Topic Based Authoring: Why Bother?
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- Founder and President, Lasselle-Ramsay
- Helping clients move to structured content
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Linda Urban

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- Work with writing teams to improve skills and create useful, usable content and instruction
- Current focus: up-front analysis and workplace research
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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…)

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Procedural Topic (Task) Sample

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.

Displaying Waveforms

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.

1. Click to activate the Scope tools:
   Icons for the Waveforms windows display in the Waveforms view.
2. Double-click the icon you want to open to a window.

See also
The Waveforms Window

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

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

Include result statements after actions.

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.

From the first “Online Help” class Linda taught, in 1999

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Today's focus is often Moving from linear content to modular...
After: Stand-alone, modular topics

Generate Project Plans Using AutoMPP

You can use the AutoMPP program to automate the work of creating project plans. To generate a project plan, you must perform specific actions on the sheets of the AutoMPP.xls file. The following figure outlines the process of generating a project plan using the AutoMPP program.

1. Configure data in the three input sheets
   - Configure sheet
   - Task Data sheet
   - Pattern sheet

2. Run program from RUN sheet
   - Project Plan sheet

3. Get output of AutoMPP program
   - Project Plan output
   - Resource Usage data
   - Usage data in Usagesheet

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 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**

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**Set Up Resource Information**

You set up the resource information in the columns E–J of the 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.

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**Important:**

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

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**To set up the resource data**

1. 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.

2. 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.

3. 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.

4. 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.

5. 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
- Support Agile development process
- Support new output formats
- Do more with less
  - Process improvement, shorten writing cycles/review time
- Cut translation costs

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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

- Clarify purpose and goals
- Understand audience needs
- Define Models
- Analyze Content
- Rework Content
- Connect & Publish

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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
Topic Based Authoring

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