adopted.

Mekon also provided a review of the currently available CCMSs.

Knowledge Management report

Having analysed the CSA and carried out more research, the report re-focused on the need for Knowledge Management. The Mekon

CSA was very helpful in confirming that my ideas were on the right track. I was now able to expand the report with information on technology and create an implementation plan.

What the report said

The report's main proposals were that:

- The Software Development, Support and Business Community be allowed to generate content in any format.
- The Technical Communicator should generate support content and acts as editor/moderator for community-generated content.
- The Technical Communicator should generate customer-facing content.
- Structured authoring and DITA (XML) should be adopted as a standard for documentation.
- A Help Centre should be established.
- A CCMS for managing content should be obtained.

Selling the idea

A major part of the organisation's restructuring was now complete and the moment was right to sell the idea. A new process improvement team has a remit to look at the overall efficiency of the organisation by taking control of the processes and procedures that the business follows.

By this time, I had started to describe what I wanted to achieve as 'Knowledge Management'.

The main arguments used to sell the strategy were:

1. Current documentation methods produce static content that means that re-use of information and presentation to different audiences is inefficient.
2. There is no centralised management of documents and versions. Quality of documents will improve because content versions are controlled.
3. The organisation must deliver managed knowledge that gathers all the knowledge in one location, where it is easy to access and is easily found.
4. The organisation must overcome the backlog of undocumented products. To do this by conventional methods would mean employing a number of Technical Communicators to service the backlog and future demands. The only way to overcome the backlog is to engage subject matter experts as content providers for internal documentation. This will free me to concentrate on customer-facing documentation (see Figure 2). Internal and external users will benefit because products will be documented.
5. Re-use and re-purposing of content that will reduce the time taken to produce documentation and allow sharing of content.

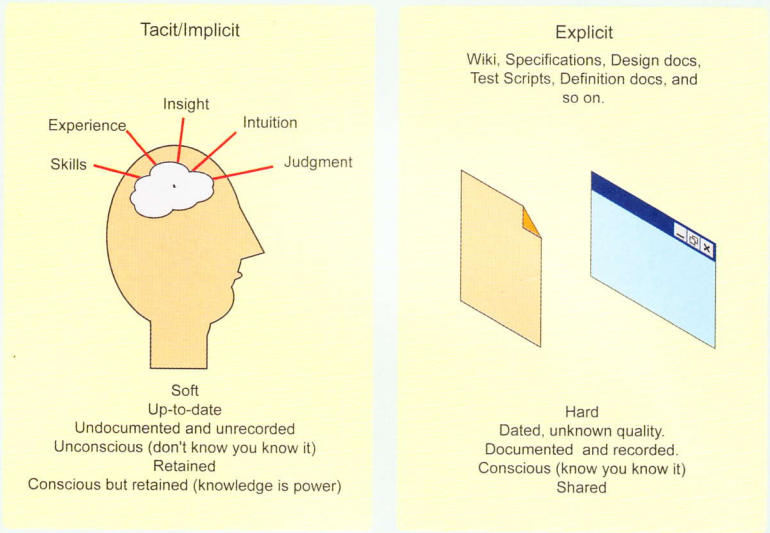


Figure 1. Knowledge Management.

6. Adopting DITA and XML will provide structured documents that guide the authors' content enabling them to concentrate on content rather than presentation.
7. The need to enable the rapid clearance of support tasks by providing the information that IT Support needs to resolve problems.

Fortunately the main principles of the Knowledge Management Strategy were quickly adopted and after several meetings and presentations there was a consensus that this was the way the organisation should go.

Where is the strategy now?

At the time of writing (June 2010), I am preparing a proof of concept trial as suggested by the process improvement team, to establish:

1. Metrics for the trial.
2. Expected outcomes that will prove the concept.
3. The cost benefits of adopting the Knowledge Management strategy.
4. Engagement of my organisation's web design team and usability team to find out what the Help Centre might look like.
5. More detailed evaluation of the software candidates and establishing the costs of plug-ins and interfaces.
6. Application for a budget for the proof of concept trial.

There is synergy with other projects that means Technical Documentation can use a CCMS they are adopting.

Things that hindered

The organisation I work for has been going through a great deal of change in recent months, with more changes to come in the future. This has meant movements of senior staff and placement of interim managers to replace them. Temporary or interim

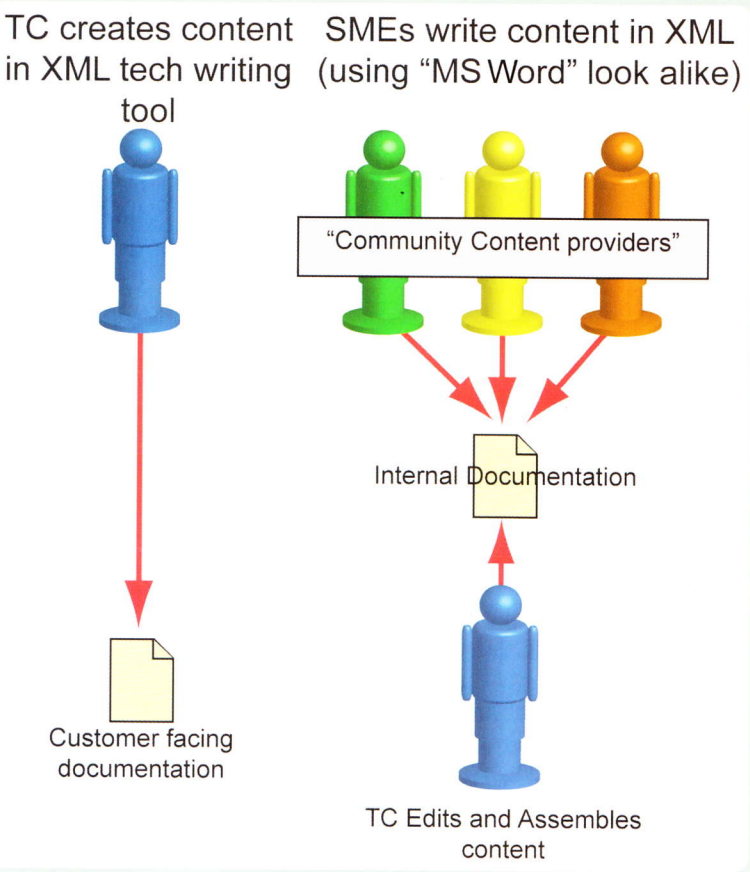


Figure 2. Content Creation

managers are not there to make long-term plans and commitments; this delayed the process of getting the strategy developed and published.

Things that helped

Being the only Technical Communicator in an organisation can be a very isolated work life, with no one to 'bounce' ideas off. However, the ISTC discussion group has been a useful sounding board with plenty of free help and experience to draw on. The same is true of networking at Technical Communication UK 09 with other Technical Communicators. Membership of my ISTC Local Group has also provided a source of good ideas and encouragement.

A number of technical documentation companies such as Just Systems, Stilo, Quark, and Mekon have all freely contributed ideas and given demonstrations or trial software.

Now that the organisational changes have started to be resolved, an organisation is in place that is prepared to champion a proof of concept trial. C

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