

Topic Based Authoring: Why Bother?

Presented by Joan Lasselle and Linda Urban, October 4, 2012

Joan Lasselle

- Founder and President, Lasselle-Ramsay
- Helping clients move to structured content
- Partner: Linda Urban Communications and Just Systems



Linda Urban



- Principal Consultant, Linda Urban Communications
- Work with writing teams to improve skills and create useful, usable content and instruction
- Current focus: up-front analysis and workplace research
- Partner: Lasselle-Ramsay and Just Systems

How this talk came about

- Our experience working with clients
 - Lots of potential benefits from topic-based authoring
 - Getting real benefits from it can be challenging
 - Some things seem to consistently trip groups up – why is that?
- Can we find a way to talk about what it really takes?

What brought you here?

- You saw the announcement for this webinar.
 - What brought you here today?
 - What are you hoping we will cover?

Please type in chat

Poll: Where are you in the process?

- Just investigating topic-based authoring
- Know you want to implement
- Currently in DITA
- Currently in DITA and have CCMS
- In DITA, and now reworking your content

Who this talk is for, and where we're headed

- Investigating
 - Moving forward...part way along
 - Already in DITA & XML... now what?
-
- Define terms and identify benefits
 - Find out what business problems you hope to solve
 - Identify common pitfalls
 - Present seven steps to success

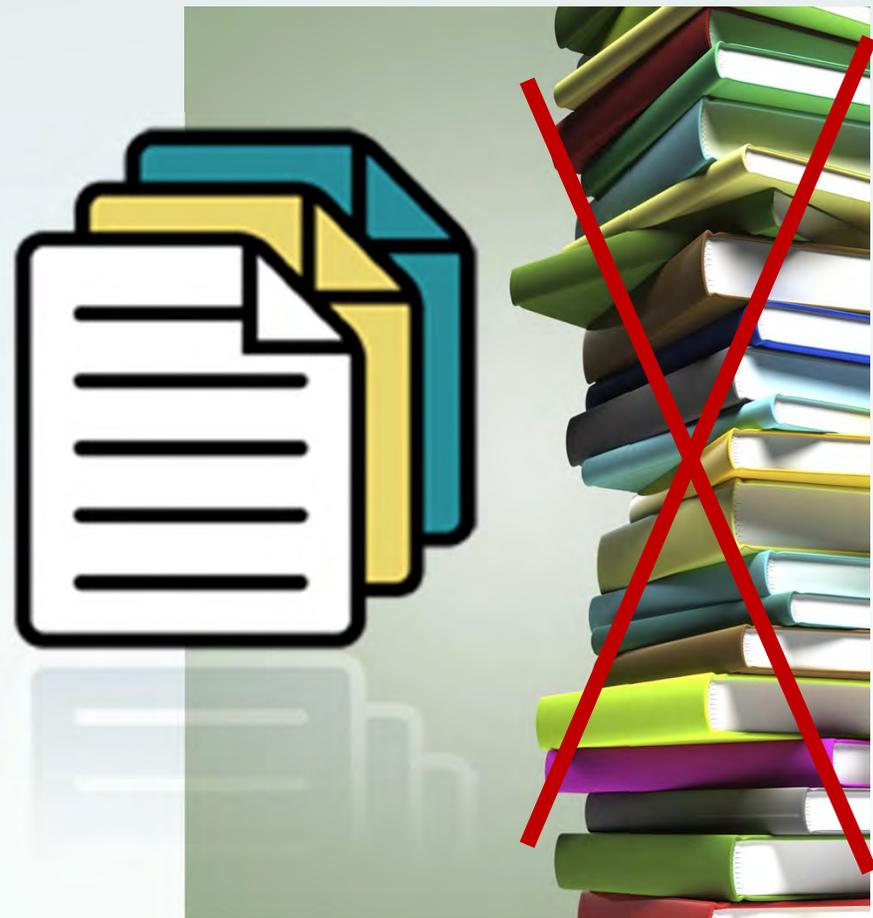
***We hope to have a conversation...not just lecture...
please post your questions in chat as we go along***

Topic-base authoring – hardly new!

- Been around for decades
- Central to online help
- Came out of early work on information design
- Aligns with research on cognition and learning
- Not necessarily = DITA

What is topic-base authoring?

- Writing technique
- Modular not linear
- Topics stand alone
- About one specific subject (it answers a question)
- Follow a consistent pattern
- Uses topic types (concept, task, reference, other...)



Procedural Topic (Task) Sample

Note: The editorial decisions shown in this handout reflect the decisions made for THIS help design. They are not wholesale recommendations for ALL help designs.



Tasks are accessible from the contents and the index, and are linked to from other related topics.

List related topics at the bottom, under the heading "See also".

A screenshot of the 'Displaying Waveforms' help page. The page has a title bar 'Power Recorder System Help' and a menu bar 'File Edit Bookmark Options Help'. Below the menu bar are buttons for 'Contents', 'Index', 'Back', 'Print', and navigation arrows. The main heading is 'Displaying Waveforms'. The text reads: 'You can display real-time waveforms for volts, amps, watts, and combined volts-and-amps. If you're not presently linked to an installed Power Recorder, any data you see will be that captured for the location now shown in the toolbar.' There are two numbered steps: '1. Click [icon] to activate the Scope tools.' and '2. Double-click the icon you want to open to a window.' A callout box points to the icon in step 1, stating 'Icons for the Waveforms windows display in the Waveforms view.' At the bottom, there is a 'See also' section with a link to 'The Waveforms Window'.

Heading (for task, start with a gerund)

Introduction: Indicate what the task accomplishes, why the user would want to do it. Also mention anything the user should know before starting.

Show buttons that users click.

Include result statements after actions.

From the first "Online Help" class Linda taught, in 1999

Today's focus is often Moving from linear content to modular

A
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CONTENTS

- What This User Manual Covers*
- Who can use AutoMPP*
- Main Features of AutoMPP*
- When and Where to Use AutoMPP*
- System Requirements*
- How to Set up AutoMPP*
- How to Generate a Project Plan*
 - Configure Data in Input Sheets.....
 - Task_Data Sheet.....
 - Pattern sheet.....
- Run AutoMPP Program*
- Get Project Plan in the Plan Sheet*
- Get Resource Usage Data in the Resource Usage Sheet*
- Tips and Tricks.....*
- Interpret and Resolve Errors*
- Limitations of AutoMPP*
- Appendix A.....*
 - Combination Formulas
- INDEX.....*

Automated Project Plan Program

Automated Project Plan Program

How to Generate a Project Plan

You must perform specific actions to generate a project plan using the AutoMPP program.

- To generate a project plan
1. Configure the data in the input sheets in the following order:
 - a. Config sheet
 - b. Task_Data sheet
 - c. Pattern sheet
 2. Run the program from the RUN sheet.
 3. Get the project plan in the Plan sheet.
 4. Get the resource usage data in the Resource Usage sheet.

Figure 1 shows the process of generating a project plan at a glance.

Configure data in the three input sheets



Automated Project Plan Program

The following sections explain in detail the actions to do on each sheet of the AutoMPP.xls file to generate a project plan.

The AutoMPP.xls file that you download at the time of program setup has three input sheets: Config, Task_Data, and Pattern.

Configure Data in Input Sheets

To use the AutoMPP program, configure the data specific to each input sheet.

1. In the Config sheet:
 - Set up the values for the program parameters.
 - Set up the names, skills, roles, and work priority for the resources.
2. In the Task_Data sheet:
 - Set up the high-level tasks and their attributes.
3. In the Pattern sheet:
 - Set up the subtasks template.
 - Set up the effort and resource template.

The Config, Task_Data, and Pattern sheets that you get in your AutoMPP.xls file have example data values. You can overwrite these example values to set up data for your project.

You can understand the data configuration for each input sheet with the help of the screenshot of the sheet. The following table provides information about the figures used in this document to explain data configuration.

Table 1. Figures that show the Excel sheets with example values

Fig.	Sheet/	Figure Caption
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After: Stand-alone, modular topics

The screenshot shows a web browser window titled "AutoMPP Online Help". The left sidebar contains a table of contents with the following items:

- Using AutoMPP Help
- Getting Started
- Process Overview: Generate Project Plans
- Configure Data in AutoMPP
 - Config Sheet
 - Set Up Program Parameters
 - Values for Program Parameters
 - Set Up Resource Information
 - Task_Data Sheet
 - Pattern Sheet
- Run AutoMPP
- AutoMPP Output
 - Tips and Tricks for AutoMPP
 - Errors and Solutions
 - Glossary

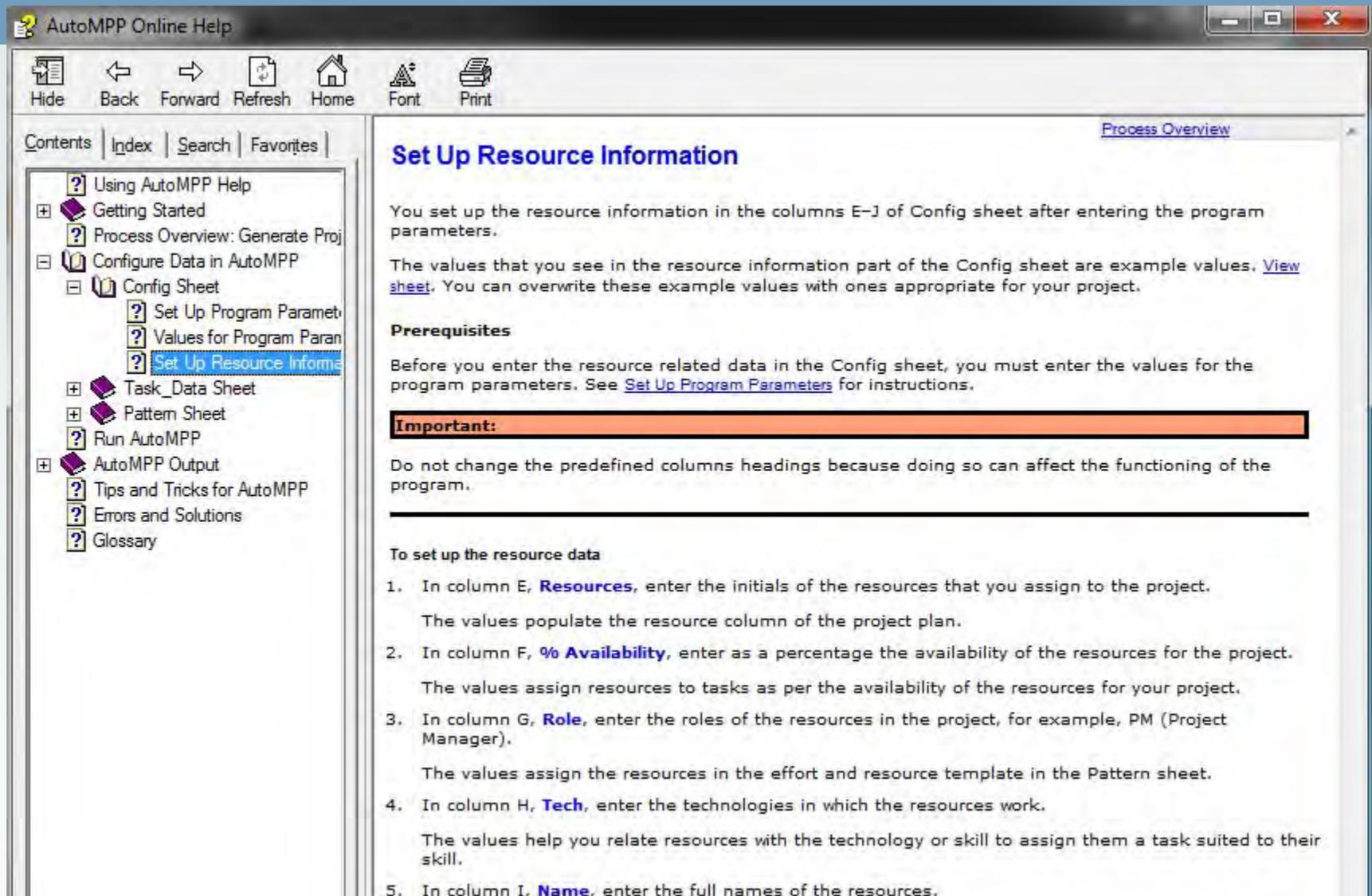
The main content area is titled "Generate Project Plans Using AutoMPP". It contains a diagram illustrating the process in three steps:

- 1** Configure data in the three input sheets. This step involves three green boxes labeled "Config sheet", "Task_Data sheet", and "Pattern sheet", connected by arrows pointing right.
- 2** Run program from RUN sheet. A blue arrow points from the "Pattern sheet" box to a green box labeled "Run program from RUN sheet".
- 3** Get output of AutoMPP program. A blue arrow points from the "Run program from RUN sheet" box to a stack of three boxes: "Project Plan in Plan sheet" (green), "Project Plan in mpp file" (red), and "Resource Usage data in Usage sheet" (green).

The overall process of generating a project plan requires three steps that must be done in the order these are listed below:

1. **Configure the data in the three input sheets of the AutoMPP.xls file.** You must configure these sheets for your project in the sequence these are listed below. The type of data for each input sheet is as follows:
 - **Config sheet:** The first input sheet in which you set up:
 - Values for the program parameters.
 - Names, skills, roles, and work priority for the resources.
 - **Task Data sheet:** The second input sheet in which you set up:
 - High-level tasks and their attributes.
 - **Pattern sheet:** The third input sheet in which you set up:
 - Subtask template.
 - Effort and resource template.
2. **Run the program from the RUN sheet**
3. Get the output of the AutoMPP program in the output sheets as follows:

After: Stand-alone, modular topics



The screenshot shows a web browser window titled "AutoMPP Online Help". The browser's address bar is empty, and the page content is displayed in a standard layout. On the left side, there is a navigation pane with a tree view of the help topics. The "Set Up Resource Information" topic is selected and highlighted in blue. The main content area on the right displays the text for this topic, including an "Important" warning box and a numbered list of steps for setting up resource data.

AutoMPP Online Help

Hide Back Forward Refresh Home Font Print

Contents | Index | Search | Favorites

- Using AutoMPP Help
- Getting Started
- Process Overview: Generate Proj
- Configure Data in AutoMPP
 - Config Sheet
 - Set Up Program Paramet
 - Values for Program Paran
 - Set Up Resource Informa**
 - Task_Data Sheet
 - Pattern Sheet
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- AutoMPP Output
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[Process Overview](#)

Set Up Resource Information

You set up the resource information in the columns E-J of Config sheet after entering the program parameters.

The values that you see in the resource information part of the Config sheet are example values. [View sheet](#). You can overwrite these example values with ones appropriate for your project.

Prerequisites

Before you enter the resource related data in the Config sheet, you must enter the values for the program parameters. See [Set Up Program Parameters](#) for instructions.

Important:

Do not change the predefined columns headings because doing so can affect the functioning of the program.

To set up the resource data

- In column E, **Resources**, enter the initials of the resources that you assign to the project.
The values populate the resource column of the project plan.
- In column F, **% Availability**, enter as a percentage the availability of the resources for the project.
The values assign resources to tasks as per the availability of the resources for your project.
- In column G, **Role**, enter the roles of the resources in the project, for example, PM (Project Manager).
The values assign the resources in the effort and resource template in the Pattern sheet.
- In column H, **Tech**, enter the technologies in which the resources work.
The values help you relate resources with the technology or skill to assign them a task suited to their skill.
- In column I, **Name**, enter the full names of the resources.

Why bother?

Common challenges in the content landscape

Customer experience:
improve access & usability

Shorter product cycles

Increased maintenance load
More customization

Do more with less

Process improvement,
shorten writing cycles/review
time

Support Agile
development process

**Support new output
formats**

Cut translation costs

Poll: What's in your landscape? What are the challenges?

- Customer experience (improve access & usability)
- Shorter product cycles
- Support Agile development process
- Support new (and varied) output formats
- Do more with less
- Cut translation costs
- Something else? (type in chat)

Can topic-based approach address those?

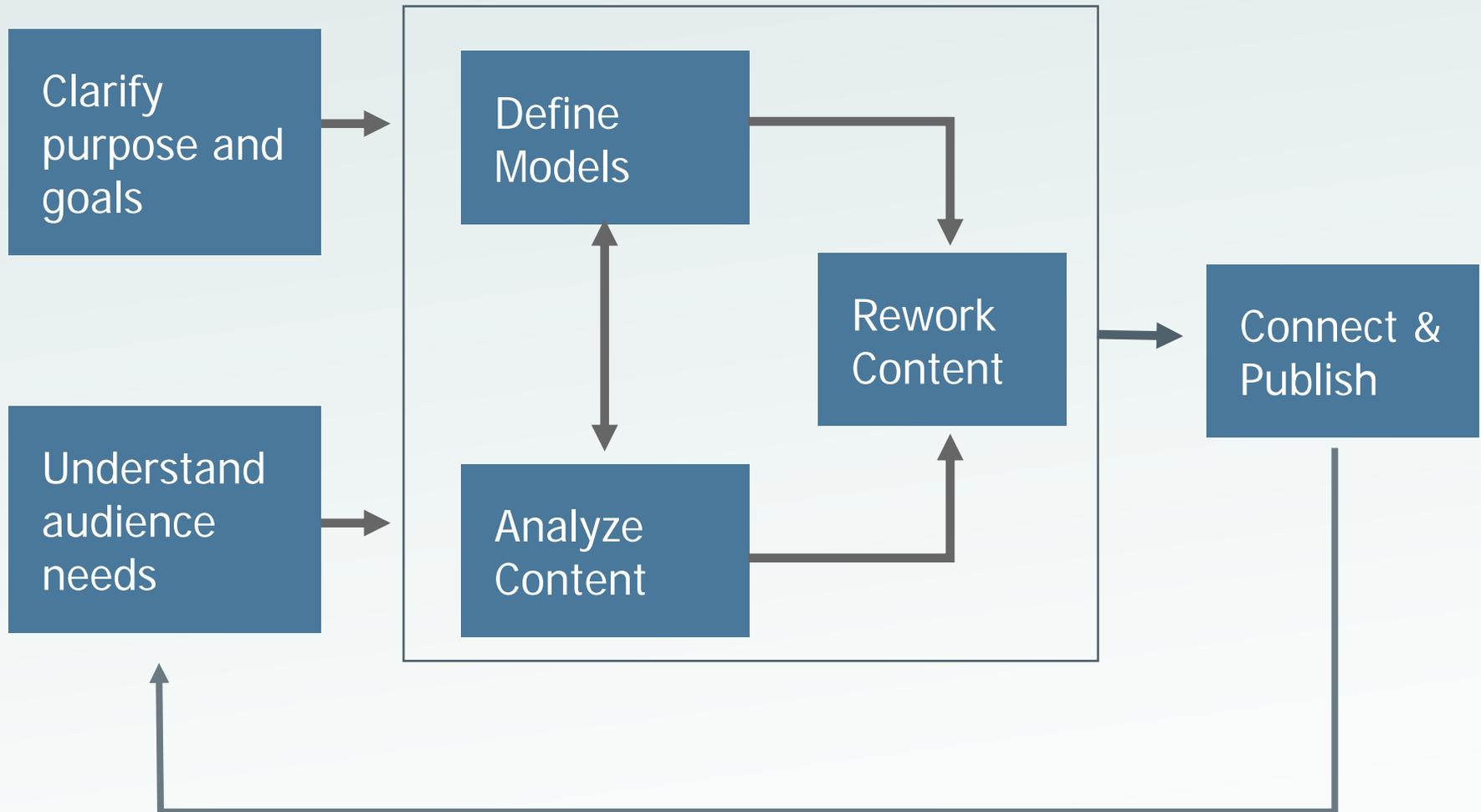
Common Challenges

- Customer experience (improve access & usability)
- Shorter product cycles
- Support Agile development process
- Support new (and varied) output formats
- Do more with less
- Cut translation costs

Topic-based benefits

- Consistent content, written to address user needs
- Modular topics allow shared authoring, faster reviews, flexible workflows
- Reduce, reuse, and repurpose
- Publish to multiple outputs

Nothing happens in a vacuum



What gets overlooked and underestimated?

- **Clearly defining what you want to accomplish**
 - Business needs
 - Customer/user needs
 - How you will know if you've been successful?
- **Looking closely at what you have**
 - Need to analyze your content
 - **It's more than chunking, or converting to XML – it's rethinking, and reworking**
- **Underestimating work and time: It takes more time than you think**
 - Analysis, tool selection, training (techniques and tools), designing your information model, prototyping...they all take time.
- **Getting support and supporting your team**
 - You must communicate the need and sell it appropriately
 - The skills aren't mastered in a 3-day training – it's an ongoing, iterative process

Summary: Seven steps to follow

1. Get started—answer “why”
Define your goals, clarify your audience, and determine how you will measure success
2. Build (and sell) your plan—answer “who, what, and when”
Create urgency, identify your team, define milestones
3. Analyze your content
4. Create an information model
Define topic types and topic clusters
5. Make time to rework the content
...And **not** at the same time as the next product release
6. Provide ongoing support, coaching, and feedback
7. Iterate: Process, content, and models

Discussion

Presented by Joan Lasselle and Linda Urban, October 4, 2012

Topic Based Authoring

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The screenshot shows the homepage of LasselleRamsay, a business content development firm. The header features the company logo and a navigation menu with links for 'About LR', 'Our Services', 'Our Clients', 'Our Content', 'Contact Us', and 'Government'. The main content area is dominated by a large blue banner with the text 'WE DELIVER CONTENT THAT GETS RESULTS' and 'JUST ASK OUR CUSTOMERS'. To the right of the banner is a 'LEARN MORE' section with a 'FREE RESOURCES' list including 'Presentations', 'Articles', 'Events', and 'Archives'. Below the banner are three columns of text: 'Who we are', 'What we do', and 'How we do it', each with a 'Learn more' link. At the bottom, there are two call-to-action boxes: 'ASK AN EXPERT' with contact information and 'EMAIL NEWSLETTER' with a subscription form. The footer contains copyright information and a 'Login' link.

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- Presentations
- Articles
- Events
- Archives

WE DELIVER CONTENT THAT GETS RESULTS

JUST ASK OUR CUSTOMERS

Who we are

Since 1982 Lasselle-Ramsay has helped global Fortune 1000 companies optimize people, process, and technology to leverage high value content to improve customer experience, lower cost, and ensure higher performance.

[Learn more](#)

What we do

Focus on the user—the rest follows. Lasselle-Ramsay helps you design content and learning based on how users work and what information is needed to improve their performance and gain business results.

[Learn more](#)

How we do it

Traditional approaches to content and learning no longer work. At Lasselle-Ramsay we follow a six-point process to shift your focus from creating content to delivering content—who needs what, when and how.

[Learn more](#)

ASK AN EXPERT

Ready to get started? Not sure where to begin? Call us today for a free, no-obligation consultation. Our content experts will explain how targeted content can help get you the results you need.

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