MadCap Flare in an Agile World

Strategies for Optimizing Quality and Productivity

25 June 2014
Setting (Webinar) Expectations

- Based on my agile experience at Venafi
- Audiences: IT administrators, software developers
- Quite disconnected from customers
- Goal: Share a method for developing documentation in step with features developed during each agile sprint cycle
Leading Questions...

- How can I develop content faster?
- How can I improve the quality of my content?
- How can I keep up with agile development?
Answers...

- Define a content model that supports the realities of agile
- Develop topic templates and styles (css) that support your content model
- Streamline your technical review process and, where you can, harness SME contributions
About Agile

One Method to Rule Them All...NOT!
About Agile...

- The Manifesto for Agile Software Development values "working software over comprehensive documentation".
- This core value “asks us to think about how much and which kinds of documents are needed and when they need to be written.”
- Sprints: discrete chunks of time in which to build shippable features (we use 2 week cycles)
Agile + Modular Content = Love

Consider this:

- Modular content (topic-driven) fits the agile process extremely well
- You can more easily connect your content with users in consumable “bites” via context-sensitive help (CSH)
- Reuse “bites” when and where they’re needed
- Greater the modularity, the more mileage you get out of your content (but, the more pieces you have to manage)
Flare and Modular Content

- Flare is designed to produce modular, topic-based content
  - Topic-based structure
  - Snippets
  - Conditions
  - Powerful linking support (cross-references, href links, etc.)
  - TOC/Outlines that can also be embedded within other outlines to create quick TOCs
  - Browse Sequences
Content Model

The Key to Quality and Productivity
Content Models

- Enables support of agile by modularizing content
- Quicker content development cycles (write, review, edit, production work, ship)
- Consistent content creates customer confidence
Iceberg Approach to Content Models

**Level I:** Screen text, tooltips, system or error messages, etc. (Little detail)

**Level II:** Context-sensitive help topics, Quick Reference Guides, Support articles, etc. (Greater detail)

**Level III:** Help topics, user guides, training guides, video tutorials, etc. (Greatest detail)
Steps to a content model...

1. Identify common information components (info types) within your content
2. Create your content model
3. Define supporting styles (CSS)
4. Build Flare templates that reflect your model
Identifying info types

1. User's Guide
2. Concepts
   - Online Help
3. Quick Start Guide
4. Step-by-Step
5. Notes
6. Terminology
Putting Your Model Together

- List info types
- Define their structure (elements vs. containers)
- If plans to reuse content, create reuse map
Content Model Principles to Live By...

- Keep your content model as simple as possible
- Complexity is typically not necessary and breeds greater complexity down the road
- Myth: Content models kill creativity
- Truth: Content models enhance creativity and produce better, more consistent long-term results
- See Anne Rockley’s book, “Managing Enterprise Content: A Unified Content Strategy”
Creating Supporting Templates and CSS
Better, Faster Content Development
Create Flare Templates

1. Create a topic
2. Add placeholder text
3. Define styles (CSS) and apply them
4. Save as a Flare template
Keeping templates in line...

- Templates should reflect your content model, not the other way around
- While it takes time to maintain a content model and keep templates in sync, that time pays off in quality and productivity
- Templates are key to keeping pace in an agile environment
CSS: Flare’s Red Bull™

- Save time and resources while making your content look compelling
- Make your CSS author-friendly:
  - Use “next” to save time during authoring (i.e. `mc-next-class: classname;`)
  - Give intuitive names to styles
  - Add usage guidelines to styles to aid authors
  - Keep list of styles as short as possible
Know your CSS!

Learn a little more every day...

- Reference a good CSS guide or use a web resource (e.g. *CSS3: The Missing Manual* and [http://www.w3schools.com](http://www.w3schools.com))

- For a more focused, Flare-applicable reference, see Scott DeLoach’s book, *CSS to the Point* (includes CSS3 updates)
Streamlining Technical Reviews and Contributions

Making Contributions Easier Breeds More (and Better) Contributions
Common content development cycle

1. Author
   - First draft
2. Technical Review
3. Author
   - Second draft
4. Signoff

Production:
1. Markup
2. Copy edit
3. Build
4. Publish
5. Test
6. Fix
Agile technical reviews?

- Modular content = modular technical reviews
- Send out smaller, discrete chunks for review
- Smaller reviews require less time—less time to review and less time to import and apply changes
Making Contributions Easy

- Choose the right tool/format
  - Remember, you have to get the round peg into the square hole (conversion nightmares)
- Lock down styles and local formatting
- Keep your list of styles simple
- Show contributors and reviewers how to use your tools and process (or suffer the consequences!)
Contributor: Fastest review cycles in the West
- Reviewers can see where content falls in the bigger picture of your outline
- Can add comments or even contribute changes directly (with the licensed version)
Why Contributor?

- Save time during tech review cycles
  - Track Changes feature lets you comb through comments and changes quickly
  - Comments imported to your original topic in seconds
  - No deciphering a reviewer’s scribbles and then retyping those scribbles into your master document
Prerequisite Configuration

1. Enable Trust Protection Platform to provision certificates on BIG-IP F5 appliances. You must complete the following high-level tasks:

   a. Using the BIG-IP web-based Configuration utility, create a pool whose members are the load-balanced IP addresses and SSL gateways of the content server nodes.

   For more information, refer to your F5 documentation.

   To provide load balancing, you must create two pools—one to load-balance connections using the IP addresses of the content server nodes and another to load-balance the SSL gateways. For more information, refer to your F5 documentation.

2. After you have created the load-balancing pools, you must create a virtual server that references the pool that is load-balancing the SSL connections, and another virtual server that references the pool that load-balances the HTTP connections through the SSL Accelerator.

   For more information, refer to your F5 documentation.

3. (Optional unless Basic Provisioning is being used) Create the Client and/or Server SSL Profiles necessary to support your application architecture. Create the gateway for the SSL Accelerator. Client SSL Profiles define how the F5 handles communications with clients such as web browsers. Server SSL Profiles define how the F5 interacts with content server nodes. Certificates are assigned to both SSL Profile types.

   BIG-IP F5 uses an SSL Accelerator to manage SSL connections. You need to configure an SSL gateway on the BIG-IP F5 to decrypt HTTP requests encrypted with SSL.

   **IMPORTANT:** If you have FIPS-140 security modules installed in the BIG-IP, you must initialize the root CA before you configure the SSL Accelerator for encrypted traffic.
MadCap Contributor: Lessons learned

- Not all SMEs are up to the task of installing and learning another tool—even a “stupid-simple” one
- Be prepared to support the tool; bugs or even user error can become YOUR support nightmare
- Paid and free versions of Contributor is confusing to reviewers who really don’t want to be bothered with another tool
Bonus: Pulse for QA?

- Host your daily doc builds on a staging server
- Enable Pulse
- Show all reviewers how to use Pulse to create tasks as a method for quick QA issues
To create a new group:

1. In Aperture, click Clients > All Groups.
2. In the Dynamic Groups area, click Add a Group.
3. In the Add a Group box, type a new group name, and then click Add a Group.

Once you have created your group, you then define group membership rules that are used to automatically add relevant systems to your newly defined group.

Related Topics

Discussions About This Topic...

Search this Feed

Elain Ogden added a task for Derek Warren

Step 1 should read: “In Aperture, click Clients> All Groups”, not just Groups.
Step 2 should read: “In the Dynamic Groups area, click Add a Group”, not Add Here.
Step 3 should read: “In the Add a Group box, type a new group name, and then click Add a Group.”
Considered Using SMEs as Authors?

- Have you had success with getting SMEs to write content you can actually use?
- THE Secret? Make making contributions easy
- SME contributions can mean more useful and technically accurate content
- SME contributions can free you up to do other tasks, including editing rough content into great content
- Case Study: Brand new global finance tool, 2 tech writers, and 15 SMEs
How?

- Gain manager support
- Provide simple templates and styles
- Provide simple training on the use of your templates
- In short, make it easy
Bonus Slide: When MSWord Is All You’ve Got

- Create Word templates and styles that match your Flare templates and CSS styles (they don’t have to but it makes your life much easier)
- Lock down local formatting
- Limit styles to only those that you want users to use
- Train them on using your templates
- Lock down local formatting
- Lock down styles
- Use same naming convention for styles
- Make sample text click-and-replace
- Demo: ConceptTemplate.dotx
Flare in an Agile World?

Agile = Modular Content = Flare = Yes You Can!
Recap...

- Develop a content model that meets your customer needs (based on required information types...reference, concepts, tasks, etc.)
- Develop templates and styles (css) that support your content model to speed authoring during sprint cycles
- Use the right tools and processes that enhance SME contributions (authoring and reviewing)
Benefits of going agile with your doc

Using a unified content strategy, supporting templates, and an optimized tech review cycle, you can

- Create better content, faster
- Minimize doc volume by sticking to your content model
- Submit content for technical review in a few clicks
- Import/apply tech review changes in seconds, not hours
- Free up more time for writing great content
End Result...

- Produce **shippable documentation by the end of each sprint cycle**
- **Win big** by having the documentation included during sprint demos
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