

MadCap Flare in an Agile World

Strategies for Optimizing Quality and Productivity

25 June 2014



SECURING
TRUST
PROTECTING
KEYS AND CERTIFICATES

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



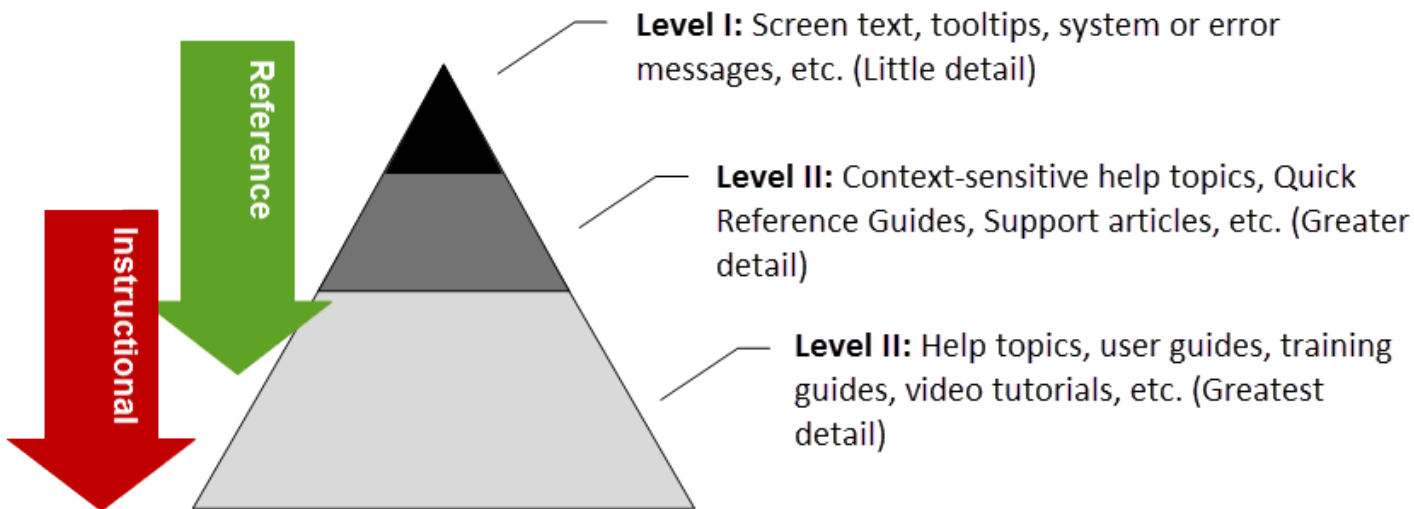
Content Model

The Key to Quality and Productivity

- 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

V



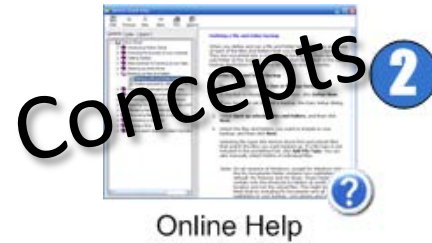
Steps to a content model...



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

V



Notes Step-by-Step



Putting Your Model Together



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

	A	B	K	L	M	N	O	P	Q	R
1		Structure	Reuse Map							
2	Information Types	Type	Help	CSH	QuickRef (PDF)	UserGuide (PDF)	TrainingGuide (PDF)	TrainingVideo	Snippet	Variat
7	Product Description	Element								
8	Product Desc. Short	Element	X		X	X	X		X	
10	Product Desc. Long	Element	X	X	X	X	X	X	X	
11	Feature Description	Container								
12	Feature Desc. Short	Element	X		X	X	X	X	X	
14	Feature Desc. Long	Element	X	X	X	X	X	X		
21	Procedure	Container			X					
22	Title	Element	X	X	X	X	X	X		
23	Feature Desc. Short	Element			X	X	X			
24	Subtitle (To...)	Element			X	X	X			
25	Steps	Element			X	X	X			
26	Note	Element	X	X	(X)	X	X	X		
33	Glossary	Container								
34	Term	Element	X	X	X	X	X	X		
35	Definition	Element	X			X	X			
36	Show Definition on click	Element	X	X						
37	Cross Reference to Definition	Element				X	X			
38	Index	Container				X	X			
39	Troubleshooting	Container								
40	Problem	Container	X			X				
41	Solution	Element	X			X				
42	Legal	Container								
43	EULA	Element							X	
44	Trademark	Element			X	X	X		X	
45	Copyright	Element	X		X	X	X	X		X
46	List_Numbered	Element	X		X	X	X			
47	List_Bulleted	Element	X		X	X	X			
63	Note	Container								
64	Note	Element	X	X	X	X	X	X		
65	Hint	Element								
66	Important	Element	X	X	X	X	X	X		
67	Warning	Element	X	X	X	X	X	X		
68	Print Documents	Container								
69	Title Page Title	Element				X	X			
70	Title Page Sub-title	Element				X	X			
77	Church Logo	Element	X		X		X	X	X	X

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"



SECURING
TRUST
PROTECTING
KEYS AND CERTIFICATES

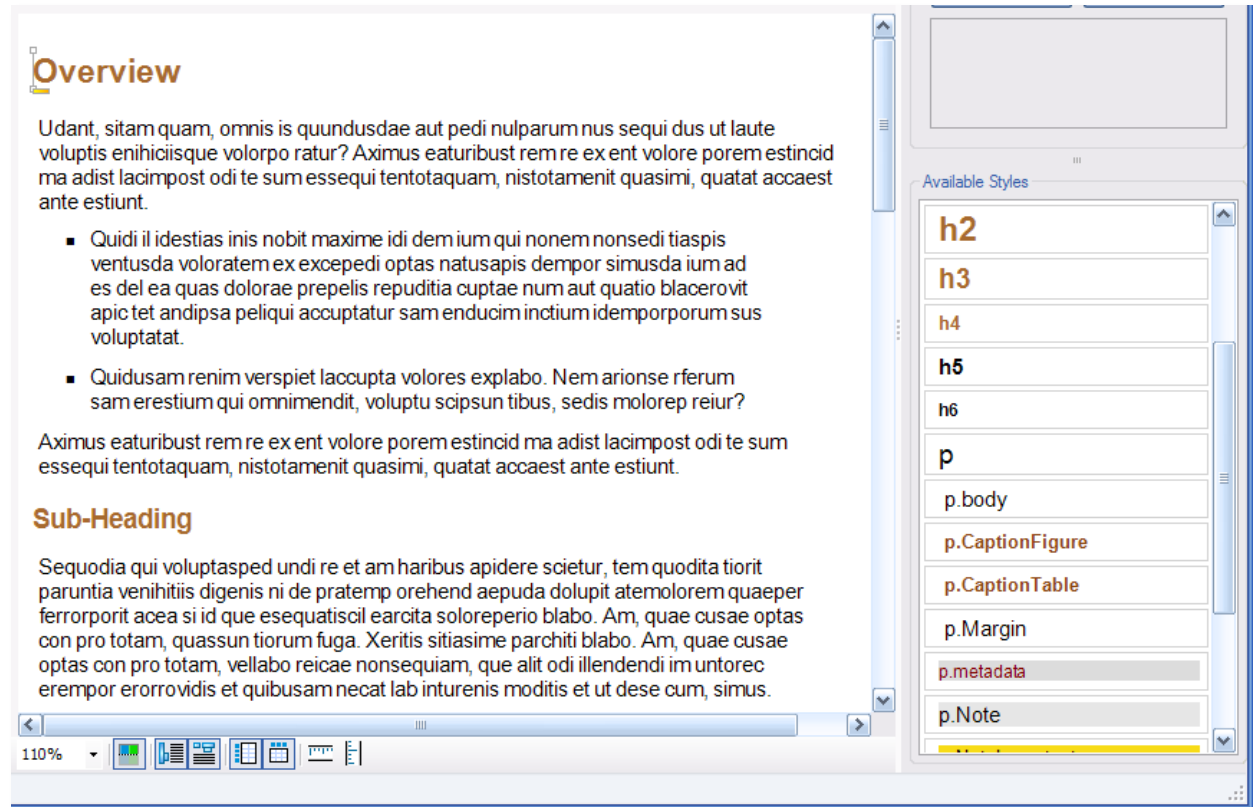
Creating Supporting Templates and CSS

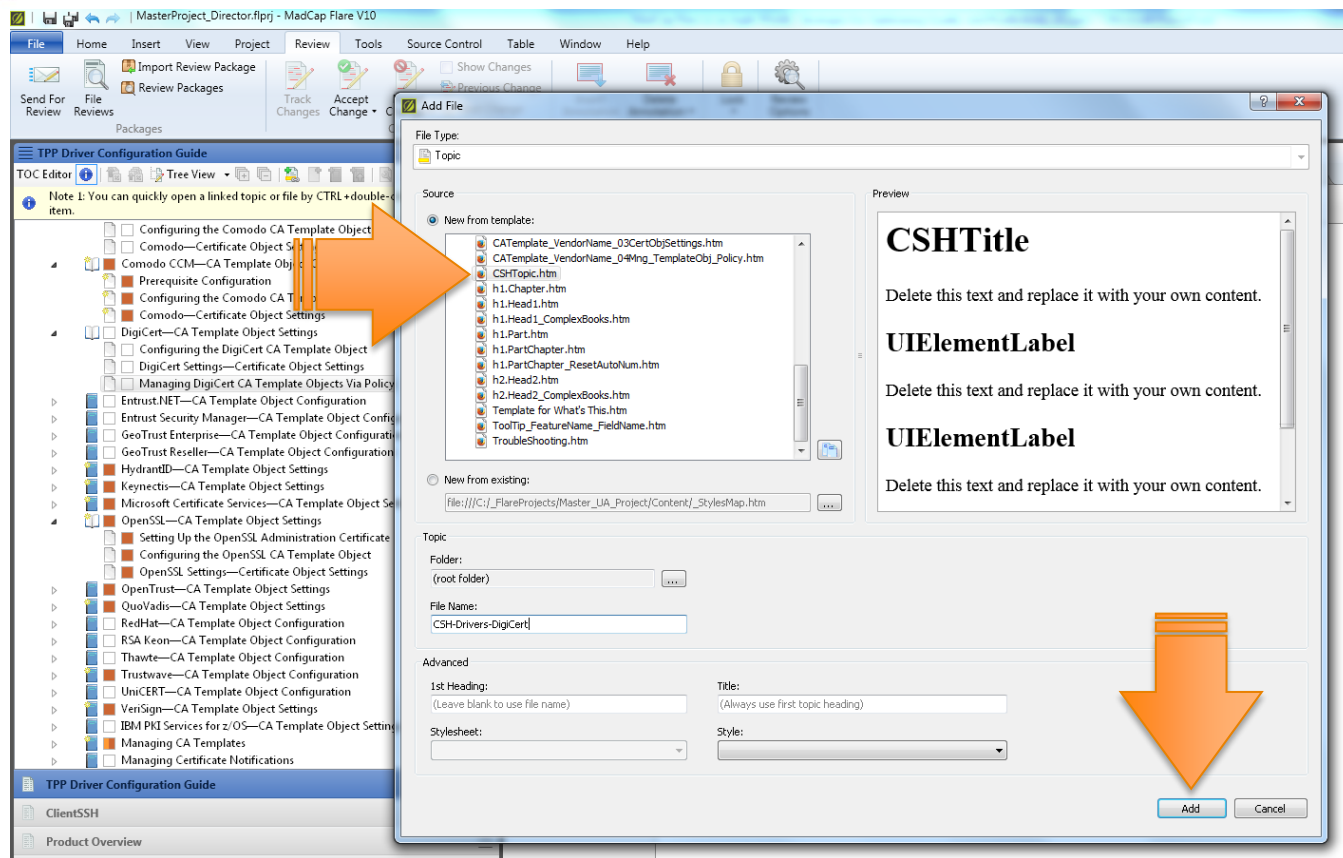
Better, Faster Content Development

Create Flare Templates



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





Sample: CSH template



The screenshot displays the TPP Driver Configuration Guide interface. On the left, the TOC Editor shows a tree view of the configuration guide. The right pane shows the CSH-Drivers-DigiCert.htm template, which is a text markup file. The template content is enclosed in a red dashed box and includes the following elements:

- CSH-Drivers-DigiCert** (Section Header)
- Delete this text and replace it with your own content.
- UIElementLabel** (Section Header)
- Delete this text and replace it with your own content.
- UIElementLabel** (Section Header)
- Delete this text and replace it with your own content.
- UIElementLabel** (Section Header)
- Delete this text and replace it with your own content.
- relationships proxy

The TOC Editor on the left lists the following topics:

- Configuring the Comodo CA Template Object
 - Comodo—Certificate Object Settings
 - Comodo CCM—CA Template Object Configuration
 - Prerequisite Configuration
 - Configuring the Comodo CA Template Object
 - Comodo—Certificate Object Settings
- DigiCert—CA Template Object Settings
 - Configuring the DigiCert CA Template Object
 - DigiCert Settings—Certificate Object Settings
 - Managing DigiCert CA Template Objects Via Policy
 - CSH-Drivers-DigiCert
- Entrust.NET—CA Template Object Configuration
- Entrust Security Manager—CA Template Object Configuration
- GeoTrust Enterprise—CA Template Object Configuration
- GeoTrust Reseller—CA Template Object Configuration
- HydrantID—CA Template Object Settings
- Keynectis—CA Template Object Settings
- Microsoft Certificate Services—CA Template Object Settings
- OpenSSL—CA Template Object Settings
 - Setting Up the OpenSSL Administration Certificate
 - Configuring the OpenSSL CA Template Object
 - OpenSSL Settings—Certificate Object Settings
- OpenTrust—CA Template Object Settings
- QuoVadis—CA Template Object Settings
- RedHat—CA Template Object Configuration
- RSA Keon—CA Template Object Configuration
- Thawte—CA Template Object Configuration

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

- 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>)
- For a more focused, Flare-applicable reference, see Scott DeLoach's book, *CSS to the Point* (includes CSS3 updates)

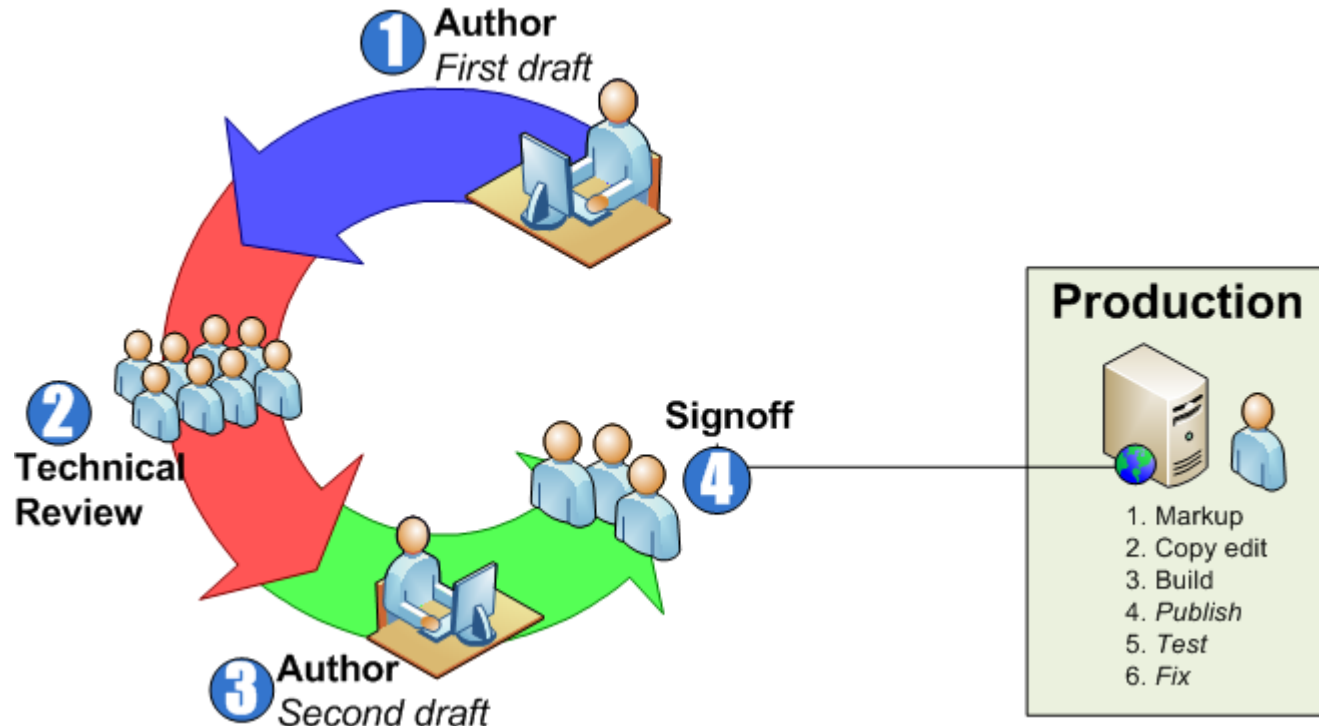
A green arrow pointing right, containing text about streamlining technical reviews. The arrow is composed of two parts: a long, thin tail on the left and a wider, trapezoidal head on the right. The background of the slide is a light gray grid with diagonal lines.

Streamlining Technical Reviews and Contributions

Making Contributions Easier Breeds More (and Better) Contributions

Common content development cycle

V



Agile technical reviews?



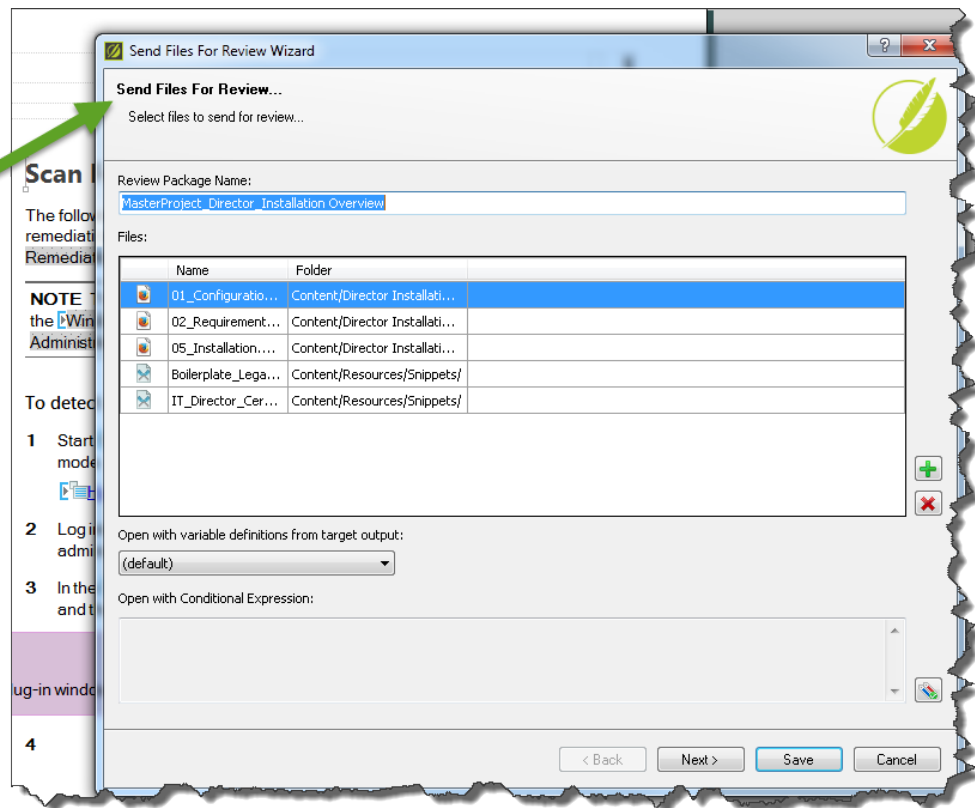
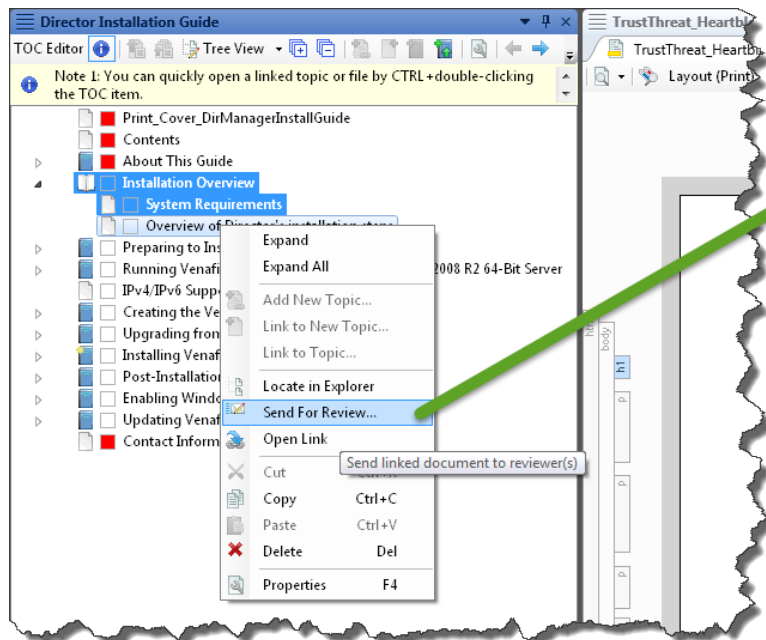
- Modular content=modular technical reviews
- Send out smaller, discrete chunks for review
- Smaller reviews require less time—less time to review and less time to import and apply changes

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)

The screenshot displays the MadCap Contributor V5 interface in Review Mode. The left pane shows a hierarchical outline of the document, with 'F5 LTM Configuration' expanded. An orange arrow points to the 'F5 LTM Basic and Advanced Driver Comparison Chart' item. The right pane shows the content of this chart, which is a table comparing F5 Basic and F5 LTM Advanced drivers.

Comparison of the F5 Basic and F5 LTM Advanced Drivers

The following table outlines the differences between the F5 LTM Basic and F5 LTM Advanced drivers.

Trust Protection Platform F5 Provisioning Drivers Feature Summary	F5 LTM Basic
F5 iControl API Version Support	9.4 10.0.1 10.1 or later
Supported Certificate File Delivery Format	PEM
Option to ConfigSync	
Partition Name (goes to <i>Common</i> if none is specified)	
Server SSL Profile Type	
Client SSL Profile Type	
SSL Profile create or update	
Associate Certificate and Key with Profile	
Option to specify a Parent SSL profile; otherwise, it uses the Default SSL profile	
Option to specify Virtual Server Name	

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

Comments and Track Changes



Prerequisite Configuration

To enable Trust Protection Platform to provision certificates on BIG-IP F5 appliances, you must complete the following high-level tasks:

- 1 Using the BIG-IP web-based Configuration utility, create a pool whose members are the to load-balance 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 one 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 Accelerators.

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 security module before you configure the SSL Accelerator for encrypted traffic.

Annotation [RWT]

This content was very old... some of the references seemed only applicable to the 4.x version of the Big-IP which we never actually supported with Director. I've revised it. I want to avoid going too deep into how to configure the F5.

Added [RWT]

Deleted [RWT]

Deleted [RWT]

Added [RWT]

Deleted [RWT]

Deleted [RWT]

Deleted [RWT]

Added [RWT]

Deleted [RWT]

Deleted [RWT]

Annotation [RWT]

This can be removed for the F5 LTM Basic but it needs to appear for the F5 LTM Advanced. Consider making this whole section common to both since the content is identical with a few small exceptions.

Available Styles

(reset class)

.atn

.atv

.clo

.com

.kwd

.lit

.opn

.pln

.pun

.str

.tag

.typ

MadCap:annotation

MadCap Contributor: Lessons learned

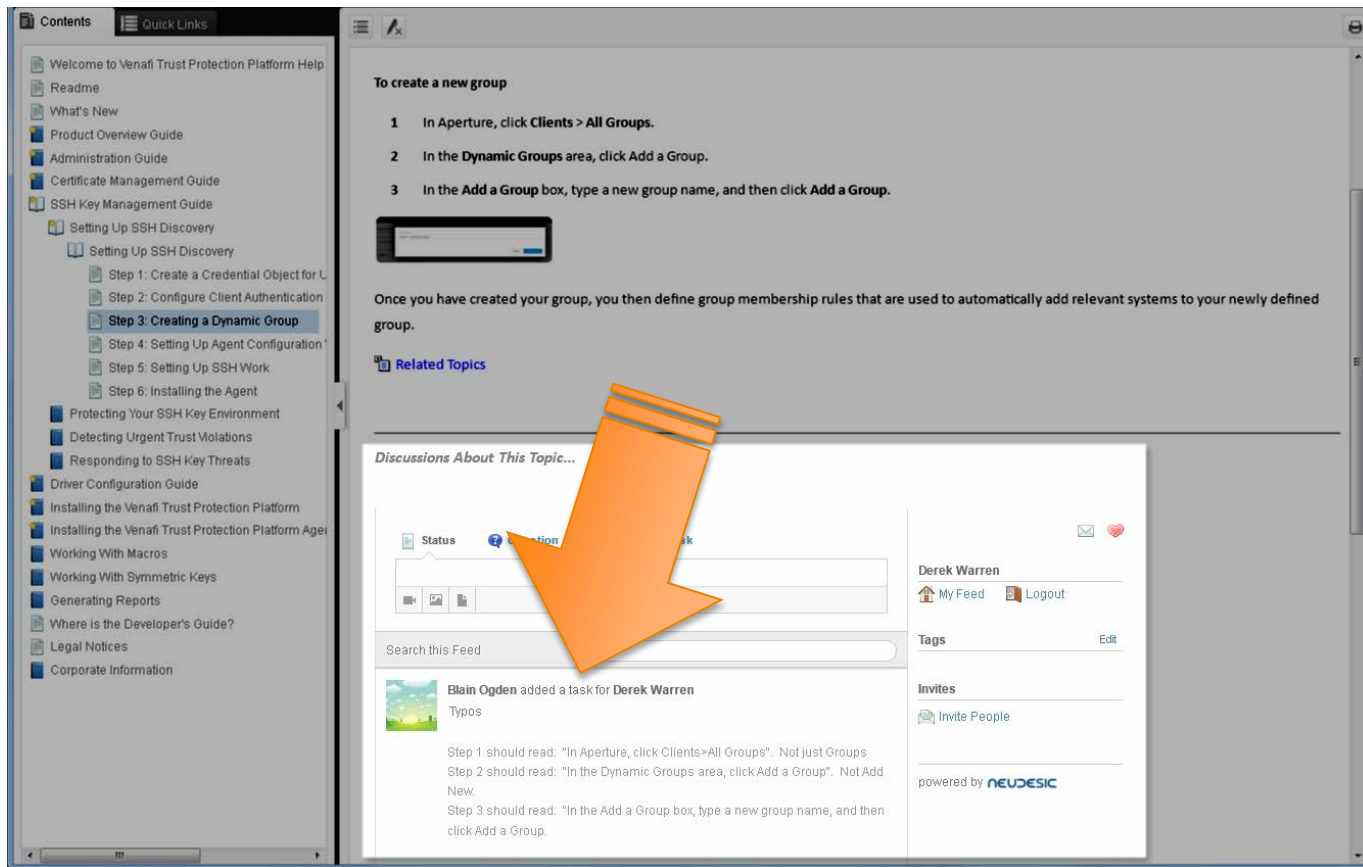


- Not all SMEs are up to the task of installing and learning another tool—even a “stupid-simple” one
- Be prepared to support the tool; bugs or even user error can become YOUR support nightmare
- Paid and free versions of Contributor is confusing to reviewers who really don't want to be bothered with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




Contents **Quick Links**

- Welcome to Venafi Trust Protection Platform Help
- Readme
- What's New
- Product Overview Guide
- Administration Guide
- Certificate Management Guide
- SSH Key Management Guide
- Setting Up SSH Discovery
 - Setting Up SSH Discovery
 - Step 1: Create a Credential Object for U
 - Step 2: Configure Client Authentication
 - Step 3: Creating a Dynamic Group**
 - Step 4: Setting Up Agent Configuration
 - Step 5: Setting Up SSH Work
 - Step 6: Installing the Agent
- Protecting Your SSH Key Environment
- Detecting Urgent Trust Violations
- Responding to SSH Key Threats
- Driver Configuration Guide
- Installing the Venafi Trust Protection Platform
- Installing the Venafi Trust Protection Platform Agent
- Working With Macros
- Working With Symmetric Keys
- Generating Reports
- Where is the Developer's Guide?
- Legal Notices
- Corporate Information

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...

Status **Discussion** **Task**

Search This Feed

Blain Ogden added a task for **Derek Warren**

Typos

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 New.
Step 3 should read: "In the Add a Group box, type a new group name, and then click Add a Group."

Derek Warren

My Feed **Logout**

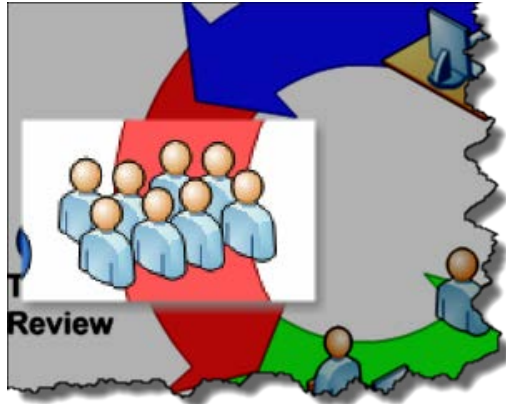
Tags **Edit**

Invites

Invite People

powered by **NEUDESIC**

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

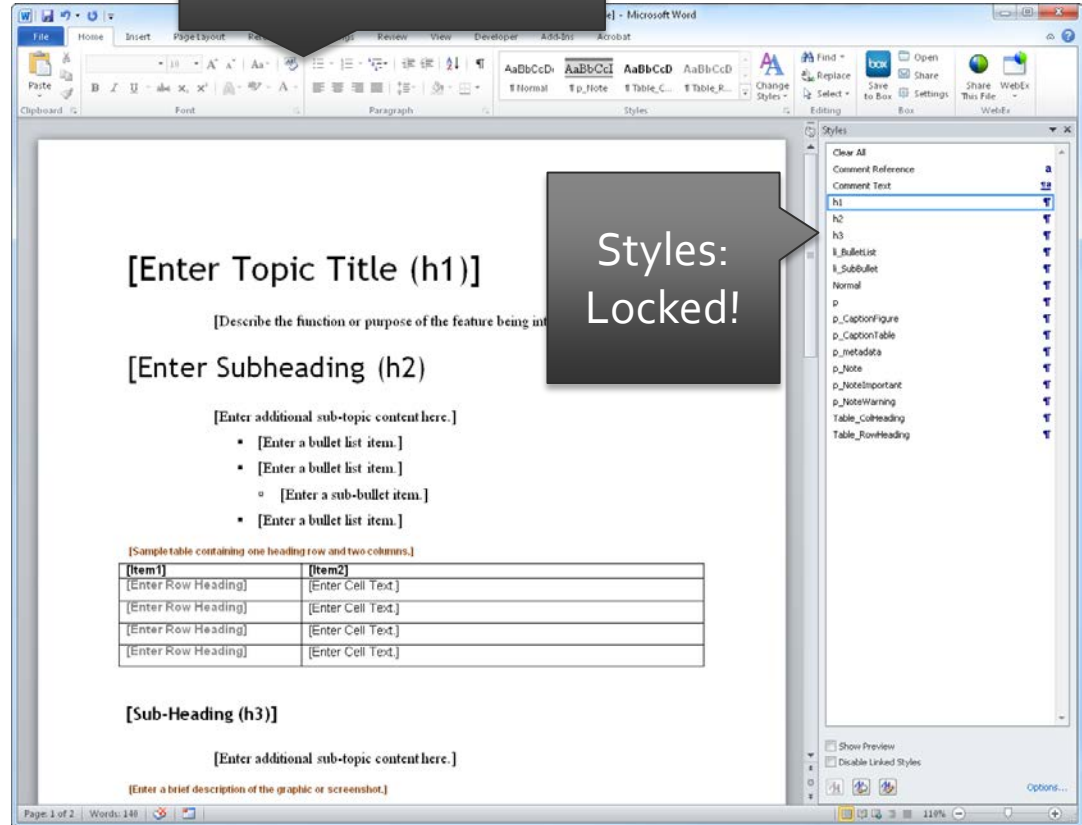


- Create Word templates and styles that match your Flare templates and CSS styles (they don't have to but it makes your life much easier)
- Lock down local formatting
- Limit styles to only those that you want users to use
- Train them on using your templates

Word on a Leash

Local Formatting:
Locked!

- 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

THANK YOU FOR ATTENDING TODAY'S WEBINAR!

As a webinar attendee, receive **\$100 OFF** our next focused training course. Just \$499 per student!

NEW TRAINING COURSE!

Mastering the MadPak Suite: Learning Contributor, Mimic, Capture and Analyzer
August 25-26, 2014 (web-based)

TO RECEIVE YOUR DISCOUNT, CONTACT:

sales@madcapsoftware.com | +1 858.320.0387 opt.1

Q & A

V



Unpublished Work of Venafi, Inc. All Rights Reserved.

This work is an unpublished work and contains confidential, proprietary, and trade secret information of Venafi, Inc. Access to this work is restricted to Venafi employees who have a need to know to perform tasks within the scope of their assignments. No part of this work may be practiced, performed, copied, distributed, revised, modified, translated, abridged, condensed, expanded, collected, or adapted without the prior written consent of Venafi, Inc. Any use or exploitation of this work without authorization could subject the perpetrator to criminal and civil liability.

General Disclaimer

This document is not to be construed as a promise by any participating company to develop, deliver, or market a product. Venafi, Inc. makes no representations or warranties with respect to the contents of this document, and specifically disclaims any express or implied warranties of merchantability or fitness for any particular purpose. Further, Venafi, Inc. reserves the right to revise this document and to make changes to its content, at any time, without obligation to notify any person or entity of such revisions or changes. All Venafi marks referenced in this presentation are trademarks or registered trademarks of Venafi, Inc. in the United States and other countries. All third-party trademarks are the property of their respective owners.

© 2013 Venafi Proprietary and Confidential

