



A Technical Perspective:

Collaborative Single-Source Development using Flare and Contributor

- Senior Instructional Designer and Lead for Dynamics Research Corporation (DRC).
- 20+ years Technical Writing and Instructional Design, 4 years using Madcap Software products
- Founded a Technical Communications and Training Company, as well as a Web Applications Company.



This was a collaborative effort. Thanks to my team.

Contact Info:

rchristensen@drc.com

<http://homerchristensen.com>

<http://www.linkedin.com/in/homerchristensen>

- Introduce our development methodology
- Discuss some of the benefits
- Set up a project for success
- Walkthrough the collaborative process
- Discuss the ADDIE model
- Walk through Flare project set-up
- Discuss Contributor's role
- Discuss production of final documents

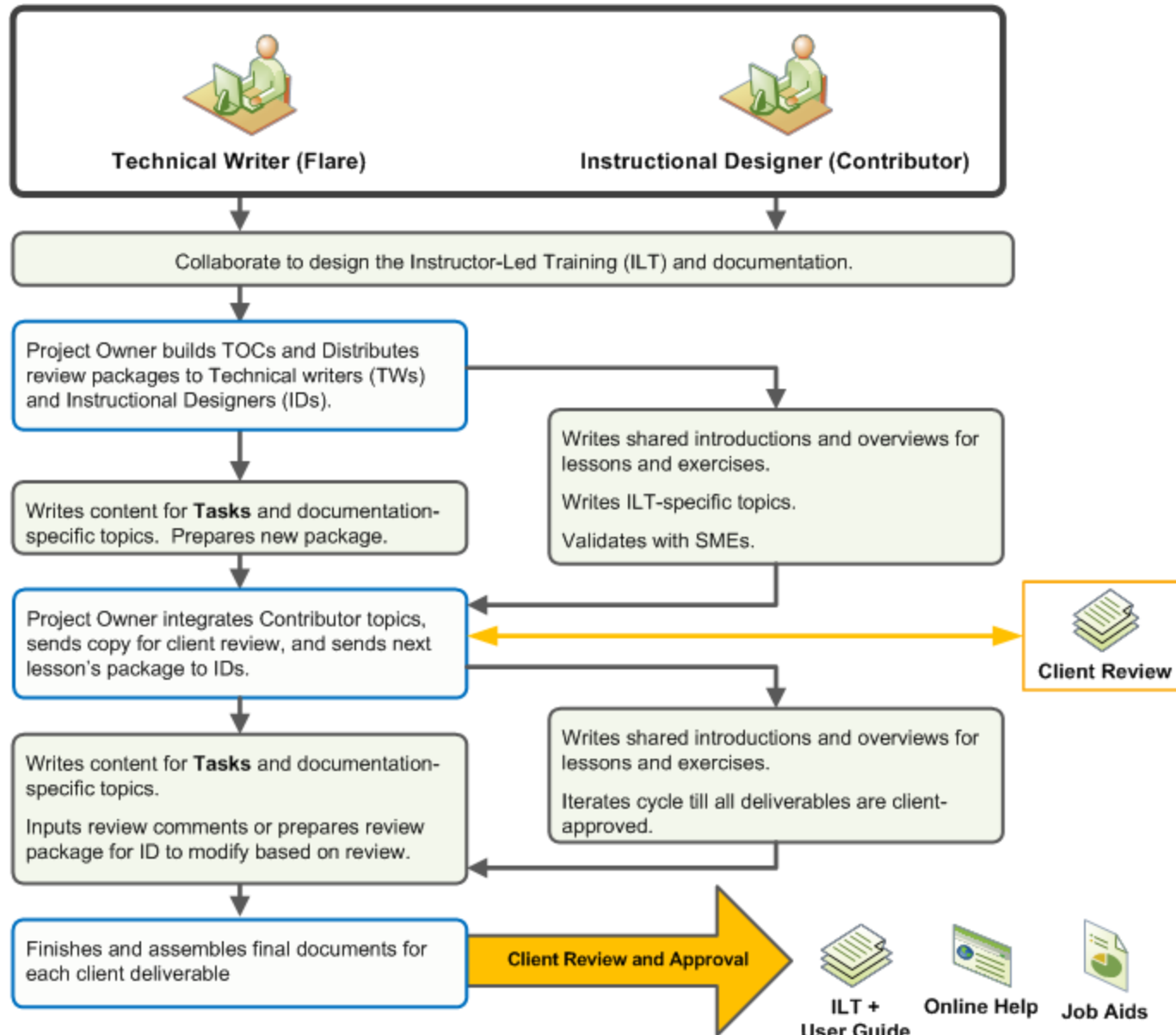
- Integrates Training Materials and Methods
- Provides Rapid Turnaround and Development
- Efficiently Uses Effort, Skills, and Experience
- Shares Content and Resources
- Produces Several Products from One Source
- Makes Ongoing Maintenance Easier by Applying Changes to One Set of Files

Use this approach when you want to:

- Reduce development costs
- Reduce maintenance costs
- Centralize management
- Increased flexibility
- Enjoy the process

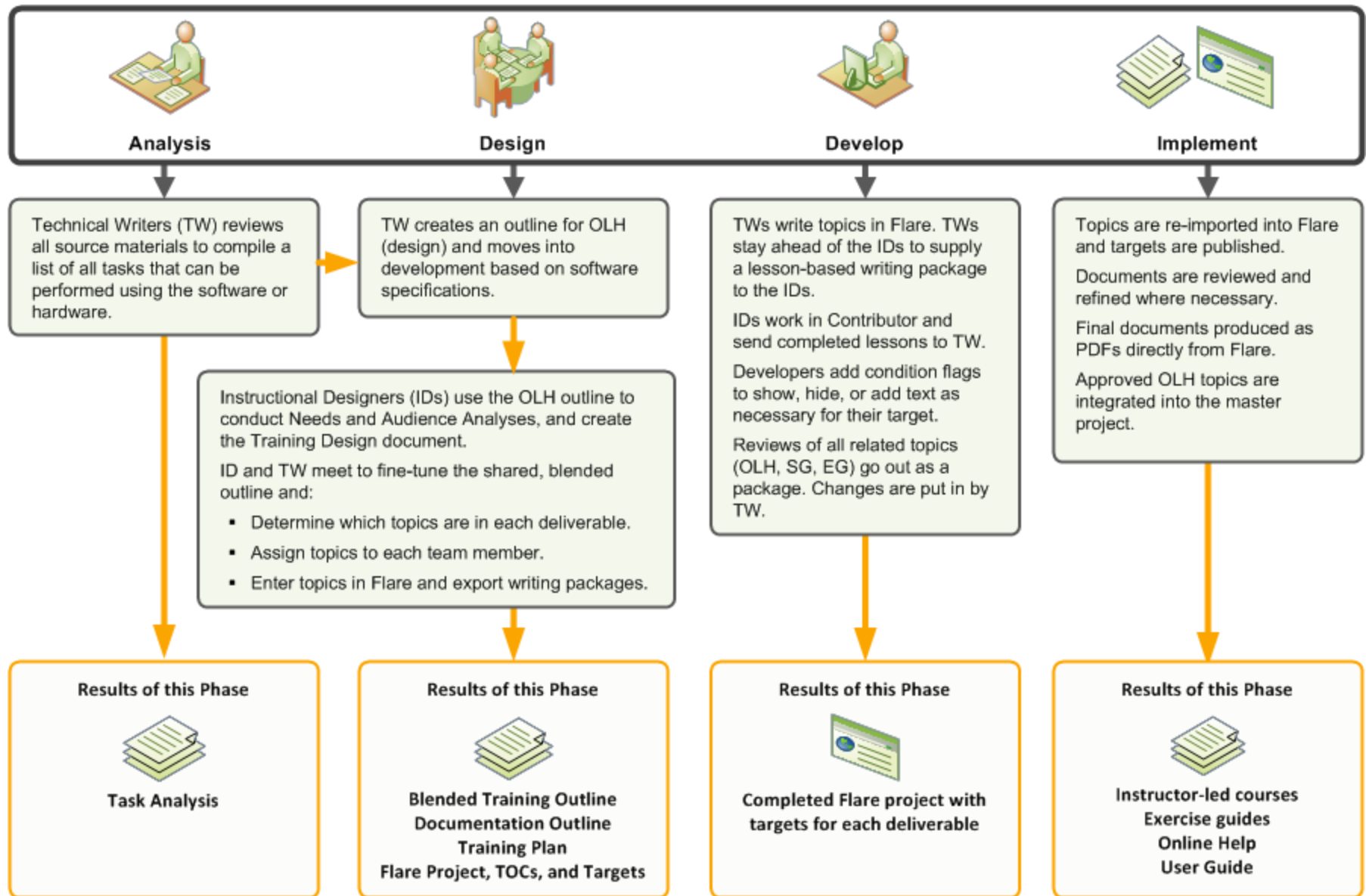
- Chunking is an acquired mindset/skill
 - Spend time upfront with team members unfamiliar with it
 - Know that time spent will be rewarded
- Frequent synchronizations reduce confusion
 - Proactive management techniques are required, especially in the beginning
- Solid analysis and design is essential
- Collaboration requires release and trust
 - Especially for managers
- Empower your team members

- Identify content to be re-used
 - Not all content will be
 - Incorporate into your CSS and template
 - Hide or show content determined by output
 - Change the way the shared content looks in each output
- Develop single-source content that is:
 - Output-agnostic
 - Limited to one idea
 - Focused



All related files reviewed simultaneously.

- Instructional design model
 - Analysis
 - Design
 - Development
 - Implementation
 - Evaluation
- Each stage builds upon the previous one
- Feedback loop is built in



- Analyze your Project
 - Audience
 - Tasks
 - Knowledge Gap / Learning Needs
- Analyze your team
 - Strengths
 - Predispositions + skills
- Essential for and applicable to each project
- Envision your goals
- List known constraints
- Identify unknown constraints and pitfalls

- Determine the delivery method for each output
- Identify the most critical information
- Identify the most frequently used material

Make them easy to find!

- Determine your sharing strategy
- Set up your project files

- Style sheet
- Snippet strategy (Can't yet edit in Contributor)
- Conditions
- Variables
- Organization of files
- Topic templates

- One CSS file
- Multiple media definitions
 - @print, @student, @help, etc.
- Few identifiers
 - Use the default **<p>** tag as much as possible
- Define at highest levels
- Distinctions in media definitions
 - E.g., pixels for online, points for print
- **<Div>** tags
 - Container for snippets and blocks of similar content

- Can't be edited in Contributor (yet)
 - We used them after client approval of training materials to share introductions with task topics
- Used for the most heavily shared chunks
- <Div> containers make it easy to create snippets
- Organize them in like folders
 - Intros
 - Procedures
 - Data tables

- Conditions for each deliverable
- Conditions to exclude from each deliverable

	Condition Tag ▲	Background	Comment
	EG		Specific to the Exercise Guide
▶	FSG		Specific to the Facilitator Setup Guide
	JA		Specific to a Job Aid
	OLH		Specific to the OLH
	SG		Specific to the Student Guide
	X-EG		Exclude this from the Exercise Guide
	X-FSG		Exclude this from the Fac Setup Guide
	X-JA		Exclude this from the Job Aid
	X-OLH		Exclude this from the OLH
	X-SG		Exclude this from the Student Guide

Variables

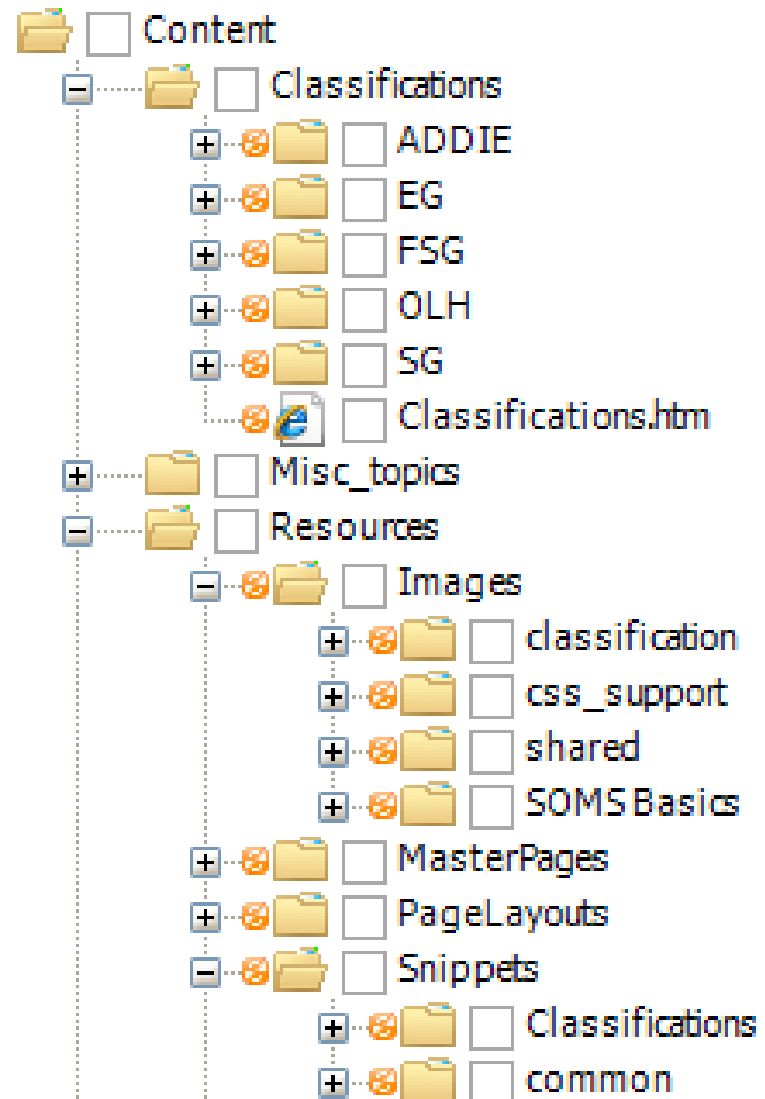
- Used primarily in page layouts
 - Title
 - Version
 - Publication date

File Tags

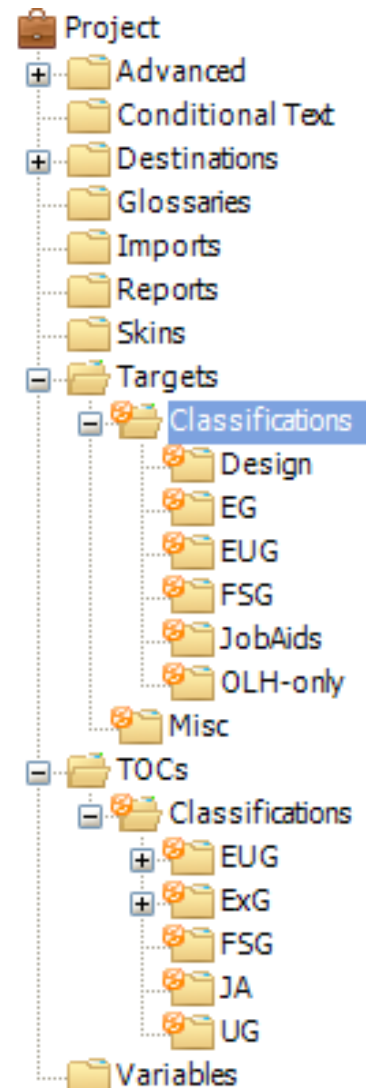
- Track developers and status

- Good organization is key.
- Necessary when you have multiple authors contributing for multiple deliverables.
- Contents + Projects folders

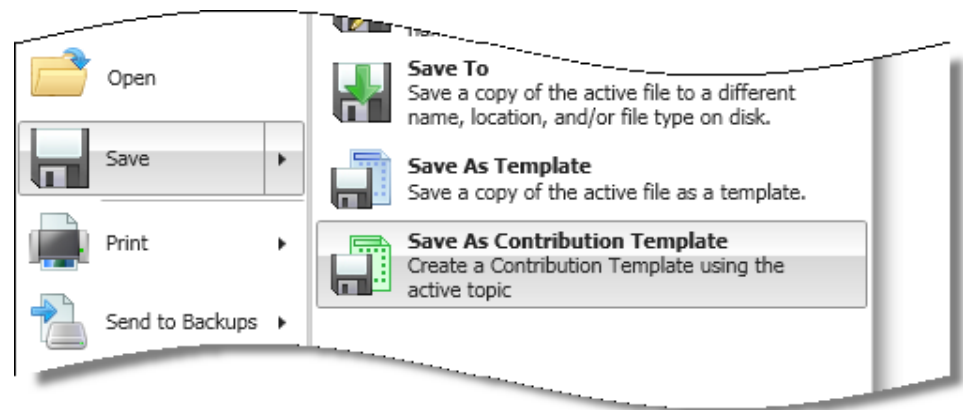
- Content folder mirrors deliverables
 - One for each deliverable
 - One for design
- Resources
 - Images
 - [one folder for each output]
 - CSS/shared/common
 - Snippets
 - [one folder for each snippet type]
 - common/shared



- Targets
 - One for each deliverable type.
 - Sub-folders for each lesson, exercise, or chapter.
- TOCs
 - One for each deliverable type.
 - Sub-TOCs for each lesson, exercise, or chapter.
 - Link TOCs to the master TOC.



- What types of topics will you have?
 - Online Help
 - User Guide
 - Facilitator Guide
 - Student Guide
 - Exercise Guide
- How are they similar / different?
- Create templates in Flare and Contributor
 - Include placeholder text for your shared content



■ Similar, but different

Creating a Confidential *Notice of Release*

This form letter is sent from CDCR to victims and other interested parties of an offender when the offender is released to parole and the nature of the offender's crime dictates that notification be provided.

To create a confidential *Notice of Release*:

1. Navigate to **Offender > Reports > Victim Notification Reports > Notice of Release**.
The *Job Submitter* screen appears.
2. In the **Current Location (Institution)** box, make a selection.
3. In the **Ending Search Date** area date box, enter a date or select the default of today's date.
4. In the **Save Document** area, select **Yes** or **No**.
5. Verify the email address to which the report is to be sent in the **E-Mail Address and Message** area **Address** box.
6. Click **Submit**.
The *Job Queue* screen appears.

Create a Notice of Release Letter

As mentioned in the previous step, once an offender is due to be released, *Notice of Release* letters are sent to requestors. A *Notice of Release* letter is sent to victims and other interested parties of an offender when the offender is released to parole and the nature of the offender's crime requires that notification be provided.

In this lesson, we are going to produce a confidential notice of release for a victim.

Use the information in the table below to complete the procedure that follows. Because the procedure is taken from *Online Help*, you may not need to follow all steps in the procedure. However, enter all of the information from the table below to obtain the desired result.

Use the same offender from the previous step.

Field	Value	Notes
Current Location (Institution)	Your location	

To create a confidential *Notice of Release*:

1. Navigate to **Offender > Reports > Victim Notification Reports > Notice of Release**.
The *Job Submitter* screen appears.
2. In the **Current Location (Institution)** box, make a selection.
3. In the **Ending Search Date** area date box, enter a date or select the default of today's date.
4. In the **Save Document** area, select **Yes** or **No**.
5. Verify the email address to which the report is to be sent in the **E-Mail Address and Message** area **Address** box.
6. Click **Submit**.
The *Job Queue* screen appears.
7. Click **Refresh** until the **Job Status** is **Job Finished** (or **No Data Found** or **Errors Encountered**).
8. Check your email in-box for a message indicating that the report has finished running.
9. Click on the email message and open the attachment to preview the report.
10. Click **File > Print** to print the report.

- Contains a superset of organizational, conceptual, reference, and procedural topics
- Sharing strategy with training materials:
 - Conceptual topics, authored by Instructional Designer (ID)
 - Introductions to procedures, authored by ID
 - Procedures authored by Technical Writer (TW)

- Similar in content
 - Facilitator Guide includes instructor notes
 - Notes are hidden in Student Guide
 - Page numbers should remain identical
- Sub-folders in Content and Target/TOC folders
 - Keeps lesson topics together
 - Allows easy re-arrangement using linked TOCs
 - Allows extraction and rearrangement of lessons for specific roles or courses

- Contains fewer topics than Student Guide.
- Uses little to no introductory topics.
- Has unique narrative.
- Uses shared procedures.
- Uses unique data for exercise procedures.

- The design informs the development schedule.
- Flare owner:
 - Develops the shared topics prior to sending review packages.
 - Manages the writing assignments.
 - Prepares outputs for reviewers, editors, and final production.
- Flare owner sends review package to author
 - E-mail or onto a shared disk
 - Contributor TOC shows other related lessons grayed out

■	Plan for Offender Release
■	About this Lesson
■	Create the Classification Actions Due Report
■	Creating a Classification Actions Due Report
■	Create a Release Plan
■	Creating a Release Plan
■	Create a Release Program Study
■	Create a Release Program Study for an Offender
■	Record the Result of a BPH Hearing
■	Entering the Board of Parole Hearing Date
■	Notify to Register
■	Update the Status of the RPS When Mailing to Parole Agent
■	Updating a Release Program
■	Update the Status When RPS is Returned
■	The Distribute the Release Notification Process
■	Create a Notice of Release Letter
■	Creating a Confidential Notice of Release
■	Update the Notification Status of Letters Sent to Victims
■	Update the Notification Status of Letters Sent to Victims
■	Lesson Review

These topics are shared from online help.
These topics are unique to the student guide.

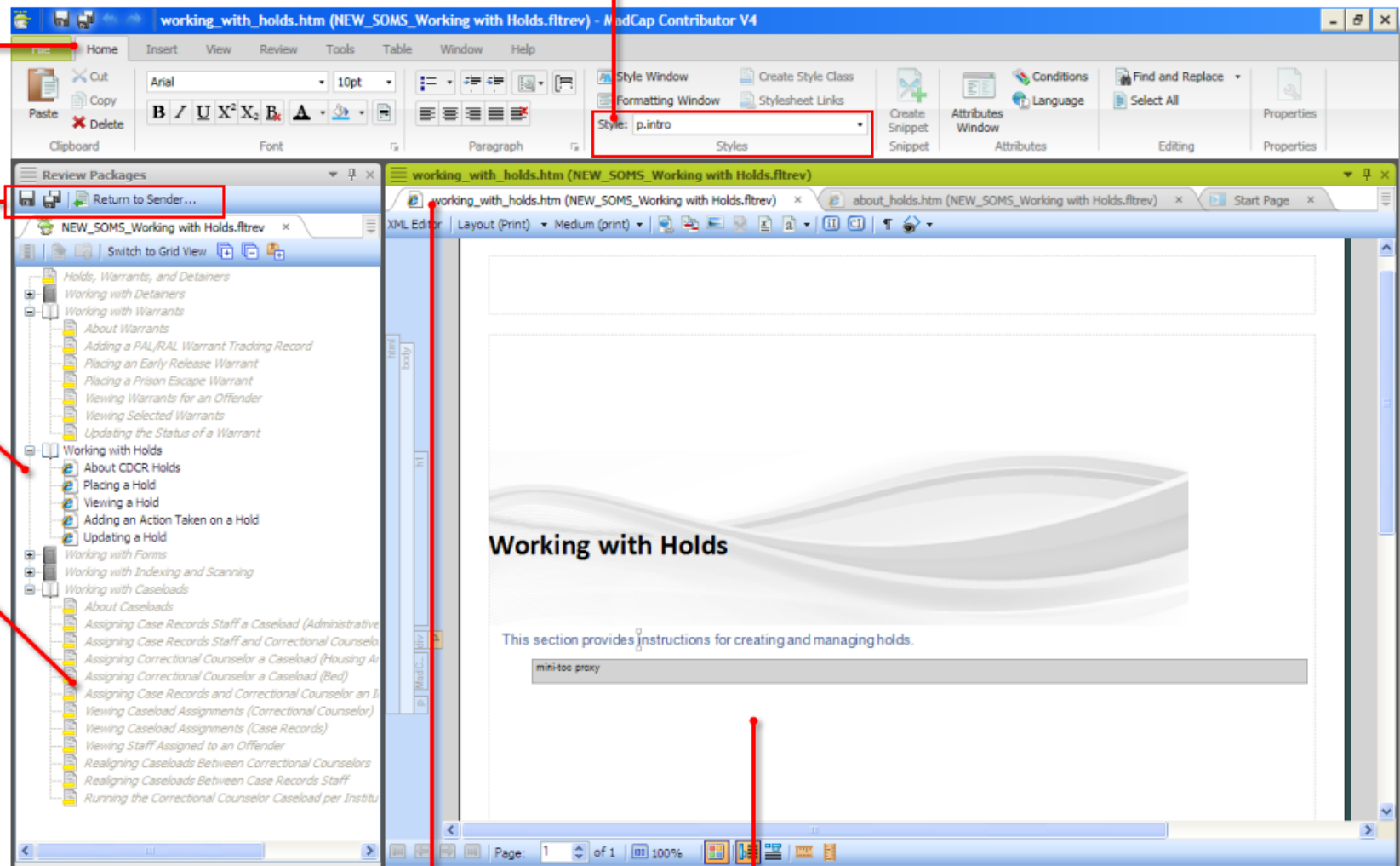
Microsoft Word-like ribbon for commands.

Buttons to save or easily return the writing package to the TW.

The TOC view shows the entire list and order of topics, however the writing package only contains the topics listed in black text.

The gray, italicized text is shown for context.

Only a few styles are used, with definitions for each type of deliverable.



Tabs for each document you open.

This is the primary authoring window.

- Contributor author adds content to each topic
 - Watch that author doesn't customize shared text
- Contributor sends review package to Flare owner
- Flare owner accepts changes and annotations
 - If incomplete, generate another review package and PDF of completed work
 - If complete, generate a review package for the next assignment

- Develop and use checklists
 - Prevents missing steps or adjusting variables (such as version numbers) during crunch times.
 - Great feedback for managers.
- Flare targets make exporting multiple docs easy
- Meet with team and client for lessons learned
 - Meet with team first
 - What worked well
 - What would we do different
 - How can we improve the process or deliverable

- The CSSDA process worked very well for us.
 - Works harmoniously, with the flow.
 - Saved approx. 20% during development
 - Should save client during maintenance phase
 - Uses the natural abilities and inclinations of team members.
 - Helps you efficiently generate and reuse content.
 - Build your library of shared content



\$100 OFF **madskills**
TRAINING

Thanks for attending today's webinar!

As a webinar attendee, receive **\$100 off any MadCap Training Course:**

Discount Code **MCTRN100***

For available training courses and to receive your discount, contact:

sales@MadCapSoftware.com

+1 858.320.0387 opt. 1

*Valid for any current or future training course reserved by August 31, 2013

MADWORLD

ATTEND. LEARN. ADVANCE.
HARD ROCK HOTEL | SAN DIEGO, CA

APRIL 13-15, 2014

www.MadWorldConference.com

- Thank you for watching
- Contact me if you have questions that aren't answered in this Q&A period

Contact Info:

R. N. Homer Christensen

rchristensen@drc.com

<http://homerchristensen.com>

<http://www.linkedin.com/in/homerchristensen>

