Maintaining a Healthy DITA Project

TECHNICAL COMMUNICATION
STC 2019 SUMMIT
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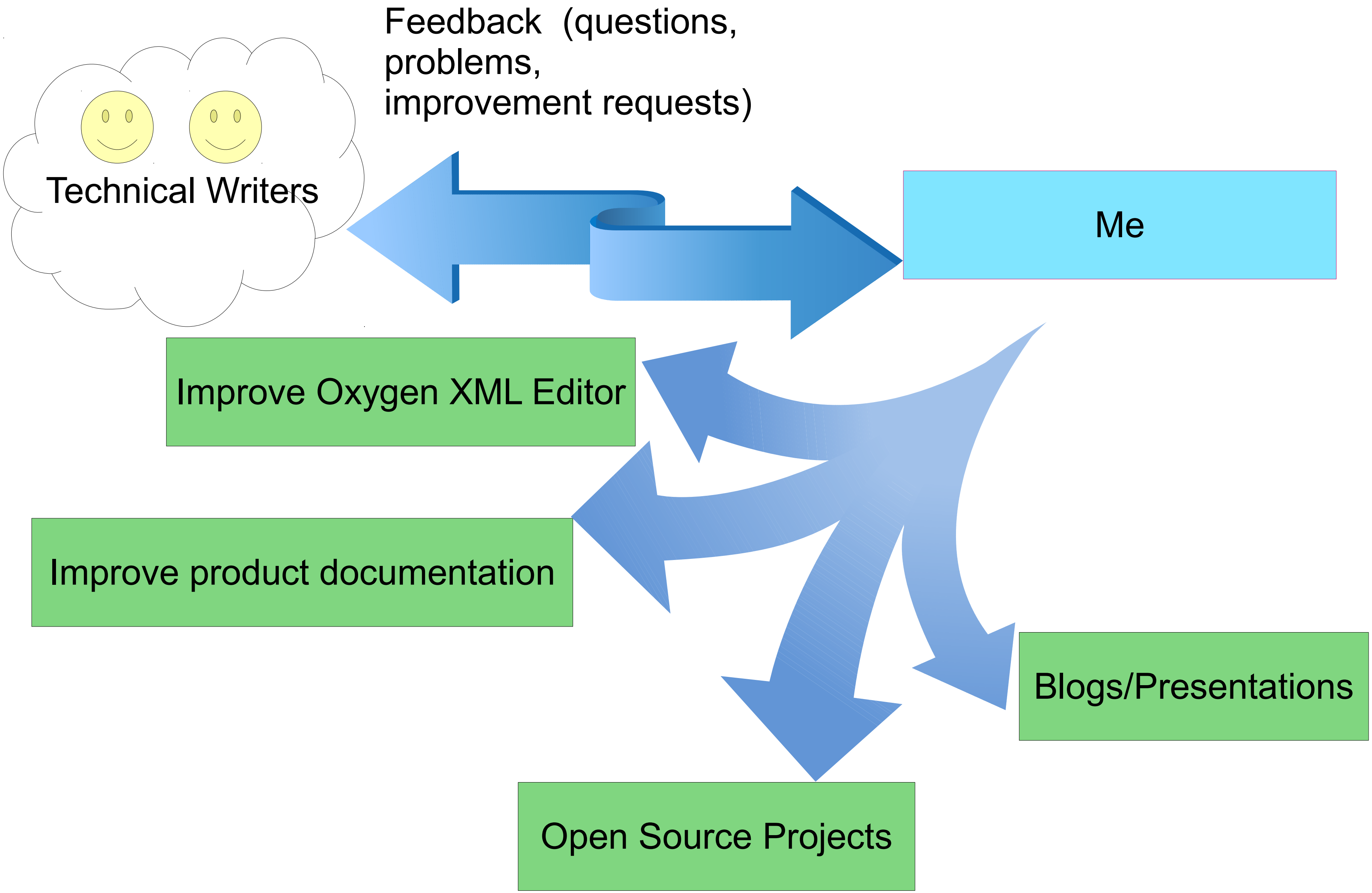

Feedback (questions, problems, improvement requests)

Technical Writers

Me

Improve Oxygen XML Editor

Improve product documentation

Blogs/Presentations

Open Source Projects

How should a Happy and Healthy Documentation Project Look Like?

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Do you have a Healthy Project?

- Focus on writing and not on workflow.
- Involve peer-reviews, SMEs and end users.
- Easy start for first-time contributors.
- Easier produce deliverables and correct errors in older deliverables.
- Allow for future evolution: more writers, more outputs, more content, more products.

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Why do big companies use the DITA standard?

- Standard means owning your content and no vendor lock-in (editing or publishing).
- DITA works very well with topic-based authoring.
- Lots of content reuse potential.
- Reuse lowers translation costs.

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DITA Doc Project Aspects

- Storage
- Workflow
- Collaboration
  - Sharing Common Constraints (editing, validation, spell check dictionaries, ...)
- Structure
  - Managing links and reusable content
- Translation
- Publishing (Producing Deliverables)

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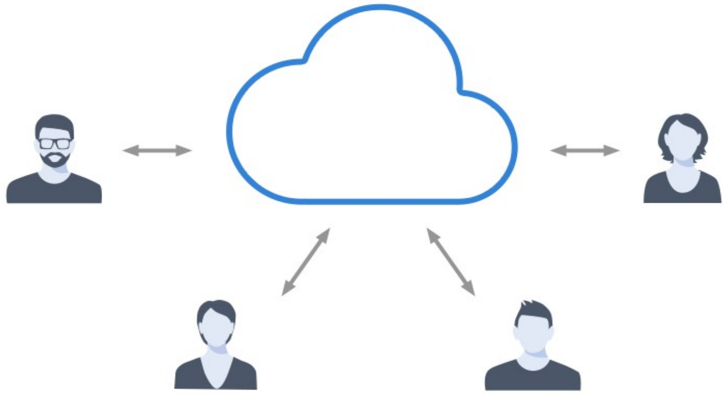
Storage



- Commercial content management systems (CMS).
- Open Source version control systems: Git, Subversion, CVS

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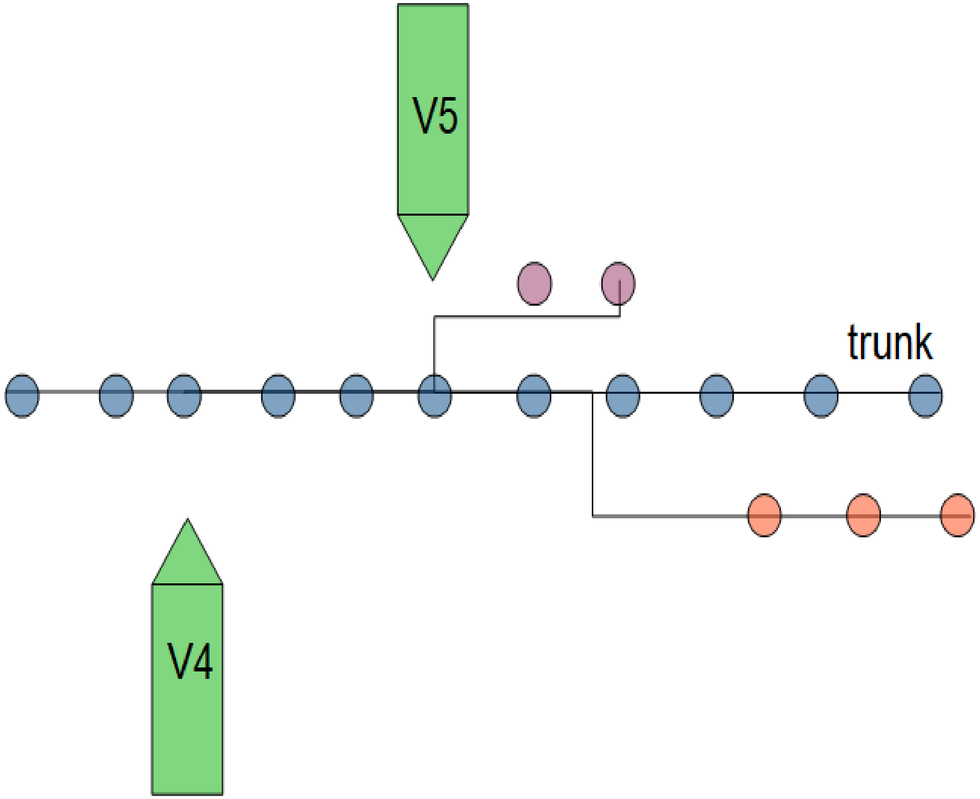
Version Control

- Ability to Tag Releases and Create Branches.
- See history for resources.



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Working with the storage system

- Commercial CMSs – Remote editing, locking.
- Open Source version control systems – Local working copies, no editing restrictions → conflicts.

Hint: Maybe you can use the same storage system as software developers in your company.

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Collaboration and Workflow

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Collaboration and Workflow

- We invest a lot of time each day collaborating with our team or external collaborators.
- Collaboration should be as comfortable as possible.

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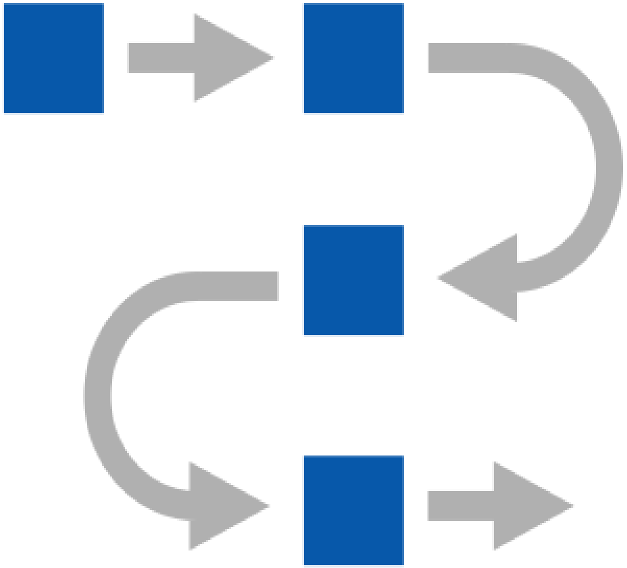
Workflow



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Issue tracking

- Using workflow features in the CMS
- Using issue management systems like Bugzilla, Atlassian JIRA or Trello.

Tip: Linking the product development with the documentation development.

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Issue Tracking Examples

Custom workflows

- Documentation task specific workflow
- Integrate QA and documentation in software development process

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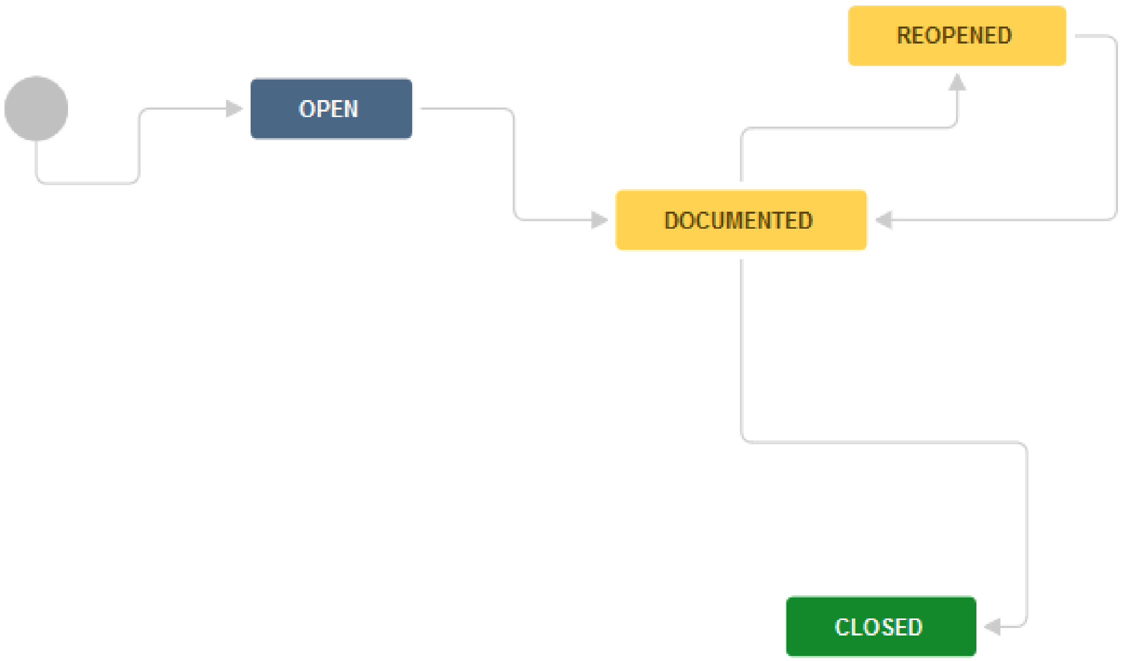
Issue tracking – Simple Documentation Workflow



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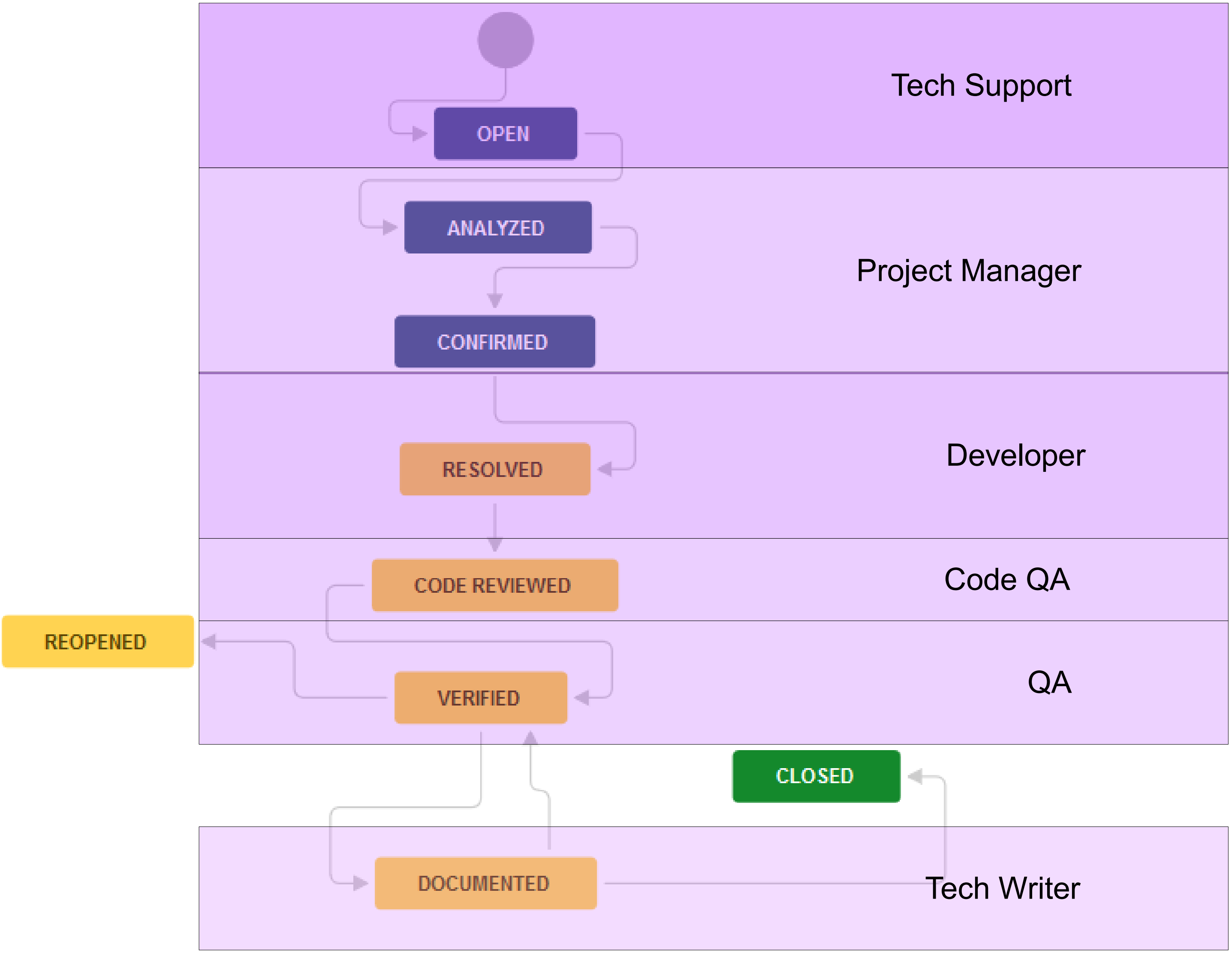
Issue tracking – Development and Documentation Workflow



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Issue Tracking and Storage Integration

Issue Tracker can provide a single place where you can monitor a ticket from start to end, including:

- Issue description and details
- Who worked on that issue
- What was changed in the application
- What was changed in the documentation
- Who should be notified when issue is resolved.

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Involving Subject Matter Experts

- SMEs provide original content (DITA or Markdown or ...)
- Let SMEs review the published output.
  - HTML with feedback forms
  - PDF with comments.
  - Formal review with web editing tool integrated with storage system.
  - Informal review DITA content using change tracking and comment capabilities

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How can end users collaborate with us?

- Send feedback via email/forum/phone.
- Send feedback in the published HTML output.
- Give feedback using an online DITA editing tool with comment-only capabilities.

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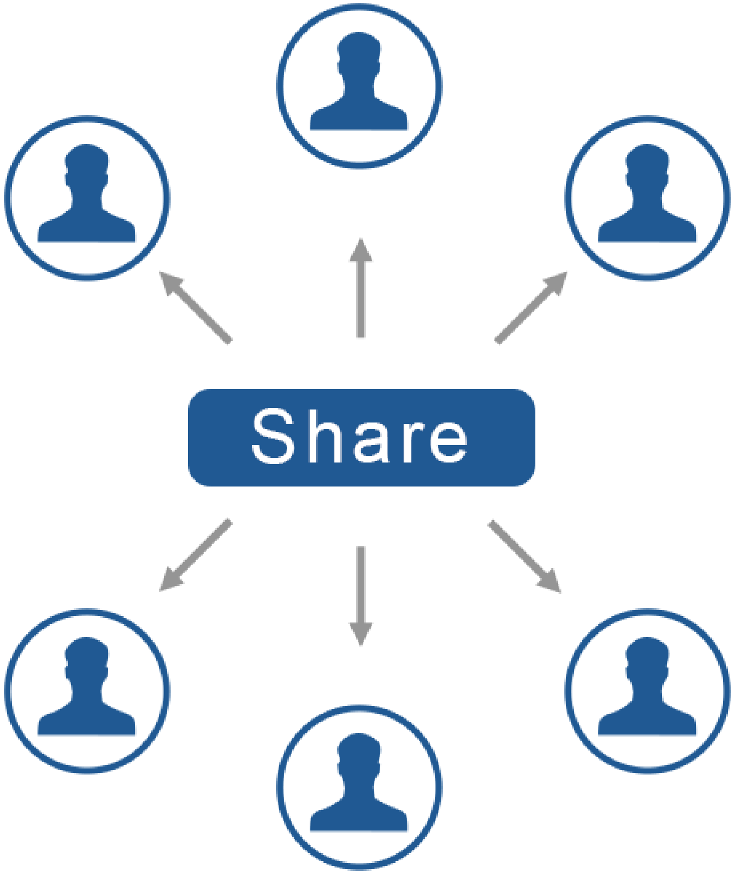
Contribution Consistency



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Sharing common settings between writers

- Custom style guide.
- Specific editing enhancements.
- Specific validation settings.
- Controlled attribute values.
- Custom spell and auto-correct dictionaries.
- Various other common preferences.

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Custom Style Guide

The style guide is internal documentation about how to write documentation.

How can we remember what's written in the style guide?

- Searchable help output from internal style guide.
- Find an automatic way to impose style guide rules when editing.

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Automating Style Guide Rules

https://blog.oxygenxml.com/2015/05/schematron-checks-to-help-technical.html

- Schematron to add custom validation rules.
- Schematron Quick Fixes to propose quick fixes for each custom error message.

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Using the same terminology rules

http://blog.oxygenxml.com/2017/06/checking-terminology-when-editing-in.html

- Custom Spell dictionaries.
- Custom auto-correct mappings.
- Advanced terminology checkers like Acrolinx, HyperSTE or LanguageTools.
- Building your own terminology checker using Schematron.

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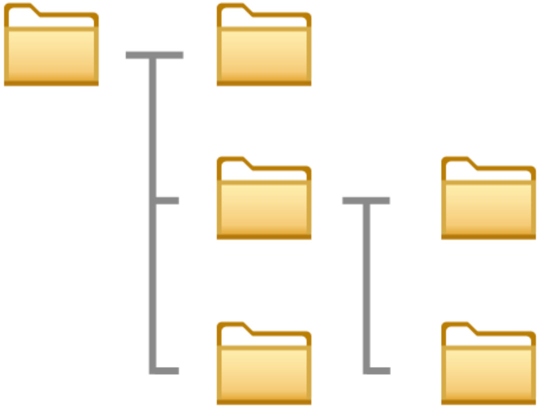
DITA Project Structure



- Organizing various resources in various folders
- Some CMSs may not consider this relevant.

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File and folder naming/organization conventions

- By type:
  - Tasks/t_installation.dita
  - Concepts/c_profiler.dita
- By semantics:
  - xslt_debugger/backmapping.dita

  https://www.oxygenxml.com/dita/styleguide/webhelp-feedback/Artefact/Documentation_Process/c_File_Naming_Conventions.html

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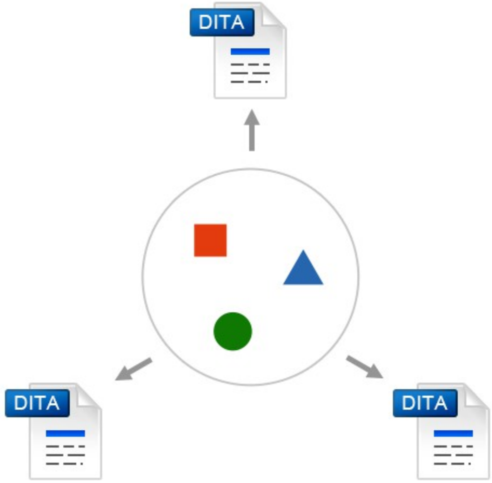
Managing Content Reuse

http://blog.oxygenxml.com/2015/11/dita-reuse-strategies-short-tutorial.html

- Separate folders containing reusable content.
- Keep dictionaries of reusable components
- Prefer indirect references (conkeyrefs)



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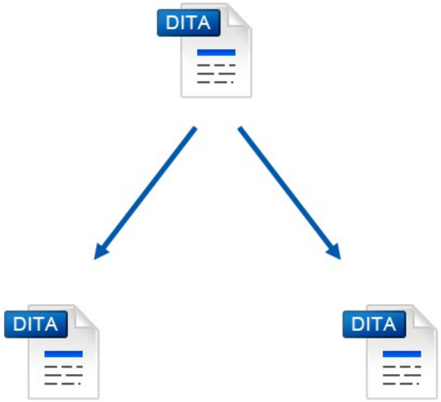
Managing Links

http://blog.oxygenxml.com/2017/06/dita-linking-strategies.html

- Prefer indirect links (key references)
  - Reuse link targets
  - Re-direct links depending on publication
- Use relationship tables



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Project-wide refactor operations

- Convert between various topic types.
- Rename or move one or more topics.
- Change XML structure in topics from the entire project.
  - Example: Change the value of a specific attribute.

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Translation

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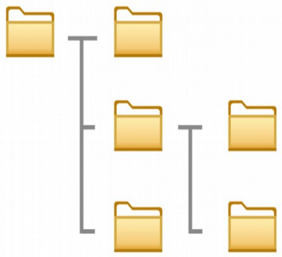
Translation

http://blog.oxygenxml.com/2018/05/translating-your-dita-project.html



- You create your content in the primary language using a DITA authoring tool.
- Send a copy of the relevant DITA files to the localization service provider (LSP).
- Receive translated DITA content back from (LSP).

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Optimizing for translation

https://www.infomanagementcenter.com/publications/best-practices-newsletter/2010-best-practices-newsletter/successful-localization-in-dita/

- Use a controlled vocabulary (simplified English).
- Avoid reusing inline elements other than product names.

  https://lists.oasis-open.org/archives/dita/201301/msg00029.html
- Avoid profiling/filtering content at inline level.

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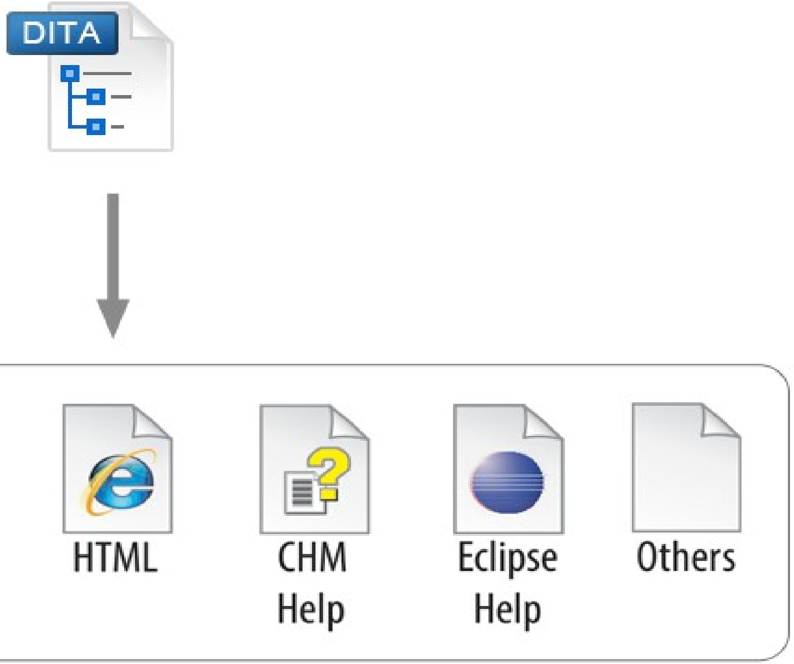
Publishing



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Map-wide Validation and Consistency Checks

- Validate each topic according to DITA standard.
- Check for broken links, key references and content references, missing images or referenced resources.
- Check for broken links to remote web sites.
- Check for broken links in the context of profiling filters.

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Producing the deliverables

- Checking the project before publishing.
- Sharing publishing customizations
- Automatic production of deliverables either via CMS or via an automated open source server (Jenkins).

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Useful links

- DITA Style Guide (by dr. Tony Self):

  https://www.oxygenxml.com/dita/styleguide/webhelp-feedback/
- Intelligent Style Guide (by George Bina):

  https://github.com/oxygenxml/dim
- Oxygen XML Blog (Reuse, Linking, custom validation, sharing settings):

  http://blog.oxygenxml.com/

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Conclusions
A healthy DITA project needs to:

- Be Manageable.
- Allow for scalability.
- Allow for easy collaboration.
- Allow for detection and correction of mistakes before the deliverables are published.
- Allow for correction of mistakes after the deliverables are published.

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Don’t panic

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