

Case Study for Single-Sourcing Reporting Software

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Summary: This case study outlines how Transcentive, Inc. creates a sample reports document (i.e., sales tool) from the product's user reference source documentation. The article graphically illustrates how our single-sourcing / re-purposing process works and includes an overview of where we began, what we learned along the way, and where we go from here.

Article:

Two years ago, the Information Development team at Transcentive, Inc. (a leading solutions and software provider for stock plan and global entity management) started down the path of "single-sourcing" and "re-purposing" its software documentation.

Our vision was to create source information using Adobe® Framemaker® 6.0 application (<http://www.adobe.com/>), and then re-use it in different ways to increase our productivity while generating quality documentation.

To single-source from those files, we planned to:

- Create books.
- Create online PDFs for distribution via CD-ROM and the company Web site.
- Create software help systems using Quadralay's WebWorks Publisher 7.0 application (<http://www.webworks.com>) for Transcentive's web-based and client / server financial reporting software.

To re-purpose from those files, we planned to:

- Convert file excerpts into other formats (such as Microsoft® Word 2000, <http://www.microsoft.com/>), for other groups in the company—sales, training, development, and support.
- Create Sample Report documents. The sales department uses these to present customers with detailed samples of the reports that the Transcentive software generates (www.transcentive.com).
- Create standalone documents such as Release Notes and Product Alerts for support and Transcentive's customer Web site.

To demonstrate how our single-sourcing / re-purposing process works, we present this case study that outlines how we create a sample reports document (i.e., sales tool) from the product's user reference source documentation.

The following discussion presents:

- Where We Began
- Our Process In Action
- What We Learned Along The Way
- Where We Go From Here

WHERE WE BEGAN

Planning, planning, and more planning. This process took two years and continues today during our weekly staff meetings.

In the initial planning sessions, these topics / tasks were addressed:

Buy in to the concept by writers and product management—Could our department afford the investment in time for the planning / implementation, and money for equipment?

Evaluate software product tools—Is Framemaker robust, flexible, and reliable enough? Is support readily accessible? Is the help system conversion process fairly seamless? Does everyone have a comfort level with the software?

Define the writing style—Do we agree that user reference material topics should be written in a functional format rather than menu driven style? Do we agree that we should use a “structured writing” style (Rockley 2003, pp.350–354)?

Create and adhere to templates based on the defined writing style—When files with set styles are converted to a help system or into different sized documents, does the process run smoothly with consistent results? Can we adjust the template? Are there templates for all document types?

Define source and text inset file sizes—We set these files to the user reference size of 7x9 inches, so that template size adjustments are minimized. Sample Reports and standalone documents such as Product Alerts or Release Notes were defined as 8.5 x 11 inches.

Cross-train—Each member of the writing team had a special role to play in communicating problems encountered, special needs, and design issues. Sharing of tips and shortcuts was essential.

Adhere to a file naming convention and directory structure—Whenever possible, source files were saved to the same three folder names in each directory: Frame, Graphics, and Stuff—to maintain cross references and graphic file links.

Document the template, tags, and style use—We created a centralized instructional document so that the next member of our team would know why we created the tags we did or why we did it that way (and for the days when we ourselves couldn't recall why).

Adjust to a group writing process—There was an adjustment period for writers who historically worked independently, because now the “source” files were common files. Collaborative authoring is often a result of discomfort and resistance (Rockley, Kostor, and Manning 2003, pp. 365–388).

Today, we continue to evaluate and revise how our documentation is created and handled, always keeping in mind the ripple effect a minor change can have down the line in the process. Our changes are always implemented on current documents (we don't look back too far).

OUR PROCESS IN ACTION

The Sample Reports document was designed to use Framemaker text inset flows and linked graphics (see Figure 1 for details).

"[insert Figure 1 here: Project Documentation File Construction (Figure_1_project_short.bmp)]"

We needed to make the following adjustments to the document structure of the report files in the user reference source files to re-purpose the files for a Sample Reports book:

- Created a separate 7x9 inch source file, i.e., text inset source, for each report.
- Formatted each report text inset source file so that it contained two named flows—Conceptual and Flow A (default main flow).
- Formatted each report text inset source file so that it ended with the paragraph override. For the last paragraph of each inset, except when the flow ended in a table or anchored graphic, we had to set Run-In Head Default Punctuation on the Pagination tab (Framemaker 6) to eliminate the extra line associated with the inset file.
- Where necessary, the user reference conceptual flow section was re-organized so that the text inset file did not contain more than one page of information in the Sample Reports book target file.

- Cross references were minimized, eliminated, or when necessary, we used hypertext named destination type references.
- Applied conditional text for information that is specific to a single product in a software suite, e.g., show_4_productabbreviation.
- Created a “container” book file for managing the sample report text inset files. Framemaker’s spell check and search / replace features do not check within text inset files of a book. Therefore, this container book is used for the purposes of selecting files, spell checking, and searching / replacing information or making style changes.

The book files (i.e., User Reference, Sample Report book) that use the container’s inset files is referred to as the target book.

- After all the report inset files were created, we replaced the user reference source file information with two text insets per report—Conceptual and Flow A.
- Created a Sample Reports book file that contained a chapter file for each category of Sample Report, e.g., Administrative, Tax Reporting, etc.

Within each chapter of the container book, each report consisted of a Heading Title, Conceptual flow inset, and a sample report graphic (linked by reference to the source file).

In the target files, we manually adjusted the main flow to force elements within a text flow to the next page when necessary.

WHAT WE LEARNED ALONG THE WAY

In summary:

- You should start small with the inset and pre-planning process.
- There is a learning curve for writers and readers alike.
- You must pay attention to small details, for example, page numbering, linking, spelling, style, conditional text, variable content, and indexing.
- The text inset process doesn’t work for all documents, for example, a course guide. We are currently evaluating the use of Framescript (<http://www.frameexpert.com/>) to mark areas of text to extract from the source files.

Finally, the Information Development team learned that reporting software offers a unique opportunity for single-sourcing and re-purposing our technical writing—if you plan ahead.

WHERE WE GO FROM HERE

The next single-sourcing project involves creating a training course guide from the user reference materials. This project will be challenging for all writers involved.

We will continue to evaluate our tools, style, templates, usage—what works and what doesn't. After all, nothing remains constant but change itself.

REFERENCES

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Rockley, Ann, with Pamela Kostur and Steve Manning. 2003. "Managing Enterprise Content: A Unified Content Strategy." Indianapolis, IN: New Riders.

Biosketch:

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