

# Migration Strategies for Author-it



## Agenda

- ▶ Two basic approaches for migration
- ▶ Testing and scoping
- ▶ Creating a Migration Plan
- ▶ Reproducing existing deliverables
- ▶ Modeling new deliverables
- ▶ The import process



## Bona Fides



- ▶ SDI has performed many migrations:
  - Large collections of legacy content (hundreds of thousands of pages)
  - Helped many Fortune 100 companies
  - Unstructured documents to SGML & XML
  - One markup language to another
  - Word, PDF, FrameMaker, HTML, Help Projects to Author-it
  - Author-it to XML
- ▶ Much of this presentation is general advice that applies to any migration project.

# Approaches for Migrating Existing Content



## Two Basic Strategies

- ▶ **Mass Migration:**
  - Import everything.
  - Clean up content "as is."
  - Reproduce existing deliverable capabilities quickly.
  - Add reuse over time.
  - Restructure content over time.
- ▶ **Selective Migration:**
  - Model structures desired for new deliverables.
  - Identify content components needed in new structures.
  - Import specific content that should be imported.
  - Create new content when it is more efficient than importing and reworking existing content.
- ▶ **Combine and adjust strategies as needed based on schedule and deadline requirements.**

## Strategic Considerations



- ▶ **Mass Migration:**
  - Little prior analysis
  - May include content of little long term value
  - Repeated content imported more than once?
  - Efficiencies of scale
  - Little or no editing during the import process
  - All content is available in new environment
  - Easier to deal with linking
  - Quickly reproduce existing deliverables
- ▶ **Selective Migration:**
  - More planning and analysis
  - Only import content with ongoing value
  - More reuse, sooner
  - Move immediately to new information structures
  - Longer time to prepare each new deliverable

# Estimating and Scoping the Migration Effort



## Test Environment



- ▶ If you already have an Author-it production library with styles and publishing templates:
  - Copy your existing production library as an import test library.
  - Publish a typical book to XML and import all objects into a new test library (to reproduce your production authoring environment).
- ▶ For new users:
  - Create a new library.
  - Set up new styles and publishing templates.

## Testing

- ▶ Identify small representative samples of your content.
- ▶ Test the import into Author-it.
- ▶ Identify issues:
  - Pre-import cleanup
  - Import profiles
  - Post-conversion cleanup
- ▶ Document import workflow.



## Scoping

- ▶ Measure time needed for specific tasks.
- ▶ Measure time for importing, proofing/correcting, and publishing a complete document, start to finish.
- ▶ Use test document import time to estimate scope for complete document set (total time).



# Creating a Migration Plan



## Creating a Plan

- ▶ Map migration time for complete document set (total time) against timeline.
- ▶ Identify resources.
- ▶ Identify costs of resources and total cost.
- ▶ Break overall process into manageable tasks.
- ▶ Create migration schedule that includes deadlines for required deliverables.
- ▶ Identify milestones.



## Allocating Resources



- ▶ Is possible, use a team approach.
- ▶ Consider your team:
  - How large is your team?
  - What is their expertise/experience?
  - How much of their time can be devoted to the migration effort?
- ▶ Can some tasks be done more efficiently using a concentrated group effort?
- ▶ Share expertise and lessons learned.
- ▶ Recognize team and individual accomplishments!

## The Inspirational Element

- ▶ The goal is better documentation that is easier to maintain and improve.
- ▶ Keep your vision in mind.
- ▶ Don't get lost in the details.
- ▶ Check your progress regularly, and celebrate your milestones.



# Reproducing Existing Deliverables



## Commit

- ▶ Don't wind up in a situation where you are maintaining the same content using two different tools.
- ▶ Make sure you will be able to publish needed deliverables once content is imported.
- ▶ Minimize the import time.
- ▶ Commit to delivering content from the new system after the import is completed.



## First, Do No Harm



- ▶ Be sure you can meet deadlines and requirements:
  - Create publishing templates in Author-it so you can publish to all required deliverable formats automatically.
  - Import all of the content for a deliverable quickly.
  - Verify that no content was lost in the import.
  - Reapply styles as needed.
  - Resist the temptation to make edits until the import is complete and verified (but keep a list of issues).
- ▶ Publish and proof:
  - Use a proof copy that *exactly* represents the content that you imported.
  - Proof the imported & published document against the proof copy.
- ▶ Make new release or editorial changes *after* you have verified the import.

# Modeling New Deliverables



## Modeling New Documents



- ▶ Begin by modeling your new deliverable structure:
  - Document structure
  - Topic types
  - Structure for each topic type
- ▶ Consider what types of elements will be reused.
- ▶ Create a model document that contains model topics.
- ▶ Publish model document to all required formats.

## Using Legacy Content in a New Structure



- ▶ Identify existing content that can be used in new structure.
- ▶ Which existing variant of duplicate content is best going forward?
- ▶ Identify changes needed in existing content:
  - More chunking
  - More focused topics - one idea per topic?
  - Make content more reusable in different contexts (variables, conditional constructs)
- ▶ Decide how you will bring existing content into new structure:
  - Easier to restructure in source or in Author-it?
  - Use import profiles to control chunking or remap styles.
- ▶ When it's easier, create new content instead of importing.

# Importing Existing Content



## Understanding Your Source Content



- ▶ Migration is an opportunity to get to know your content in a new way.
- ▶ How large is your existing library of legacy content?
- ▶ How is the information organized?
  - In large chapters?
  - In small chunks?
- ▶ What styles or elements are used in your content?
- ▶ What is the potential for reuse?
- ▶ Who are the audiences?



## Graphics

- ▶ Author-it requires each graphic to be one object.
- ▶ Graphics can cause import problems:
  - Keep graphics in the text flow (not absolutely positioned).
  - Group Word or FrameMaker drawing objects (may not help).
- ▶ Test the import and identify issues.
  - Graphics are represented as Author-it file objects.
  - If graphics are poor quality, you can keep them as placeholders and replace later.
  - You may need to capture graphics in a drawing program or recreate.
  - It may be easier to strip out source graphics, and reinsert new graphics into Author-it topics after the import.
- ▶ Size graphic files for online outputs; scale in Author-it for print output if necessary.

## Customizing Profiles



- ▶ Import profiles use customizable rules to transform a document into a set of Author-it objects:
  - General properties control graphic handling, folder creation, book templates associated with imported documents, and release states for imported content.
  - Import rules control document structure, topic chunking, and style mapping.
- ▶ Author-it provides a set of import profiles, but you can create additional ones as needed.
- ▶ Each step of an import can be customized during the import, and the results saved as a changed or new profile.
- ▶ To work with saved import profiles, choose Profiles from the Import tab of the main window.

## Topic Structure Rules



- ▶ Decide how you want to break a document up into chunks:
  - Usually based on heading styles
  - Should each lower level heading create a separate topic?
  - Heading levels typically determine the hierarchical structure for topics in a book.
- ▶ What topic template should be applied?
  - Top level topics should use a template that sets a page layout for print output (e.g., Chapter Template or similar).
  - Lower level topics should be based on Normal Template (V4) or Topic Template (Author-it 5) - can be used in any page layout.

## Style Mapping Rules



- ▶ Every Author-it paragraph must have a named style.
- ▶ Character styles and formatting can be mapped to named Author-it character styles.
- ▶ If source documents have different styles that do the same thing, map to a single Author-it style.
- ▶ If source documents have a style that should be retained but is not in Author-it, create a custom style in Author-it before importing.
- ▶ If style usage is inconsistent in source document, it will still be inconsistent after importing.

## Preview

- ▶ You can create new style mapping rules during the Preview.
- ▶ You can also remove topics from the book structure or move topics to a new location in the book contents.



## After the Import



- ▶ At the end of the import, you can save changes you made:
  - To the existing import profile
  - As a new import profile
- ▶ You can also discard import rule changes.
- ▶ If you are not happy with the results, you can discard the imported content and repeat the import.
- ▶ In addition to making adjustments during an import, you can open an import profile directly and change properties or rules.

## Refining the Import Process

- ▶ You can improve the results of an import in several ways:
  - Clean up the source before importing (especially for replacing formatting with styles, or fixing graphics).
  - Tweak your import profile.
  - Clean up the imported content in Author-it.
- ▶ Automate the process and minimize your effort as much as possible.
- ▶ When importing different types of documents, adapt your process:
  - Use a special import profile for a Glossary - each definition should be a separate topic based on Glossary Term Template.
  - May need special import profiles for other specialized content.
- ▶ Document best practices and share lessons learned.

# Questions and Discussion



## Need Help?



- ▶ SDI can help with migration planning and execution.
- ▶ Do it yourself?
  - Migration forces you to look at your content very closely.
  - Easier to make editorial and content decisions as you go.
- ▶ Farm it out?
  - This task requires a special set of skills (not necessarily useful for ongoing work).
  - Can you spare the in-house resources?
  - Can you do it in the required time frame?
- ▶ If you do farm it out:
  - Provide proofing copies that match content being imported.
  - Decide whether editorial changes can be made during import.
  - Make sure contractors track unresolved content issues.
  - Have an in-house contact for questions during migration.

## Check for Future Events!



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- ▶ **SDI's AuthorIT web pages** (<http://www.sdicorp.com/authorit>) - check out the Free Webinars and Music sections.
- ▶ We welcome your suggestions for additional webinars!
- ▶ Send comments or suggestions to **John Hawkins** (<mailto:jhawkins@sdicorp.com>).