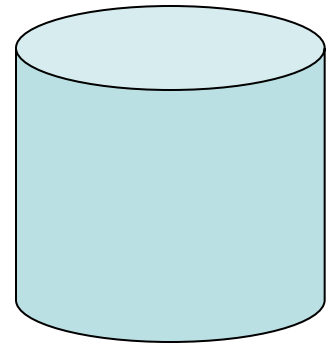


# Planning for Content Reuse

Best Practices for Legacy  
and New Content



# About me...

## **Eddie VanArsdall** **VanArsdall InfoDesign**

- Training
- Instructional Design
- Technical Writing
- Help Development



# Industries that I have served

- Legal
- Economic development
- Telecommunications
- Health care
- Health insurance
- Finance
- Grant management
- Cancer research

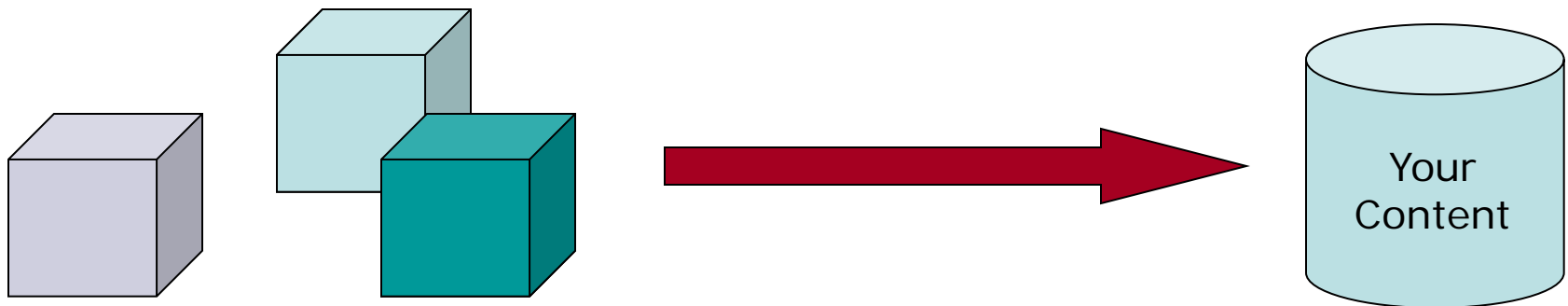




# This webinar is about...

Best practices for starting a “low-tech” content management project, including

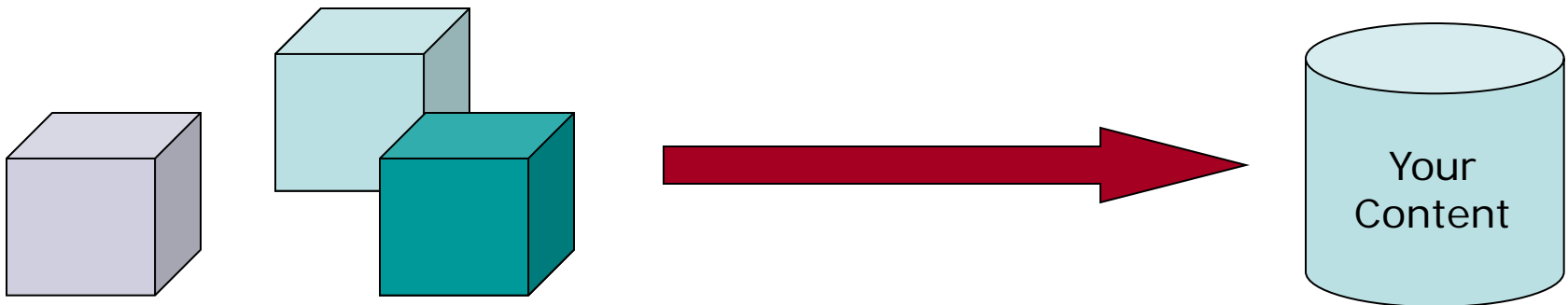
- Planning for content reuse
- Analyzing what you have
- Anticipating what you will need
- Building a content repository





# I'll give you ideas so that you can...

- Design a content model that supports **topic-based** writing
- Use templates to develop **information types** and **content units**
- Design a forward-looking infrastructure for **component-based** content management



# This webinar is **not**...

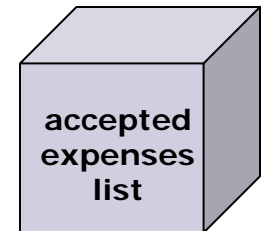
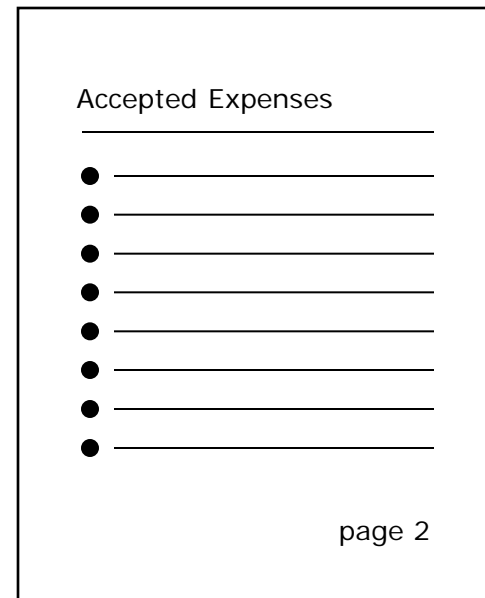
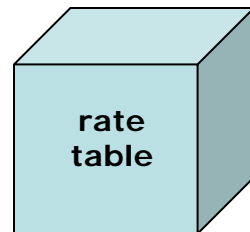
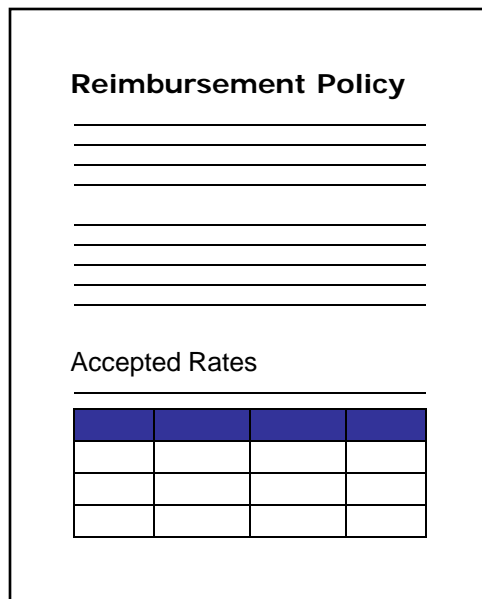
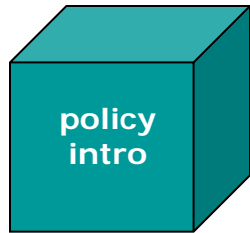
- A sales pitch for any tool
- A presentation about CMS deployment
- A substitute for available content management resources:
  - Bob Boiko
  - JoAnn Hackos
  - Ann Rockley





# This webinar is **not**...

About formatting and presentation.



It's about content.

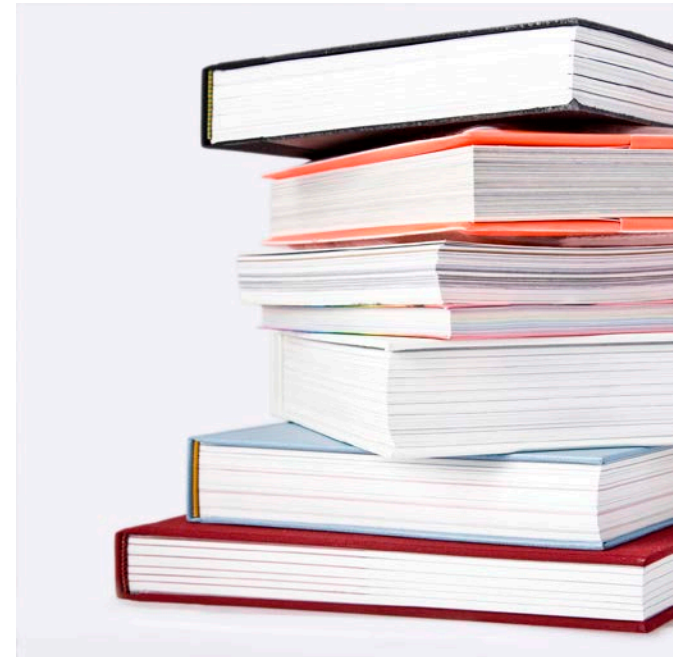


# Let's begin with **stories.**

A tale of woe...

A tale of confusion...

A tale of impending doom...





So where do you start?



# Maintain writing and style standards

- Style guide
  - Company
  - Industry
    - Sun *Read Me First!*
    - Microsoft Manual of Style
    - Chicago Manual of Style
  - Team
- Well-documented writing standards



# Consider your writing model

Are you still writing chapters?

- Linear, narrative writing
- Common phrases:
  - “As stated on page 2, ...”
  - “In the next section we will...”
- Can be appropriate for training or tutorials



# Consider topic-based writing

- **Proven:** Common in help authoring
- **Concise:** Promotes discrete chunks of information that provide just enough detail to enable users to
  - understand a concept
  - perform a task
  - find factual information
  - answer a question (FAQ)
  - solve a problem

More...

# Consider topic-based writing

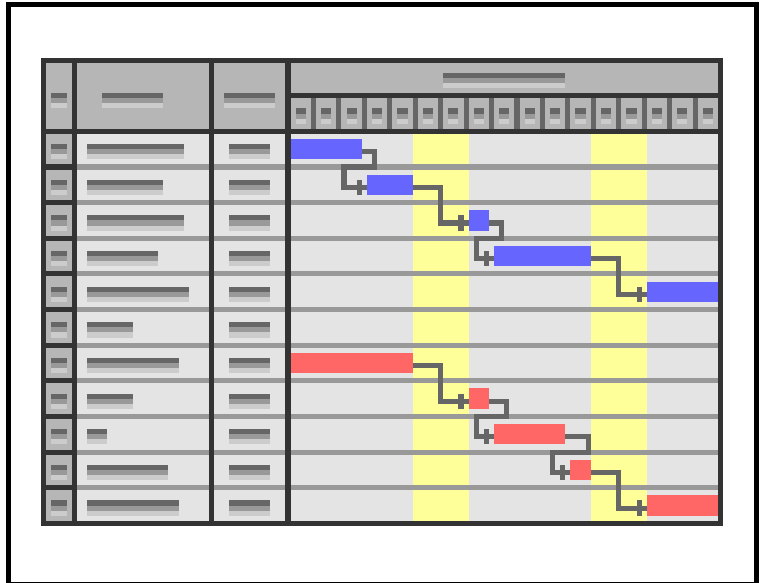
- **Readable:** Easy to scan
- **Consistent:** Has a uniform structure so that readers know what to expect
- **Standalone:** Can be understood in and out of context
- **Reusable:** Maps to related information through topic links
- **Searchable:** Promotes findability





# Maintain a solid project management infrastructure

Consistent with repeatable processes





# Use project templates to...

- Establish and maintain project standards (planning and analysis)
- Support a content planning and mapping *project*
- Separate yourself from authoring tools

Keep it simple: Use Word and Excel.

# Sample information plan

## Information Plan

VanArsdall InfoDesign ♦ 703-201-6433 ♦ evanarsdall@evidd.com

Project Name:	
Covered Date(s):	
Assigned Information Developer:	Edward VanArsdall

### Purpose of This Project

- <State purpose> ;
- <State purpose> }
- <State purpose> .

### Purpose of the Documentation

- <State purpose> ;
- <State purpose> ;
- <State purpose> .

### Usability Goals of the Documentation

To provide a clear path for users transitioning from a client-based version of **Product X** to the Web-based version. To accomplish this goal, we will use the following methods:

- <Method> ;
- <Method> .

# Sample task map

## Task Map for <client>

VanArsdall InfoDesign ♦ 703-201-6433 ♦ [evanarsdall@evidd.com](mailto:evanarsdall@evidd.com)

<b>Task:</b>	Create a table display report using a simplified workflow
<b>Description:</b>	Set up a table display report with minimal steps
<b>Prerequisites:</b>	Distinguish between table and crosstab display reports
<b>Subtasks:</b>	Add items
	Define conditions
<b>Follow-up tasks:</b>	Create a table display report using complete workflow
<b>Related tasks:</b>	Create one or more parameters
	Arrange the data layout
	Define sort criteria
	Update a query



# Sample information hierarchy

## **Information Hierarchy for Widgets, Inc.**

---

TOC

Images used in this guide

Lesson 1: Introduction to WidgetMaker

Lesson 2: Getting Started with WidgetMaker

Lesson 3: Creating Your First Widget

Lesson 4: Modifying a Widget

Lesson 5: Managing a Widget Library

Glossary

Index



# Other project templates

- Specifications
  - High-level: Answers basic questions
  - Detailed: Covers more specifics
- More detailed task analysis
- Use cases, user scenarios, personas
- Process or other flow diagrams
- Review comment forms



# Conduct a content inventory

- Also called a “content audit” (Rockley) or content analysis
- Starts with a random sampling:
  - User’s guide
  - API guide
  - Quick reference guide
  - Training material
  - Online help
- Identifies what samples have in common.

# Content inventory excerpt

## Content Inventory for <client> Information Products

VanArsdall InfoDesign ♦ 703-201-6433 ♦ [evanarsdall@evidd.com](mailto:evanarsdall@evidd.com)

### Product Type

Content Unit	User's Guide	API Guide	Quick Reference Card	Training Guide	Online Help
Copyright statement	X	X	X	X	X
Company logo	X	X	X	X	X
Conventions used	X			X	
Credits and resources	X	X		X	
Support contact info	X	X	X	X	X



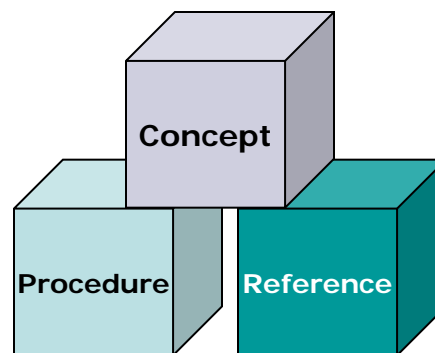
# Create a content model

- Establishes a framework for your content
- Results in a better user experience:
  - Information is consistently organized
  - Users can find what they're looking for
  - Users can get answers to their questions
- Can serve the entire company or seed departments such as documentation and training



# Identify your information types

- At the topic level:
  - Concept
  - Procedure
  - Reference
  - UI Element
  - Definition Topic
  - FAQ
  - Troubleshooting



# Sample information types

# Concept: About Widgets

---

Users need to understand the concepts behind processes, procedures, and product features. Ask yourself what concepts your users need to know, and explain each a concept using this format.

## Definition

### **widget**

A thingamabob.

## Examples...

Provide an example of the concept here. The example should enable the user to form a mental picture of the concept. Provide an image if necessary.

### **(Optional) Non-Examples**

Include any similar or closely related concepts that might confuse the reader's understanding. Provide an image if necessary.

### **(Optional) Analogy**

Use an analogy (usually from another domain) if it reinforces understanding.

### **(Optional) Synonyms**

If synonyms might help, provide them here.

## Illustrations

Provide any additional images here.

## Task: Creating a Widget

When you create a widget, you establish the type of widget and assign it various properties. The following procedure explains how to create and define the widget.

To create a widget, follow these steps:

1. Select the following menu command:  
**File > Create Widget.**

The New Widget window opens.

2. Select a widget type from the **Type** list:

- **Type1:** Explanation
- **Type2:** Explanation
- **Type3:** Explanation

3. Do one of the following, depending on what you selected in the last step:

If...	Then...
You selected Type3	Follow these steps: <ol style="list-style-type: none"><li>a. Click <b>Subproperties</b> and apply additional attributes.</li><li>b. Go to the next step.</li></ol>
You selected any other type	Go to the next step.

4. In the **Properties** area on the left, check the box for each property that you want to include.
5. Click **Add** to add the selected properties to the Selected area on the right.
6. Click **OK** to close the window and define the new widget.



Verify that the new widget exhibits all of the properties that you applied.





# Overview

You are here: Browsing Terminologies

## **Browsing Terminologies**

---

When using the NCI BioPortal, you may sometimes prefer to simply browse terminologies, rather than search for specific terms. The following topics explain how to browse the LexBIG library, as well as how to visualize and download terminologies.

[About the Terminologies Page](#)

[Viewing Project Information for a Selected Terminology](#)

[Visualizing a Terminology](#)

[Downloading a Terminology](#)



# Definition

## **FTP site (definition)**

An FTP site consists of an FTP server program located on an Internet host computer.

Many companies and organizations maintain FTP sites (also known as "FTP servers"). These can be

- File repositories from which you can copy files such as free programs and evaluation versions of software. WS\_FTP provides a number of popular FTP sites that have already been configured for you. When you connect to an FTP site like this, look for a file called *readme*, *readme.txt*, *index*, or *00index*. Such files provide descriptions of the resources available on the site as well as other useful information.
- File repositories where you can place files for use by others. (For example, a site on which you place your Web site pages for your ISP, or a site on which you place a photograph file for use in an on-line auction.)]



# FAQ: Too wordy

## Can I use a Mac instead of a PC?

Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo. Nemo enim ipsam voluptatem quia voluptas sit aspernatur aut odit aut fugit, sed quia consequuntur magni dolores eos qui ratione voluptatem sequi nesciunt. Neque porro quisquam est, qui dolorem **BLAH** quia dolor sit amet, consectetur, adipisci velit, sed quia non numquam eius modi tempora incidunt ut labore et dolore magnam aliquam quaerat voluptatem. Ut enim ad minima veniam, quis nostrum exercitationem ullam corporis suscipit laboriosam, nisi ut aliquid ex ea commodi consequatur? Quis autem vel eum iure reprehenderit qui in ea voluptate velit esse quam nihil molestiae consequatur, vel illum qui dolorem eum fugiat quo voluptas nulla pariatur?"

Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo. Nemo enim ipsam **BLAH** quia voluptas sit aspernatur aut odit aut fugit, sed quia consequuntur magni dolores eos qui ratione voluptatem sequi nesciunt. Neque porro quisquam est, qui dolorem ipsum quia dolor sit amet, consectetur, adipisci velit, sed quia non numquam eius modi tempora incidunt ut labore et dolore magnam aliquam quaerat voluptatem. Ut enim ad minima veniam, quis nostrum exercitationem ullam corporis suscipit laboriosam, nisi ut aliquid ex ea commodi consequatur? Quis autem vel eum iure reprehenderit qui in ea voluptate velit esse quam nihil molestiae consequatur, vel illum qui dolorem eum fugiat quo voluptas nulla pariatur?" Sed ut perspiciatis unde omnis iste natus error sit voluptatem **BLAH** doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis...

**NO.**



# FAQ: Streamlined

## Can I use a Mac instead of a PC?

Although PCs are the standard equipment issued by WidgetsRUs, you can use a Mac if you are willing to sign a service waiver.

[Read the full policy](#)

# Assign metadata for generic types

**Information Type:** Procedure

**Title:**

**Description:**

**Author:**

**Date:**

Attribute	Value	Assigned
User	Editor	
	Workflow Manager	
Product	Protégé local install	
	Protégé server install	
Delivery	Print	
	Online Help	
Language	English	
	French	

# Assign metadata to written modules

**Information Type:** Procedure  
**Title:** Running a baseline comparison  
**Description:** Explains how to run tools that compare two versions of the thesaurus.  
**Author:** Eddie VanArsdall  
**Date:** February 24, 2009

Attribute	Value	Assigned
User	Editor	
	Workflow Manager	X
Product	Protégé local install	
	Protégé server install	X
Delivery	Print	
	Online Help	X
Language	English	X
	French	

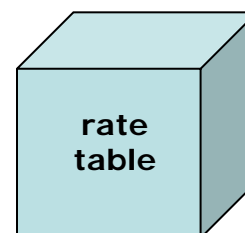
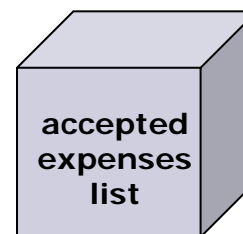
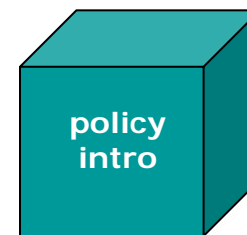
# Info types in an information model

Type	Description	Instance
Concept	Provides the prerequisite knowledge for performing a task.	<a href="#">About widgets</a>
Procedure	Provides instructions that enable users to complete a task.	<a href="#">Creating a widget</a>
Reference	Provides factual, look-up information such as a list of commands.	<a href="#">WidgetMaker commands</a>



# Identify your content units

- Modular building blocks for topics:
  - Procedures
  - Unordered lists
  - Tables
  - Paragraphs
  - Sentences
  - Phrases
  - Words



Sample content units



## SOP purpose statement

### Purpose

This document establishes the oversight procedure for research and development activities in the **Widget Monitoring** sector.

## SOP activities list

### Current activities

Current **Widget Monitoring** activities include

- **Development of a widget classification taxonomy**
- **Monitoring of newly defined widgets with built-in seeking intelligence**
- **Study on widget biolab**

## Wiki registration statement

### Before You Begin

Although you are welcome to browse and search this wiki, you need to register as a collaborator to perform certain tasks that are detailed on this page. If you want to propose additions or changes to current terminology, see [Registration Process for Collaborators](#).



# Training module

**Introduction**  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**About...**  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
**Key Concepts**  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Creating...**  
\_\_\_\_\_  
1. \_\_\_\_\_  
2. \_\_\_\_\_  
3. \_\_\_\_\_  
4. \_\_\_\_\_

	_____
	_____
	_____

**Challenge**  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Objectives**  
\_\_\_\_\_  
● \_\_\_\_\_  
● \_\_\_\_\_  
● \_\_\_\_\_



# Training module

<b>Introduction</b> _____ _____ _____
<b>Objectives</b> _____ ● _____ ● _____ ● _____
<b>About...</b> _____ _____ _____ <b>Key Concepts</b> _____ _____ _____
<b>Creating...</b> _____ 1. _____ 2. _____ 3. _____ 4. _____

<b>Lab X...</b>	
_____	_____
_____	_____
<b>Steps</b> _____ 1. _____ 2. _____ 3. _____ 4. _____	
<b>Challenge</b> _____ _____ _____	



### Lab 3: Configure the local thesaurus file

<b>Purpose</b>	When you first install a local thesaurus project, you need to activate the LocalThesaurus plug-ins.
<b>Objectives</b>	Activate the LocalThesaurus plug-ins
<b>Preparation</b>	Open the <code>lab3.ths</code> file.
<b>Process</b>	Complete this exercise on your own.

#### Steps:

To complete this lab, follow these steps:

1. Open the project file.
2. Select the following menu command: **Project > Configure**.
3. Select the **Plug-ins** tab in the Configure File window.
4. Check the box to the left of each **LocalThesaurus** plug-in.
5. Click **OK**.

#### Challenge:

Open the `lab3a.ths` file. Select a term and auto-generate a term tree.



# Procedure in two contexts: user's guide and lab exercise

## Configuring the local thesaurus file

When you first install a local thesaurus project, the LocalThesaurus plug-ins are not yet active. This procedure explains how to activate the plug-ins.

To activate the LocalThesaurus plug-ins, follow these steps:

1. Open the project file.
2. Select the following menu command: **Project > Configure**.
3. Select the **Plug-ins** tab in the Configure File window.
4. Check the box to the left of each **LocalThesaurus** plug-in.
5. Click **OK**.

### Related Topics:

- [Running local term queries](#)
- [Running the classifier plug-in](#)

## Lab 3: Configure the local thesaurus file

<b>Purpose</b>	When you first install a local thesaurus project, you need to activate the LocalThesaurus plug-ins.
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5. Click **OK**.

### Challenge:

Open the `lab3a.ths` file. Select a term and auto-generate a term tree.

Heading  
 Purpose statement  
 Stem intro  
 Steps  
 Related Topics links

Heading  
 Lab table  
 Stem intro  
 Steps  
 Challenge

Let's conclude  
with some  
**reminders.**

# Start *small*; think **BIG**

- Analyze your own department's content
- If possible, partner with another group:
  - Documentation
  - Training
- Identify content that the two can share
- Create templates to support content modeling and reuse

# Step away from authoring tools

Use common office productivity tools to

- Document the results of your analysis
- Create a content model
- Map out the model

Adapt the tool to the model; don't adapt the model to the tool.



Focus on your

**Users.**

# Resources used for this webinar

- *Is the Help Helpful?* by Jean Hollis Weber  
2004. Whitefish Bay, WI: Hentzenwerke  
ISBN: 1-930919-60-3
- *Content Management for Dynamic Web Delivery*  
by JoAnn T. Hackos  
2002. New York, NY: Wiley & Sons  
ISBN: 0-471-08586-3
- *Managing Enterprise Content*  
By Ann Rockley, Pamela Kostur,  
and Steve Manning  
2003. Indianapolis, IN: New Riders  
ISBN: 0-7357-1306-5

[More...](#)

# More resources used for this webinar

- *The Content Management Bible*  
By Bob Boiko  
2<sup>nd</sup> Ed, 2005. New York, NY: Wiley & Sons  
ISBN: 0-7645-7371-3
- *Developing Technical Training*  
By Ruth Colvin Clark  
3<sup>rd</sup> Ed, 2008. San Francisco, CA: Pfeiffer  
ISBN: 978-0-7879-8846-3

# Contact me

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