



DITA Worst Practices: What *Not* to Do

Keith Schengili-Roberts • March 15, 2018



OASIS DITA Adoption Technical Committee





Agenda



1. Introduction
2. Dud Decisions
3. Poor Processes
4. Q/A



Keith
Schengili-Roberts

@KeithIXIASOFT



What I do:

- DITA Evangelist & Market Researcher at IXIASOFT
- Chair of OASIS DITA Adoption Committee
- Member of OASIS DITA Technical Committee and LwDITA Sub-committee
- 12+ years of experience with DITA XML
- Lectured on IA and Info Management at the University of Toronto for 16 years



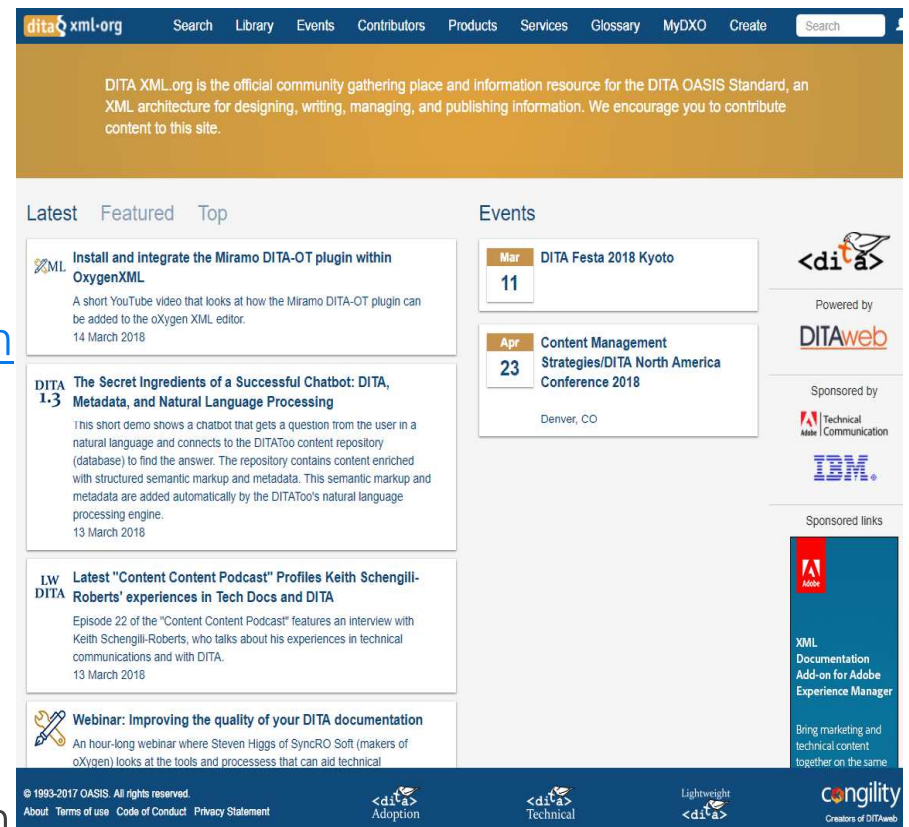
AKA “DITAWriter”

- Industry blog started 6+ years ago
- Over 290,000 hits(!)
- Regularly updated info on DITA conferences, DITA books, companies using DITA, DITA CMSes, DITA editors, other DITA tools, and DITA consulting firms
- News and views on DITA use
- Also features interviews with those making a difference in the world of DITA

The screenshot shows the homepage of the DITAWriter website. At the top, there is a navigation bar with links for ARTICLES, NEWS, INTERVIEWS, WEBINARS, SOFTWARE UPDATES, DITA CONSULTANTS, and ABOUT. A search bar is located on the right side of the navigation bar. Below the navigation bar, the website's logo, "<di>a>Writer", is displayed. A main banner features a clock face with the text "DON'T WAIT FOR THE DITA 2.0 STANDARD TO MIGRATE TO DITA" and a quote: "I and some of my colleagues have run into a few people at recent conferences who have been asking me...". Below the banner, there are tabs for "Latest Blogs", "Popular", and "Recommended". The "Latest Blogs" section shows two articles: "SIGDOC 2017: EDUCATING TOMORROW'S TECHNICAL COMMUNICATORS" and "DON'T WAIT FOR THE DITA 2.0 STANDARD TO MIGRATE TO DITA". On the right side, there is a "FOLLOW ME ON TWITTER" section with a tweet from @ditawriter and a "RECENT POSTS" section with a list of links to various articles.

The DITA Adoption Technical Committee

- OASIS DITA Adoption Technical Committee goo.gl/5BySBc
- Twitter: @dita_adoption
- SlideShare: [slideshare.net/DITA Adoption](http://slideshare.net/DITA_Adoption)
- OASIS DITA Adoption Committee articles: look under “Expository Work Produced by the Committee” on our OASIS webpage
- My thanks to IXIASOFT for allowing me dedicated time devoted to DITA Adoption efforts



The screenshot shows the homepage of DITA XML.org. The header includes navigation links: Search, Library, Events, Contributors, Products, Services, Glossary, MyDXO, Create, and a search bar. Below the header, a mission statement reads: "DITA XML.org is the official community gathering place and information resource for the DITA OASIS Standard, an XML architecture for designing, writing, managing, and publishing information. We encourage you to contribute content to this site."

The main content area is divided into two columns. The left column, titled "Latest", features three articles:

- Install and integrate the Miramo DITA-OT plugin within OxygenXML**: A short YouTube video that looks at how the Miramo DITA-OT plugin can be added to the Oxygen XML editor. 14 March 2018.
- The Secret Ingredients of a Successful Chatbot: DITA, Metadata, and Natural Language Processing**: This short demo shows a chatbot that gets a question from the user in a natural language and connects to the DITAoo content repository (database) to find the answer. The repository contains content enriched with structured semantic markup and metadata. This semantic markup and metadata are added automatically by the DITAoo's natural language processing engine. 13 March 2018.
- Latest "Content Content Podcast" Profiles Keith Schengill-Roberts' experiences in Tech Docs and DITA**: Episode 22 of the "Content Content Podcast" features an interview with Keith Schengill-Roberts, who talks about his experiences in technical communications and with DITA. 13 March 2018.
- Webinar: Improving the quality of your DITA documentation**: An hour-long webinar where Steven Higgs of SyncRO Soft (makers of oXygen) looks at the tools and processes that can aid technical

The right column, titled "Events", lists two upcoming events:

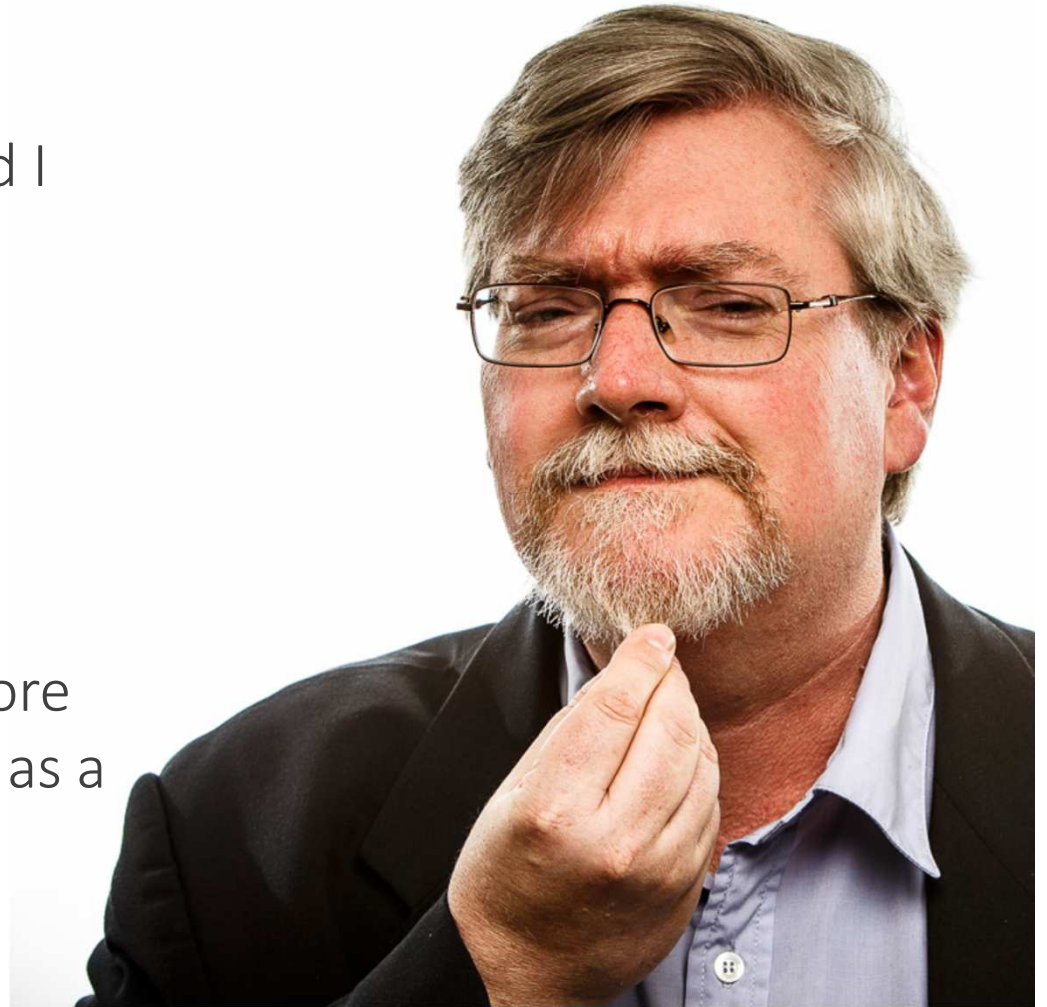
- Mar 11 DITA Festa 2018 Kyoto**
- Apr 23 Content Management Strategies/DITA North America Conference 2018** (Denver, CO)

On the right side of the page, there are logos for "Powered by DITAweb", "Sponsored by Technical Adobe | Communication IBM", and "Sponsored links" for Adobe XML Documentation Add-on for Adobe Experience Manager. The footer contains copyright information: "© 1993-2017 OASIS. All rights reserved." and logos for DITA Adoption, DITA Technical, Lightweight DITA, and Congility (Creators of DITAweb).



How This Presentation Came About

- Last year I went to the CIDM *Best Practices* conference, and I got to thinking...
- How often do best practices emerge after trying out what ended up being a “worst practice”?
- I also think we learn things more readily when they are framed as a story of “things gone wrong”





This Presentation is Crowd-sourced

- While I have some good stories of my own of DITA mishaps and adventures, I decided to reach out to my colleagues and peers in the industry to get their take on the subject
- My thanks to everyone who responded!
- In some cases the contributor of the anecdote does not wish to be identified
- In all cases, no company names are mentioned





A Pattern Emerges...

Two main types of issues appeared:

1. DITA-specific issues (aka, “poor information architecture decisions were made”)
 2. Problems with processes (aka, “how *not* to work effectively with people”)
- Boundaries between categories can be fuzzy; ultimately it comes back to the people behind the issues

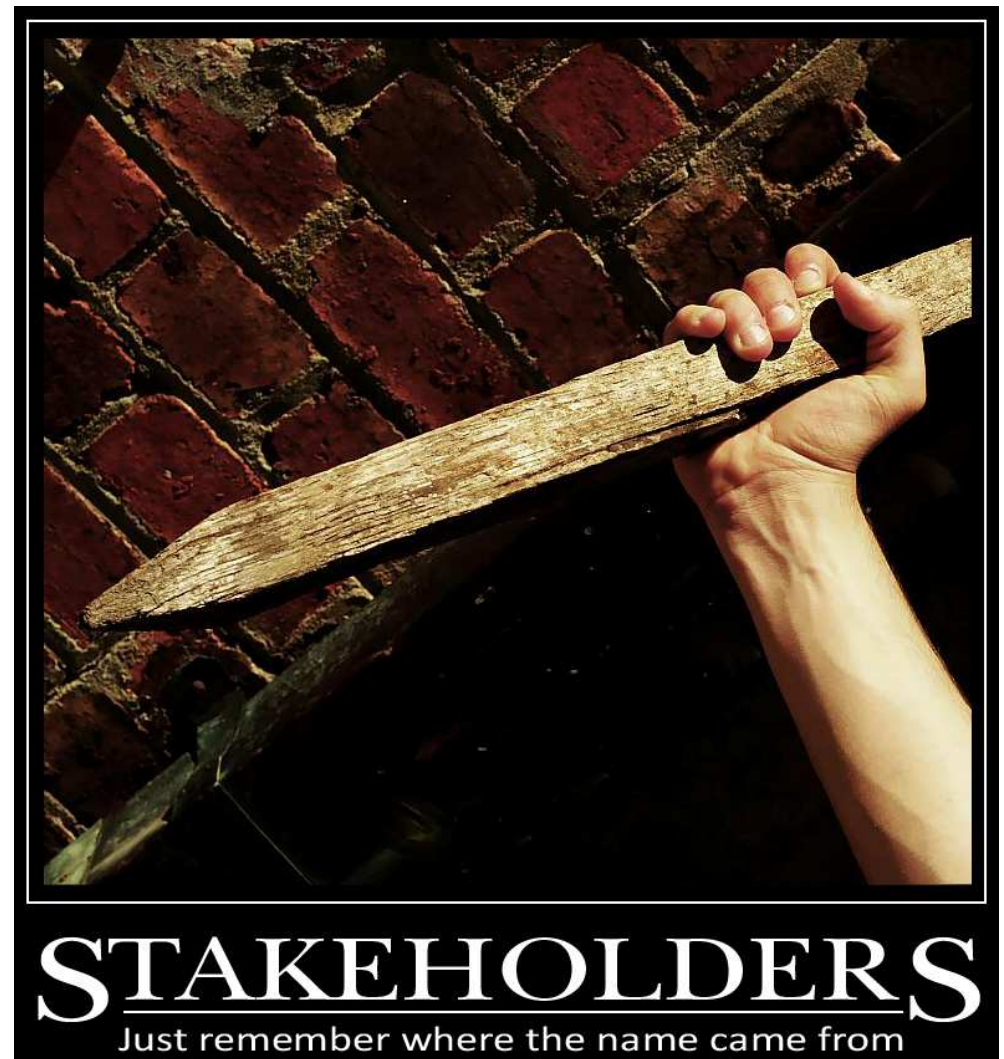


Identifying Roles

“Who makes which bad decisions” by role helps to clarify things:

- Worst executive/sponsor/stakeholder decisions
- Worst people management decisions
- Worst DITA Information Architect decisions
- Worst DITA toolsmith decisions
- Worst writer decisions

The lesson here is that many of the decisions made were rarely the result of a single person’s actions, but of many people not working together effectively



Original image by Jes <https://www.flickr.com/photos/mugley/310184558/>



What The Fudge?

- While these two categories capture the essence of the types of problems from an objective, dispassionate perspective, there's often a third, more intangible "What The Fudge" factor that turns up
- This is what typically propels what otherwise would have been a bad experience into a memorable "worst experience"

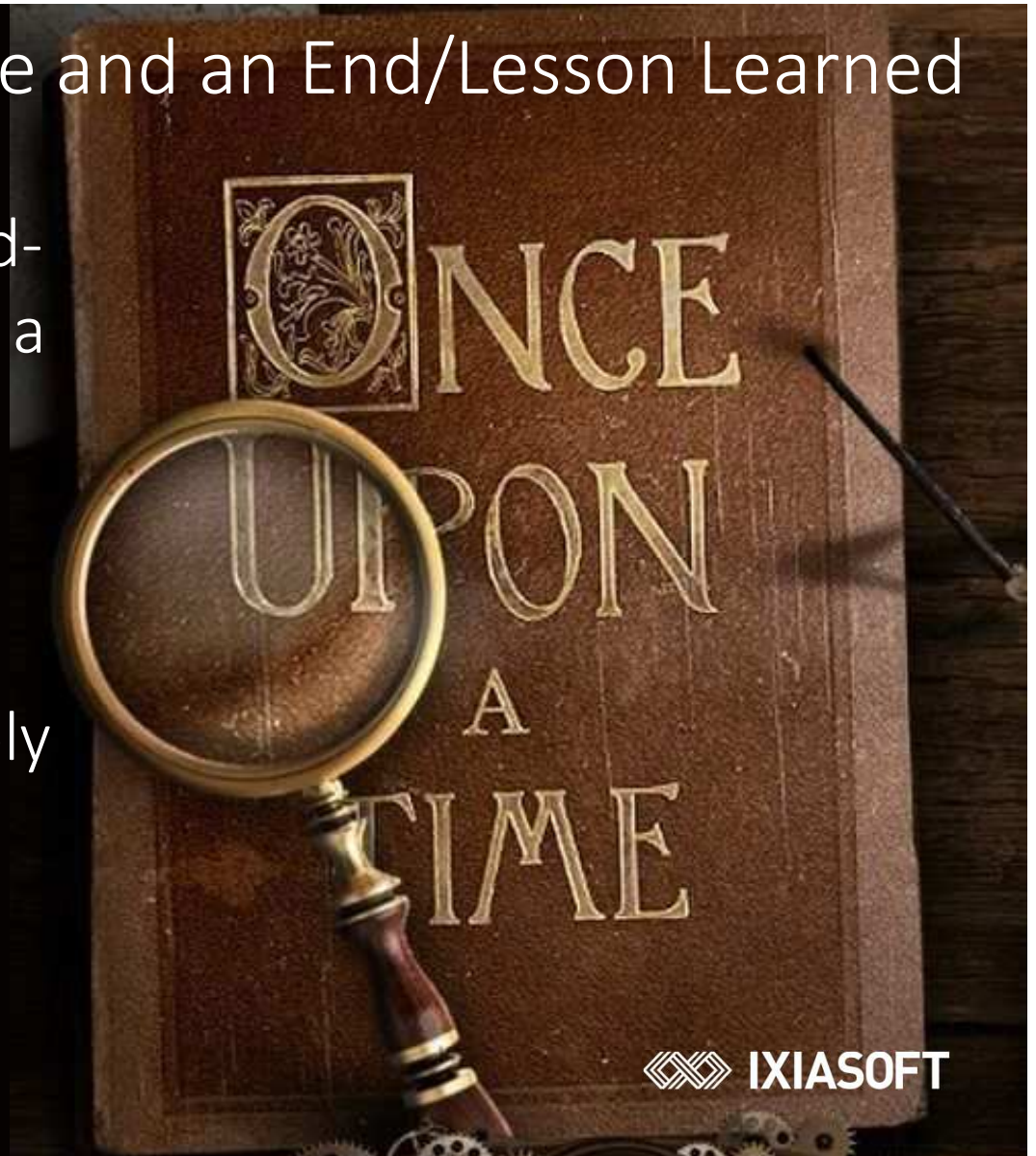




A Beginning, a Middle and an End/Lesson Learned

My tales use this tried-and-true three part process of a good story:

1. The good intention/beginning
2. How things went horribly wrong
3. What can be learned

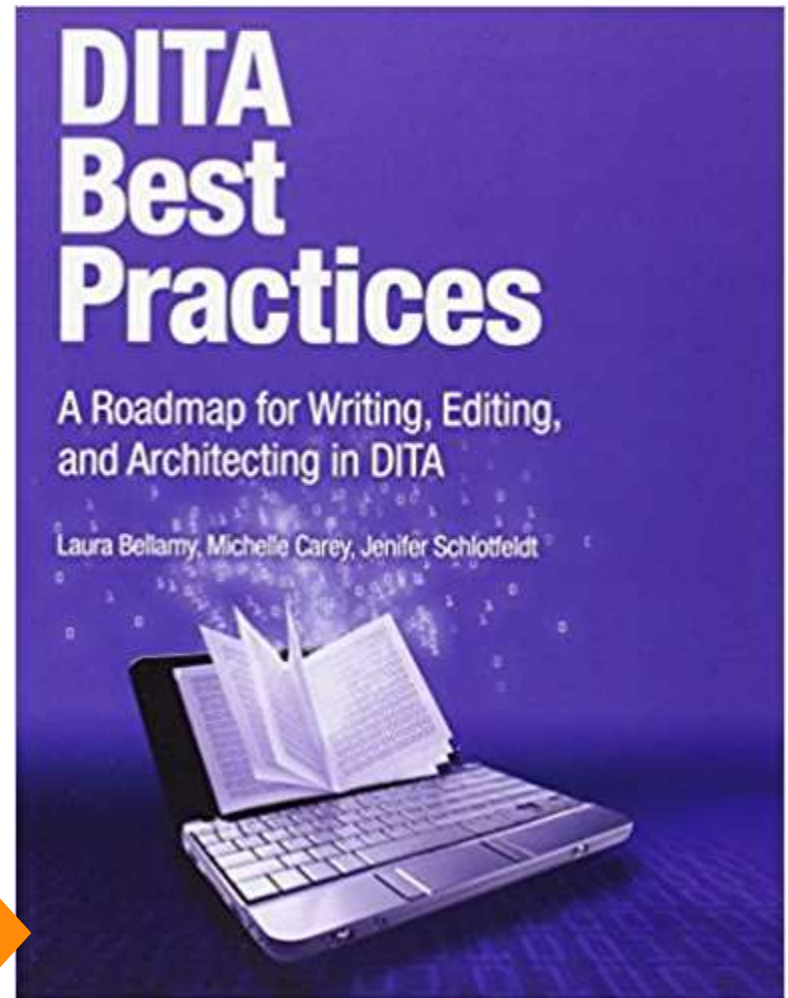




DITA Best Practices are More Widely Known

- Before I get started, I just want to point out that many of the examples here are from the early days of DITA
- While many of these problems keep coming up, greater dissemination of DITA best practices from people who have experience using DITA and better tools means that there is a growing “core” of people with good experience out there
- But we can still learn from “Worst Practices”

A really good book, from 2011





DITA-specific Issues (aka “Poor Information Architecture Decisions Were Made”)





#1. Content Reuse is Always a Good Thing, Right?

Yes, but it also depends on how you do it.
Consider this example:

- A tech docs group finds that they want use the conref mechanism for reuse purposes, such as:
 - Creating a standard way of referencing standardized phrases, such as “Click OK”
 - “Let’s use the new trademark term used in this topic and use that everywhere”
 - One writer likes a paragraph another writer has created in a topic

In all/most cases, the first version encountered is conrefed, which is in turn re-conrefed, and so on, and so on...





Welcome to “Spaghetti Conrefs”

How the pain emerges:

- Someone conrefs a phrase containing a conref, which may contain another conref, and so on, and so on...
- Nobody knows the origin of the original conref and it needs to be changed...
- Somebody changes the targeted conref-ed word/phrase/block unknowingly, affecting all publications that link to it





The Horror... The Horror...

“I have seen 20K references to a single topic, in a folder containing 40K objects. I saw this when a small amount of content needed to be extracted and handed off and *10K topics having to be included for a 20-topic map, because you can never get to the bottom of the broken links to files which link to other files which link to...*”





Solutions to Spaghetti Conrefs

- ~~1. Just don't do that.~~ For phrases that are commonly used, create a conref warehouse: a single file or set of files that cover most commonly-used blocks of content
 - When people want to add new items, discuss within the team, then add accepted additions to this warehouse topic(s)
2. For trademark terms / product / company names, consider using keys, and storing their values in a key warehouse topic(s)



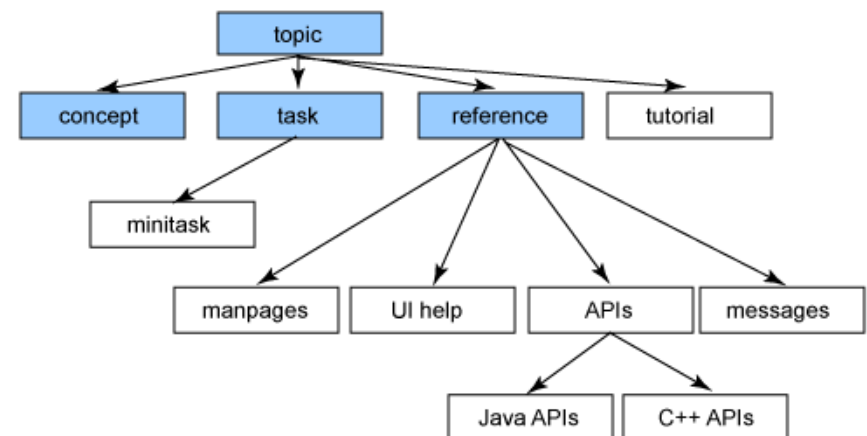
Nolwenn Kerzreho

Technical Account Manager Europe,
IXIASOFT



#2. Never Specialize Your Content

- Specialization is core to DITA, allowing people to create new topic types, elements and attributes
- The general recommendation has been: “do not specialize if you don’t have to”; specialization is not easy, and it can limit content reuse, especially if you intend to share your content to other organizations
- But “never” is a strong word...





A Worst Practice from a Supposed Best Practice

An example that shows the pain this can cause:

- Client was (incorrectly) told not to specialize
- Implementation had to be done on a tight timeline (uh oh...)
- As a result, there were @outputclass-es in places that didn't make a lot of sense, including:
 - Individual table cells (instead of to the table or row)
 - Various types of images for explicit scaling purposes
 - Bibliographic references (which also included convoluted, doubly-referenced conrefs)
- These were all poorly designed, ultimately making more work for the writers



Pairman's Outputclass Rule

- Result: a frustrating mess for all involved
- Better, more judicious use of the available DITA elements, such as wrapping a fig element around image for better block-level formatting
- Pairman's Outputclass Rule: "if an organization uses the outputclass attribute for more than two or three different features, think instead at better leveraging the standard, including the possibility of creating a specialization."



Joe Pairman
Lead Consultant, Mekon

</> #3. If a DITA Tag Exists, We Should Use It

Basic + Technical DITA 1.3 Elements

Sharon Figueira's story: "during the first migration I did, my team and I were so enchanted with DITA and its every last detail that we implemented as many tags as possible. We had the approach of: 'if it's there we should use it'.

abbreviated-form	change-started	dlhead	groupchoice	msgblock	propdeschd	source	textentity
abbrevlist	change-summary	draft-comment	groupcomp	msgnum	properties	spare	tgroup
abstract	chapter	draftintro	groupseq	msgph	property	spares	thead
addressdetails	chdesc	dt	hasInstance	namedetails	prophead	sparesli	throughfare
administrativearea	chdeschd	dthd	hasKind	navref	proptype	started	title
alt	chhead	dvrKeyscopePrefix	hasNarrower	navtitle	proptypehd	state	titlealts
amendments	choice	dvrKeyscopeSuffix	hasPart	noconds	propvalue	stentry	tm
anchor	choices	dvrResourcePrefix	hasRelated	nosafety	propvaluehd	sthead	toc
anchord	choicetable	dvrResourceSuffix	hazardstatement	nospare	pt	stepresult	topic
anchorkey	choption	edited	hazardsymbol	nosupeq	published	steps	topicably
anchorref	choptionhd	edition	honorific	nosupply	publisher	stepsection	topicCell
apiname	chrow	elementdef	howtoavoid	note	publisherinformation	steps-informal	topicgroup
appendices	cite	emailaddress	i	notices	publishstye	steps-unordered	topichead
approved	closerreqs	emailaddresses	image	no-topic-nesting	q	steptroubleshooting	topicmeta
area	cmd	entry	imagemap	numcharref	refbody	stepxmp	topicref
attributedef	cmdname	enumerationdef	index-base	object	refbodydiv	sthead	topicref
audience	codeblock	equation-block	indexlist	ol	reference	strow	topicsetref
author	codeph	equation-figure	index-see	oper	refsyn	sub	topicsubject
authorinformation	coderef	equation-inline	index-see-also	option	related-links	subjectCell	topicSubjectHeader
b	colophon	equation-number	index-sort-as	organization	relatedSubjects	subjectdef	topicSubjectRow
backmatter	colspec	estime	indexterm	organizationinfo	relcell	subjectHead	topicSubjectTable
bibliolist	completed	example	indextermref	organizationname	relcolspec	subjectHeadMeta	trademarklist
body	component	exportanchors	info	organizationnamedetails	relheader	subjectRef	tbody
bodydiv	conbody	featnum	isbn	otherinfo	relrow	subjectRel	tbody
bookabstract	conbodydiv	fig	itemgroup	othermeta	reltable	subjectRelHeader	tbody
bookchangehistory	concept	figgroup	keydef	override	remedy	subjectRelTable	tbody
bookevent	condition	figurelist	keyword	param	repsep	subjectRole	tbody
bookeventtype	consequence	filepath	keywords	parameterentity	reqcond	subjectScheme	tbody
bookid	contactnumber	firstname	kwd	parml	reqconds	subjectScheme	tbody
booklibrary	contactnumbers	fn	lastname	parmname	reqcontp	substep	tbody
booklist	context	foreign	li	part	reqpers	summary	tbody
booklists	coords	fragment	lines	pd	required-cleanup	sup	tbody
bookmap	copyfirst	fragref	line-through	permissions	resourceid	supeql	tbody
bookmeta	copyholder	frontmatter	link	perscat	responsibleParty	supequi	tbody
booknumber	copyright	generationidentifier	linkinfo	perskill	result	supequip	tbody
bookowner	copyrlast	glossAbbreviation	linklist	person	reviewed	supplies	tbody
bookpartno	copyyear	glossAcronym	linkpool	personinfo	revised	supply	tbody
bookrestriction	country	glossAlt	linktext	personname	revisionid	supplyli	tbody
bookrights	created	glossAlternateFor	localityname	personnel	row	svg-container	tbody
booktitle	critdates	glossarylist	localityname	ph	safecond	svgref	tbody
booktitlealt	data	glossBody	longdescref	platform	safety	synbik	tbody
boolean	data-about	glossdef	longquoteref	plentry	schemeref	synnote	tbody
brand	day	glossentry	lq	postalcode	screen	synoteref	tbody
category	dd	glossgroup	mainbooktitle	postreq	searchtitle	synph	tbody
cause	ddhd	glossPartOfSpeech	maintainer	pre	section	syntaxdiagram	tbody
change-completed	dedication	glossProperty	map	preface	sectiondiv	systemoutput	tbody
change-historylist	defaultSubject	glossref	mapref	prelreqs	sep	table	tbody
change-item	delim	glossScopeNote	markupname	prereq	series	tablelist	tbody
change-organization	desc	glossShortForm	mathml	printlocation	shape	task	tbody
change-person	dita	glossStatus	mathmlref	prodinfo	shortcut	taskbody	tbody
change-request-id	ditaavalmeta	glossSurfaceForm	menucascade	prodname	shortdesc	tasktroubleshooting	tbody
change-request-reference	ditaavalref	glossSymbol	messagepanel	prognum	tbody	tbody	tbody
change-request-system	div	glossSynonym	metadata	prolog	simpletable	tbody	tbody
change-revisionid	dl	glossTerm	middlename	propdesc	si	tbody	tbody
	dentry	glossUsage	month		sli	tbody	tbody
					sort-as	tbody	tbody

433 Elements



The Problem, The Pain

- It was a self-made problem: “The ridiculous thing was that we weren’t using these tags before DITA, so why we thought we suddenly had a need for `filepath` etc. I have no idea.”
- The pain: “the writers soon revolted and refused to put in multiple inline tags per paragraph.”

Luigi Russolo, The Revolt (1911)



Figueira's DITA Complexity Formulation

- There are many tag and element choice options in DITA, and you are not obliged to use them all
- While you might want to add new semantically-descriptive tags/elements to your existing content when migrating...
- Figueira's DITA Complexity Formulation: "Build out complexity slowly and in response to a well-understood need."



Sharon Figueira
Pre-Sales Engineer, IXIASOFT



#4: All DITA is Good DITA, Right?

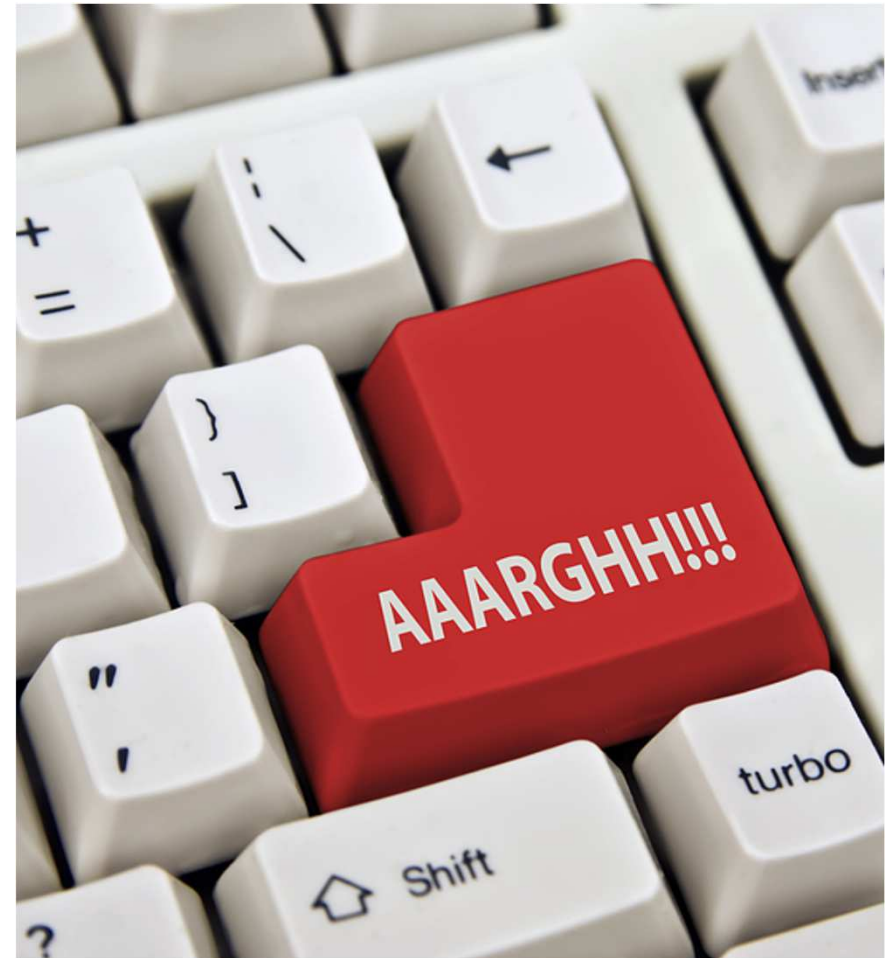
- The scenario: firm is moving to DITA, decides to contract with an outside firm to migrate their legacy content over to DITA
- Client is new to DITA; assumes content migration firm knows what it is doing and so the client provides little or no direction on how to do the conversion





Problems with Unoptimized DITA Converted Content

- Conversion firm does its best, but without guidance it can't optimize the content for the needs of the client; creates DITA content using minimal DITA tagging, done in the most generic manner possible
- Final result initially looks good, but problems emerge:
 - Works poorly with newly-created DITA content
 - Need to convert from generic to specific topic types
 - Provides no guidance to writers working with content
 - Problematic when it comes to content reuse
 - Keys for product names not present





Pringle's Directions for DITA Conversion Success

1. Learn enough DITA to know what you need to specify in any converted legacy content.
2. Create new, sample content covering what you think you will need. When it works the way you intend, show it to the conversion firm. If they are good at what they do, they will provide suggestions based on your model to improve it.
3. Only then begin the legacy conversion!



Alan Pringle

Chief Operating Officer,
Scriptorium Publishing



#5: A DITA Test Output Document? What's That?

- A DITA output related tale: a DITA test document is a map + topics designed specifically to test output conditions
- As new XSL transforms are added, add content to the test document to see how they work
- Can be used to test fonts, image sizing, widow/orphan control, how errors appear; basically to test the “look and feel” of *everything*

Caution:

Remember to discharge your body's static electricity by touching the power supply case or the metal surface of the computer chassis.

4. Remove any unneeded graphics cards from the computer.

Warning:

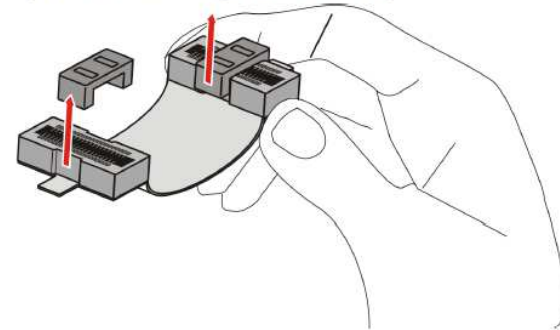
Some graphics cards can get hot while operating. Wait approximately five minutes after turning off the computer before touching the card.

5. Locate the PCIe slots on the motherboard. If necessary, remove the corresponding back panel cover.
6. Align the new graphics card in the secondary PCIe slot next to the existing graphics card and press firmly until the card is fully seated.
7. Remove protection tags from the ends of the AMD CrossFire interconnect and connect the cards.

Caution:

Always handle the AMD CrossFire bridge interconnects by the connector only. Do not push or pull on the flexible cable.

Figure 3-32 AMD CrossFire™ Bridge Interconnect Protection Tag



EDITING PRELIMINARY

saul147098367112.ditamap 2011/09/28 10:00 EDT



“It was Working Before”

- Example: shortly after a software upgrade, images no longer rendered properly for a new document; blame was put on software
- Separate test installation showed that new software was working fine
- A recent change in how images were inserted into DITA code was the real culprit; in the end a single line of XSL code had to be tweaked
- Discovering the root cause without having a test document *took 8 hours...*






Proulx's DITA Test Document Dictum

- Create a separate test document designed to test all aspects of your DITA output conditions
- It can serve as a companion to your style guide, showing expected output under all circumstances
- Every time something is changed (new DITA feature, software, rendering engine, etc.), check output using test document and compare to previous version
- It should *not* be an existing document, as it can always be changed (as the last example shows)



Martin Proulx
Senior IT Specialist &
Integration, IXIASOFT



Problems with Processes

(aka “how *not* to work effectively with people”)

OASIS DITA Adoption Technical Committee





#6: “Just Let IT Choose a CCMS for You”



- Last summer I worked on an internal project where I studied the factors behind “successful” RFIs/RFQs from vendor perspective
- Over a third of the RFIs/RFQs I reviewed had zero or minimal references to “DITA” in them
- In most of these cases it was clear that IT was choosing a CCMS based on their technical requirements, with little to no input from the technical writers



Some Not Unexpected Results When this Happens

- Technical writing team is given a CCMS that they had no part in selecting; not surprisingly, this often leads to general unhappiness
- Project may lead to outright failure; DITA / CCMS initiative may be dropped
- Or, at significant expense, a second, more appropriate CCMS is selected, this time with input from technical writing staff



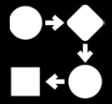


Schengili-Roberts' RFI Recommendation

- When your company is choosing a CCMS, make sure that the technical writing staff plays an active part in the selection
- Should cover not only what you need in terms of DITA requirements, but in terms of processes and expected workflows, report capabilities, metrics gathering, expected content contributions from SMEs, localization requirements, etc!



Keith
Schengili-Roberts



#7: “Workflow Captures / Enforces All Possibilities”

- Introduction of a DITA CCMS into a company provided the opportunity to hone the workflow in which content is reviewed, managed and produced
- Consultant is brought in, and maps out a very detailed workflow that captures *every* possibility:
 - initial state, editor review, second review steps (including SME review), third step (including separate reviewer/editor), and so on...

Let The Technical Writers Eat Cake?

- *This was all for a team of three technical writers*
- Not all steps were necessary, but they were *all* implemented within the CCMS
- This meant that even the smallest of changes (such as typos) had to go through this process
- Not surprisingly, the technical writing staff soon revolted against this strict and overly-convoluted workflow



**KEEP
CALM
AND
START
A REVOLUTION**



Anonymous' Recognizing Workflow Reality

- This story was relayed to me by a subsequent consultant who came in to try and fix the resulting mess
- In the end DITA usage was dropped within this firm, even though DITA itself had *nothing* to do with the problem
- **Solution:** start with a basic workflow, and then build up as required; build flexibility into the system to allow for minor changes or overrides as required



Anonymous



#8: The Person with Too Many Hats

- The change from unstructured to structured content does not just mean a change in how to write content, but also in the associated roles for a technical communications team
- **Situation:** a “DITA Lead” person is designated, and they are given *all* of the tasks with making the DITA implementation a success





DITA Overload Ensues!

- That one designated person must adopt multiple roles at once, which may include:
 - Conversion Specialist
 - Information Architect
 - Trainer
 - Project Manager
 - CCMS Administrator
 - XSL Developer





Houser's "A Head for Each Hat" Homily

- This is a sure way for a structured content initiative to fail
- Understand the new roles that are required; see: *Roles and Responsibilities of a DITA Adoption* (from: goo.gl/s3x44g)
- Effective change management is required, ideally have one person per "hat"



Alan Houser

Technical Publishing Consultant,
Group Wellesley



#9: “They Can Learn DITA as They Use It”

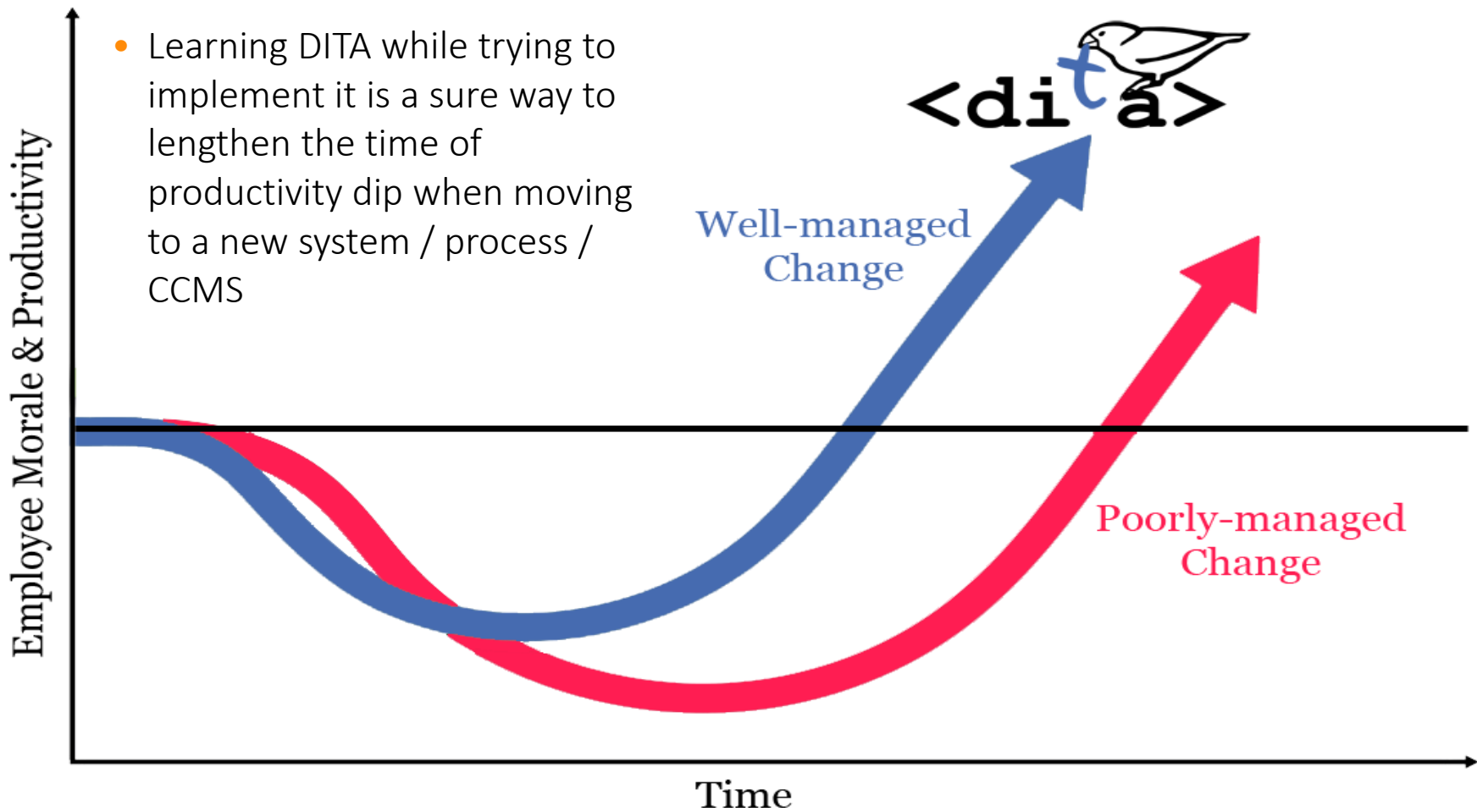
- An all-too-common assumption that technical writers are able to cope with writing content while also learning the intricacies of DITA elements and attributes





Juggling Too Many Balls

- Learning DITA while trying to implement it is a sure way to lengthen the time of productivity dip when moving to a new system / process / CCMS





O'Keefe's DITA Training Lesson

- Where possible, bring in someone with DITA experience to help train the rest of the technical writing staff
 - Can be external consultant or someone internal who already knows DITA
- Another alternative: online courses, such as those offered by CIDM or LearningDITA.com
 - Proven to shorten productivity gap

learningDITA 



Sarah O'Keefe

CEO, Scriptorium Publishing



#10: “We Already Have Sufficient Executive Buy-in”

- European software firm contracts with consultant for most of a year to understand and rationalize their information architecture and overall content strategy
- I am brought in to help train Directors on basics of DITA for several days
- A full plan is ultimately delivered to company’s board

🏠 Um, We Forgot About the Pointy-Haired Boss...

One executive ends up saying: “if we can’t do this using [insert exec’s favourite technology here] we aren’t going to do it”

All that work and preparation goes down the tubes...





Anonymous' "Always Get Full Buy-in First"

- Not anticipating this "requirement" was a serious oversight by those leading the project
- While this example is extreme, lower-level buy-in from SMEs, Directors, Managers and of course from your technical writing staff counts as well
- It's all about effective communication



Anonymous



Son of DITA Worst Practices?

This is only the beginning of the stories I have been told; there's easily enough for another presentation. Other ideas:

- Feeling compelled to move to DITA without really understanding what business issues need to be addressed
- Going through a tool selection process without performing even basic information architecture
- Over 1K DITA “variables” (keys) created to cover every product name, trademark, interface control, file paths, etc.
- Repeated chunking at or below the sentence level
- Writers using semantic tagging just to change how something appears at output
- Constraining out short descriptions, then finding resulting SEO is poor as users can't find content



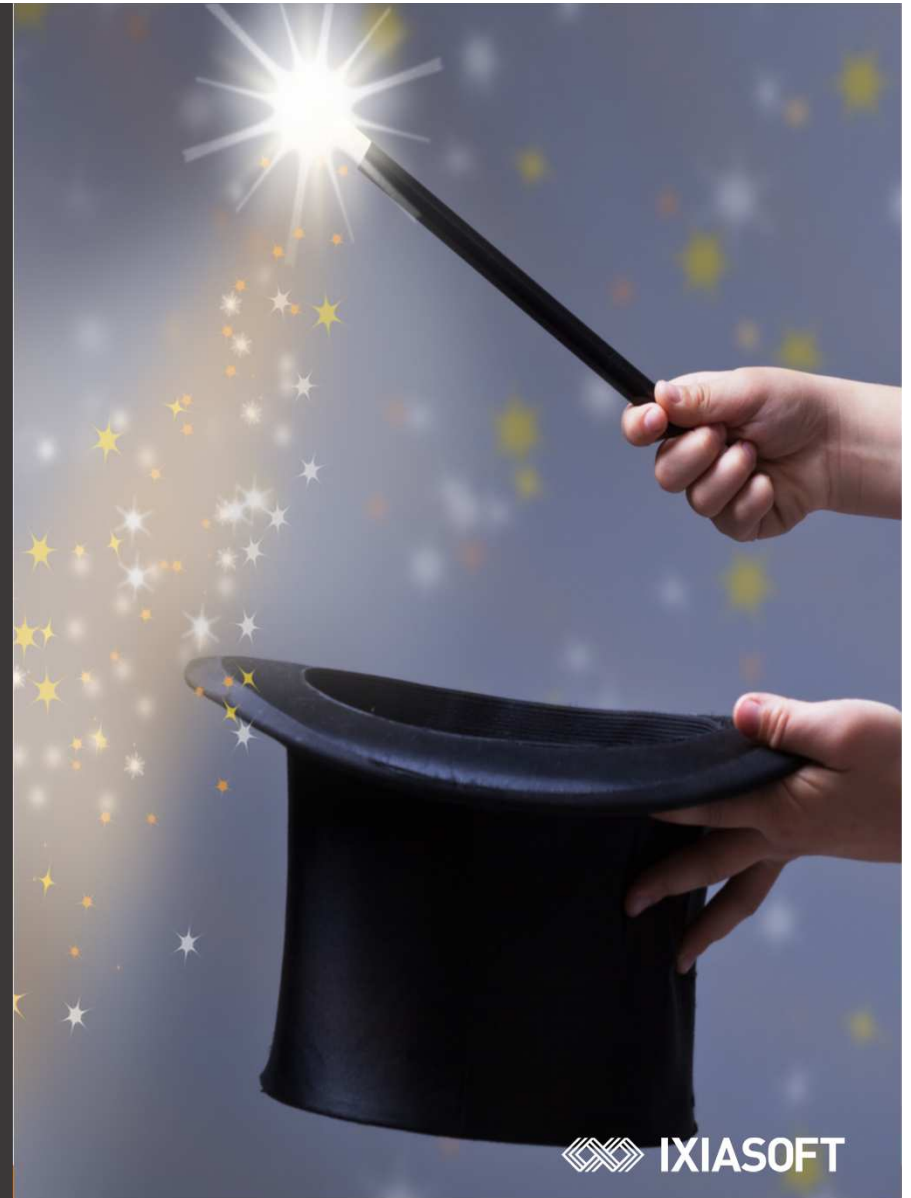
A Review of DITA Worst Practices

1. Content Reuse is Always a Good Thing, Right?
2. Never Specialize Your Content
3. If a DITA Tag Exists, We Should Use It
4. All DITA is Good DITA, Right?
5. A DITA Test Output Document? What's That?
6. "Just Let IT Choose a CCMS for You"
7. "Workflow Captures / Enforces All Possibilities"
8. The Person with Too Many Hats
9. "They Can Learn DITA as They Use It"
10. "We Already Have Sufficient Executive Buy-in"



Documentation Does Not Happen by Magic

- Must remember that all documentation is made by and for people
- DITA may be a driver towards creating better documentation, but it is part of a larger process that involves people and tools
- Need to think about documentation in a new way





QA

- OASIS DITA Adoption Technical Committee
https://www.oasis-open.org/committees/tc_home.php?wg_abbrev=dita-adoption (or try: goo.gl/5BySBc)
- Twitter: @dita_adoption (and @KeithIXIASOFT)
- SlideShare: www.slideshare.net/DITA_Adoption
- OASIS DITA Adoption Committee articles: look under “Expository Work Produced by the Committee” on our OASIS webpage

- My thanks to IXIASOFT for allowing me dedicated time devoted to DITA Adoption efforts