



Structuring for Content Reuse with Doc·To·Help

MadCap Webinar – February 1, 2017

Hello!



I am Mary Connor

I am here because I love helping fellow tech writers survive and thrive.

You get cats, too. You can find me at www.cleverhamster.com

But first, let's
deal with this:

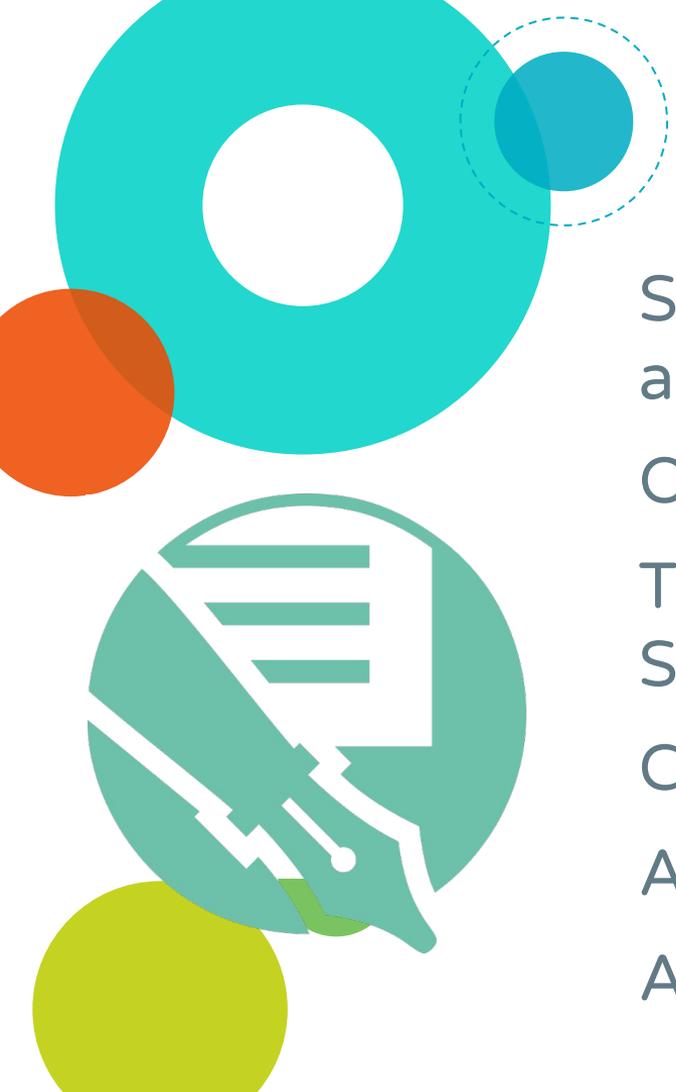




“You’re using WORD for documentation?”

Get a REAL tool!”

~ Says everybody, everywhere



So, why Doc-To-Help?

Single-sourcing across targets
and *sources*: HTML, XHTML, DOCX

One strategy for user and API docs

Team features: source files in TFS,
SharePoint; familiar editors, no markup

Command-line builds, build scheduler

Able to handle our immense builds

Affordability

The image shows the Microsoft Word interface with the **Proofing** ribbon selected. The **AutoCorrect options** task pane is open, displaying settings for correcting spelling and grammar. A secondary window titled **AutoCorrect** is overlaid, showing the **AutoFormat As You Type** tab. In this tab, the **AutoFormat** section is active, and the **Preserve Styles** checkbox is unchecked. The **AutoFormat** section includes options for applying built-in heading styles, list styles, fractions, hyphens, bold/italic formatting, and internet paths. The **Replace** section includes options for straight quotes, ordinals, and hyperlinks. The **Preserve Styles** checkbox is highlighted with a red box, indicating it should be disabled to avoid unintended formatting.

Proofing

- Save
- Language
- Advanced
- Customize Ribbon
- Quick Access Toolbar
- Add-ins
- Trust Center

AutoCorrect options

Change how Word corrects and formats text as you type: [AutoCorrect Options...](#)

When correcting spelling in Microsoft Office programs

- Ignore words in UPPERCASE
- Ignore words that contain numbers
- Ignore Internet and file addresses
- Flag repeated words
- Enforce accented uppercase in French
- Suggest from main dictionary only

[Custom Dictionaries...](#)

French modes: [Traditional and new spellings](#)

Spanish modes: [Tuteo verb forms only](#)

When correcting spelling and grammar in Word

- Check spelling as you type
- Mark grammar errors as you type
- Frequently confused words
- Check grammar with spelling
- Show readability statistics

Writing Style: [Grammar & more](#) [Settings...](#)

[Check Document](#)

Exceptions for: [Import-to-D2H.docx](#)

AutoCorrect

AutoFormat As You Type

AutoFormat

Apply

- Built-in Heading styles
- Automatic bulleted lists
- List styles
- Other paragraph styles

Replace

- "Straight quotes" with "smart quotes"
- Ordinals (1st) with superscript
- Fractions (1/2) with fraction character (½)
- Hyphens (-) with dash (—)
- *Bold* and _italic_ with real formatting
- Internet and network paths with hyperlinks

Preserve

- Styles

Always AutoFormat

- Plain text e-mail documents

Caveat: Be sure to disable the “newbie” features!

...and set up for serious global editing:

The screenshot displays the Microsoft Word ribbon with the **View** and **Developer** tabs highlighted in red. The **Views** group includes **Outline**, **Draft**, **Read Mode**, **Print Layout**, and **Web Layout**. The **Show** group includes **Ruler**, **Gridlines**, and **Navigation Pane**. The **Zoom** group shows **Zoom** at 100%. The **Window** group includes **New Window**, **Arrange All**, **Split**, **View Side by Side**, **Synchronous Scrolling**, and **Reset Window Positions**.

The **Navigation** pane on the left shows a search bar and a tree view of document structure. The **Style** pane on the right shows the current style for the selected text, which is **Heading 3**. The **Find and Replace** dialog box is open, showing the **Find** tab with **Find what:** `^p^w` and **Replace with:** `^p`. The **More >>** button is highlighted in red.

The document content includes the following text:

Understanding Swarm Objects

Types of Data Objects

All data objects used by Swarm are either unnamed or

- **Unnamed objects** are assigned identifiers by Swarm and deleted using an unambiguous UUID. Swarm is

Mutable

Our Scope: Soup to Nuts!

1. Standardize it



2. Structure it



3. Reuse it



A photograph of two ginger cats looking at each other, with a large blue number '1' centered between them. The background is white with various colorful circles and dashed lines. The cats are wearing collars with spikes.

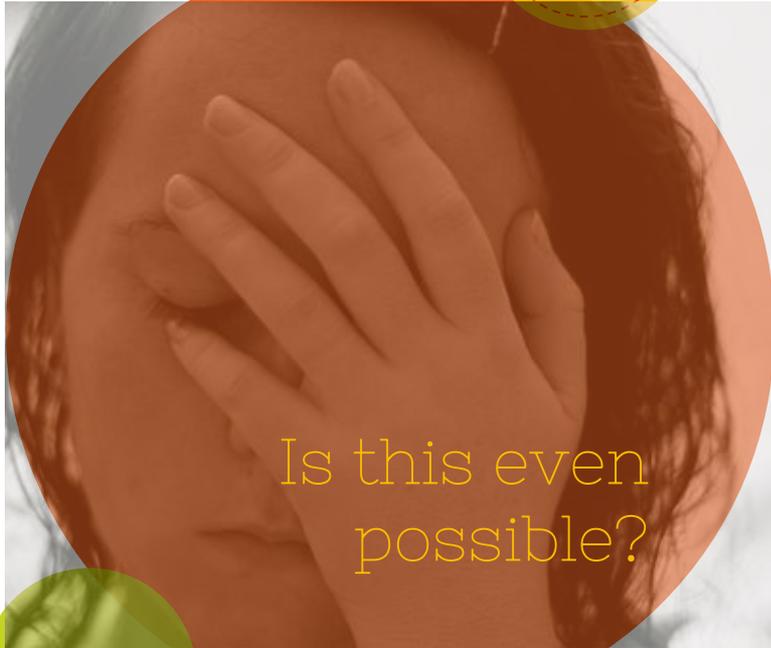
1

Standardize It
Merge and Purge



“IT’S ALL IN THE PREP!”

1. **Unify** content into one DOCX
2. **Purge**, scrub, clean, trim
3. **Standardize** heading structures
... *before* you divide for reuse



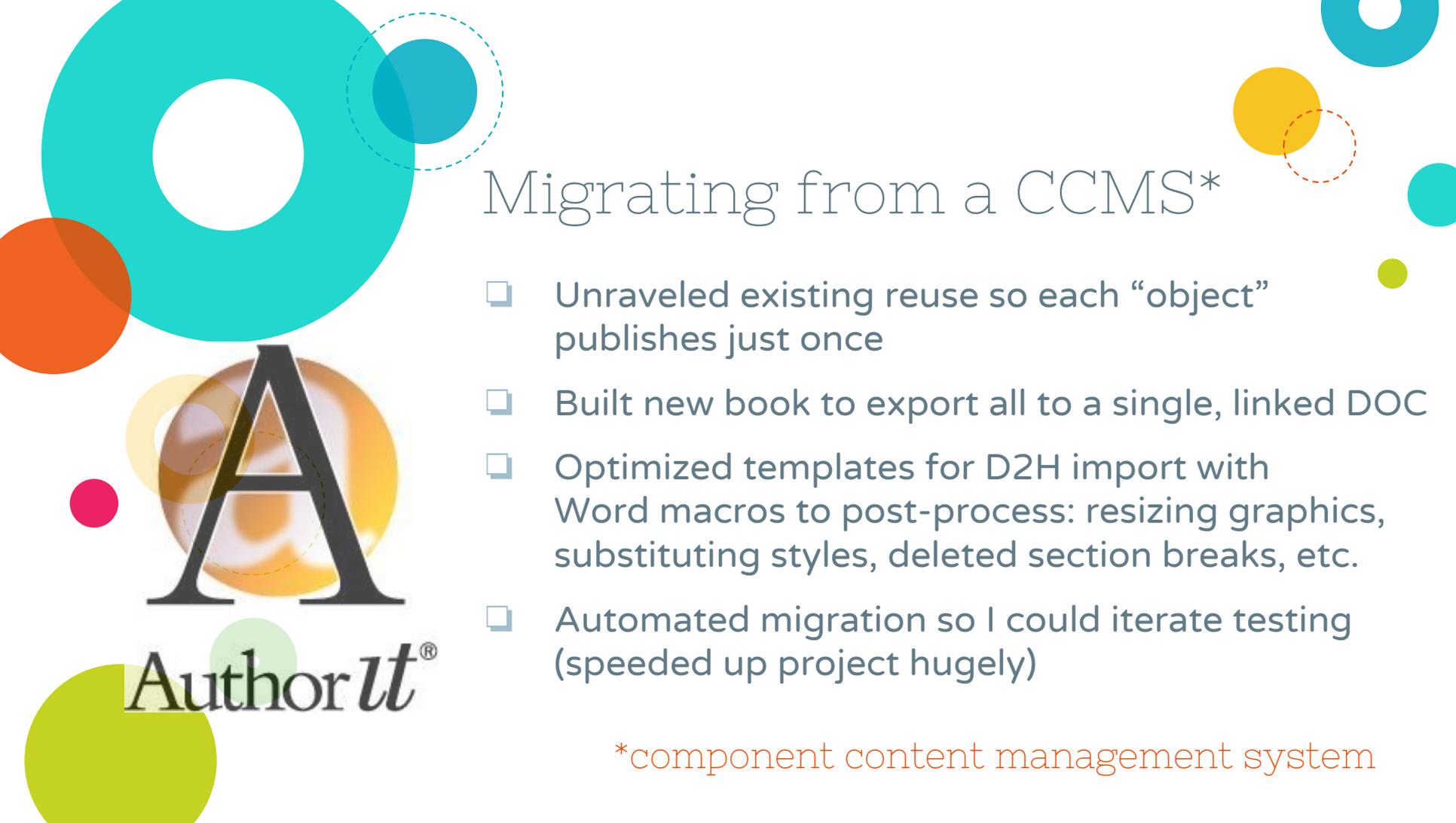
Is this even possible?

1- UNIFY

Case Studies:

- ◎ Author-it to Doc-To-Help
- ◎ DocBook XML to Doc-to-Help

...which means, yes,
you really can!



Migrating from a CCMS*

- ❑ Unraveled existing reuse so each “object” publishes just once
- ❑ Built new book to export all to a single, linked DOC
- ❑ Optimized templates for D2H import with Word macros to post-process: resizing graphics, substituting styles, deleted section breaks, etc.
- ❑ Automated migration so I could iterate testing (speeded up project hugely)



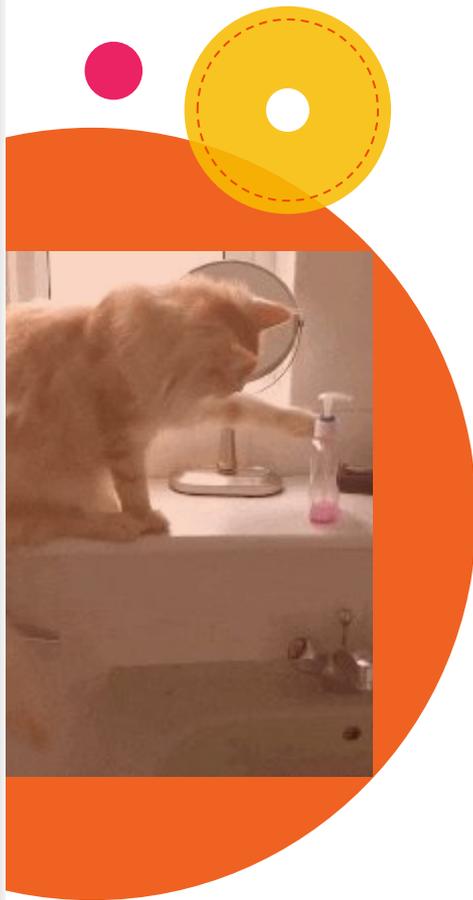
Author *It*®

*component content management system

Migrating from DocBook

- ③ Used **xmllint** to process all XML projects (several PDFs per product) into master XML source (`merge.xml`)
- ③ Used **Pandoc** transform tool to build merged XML into master Word file

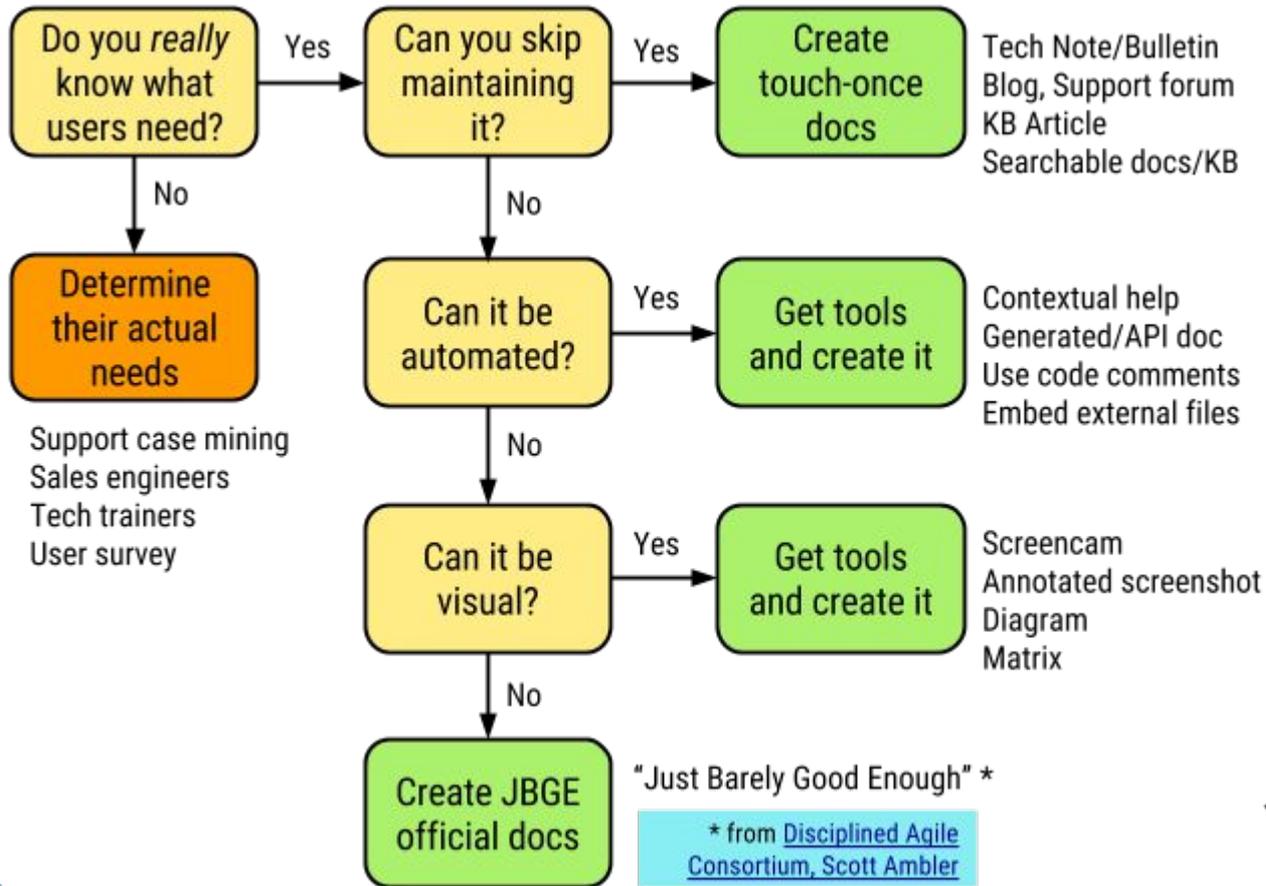
```
1 REM Project to export Docbook to Word, February 2015
2
3 REM Pandoc for doc conversion; see http://johnmacfarlane.net/pandoc/README.html
4
5 cd C:\svn\Swarm\Docbooks\CASTorAdvancedAdministrationGuide
6 xmllint --xinclude CASTorAdministrationGuide.xml --output merged.xml
7 pandoc -s -f docbook -t docx -o CASTorAdministrationGuide.docx merged.xml
8 pandoc -s -f docbook -t markdown -o CASTorAdministrationGuide.txt merged.xml
9
```



2- Purge! :-)

- ◎ Clear section/page/line breaks
- ◎ Trim wordiness
 - ◎ ~~“For more information about blah, refer to”~~ “See”
- ◎ Legacy handholding
 - ◎ (e.g., browsers aren’t new)
- ◎ Useless screenshots (no data)
- ◎ Metadiscourse (“As discussed”)
- ◎ **Move out “touch-once” content**

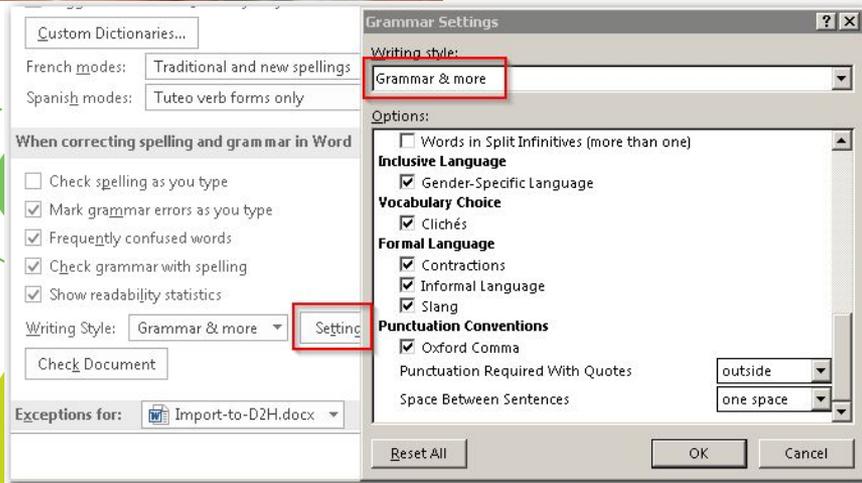
Survival: Do more with less.





...and scrub for consistency

- ◎ Use Word's **style** checker!
 - ◎ Enable *everything*
 - ◎ Set per your style guide (commas, spaces)
 - ◎ Improve readability for i18n, translatability (passives, noun strings)

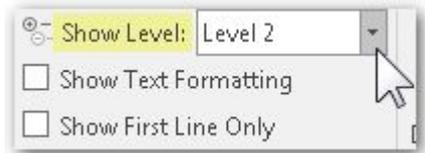


3- Standardize Headings

- ◎ Fix **levels** (super easy in Outline)
 - Equalize, flatten (promote)
 - Convert excess to subheads
- ◎ Fix **wording**, by level (iterate)
 - H1 Product Name
 - H2 Noun (area)
 - H3 Gerund (task)
- ◎ Fix **repetition**, eliminating as can
 - **Introduction**



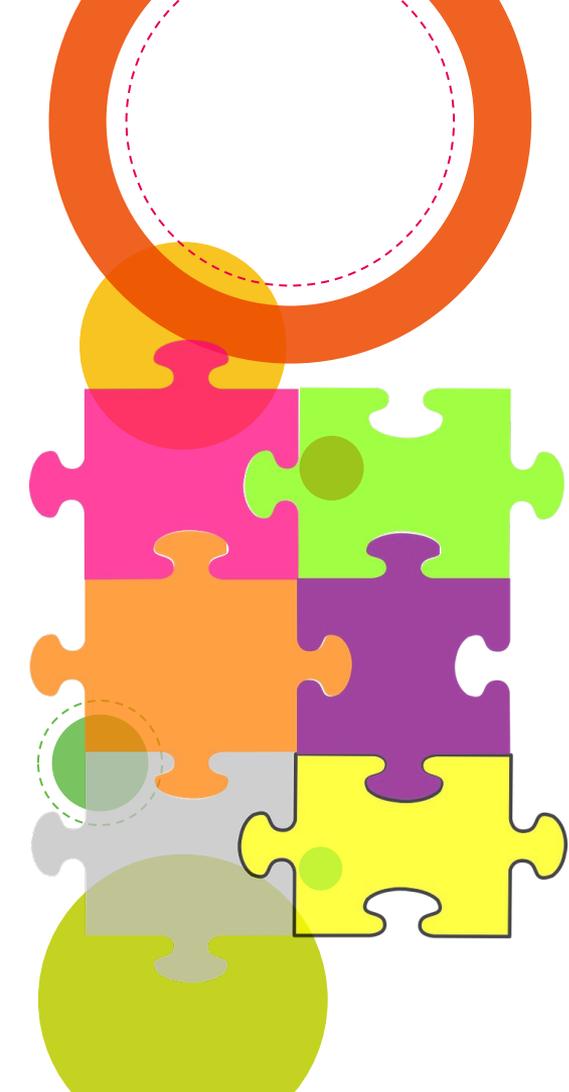
Make Headings Orderly, Unique, and Standalone!



Heading 1	⊕ CASTor
Heading 1	⊖ Introduction
Heading 1	⊕ Swarm Concepts...
Heading 1	⊕ Planning and Setup
Heading 2	⊕ Installing the Cluster...
Heading 2	⊖ Configuring the Cluster
Heading 2	⊕ Defining Admins and Users...
Heading 1	⊕ Managing the Cluster
Heading 2	⊕ Advanced Administration
Heading 1	⊕ Development Essentials
Heading 2	⊕ API Reference
Heading 2	⊕ Advanced Development
Heading 1	⊕ CloudScaler
Heading 1	⊖ Introduction
Heading 1	⊕ Planning and Setup
Heading 2	⊕ Installing the Cluster...
Heading 2	⊖ Configuring the Cluste
Heading 2	⊕ Defining Admins and Users...
Heading 1	⊕ Managing the Cluster
Heading 2	⊕ Advanced Administration
Heading 1	⊕ FileFly
Heading 1	⊖ Introduction
Heading 1	⊕ Planning and Setup
Heading 2	⊕ Installing the Cluster...
Heading 2	⊖ Configuring the Cluster
Heading 2	⊕ Defining Admins and Users...
Heading 1	⊕ Managing the Cluster
Heading 2	⊕ Advanced Administration

Fix h1 level,
then h2, ...

Heading 1	⊕ CASTor
Heading 1	⊖ CASTor Overview
Heading 1	⊕ CASTor Concepts...
Heading 1	⊕ CASTor Network and Hardware
Heading 2	⊕ CASTor Installation and Upgrade
Heading 2	⊖ CASTor Cluster Configuration
Heading 2	⊕ CASTor Access Control
Heading 1	⊕ CASTor Cluster Management
Heading 2	⊕ CASTor Advanced Administration
Heading 1	⊕ CASTor Development Essentials
Heading 2	⊕ CASTor API Reference
Heading 2	⊕ CASTor Advanced Development
Heading 1	⊕ CloudScaler
Heading 1	⊖ CloudScaler Overview
Heading 1	⊕ CloudScaler Hardware
Heading 1	⊕ CloudScaler Installation
Heading 2	⊖ CloudScaler Configuration
Heading 2	⊕ CloudScaler Access Control...
Heading 1	⊕ CloudScaler Management
Heading 2	⊕ CloudScaler Advanced Administration
Heading 1	⊕ FileFly
Heading 1	⊖ FileFly Overview
Heading 1	⊕ FileFly Setup
Heading 2	⊕ FileFly Installation
Heading 2	⊖ FileFly Configuration
Heading 2	⊕ FileFly Access Control
Heading 1	⊕ FileFly Management
Heading 2	⊕ FileFly Advanced Administration



2



Structure It
For Topic-Base Authoring



Topic-Based Writing: Modularized Chunks

- ◎ Similar goals to DITA *
- ◎ **Standalone** chunks (final division)
- ◎ **Unified** per Minimalism
 - ◎ Includes what ya need to succeed
 - ◎ Action-oriented on user goals
 - ◎ Troubleshooting, recovery
 - ◎ Findability without linking away





How do I reuse content for docs *and* training?

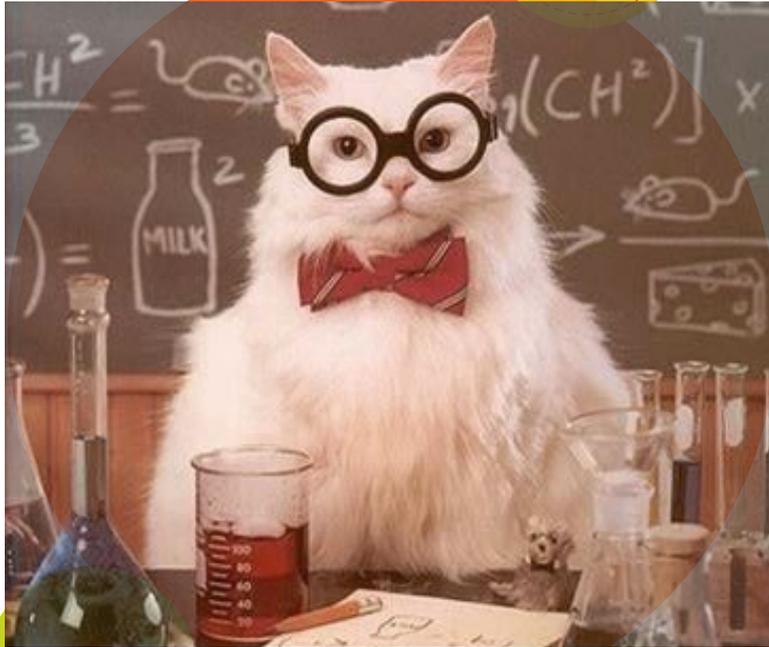
Topic = RLO (from instructional design)

“A **Reusable Learning Object** is ... a digital educational **resource (chunk)** that can be reused, scaled, and shared from a **central online repository** in the support of instruction and learning.”

Relevant traits:

- ⊙ Standardized
- ⊙ Self-contained
- ⊙ Reusable
- ⊙ Combine them into courses (deliverables)

<http://ecolearnit.ifas.ufl.edu/concept.asp>



Encapsulation by RLO

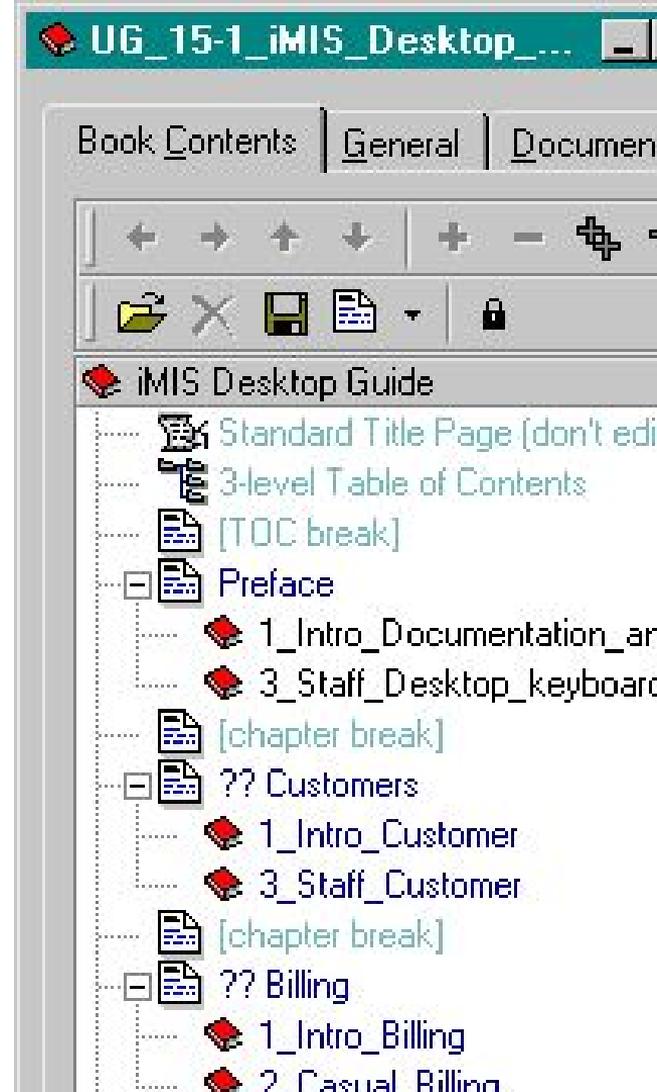
Approach (think, “*module-only*”)

1. Reuse is only by RLO
2. RLO = source file
3. Only divide if required for reuse across outputs
4. Organize away most links
5. If dividing is getting hard or messy, reorganize the content



RLO rules, AIT

1. All content must be managed in a container/map/book
2. All content reuse occurs via container
3. Build outputs are comprised of containers



Prepare to break by chunk (RLO), here by **area + audience**

= audience

0 = all, prospect, mkt

1 = cheap license

2 = staff license

3 = admin access

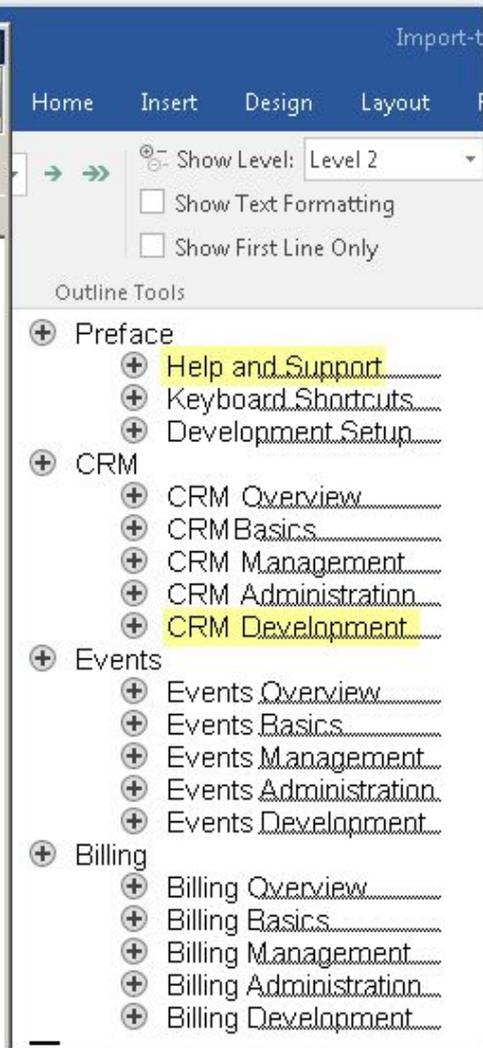
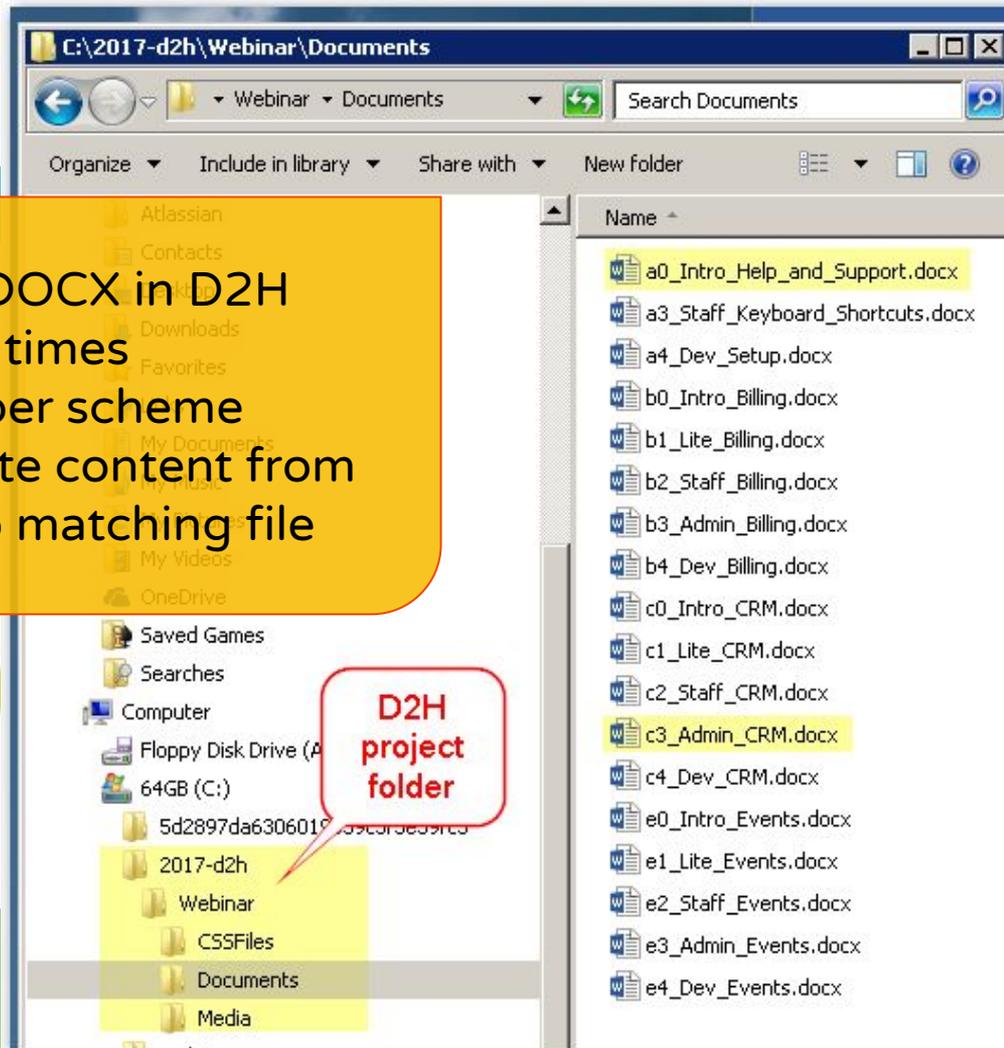
4 = developer

The screenshot shows the Microsoft Word Outlining ribbon with the following elements:

- Outlining Ribbon:**
 - Level 2 dropdown menu.
 - Show Level: Level 2 dropdown.
 - Show Text Formatting checkbox (unchecked).
 - Show First Line Only checkbox (unchecked).
 - Show Document button.
 - Collapse Subdocuments button.
 - Outline Tools group.
 - Master Document group.
- Table of Contents:**
 - Heading 1: Preface
 - 0_Intro_Help_and_Support Help and Support
 - 3_Staff_Keyboard_Shortcuts Keyboard Shortcuts
 - 4_Dev_Setup Development Setup
 - Heading 1: CRM
 - 0_Intro_CRM CRM Overview
 - 1_Lite_CRM CRM Basics
 - 2_Staff_CRM CRM Management
 - 3_Admin_CRM Administration
 - 4_Dev_CRM CRM Development
 - Heading 1: Events
 - 0_Intro_Events Events Overview
 - 1_Lite_Events Events Basics
 - 2_Staff_Events Events Management
 - 3_Admin_Events Events Administration
 - 4_Dev_Events Events Development (highlighted with a red box)
 - Heading 1: Billing
 - 0_Intro_Billing Billing Overview
 - 1_Lite_Billing Billing Basics
 - 2_Staff_Billing Billing Management
 - 3_Admin_Billing Billing Administration
 - 4_Dev_Billing Billing Development

1. Create a DOCX in D2H
2. Clone it n times
3. Rename per scheme
4. Copy/paste content from Outline to matching file

D2H
project
folder

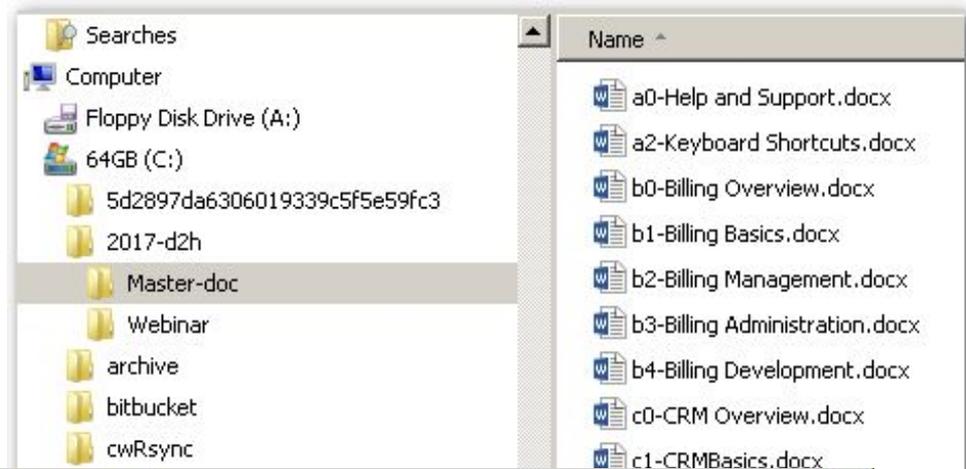


Shortcut!

1. Make a copy
2. Attach D2H template
3. Use **Master Document** to quickly **Create** subdocuments

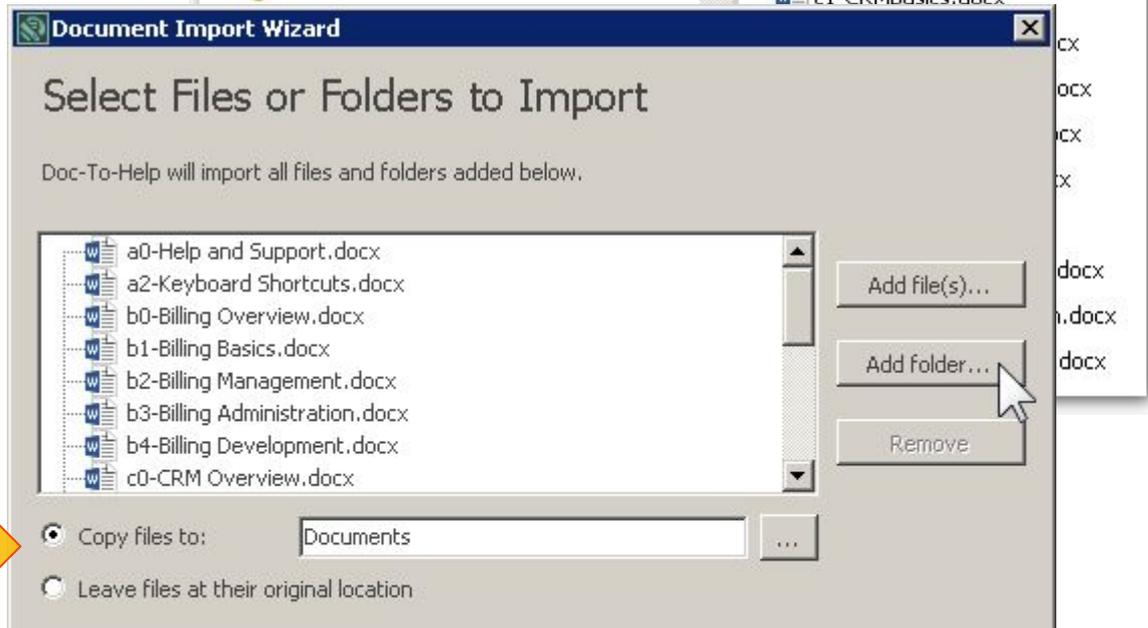
The screenshot shows the Microsoft Word interface with the 'Outlining' ribbon selected. The ribbon includes tabs for File, Outlining, Home, Insert, Design, Layout, References, Mailings, and Review. The 'Outlining' ribbon is active, showing options for 'Level 2' (selected), 'Show Level: Level 2', 'Show Text Formatting', and 'Show First Line Only'. The 'Outline Tools' group contains 'Show', 'Collapse', and 'Document Subdocuments'. The 'Master Document' group contains 'Create', 'Insert', and 'Unlink'. The 'Create' button is highlighted with a yellow box and a mouse cursor. Below the ribbon, the 'Outline Tools' group is visible, and the 'Master Document' group is also visible. The main content area shows a list of subdocuments under the 'Master Document' group, including 'Preface', 'Help and Support', 'Keyboard Shortcuts', 'Billing', 'CRM', 'CRM Administration', 'CRM Development', 'Events', 'Events Overview', 'Events Basics', and 'Events Management...'. The 'CRM Administration' subdocument is highlighted with a yellow box.

...Then have
D2H import
the entire
folder



Remember: Keep filenames
team-friendly; they don't
appear in outputs

Powerful flexibility!



You can build immediately!

The screenshot displays a software interface with a ribbon menu at the top containing 'File', 'Home', 'Topics', and 'Project'. The 'Home' ribbon is active, showing icons for 'Select Target', 'Build', 'Rebuild', and 'View'. The 'Build' button is highlighted with a red box. To its right are 'Cancel Build' and 'Build Log' buttons. Further right are 'Theme' and 'Target Template' dropdowns. On the far right, there are input fields for 'Platforms', 'Targets', and 'Attributes'. Below the ribbon is a 'Documents' pane on the left listing various .docx files. The main area shows a progress window with 'Output' and 'Topics' tabs. The 'Output' tab is highlighted with a red box and shows a list of tasks: 'Processing list paragraphs...' (Done), 'Converting lists to text...' (Done), 'Saving preproc', 'Preparing HT...', 'Processing HT', 'b0-Billing Over...', 'Processing fie', 'Processing list', and 'Converting lis'. A 'Doc-To-Help' dialog box is open in the foreground, featuring a question mark icon and the text 'Would you like to view the help target that has just been built?'. It includes a checkbox for 'Don't show me this again' and 'Yes' and 'No' buttons.



Reuse It
Build deliverables from topics (files)



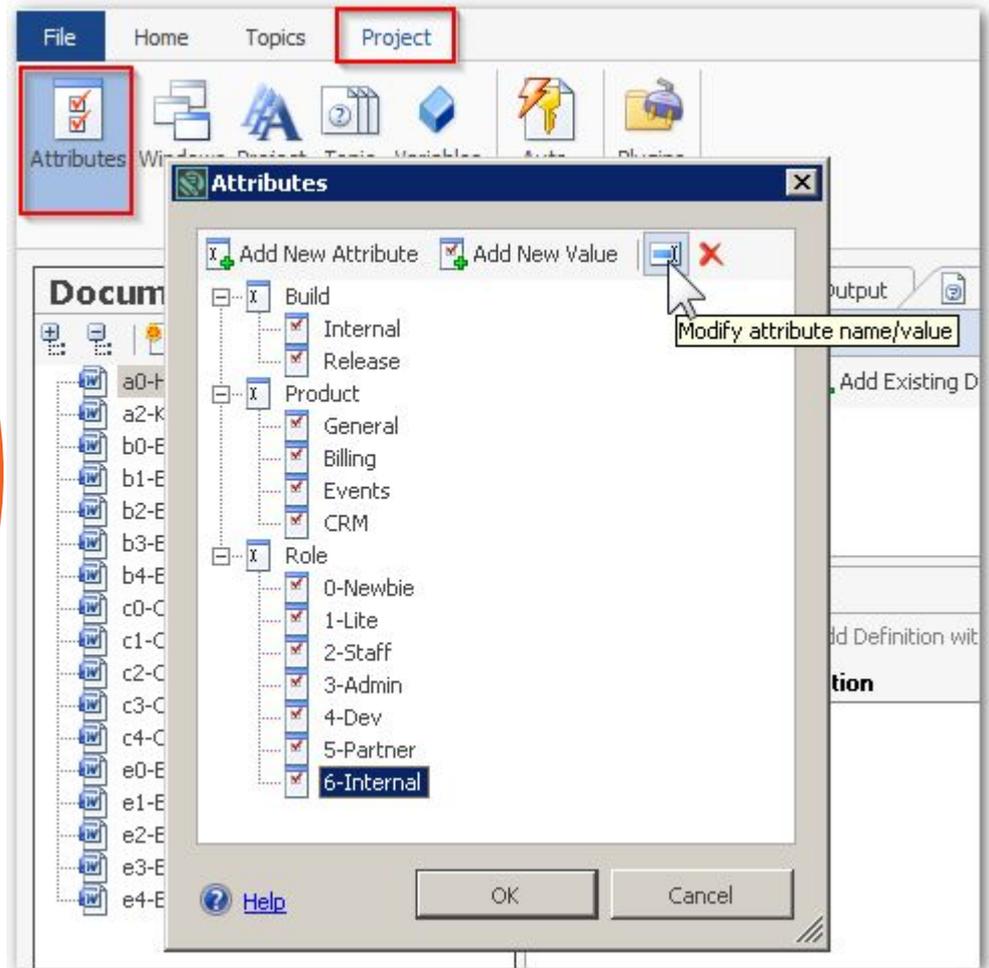
Home stretch!

1. Define reuse tags
2. Set tags on each file
3. Define build targets with tag filters
4. Automate builds



First, define all of the attributes (facets) that you will want to filter on

Second, define easy-to-interpret values for filtering



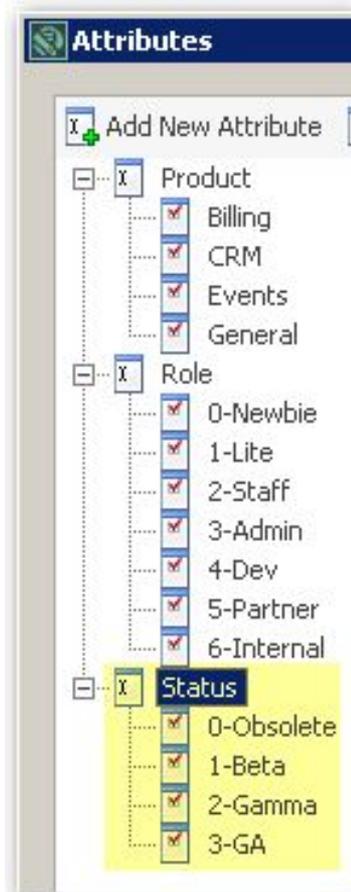
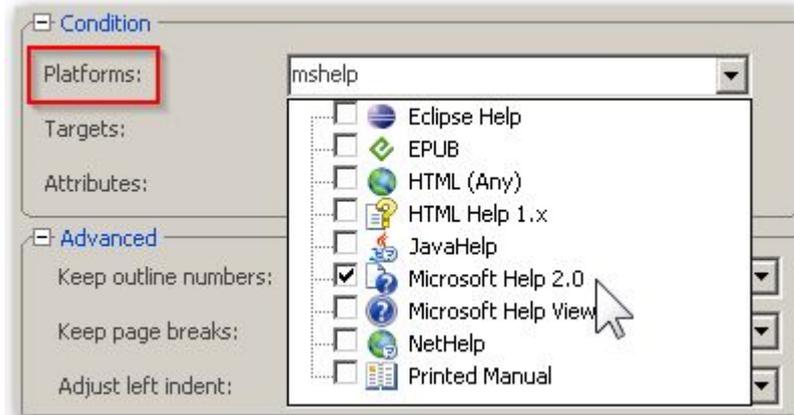
For each file,
right-click and set
Properties

Under **Condition**,
set **Attributes**

The screenshot shows a software interface with a file explorer on the left and a 'Document Properties' dialog box on the right. The file explorer shows a tree structure of documents, with 'b2-Billing Management.docx' selected and highlighted with a red box. The 'Document Properties' dialog box has several sections: 'Document' (Name: Documents\b2-Billing Management, Type: Word Document, File size: 1.64 MB, File modified: Wednesday, January 25, 2017), 'Basic' (Single topic: unchecked, Title: (N/A), Style: (N/A)), 'Condition' (Platforms: empty, Targets: empty, Attributes: Product: Billing+Role:2-Staff), and 'Advanced' (Keep outline numbers: checked, Keep page breaks: unchecked, Adjust left indent: unchecked, Plain text popups: unchecked, Include in search: checked). The 'Advanced' section has a tree view for 'Product' and 'Role'. Under 'Product', 'Billing' and '2-Staff' are checked. Under 'Role', '0-Newbie', '1-Lite', '2-Staff', '3-Admin', '4-Dev', '5-Partner', and '6-Internal' are checked. A red callout box with a white background and a red border points to the 'Status' section, containing the text 'Okay to leave undefined'. The 'Status' section has a tree view with '0-Obsolete', '1-Beta', '2-Gamma', and '3-GA' listed, with '3-GA' checked.

Best use of Condition types

- To stage pre-release files, restrict by **Attribute**
- To limit to output type (HTML only), restrict by **Platform**
- For *custom* control (mix-n-match), restrict to one or more **Target**



Now, go define your
“targets” (deliverables)

The screenshot shows the 'Help Targets' dialog box with the following configuration:

- Name: **_Acme_Admin_Coursebook**
- Base name: Acme_Administration
- Style sheet: Print_nomargin.css
- Template: C1H_PRNOMARGIN.DOT
- Attributes: **Role:3-Admin, Status:3-GA**
- Folder: (empty)

The 'Attributes' section is expanded, showing the following checked options:

- Product
 - Billing
 - CRM
 - Events
 - General
- Role
 - 0-Newbie
 - 1-Lite
 - 2-Staff
 - 3-Admin
 - 4-Dev
- Status
 - 0-Obsolete

The screenshot shows the 'Help Targets' dialog box with the following configuration:

- Name: **_CRM_Help**
- Base name: (empty)
- Style sheet: NetHelp.css
- Template: C1H_HTML.DOT
- Theme: Responsive
- Attributes: **Product:CRM, Role:0-Newbie, Role:1-Lite, I**
- Folder: (empty)

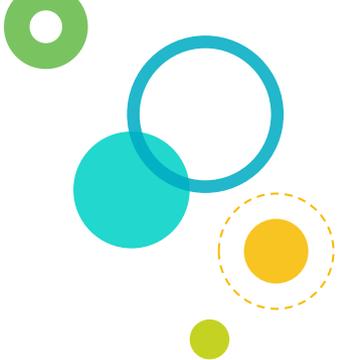
The 'Attributes' section is expanded, showing the following checked options:

- Product
 - Billing
 - CRM
 - Events
 - General
- Role
 - 0-Newbie
 - 1-Lite
 - 2-Staff
 - 3-Admin
 - 4-Dev

Future-proof and flexible: If you later add a 'Reporting' module, it will pick up **r3-Reporting_Admin.docx** by attributes



Examples of Targets



Event Guide

- ◎ e0-Events Intro
- ◎ e1-Events Basics
- ◎ e2-Events Manage
- ◎ e3-Events Admin

Finance Guide (custom)

- ◎ b2-Billing
- ◎ b3-Billing Admin
- ◎ c3-CRM Admin
- ◎ e3-Events Admin
- ◎ a2-Keyboard

Bootcamp

- ◎ **Intro Course**
 - ◎ *0-* (Newbie)
 - ◎ *1-* (Lite)
- ◎ **Staff Course**
 - ◎ *2-* (Staff)
 - ◎ *3-* (Admin)

Developer

- ◎ *0-* (Newbie)
- ◎ *4-* (Dev)



Set it
and
forget it

Final Goals

1. **Single-sourcing**

- ◉ Across products (reuse)
- ◉ Across outputs (HTML, PDF)

2. **Automatic outputs**

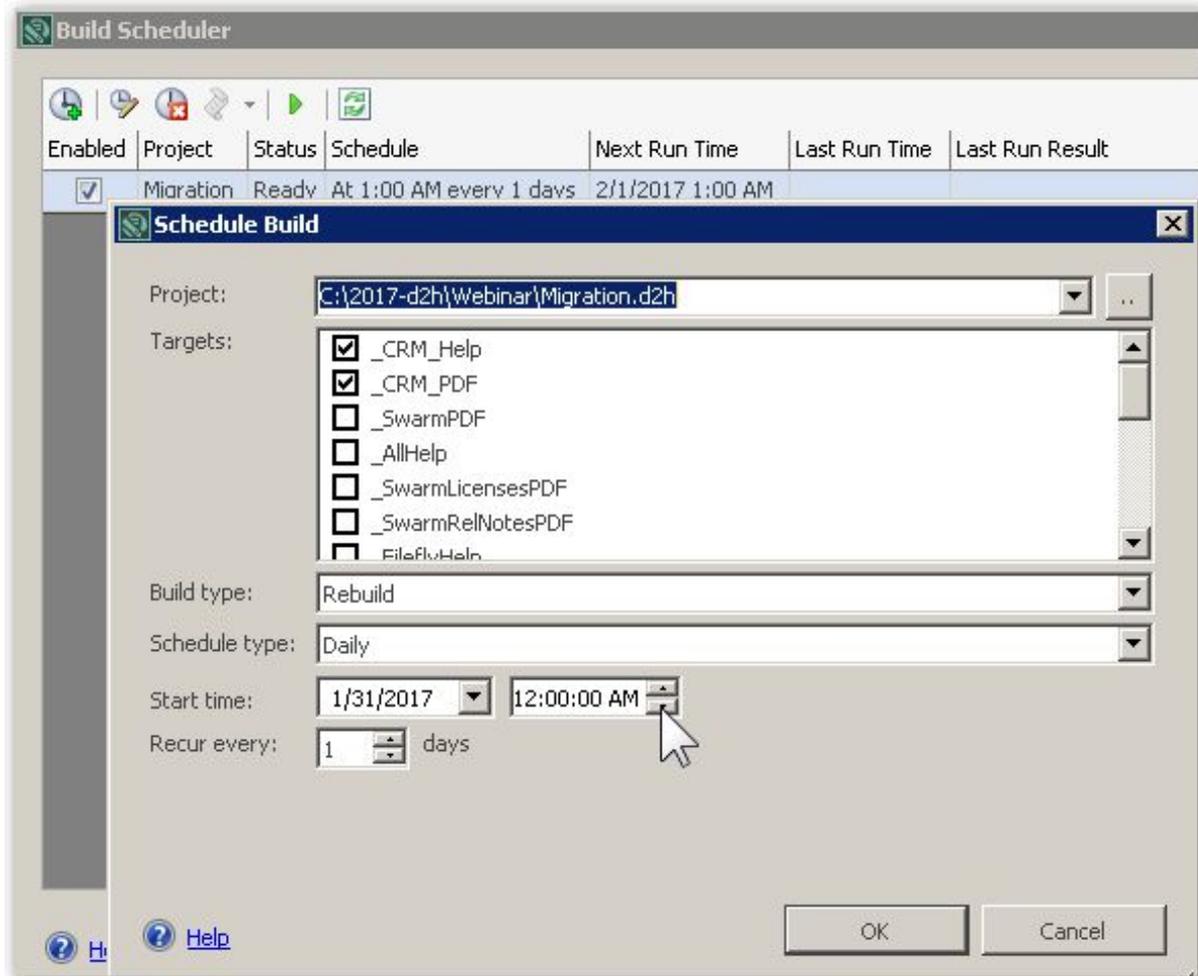
- ◉ No-touch builds
- ◉ No-touch delivery

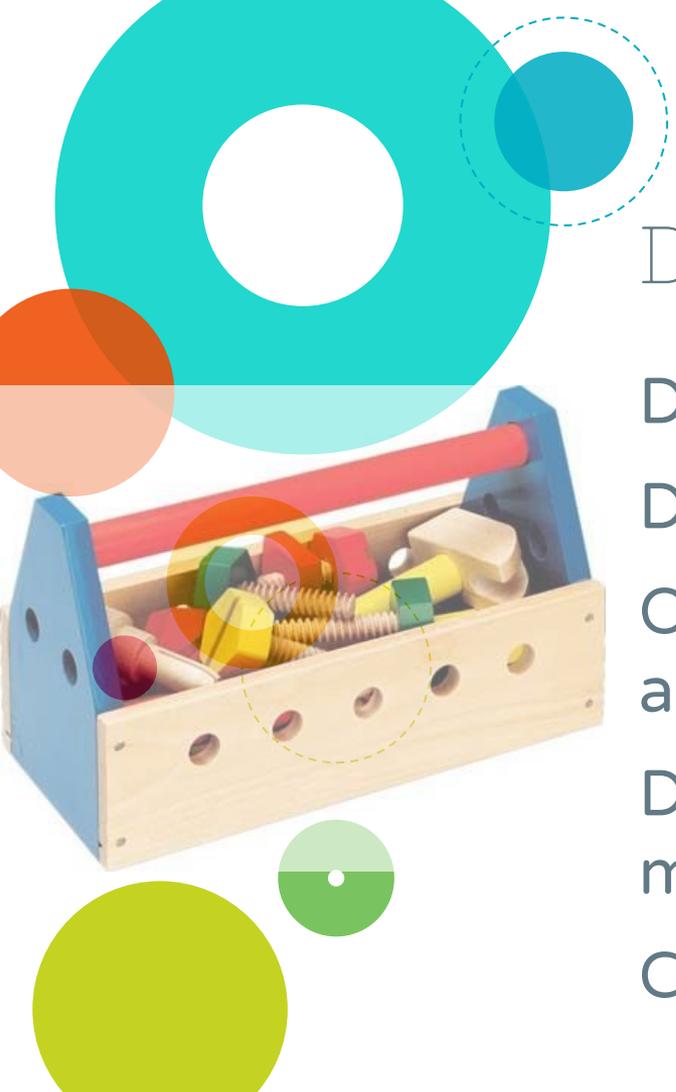
3. **Need a new deliverable? Just add a new Build Target!**

Tip: Schedule builds for noon *and* midnight when GA is near

Use **Build Scheduler** and/or batch files to deliver outputs

Best: Run D2H on dedicated build machine for hourly





D2H with TFS Setup

D2H installed on test + build machines

D2H builds from TFS working files (get)

One project generates all targets across all products (= shared content library)

D2H project (non-content) files managed separately in source control

Content editable on any TFS machine

Word in TFS

Doc-To-Help project
(Access DB)

Team Foundation Server (VS)
Source Control

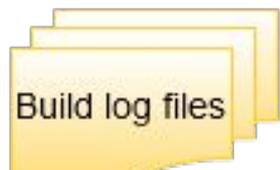
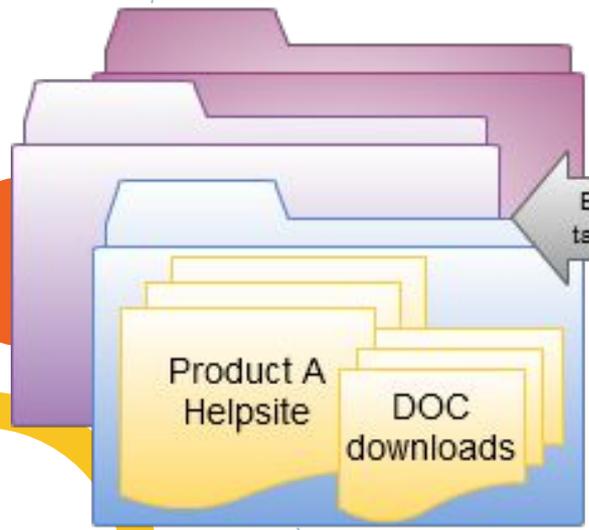
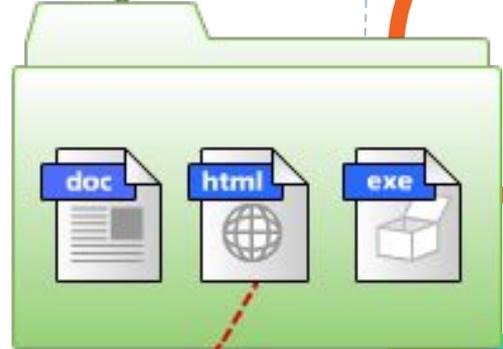
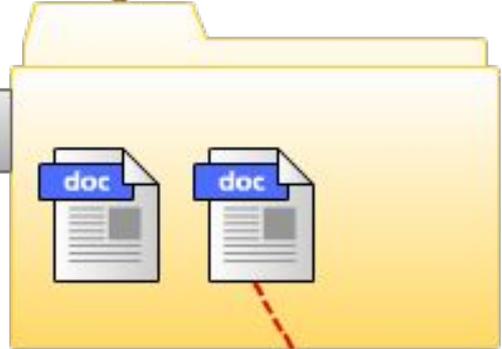
Sandcastle
API reference

Non-D2H
.DOT

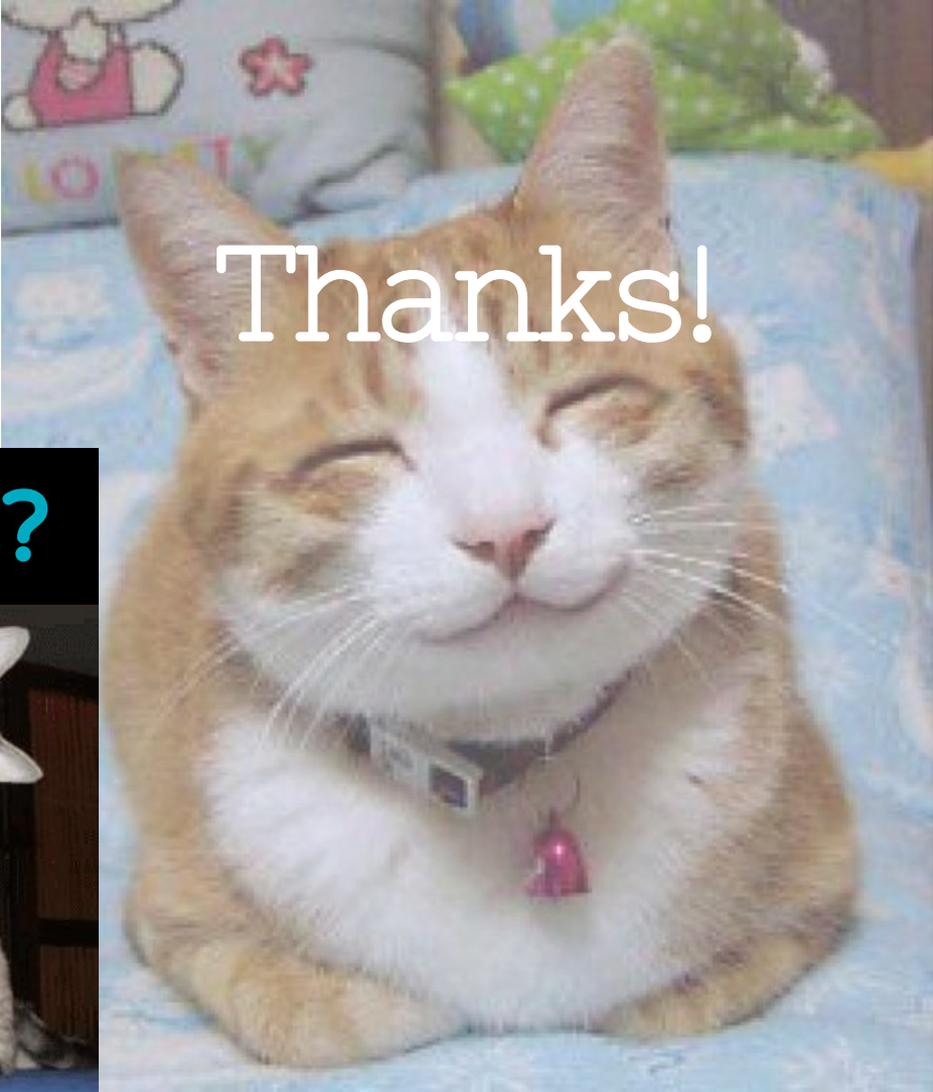
Project folder

Working folder

Build targets



{ links to HTMs } in DOCX



Thanks!



Questions?



?



Reaching me:

maryconnor@gmail.com

@maryfconnor

MADWORLD

The Premier Technical Communication and Content Strategy Conference

APRIL 2-5, 2017 | HARD ROCK HOTEL | SAN DIEGO, CALIFORNIA

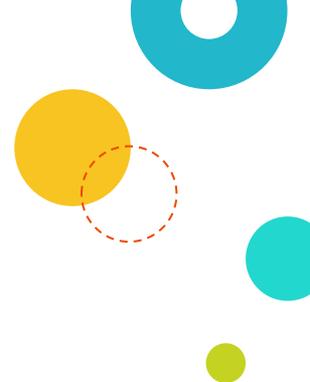
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- 

Presentation design

This presentation uses the following typographies and colors:

- ⦿ Titles: **Nixie One**
- ⦿ Body copy: **Varela Round**

You can download the fonts on this page:

<http://www.google.com/fonts/#UsePlace:use/Collection:Nixie+One|Varela+Round>

Click on the “arrow button” that appears on the top right



Yellow #f8bb00

Blue #00acc3

Green #65bb48

Orange #ed4a00

Aqua #00d1c6

Gray #617a86

Fuchsia #e8004c

Lime #bbcd00

Light Gray #a1becc