



Europe's Largest XML  
& CMS Conference



## X-Pubs 2008

**Maximising the re-use opportunity**

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## Agenda

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- **What do I mean by re-use?**
- **Why it's important in today's environment?**
- **Some of the pieces of the jigsaw**
  - Supporting Cultural Change
  - Adopting Authoring Guidelines
  - Enforcing Consistent Terminology
  - Authoring Standards
- **Examples**
- **Summary**



## What is re-use?

Common definitions

## General definitions of re-use

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- **Re-use is using the same information multiple times in multiple locations**
- **Technically, re-use can be accomplished using multiple methods**
  - Copy and paste
  - Data can be re-used by integrating multiple systems
  - Links and references can be made between multiple “documents”
- **However in a content management or localisation paradigm, re-use can have a much more specific meaning**

## Re-use for content management

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- **In content management terms re-use is**
  - Creating information not as single purpose large “document” but as much smaller blocks of information that are intended for use in multiple locations and output formats
  - These information blocks have many names:
    - Topic
    - Data Module
    - Component
    - Object
    - Fragment
- **Regardless of the name, the purpose of these information blocks are the same:**

**Author Once – Use Many Times**

## Re-use for localisation

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- **Maintains phrases and sentences that have already been translated**
  - Prevents re-translation
- **Analyses content and suggests pre-translated alternatives**
  - Reduces translation time and cost



**Why it's important in today's environment?**

## 90% of Published Information is Stale

### We are drowning in information

- Each year, print & electronic info grows by 5 exabytes
  - = 37,000 U.S. Library of Congress collections
  - = All words ever spoken by humans
- Print growing 35% per year

Medium	Terabytes	Doubles Every...
Surface Web	167	Year
Deep Web	91,850	?
Emails	440,606	3 years
Instant messaging	274	Year
Usenet	102	Year

Source: <http://www.sims.berkeley.edu/research/projects/how-much-info-2003/execsum.htm>

### But information quality is getting poorer

- Are all your customer-facing documents up to date? What do your customers do when they do not find needed information?
- Have you estimated the number of field service errors or repeat calls that weigh down your costs due to missing or inaccurate information?
- Have you ever delayed product delivery because of lengthy documentation development processes?

**Customer Satisfaction** ↓

**Employee Productivity** ↓

**Time to market** ↓

## Up to 75% of the Publishing Process is Wasted Effort

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- Manual, Redundant Tasks

- Manual page layout
- Linear authoring process (vs. collaborative effort)
- Different process for each media (print, Web, etc.)

**“30-50% of worker’s time is wasted in searching and formatting documents”**

**IDC**

- High Cost of Updates

- Manual updates of multiple instances of same information
- Manual reformatting after every change

**“Workforce inefficiencies related to publishing will cost organizations across the globe approximately \$750 billion.”**

**AT Kearney**

- Costly Data Proliferation

- Recreate existing information (vs. reuse)
- Duplicate information for each release and or customer
- Redundant translations

**“Documentation and translation costs for a complex product can exceed 5% of the R&D budget.”**

**Large software manufacturer**

## Recent commentary

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At last week's Roadshow, AIIM's President, John Mancini, coined the term "**digital landfill**" to describe the uncontrolled storage of emails, file-shares and legacy repositories. Findability of information is paramount, but an underlying structure of classification is important for any level of management and control.

## Internal challenges

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- **Less investment from the business**
  - Reduced internal resource
  - Increased pressure on authors to do more with less
- **Demands from your customers and partners**
  - Single channel output is not good enough
  - They want it right first time and now!
- **Globalisation**
  - Only working in your local geography is not enough to sustain a business

## In a nutshell

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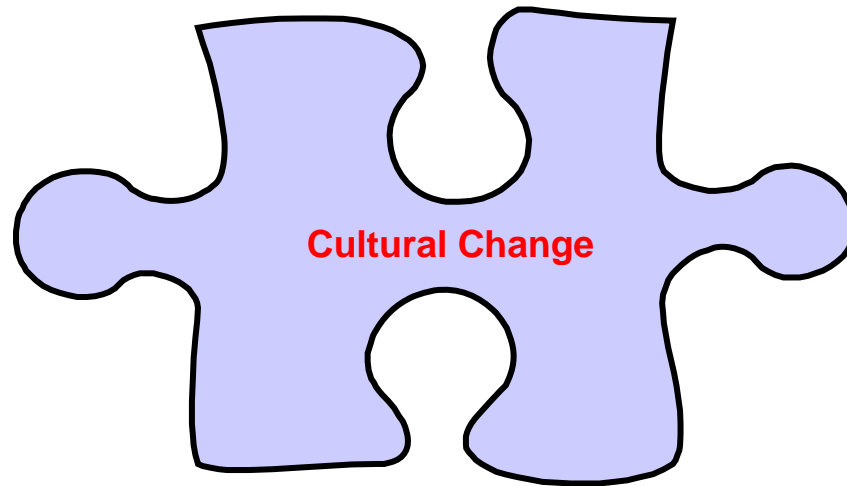
Running faster is just about enough to  
keep you running on the spot!



We have to work **smarter** to break the  
cycle...



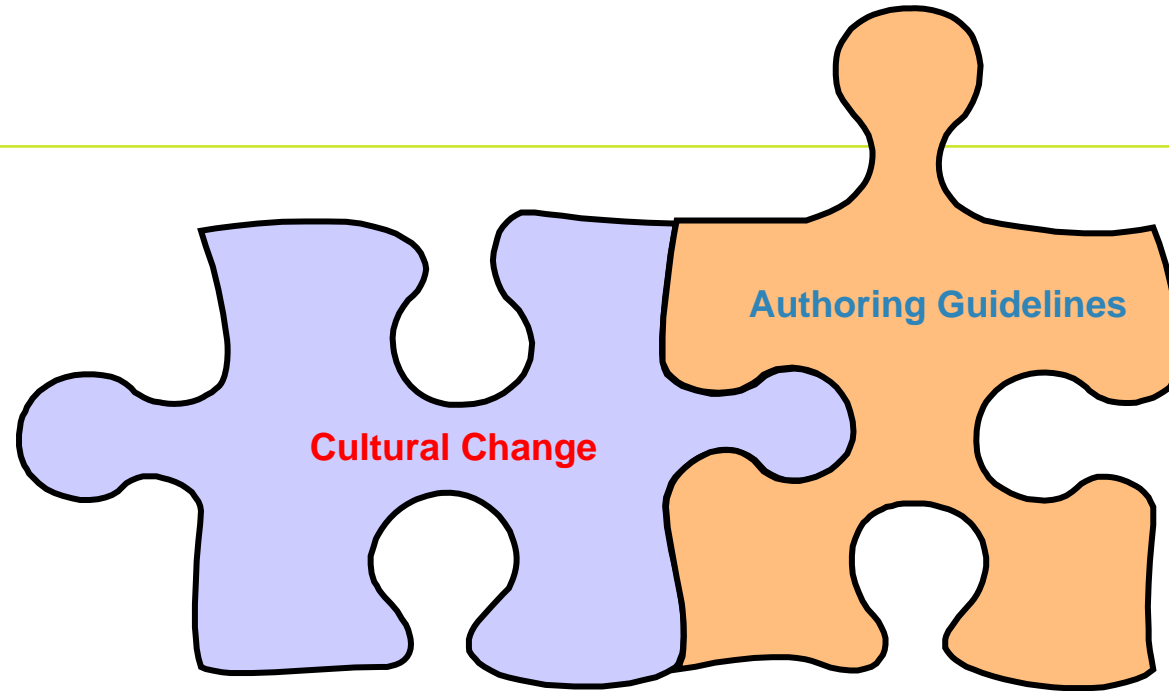
**Some pieces of the jigsaw**



## Supporting cultural change

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- **Involve a good cross section of the user community early on in the process to gain buy-in**
- **Show and discuss the positive impact of change to their daily routine**
- **Run regular workshops using existing data, items covered should include:**
  - A detailed assessment of the content produced
  - Identifying opportunities for automating ways to normalize content
  - How to author using Simplified English
  - Techniques like Information Mapping a proven method to increase re-use
  - Generally educate on how to look at the content outside of the context of a book



## Adopting Authoring Guidelines

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- **Published resources**

- “Authoring for maximum reuse” by Tim Voss, published winter 2006 in the ISTC magazine.

- **Information Mapping**

- U.S. Air force initiated the project
- Robert E. Horn released the method 1967
- IBM developed the DITA DTD as a tool to support the Information Mapping documentation process
- Principles for how to:
  - Analyze
  - Structure
  - Present the information

# Information Mapping provides the method for creating re-usable content modules

*A traditionally written memorandum*

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TO: All Supervisors  
 FROM: Director of Human Resources  
 SUBJECT: TRANSFERS

There are more and more requests for transfers as the company and key work force adopts a more flexible lifestyle. The company supervisor is a key person in facilitating such transfers and in determining whether they would be in the best interest of the company and the employees. This memorandum covers company policy which has been in effect for the past year and continues to be our policy. It outlines each supervisor's responsibilities when an employee requests a transfer.

First, it is in the company's interest to retain employees who are performing satisfactorily, therefore, we will try to help employees to move to an area or job which they find more desirable. This is what you should do. When an employee comes to talk about or request a transfer, you should provide them with Form 742, Application for Transfer, and request that they fill it out as soon as possible.

If the employee is applying for a new job and not just a new location, and if there are any parts of the new job that you think may disqualify the employee, then you should discuss those area with the employee immediately. Remember, it is company policy that if an employee wants a transfer, the company will make every effort to find an acceptable job. So you should not discourage any request, even if it would disturb the completion of projects or goals in your department.

At the bottom of the form, fill out the supervisor's comment. Be brief and to the point. When you finish that, make a copy of the employee's most recent performance review and attach it to the form.

If the employee's current performance is unsatisfactory, then your signature and your immediate supervisor's signature are required on Part C of the form. If the current performance is outstanding, attach a copy of any letters of commendation. If the current performance is satisfactory, you don't have to attach anything.

Send a copy of the blue copy of the form to the company Placement Bureau and a pink copy to your Departmental File. The yellow copy should be given to the employee.

*The same memorandum written in our new method*

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**TO: All Supervisors**  
**FROM: Director of Human Resources**

### How to Handle Transfer Requests

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**Introduction** There are more and more requests for transfers as the company expands and the key work force adopts a more flexible lifestyle. This memo outlines each supervisor's responsibilities when an employee requests a transfer.

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**Policy** It is company policy to retain any employee whose performance is satisfactory. The company makes every effort to find an acceptable job if an employee wishes to be transferred.

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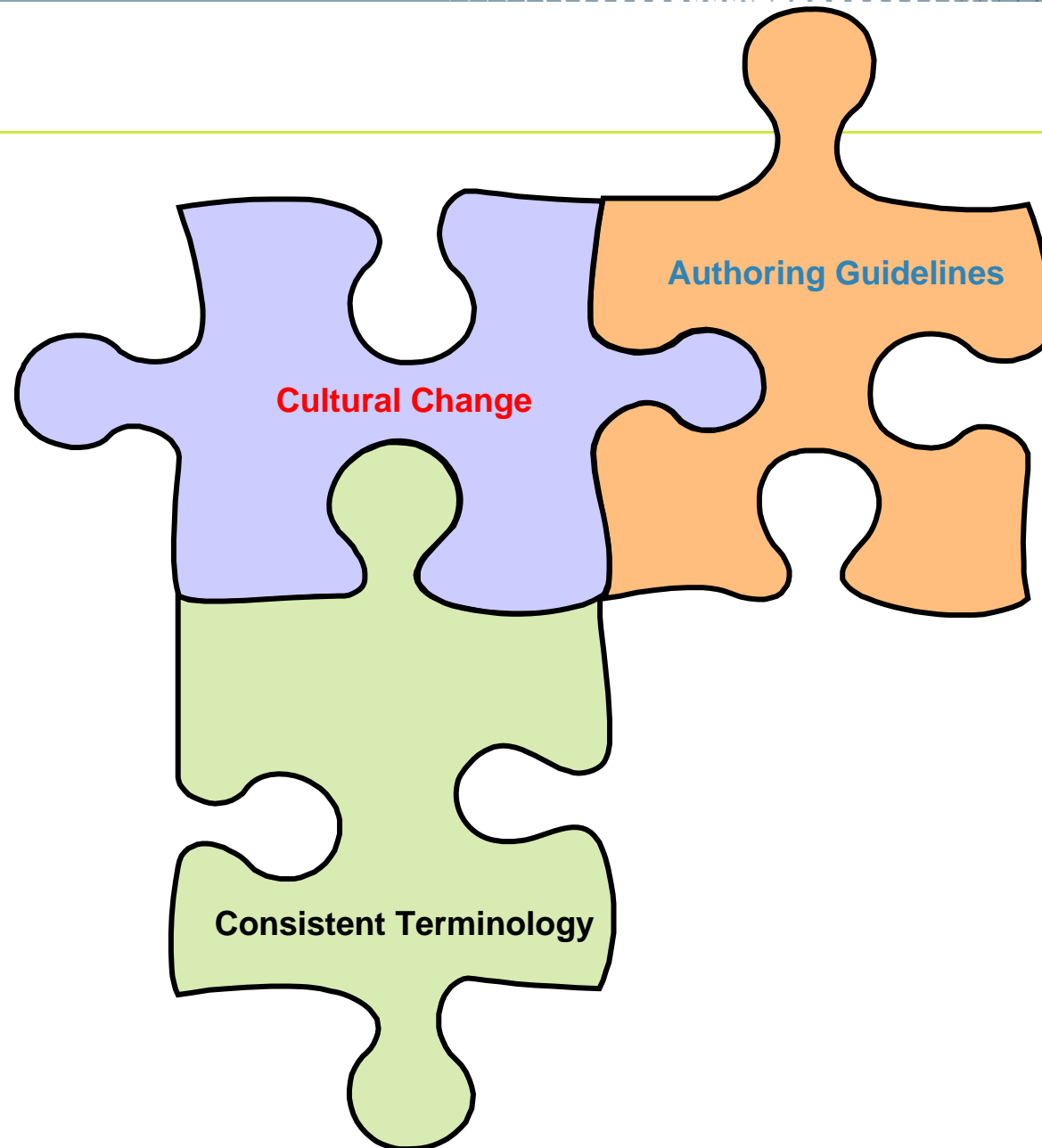
**Procedure** When an employee requests a transfer, follow the steps below.

Step	Action								
1	Provide the employee with Form 742, Application For Transfer.								
2	Discuss with the employee any areas in the job that you consider may disqualify the employee. <b>Important:</b> You may in <b>no</b> way discourage a request for a transfer.								
3	Enter your supervisor's comment in the space at the bottom of the form.								
4	Attach a copy of the latest performance review.								
5	<table border="1"> <thead> <tr> <th>If the current performance is ...</th> <th>Then ...</th> </tr> </thead> <tbody> <tr> <td>unsatisfactory</td> <td>Add your signature and your immediate supervisor's signature on Part C of the form.</td> </tr> <tr> <td>satisfactory</td> <td>Do not add any additional attachments.</td> </tr> <tr> <td>outstanding</td> <td>Attach copies of any letters of commendation.</td> </tr> </tbody> </table>	If the current performance is ...	Then ...	unsatisfactory	Add your signature and your immediate supervisor's signature on Part C of the form.	satisfactory	Do not add any additional attachments.	outstanding	Attach copies of any letters of commendation.
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Send this copy of the form ...	to ...								
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## Other re-use best practices

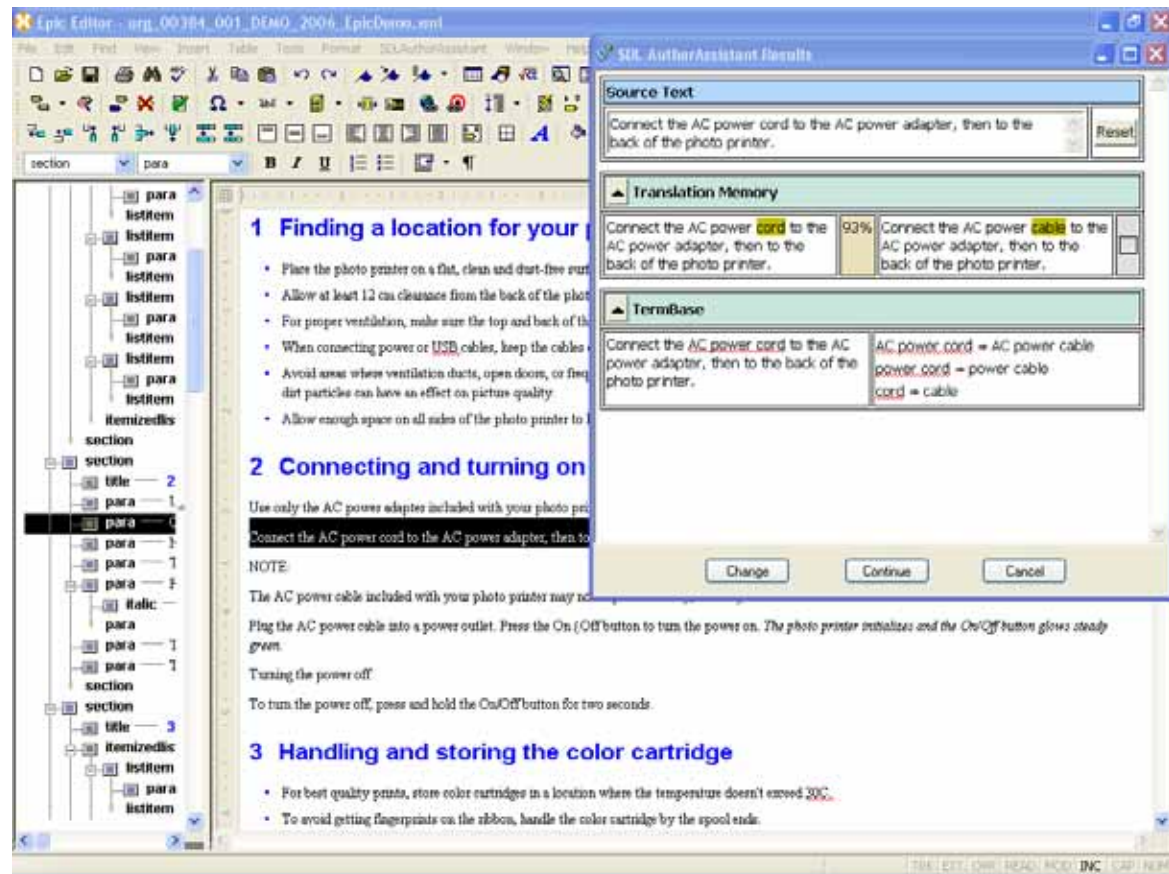
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- **Identify any information that is copied or referenced from external databases and try to automate the insertion or update of the information**
- **Identify components that should not be modified by the majority of authors**
  - Cautions
  - Warnings
  - Legal disclaimers
- **Text on graphics that is dependent on context, such as a callout legend, should belong to the object that the graphic is referenced from and not be added directly to the graphic**
- **When designing a re-use strategy it is critical to keep all of the business reasons for re-use in mind**
  - Parallel authoring of document content
  - Better control of text with legal implications (Cautions, Warnings, Disclaimers, Terms and Conditions)
  - Being able to create documentation that can be tailored to specific configurations
  - Creating a translation process that can run in parallel with the authoring process thereby driving down translation costs and timeframes



## Enforcing Consistent Terminology

- SDL's Global Authoring Management System
- Acrolinx's Acrocheck
- Create "Personas" to help the author



## What are “Personas”?

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- **Personas are composite personalities or archetypes which serve as "stand-ins" for actual users and drive the content development decision making**
- **Personas are not individuals but they represent a profile of individuals throughout the design process**
- **Names and personal details are made up for personas to make them more realistic**
- **Personas are defined by their goals**
- **The content is built to satisfy personas' needs and goals**

## Henry Smith, USA

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Henry is 43 years old, lives in the USA and is working as a sales manager at ACME.

He is the father of four children.

Henry's attitude to his professional life is that he expects service from HQ and delivers service to his customers.

Henry uses ACME's material everyday and his preferred working tool is his laptop, on which he surfs and mails on a daily basis - Google is his favorite site. He prefers that news concerning documentation be delivered via e-mail. He doesn't send or receive any sms at work.

### Henry's priority-list for ACME's documentation:

- Use plenty of graphics to illustrate features and procedures
- Use only American English
- Customers do not want multilingual manuals and they do not want a multitude of different products in the same manual
- Make sure that the particular document contains only relevant information that is to the point regarding the specific product or products.
- Different products from ACME should be presented in the same manner - they all belong to the same brand.



## Gabriel Simone, Europe

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Gabriel is 34 years old, lives in Europe and has been working as a technical engineer for two years at ACME.

At the office he uses a stationary computer and he sometimes he searches the ACME intranet to find information while talking to customers on the phone.

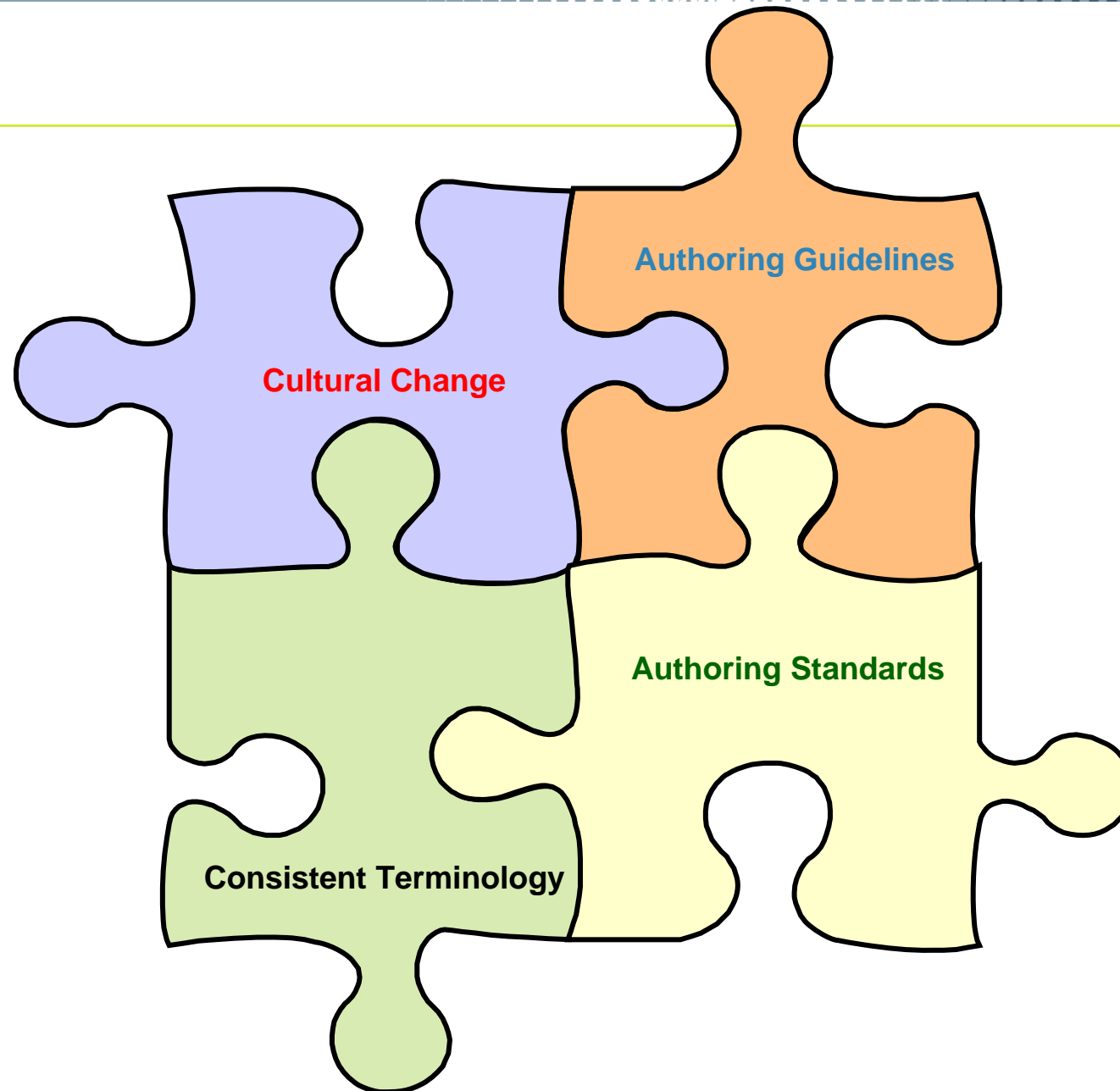
He shares information about new documentation with his colleagues - and for specific products, they use a specific set of binders at the office. When working outside the office, he uses a cell-phone.

Gabriel uses the net and ACME Service Guide everyday. He accesses documentation on the ACME intranet, but he also uses faxes to send information to customers. His favorite website is BBC.com

### **Gabriel's priority-list for ACME documentation:**

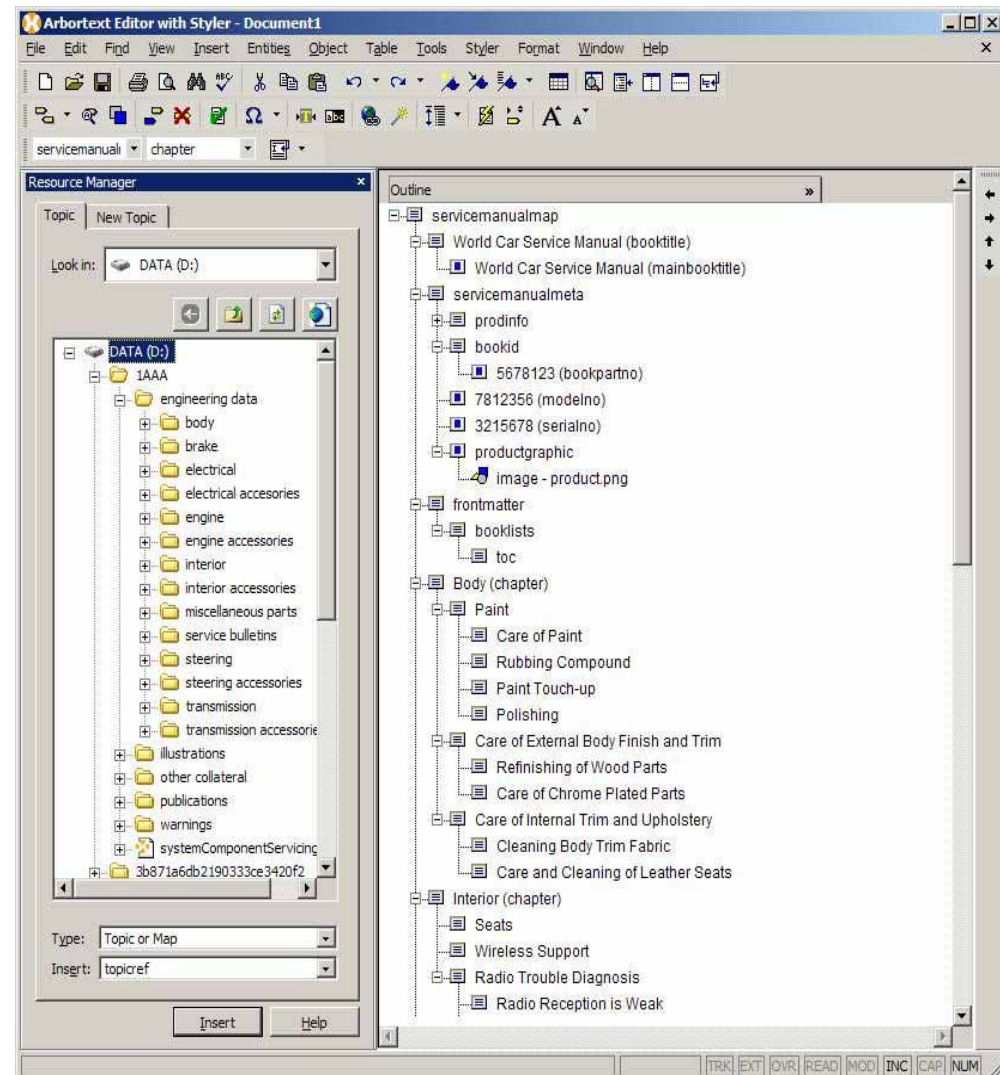
- Maintain old documentation to support our customers - thus help them find the proper replacement equipment more effectively
- The information must be updated and defined in ACME's different systems – performance curves, in particular, have to be updated in sales situations.
- Service intervals
- Native language





## Authoring Standards - DITA

- DITA is one of the most important innovations in XML because it incorporates several best practices to XML publishing.
  - DITA requires a modular approach to building publications, which is essential for **re-using** information effectively and for configuring information for the varying needs of multiple audiences
  - DITA allows different groups to customize their application for their specific needs while maintaining the capability to share information easily with all other groups using DITA.
- **Re-use at Topic Level**
- **Re-use at non-Topic Level e.g. Admonitions**



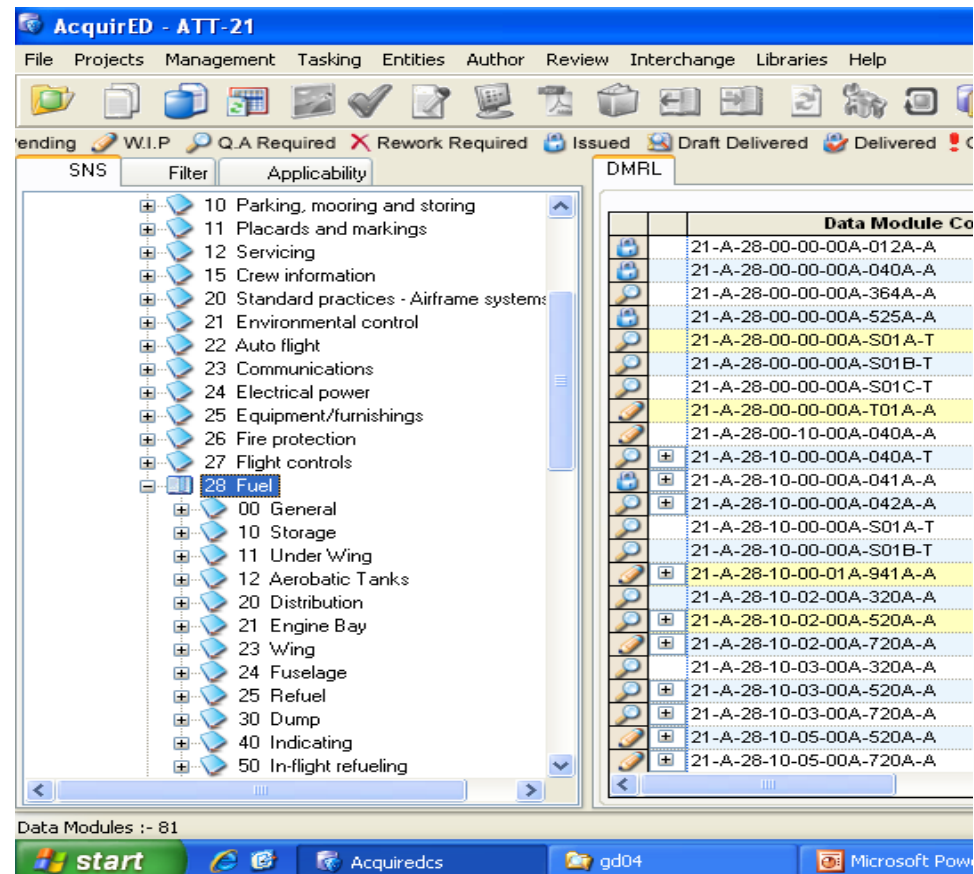
## Authoring Standards - S1000D

- **What Do I Gain If I use S1000D?**

- Carry out the same logistics function as you have done in the past
- More of what you do can be re-used because we are dealing with a standard for information using XML, it is freely interchangeable between partners, suppliers and customers.
- It is flexible in terms of delivery, we can package the data in various ways for different uses, but the key is we create it once.

- **Re-use at Data Module Level**

- **Re-use at Fragment Level**





## Examples

## Higher Education Press

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- The largest and most prominent publisher of educational books in China. Its publications range from science, engineering, humanity and arts, social sciences, education to economics and management. Never confining itself to paper printing, Higher Education Press also develops a great amount of audio-visual, electronic products and on-line teaching materials today.
- **Result:**
  - **Re-use** of resources between textbooks and i-Books
  - Reorganisation of content in textbooks
  - Provided a web-based interactive online book
  - Improved collaboration
  - Allowed automatic typesetting.

## Minnesota Office of the Revisor of Statutes

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- The Office of the Revisor of Statutes is a legislative office that provides services to members of both houses of the legislature as well as all constitutional offices and all state agencies and departments.
- Result:
  - Emailing a single bill, which took up to 30 minutes with the old system, now takes just 5 minutes
  - It takes just 30 minutes from start to finish to make copies of the 278 page tax bill for the senate chambers, a process that required 90 minutes with the previous system
  - *"Arbortext software allows our users to more easily automate the publishing process, **re-use text**, build bill titles, add numbered references and collaborate with other agencies."*
    - Michele Timmons, Revisor of Statutes, State of Minnesota



## Continental Data Graphics

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- **Create, maintain and convert technical documentation and technical publications for aerospace and defence applications. They provide authoring and illustrations for a wide range of technical documentation and technical publications**
- **Result:**
  - CDG are able to deliver S1000D compliant data on 4 major international defense projects, whilst improving internal efficiency over previous production methods by 30%
  - *“We chose the PTC S1000D solution because of their long history and experience with the S1000D standard and because we were able to work as a team. They understand and support our business.”*
    - *Ian Proctor, Technical Consultant, CDG UK*





## Summary

## Summary

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- **Just focussing on one piece of the jigsaw will only get you so far**
  - The whole is more than the sum of it's parts...
  - Having a validated strategy is key to achieving success
- **Technology alone will not solve all your challenges**
  - Don't underestimate the cultural changes
- **Choose a vendor who will share the challenges with you**
  - Experience counts for a lot



**Thank You**

Come and see us at our stand