

A Case in Single Sourcing

	
	<p>A Case in Single Sourcing</p> <p>Mindy Sichel & Christel Kurz</p>

	
	<p>Mission Impossible!</p> <p>Mindy Sichel & Christel Kurz</p>

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Our story in a nutshell

- Delivered 15 different install guides
 - 9 months
 - 2 writers (plus helpers)
- Used nothing but FrameMaker
 - 590 files
 - 259 text insets

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Mission Impossible! Agenda

- How we got here; some history...
- Your mission, should you choose to accept it...
- Plan, plan, and then plan some more
- Implementation
- Tips and tricks

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Before single sourcing

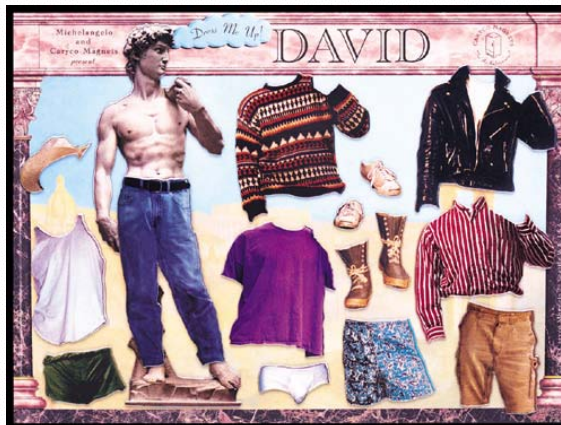
Many different Cognos products

- complex products, many features
- common components across products

⇒ A situation like David's closet...

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Common components



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How did we get here?

Many products

- different release schedules
- different versions of common components

Doc teams structured accordingly

- product doc teams
- component doc teams

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Shared documentation

- Component writers
 - wrote about components
 - delivered content to other writers
- Content incorporated into product documentation

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How we shared

- Problem
 - many install guides, one for each product
 - some common content among products
 - common look and feel needed
- Old solution
 - generic install guide outline
 - install guide committee

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How did it work?

Process: component writers - SMEs

- Researched and wrote content
- Used FrameMaker change bars
- Emailed all affected writers
- Copied and pasted content

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How didn't it work?

- Problems for
 - component writers
 - product writers
 - technical reviewers
 - localization
 - users
 - Content duplicated
- ➡ Almost the same but not quite

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The Result? Stress...



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Questions?



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and then... Cognos Series 7

Simultaneous release

- All server and client products
- All platforms
- Lots of component sharing

⇒ Installation and configuration was key

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Brave new world

- **Component:** identifiable software pieces
- **Product:** multiple components, some shared
- **Package:** one or more products

➔ Everything is now a component!

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The Cognos Solution

The perfect fit!



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New doc team

- Reorganized resources
 - installation and configuration writers
- New mandate
 - more and better sharing

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The mandate – 15 books

- Windows packages
 - 5 server
 - 3 client
 - 1 solution
- UNIX packages
 - 5 server
 - 1 solution



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The Planning Phase

- Research
- Task analysis
- Information pieces
- Planning documents

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Lots of research

- Who is the audience?
- What components are in each software package?
- Do UNIX and Windows packages contain the same components, just different flavor?

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Capturing the research

- For each package
 - What were the related user tasks for each component?
 - What information pieces were required to support the tasks?
 - Were the information pieces the same across packages and platforms?

➔ One spreadsheet did the job!

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The component puzzle



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Task analysis

- If components are shared, are user tasks the same for each component?
- We did a task analysis to find out.



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Our users need to know

- Prerequisites
- Installation
- Configuration
- Testing
- Uninstalling



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Information pieces

Directory Server component	Windows Svr Pkg	Client Pkg	UNIX Svr Pkg
Prerequisites	A	A	A
Default settings	B	B	C
Installation			
- overview	D	E	D
- steps	F	F	G
Configuration	H	n/a	H

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Single-source candidates

Shared information pieces

- In every book
- In some books
- Only in Windows books
- Only in UNIX books
- In Windows and UNIX books



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Information design


Three types of shared content

- “Boilerplate” text
- Shared chapters
- Text insets


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Boilerplate text

Copy from sample and paste into books 


- Editors and localization liked it
- Reviewers didn't notice


 A good idea but difficult to maintain

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Shared chapters

Entire chapters identical among books

- Editors and localization liked it 
- Reviewers didn't like it
- We liked it

 Works but not the best solution

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FrameMaker text insets

As close as we got to the holy grail:
true single sourcing



- Editors and localization liked it
- Reviewers liked it
- We loved it

➡ Two thumbs up!



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What are text insets?

Plain ol' FrameMaker files



- Referenced by another file
- Updated once, updates are reflected everywhere
- Can be as small as a single paragraph
- Can be as large as you want

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File naming conventions

- Text insets
 - ti_win_inst_xxx.fm
 - ti_unix_inst_xxx.fm
 - ti_winunix_inst_xxx.fm
- Shared chapters
 - shr_xxx.fm

Critical when working with 590 files!

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From files to books

- Outlines
- Sample books, including boilerplate
- Stub files for each chapter and text inset

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Outlines

Traditional, based on task analysis 

- Chapter titles
- Section headings
- Information pieces
- Sharing

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Sample books

Two sample books: UNIX and Windows 

- Based books on outline
- Created books – unique and shared chapter files
- Wrote boilerplate text
- Generated and saved books as PDF

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Using the sample books

- Edited for boilerplate and structure
- Identified information pieces that were missing
- Estimated time required
- Allocated pieces to resources

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Stub files

- Used naming conventions
- Made a list of all text insets
- Created files according to list
- Saved all files in source control
- Built the 15 books

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What's left?


Almost forgot...
...the writing!




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The writing process

- Boilerplate already existed 
- Headings were in place
- Single-sourced content was written first
- Unique content came last

 Books came alive!

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The finishing touches

Benefits of text insets trickled down

- Tech Review
- Editing
- Indexing
- Production
- Translation

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Tech review and editing

- Marked up only once for each single-source piece
 - Marked up a file in isolation
 - Implemented feedback quickly
 - Attained consistent technical accuracy across books
- Generated confidence in our process

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Indexing

- Inserted index markers in text insets
 - populates indexes in all books
 - results in consistent index entries across books
 - reflects changes immediately in all books
- Faster and more usable indexes

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Production

- Checked all shared files first
- Checked chapter files next
- Checked for new quirks
- Lots of files to manage

⇒ Teamwork to the max!

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Translation

- Large cost savings – ¡mucho dinero!
- Translation memory – on traduit le même texte seulement une fois!
- Consistent translation throughout the books – Folgerichtigkeit!

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Automagically!



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What have we learned?



- Advantages
- Disadvantages
- Tips and tricks
- Stuff for next time

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Advantages

- Identical information guaranteed for identical user tasks
- Consistent way for users to find information
- Identical content maintained in one file
- Cost-effective review and editing time
- File sharing among resources
- Cost-effective translation

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Disadvantages


- Lots of files to track
 - Must be very organized
 - Difficult to work offsite
- Must think creatively
 - Difficult to respond to software changes
- Technical “issues” with text insets



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Tips and tricks

- Finding any or unresolved text insets
- Updating text insets 
- Solving formatting issues
- Avoiding cross references

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Things to remember

- Research and plan
- Identify what's common across products
- Identify the shared information pieces
- Create outlines to show structure
- Review before writing content
- Create and test sample books
- Use good file management

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The afterlife

- Added five more installation guides for new packages
- Improved usability of documentation and software
- Received positive customer feedback

➡ Happy customers :-)

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Statistics

First release

- 590 files
- 259 text insets

Current release

- 692 files
- 318 text insets

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It continues to breathe!



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