

To: Tom Johnson; Technical Communication Project Manager
From: Autumn Hood; Junior writer, Technical Communication Department
Date: 24 November 2014
Subject: Proposal to adopt MadCap Flare to switch to single sourced documentation

Hello, Mr. Johnson. This proposal describes the benefits for the technical communication department of adopting single-sourcing as our method of documentation and why we should use MadCap Flare to do it.

Why do we need to switch?

Our department is still rooted in the "craftsman model" of documentation, composing entire documents one at a time [1]. This model is inefficient and does not allow us to fully explore professional avenues. Single sourcing would streamline the documentation process, thus allowing us to focus on the integrity, context, and architecture of the content itself, rather than formatting and repetitive data entry.

Why MadCap Flare?

Flare has several features that make it ideal for topic-based authoring and single sourcing. Flare's structure relies on CSS and XML, standardized by the W3C, making it easier to create content that is consistent and self-contained. New users can exploit its drag and drop interface to pick up its key features quickly, and those who are so inclined may view the source coding for Flare's output. Additionally, its use of conditional tags makes customizing documentation outputs more simplified and efficient.

However, most importantly, MadCap Flare will transform all of our existing Microsoft Word documentation into Flare projects, while simultaneously integrating any styles. This means that while the team is learning to use Flare, our existing documentation will not be in "virtual limbo" while we switch.

What are the costs and challenges?

The initial costs are vivid and admittedly daunting. The problems most relevant to the technical communication department are interpersonal challenges, such as work reallocation during training periods, possible changes in role-definitions, and frustration at having to learn a new technology. Some members of our team may be anxious, skeptical, or frightened at the aspect of needing to learn a new technology to remain in the same job. There will also be a learning curve, and some writers will get the hang of using Flare more easily than others. However, Flare's most basic functionality can be easily picked up by someone who wants to learn and is willing to ask questions (please see Appendix A). We can apply the training models recommended by researchers Clark and Andersen [2], as well as AT&T ex-Executive Director Neil Cobb [3]:

- Have a plan early on
- Over communicate within and outside of departments
- Do not rely solely on vendor tutorials

How will switching affect work processes?

The initial process will encumber workflow to some degree. However, clear and constant communication, realistic deadlines with sufficient time spans, and building a dedicated CM team will smooth the transition. Also, presenting this change as an opportunity for professional and personal development instead of a mandated transformation of their job titles can make the opportunity “well received” and “exciting” [4].

What are the benefits to the technical communication department?

1. **Technical communicators will be able to move into symbolic-analytic work.** Symbolic analysts perform problem-solving functions in the “global emerging economy” [5]. This work is more valued than ever before in the information economy, where data and communication have become commodities themselves. If we spend less time formatting, crafting whole documents, and manually updating content, we could efficiently address other issues such as information architecture, design, content management, and usability/user experience. This is the symbolic analytic work described by Reich and Johnson-Eilola. These roles, as proposed by Clark and Anderson, are more sustainable within an organization than a generalized technical communicator because they have clear, tangible effects on the bottom line of an organization [2].
2. **Other departments will see more value in technical communication.** Single sourcing is a technology technical communicators can use to ascend the ranks of their organizations because it allows them to provide *knowledge*, or data “with context,” and disseminate it across “different branches of an organization” [2]. Providing this knowledge can allow technical communicators to move into more meaningful and valued positions.
3. **Single sourcing will help technical communicators maintain consistency and organizational standards.** Because technical communicators are reusing content, they can better ensure consistency and can more easily standardize documentation practices [7].
4. **Single sourcing may further lead to the professionalization of technical communication.** The aforementioned benefits, such as moving into symbolic-analytic work and expressing value, and writing specialization may result in implications for technical communication as a profession [1].

Thank you for reading my proposal. If you have questions on the information I’ve presented here or would like to further discuss how we can successfully transition to single-sourcing with MadCap Flare, please contact me at autumnhood@techcorp.com at your convenience.

Appendix A: “Getting Started with MadCap Flare”

This appendix includes some screenshots of a rudimentary project I started with MadCap Flare. The project entailed transforming a Word Document into a Flare project and then creating two outputs: an Adobe PDF and an HTML page. This appendix is solely meant to serve illustrative purposes to indicate how easy using some of the basic features of MadCap Flare can be with the right mindset and some patience.

1. I created a document in Microsoft Word using the default styles (Figure 1).

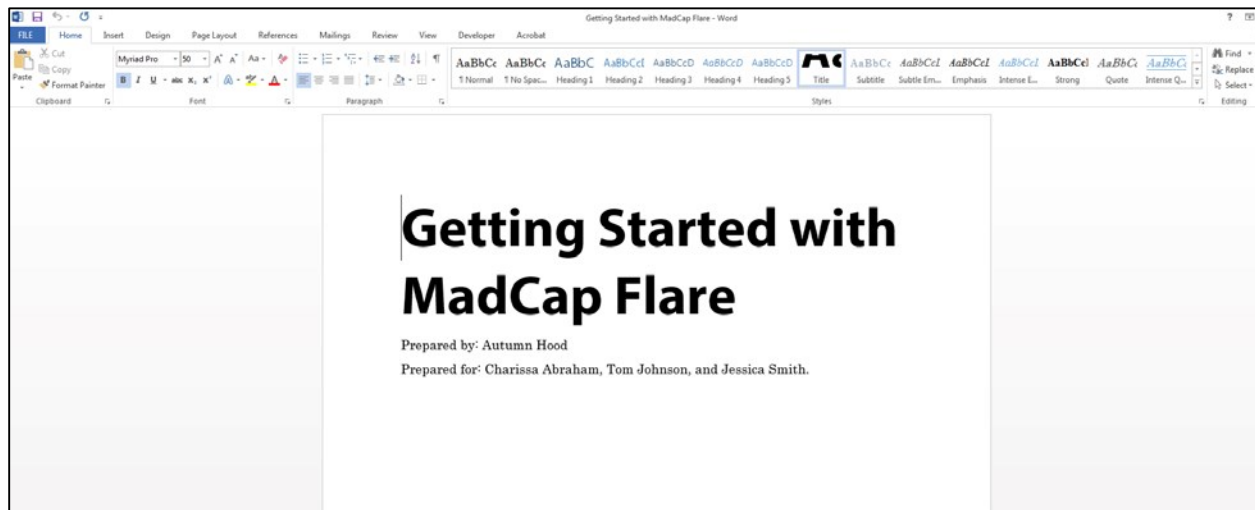


Figure 1: Word Document

2. I then uploaded that document into Flare (Figure 2) and transformed it into a Flare project file (Figure 3).

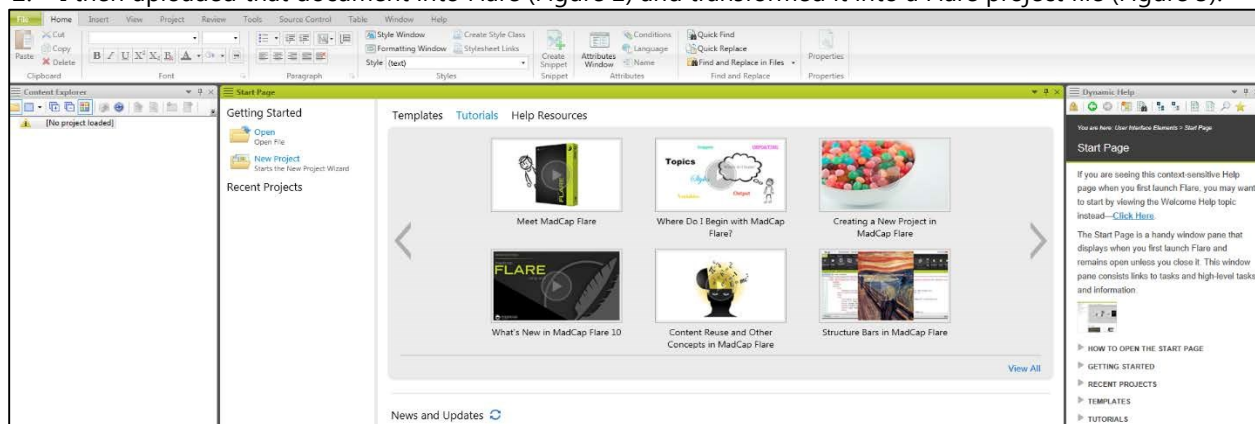


Figure 2: Flare default start page

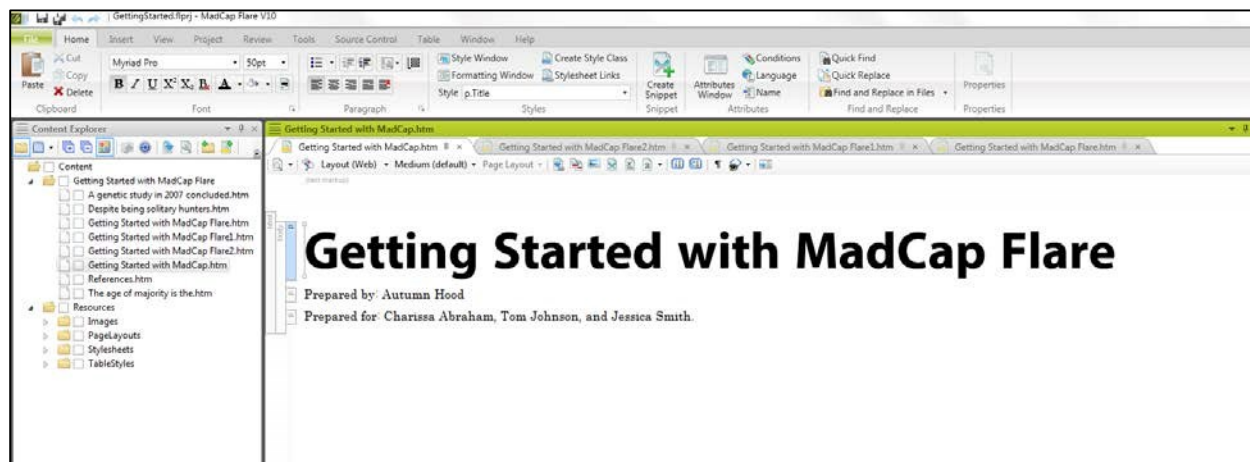


Figure 3: The Microsoft Word document has been transformed into a Flare Project. As you can see, Flare renders the styles that were already applied.

- I applied a conditional tag (Figure 3) to one of paragraphs on the page to include that content only in print format, not web format (Figure 4).

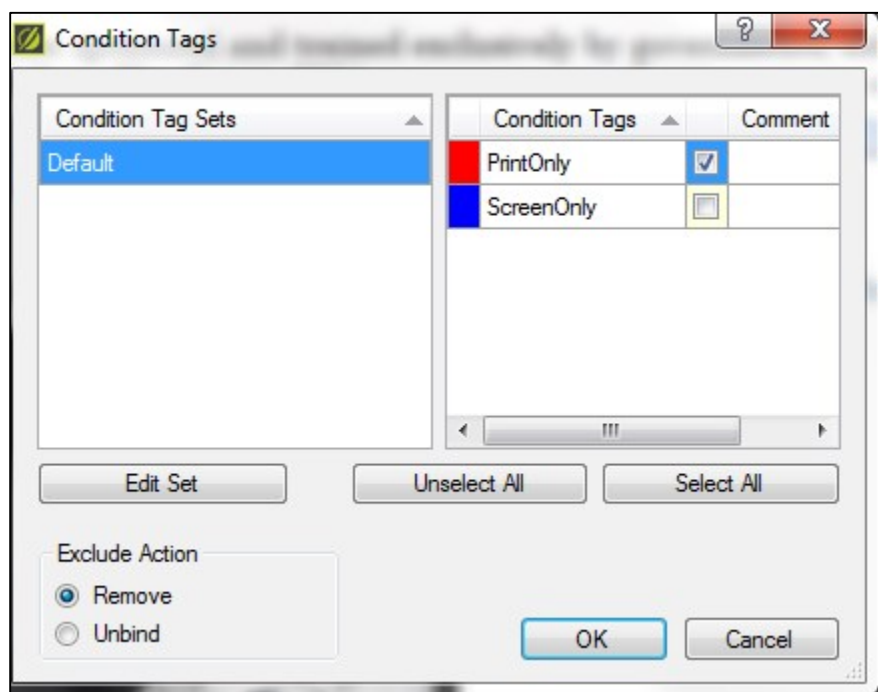


Figure 3: Flare's conditional tag options can be viewed by right-clicking any content.

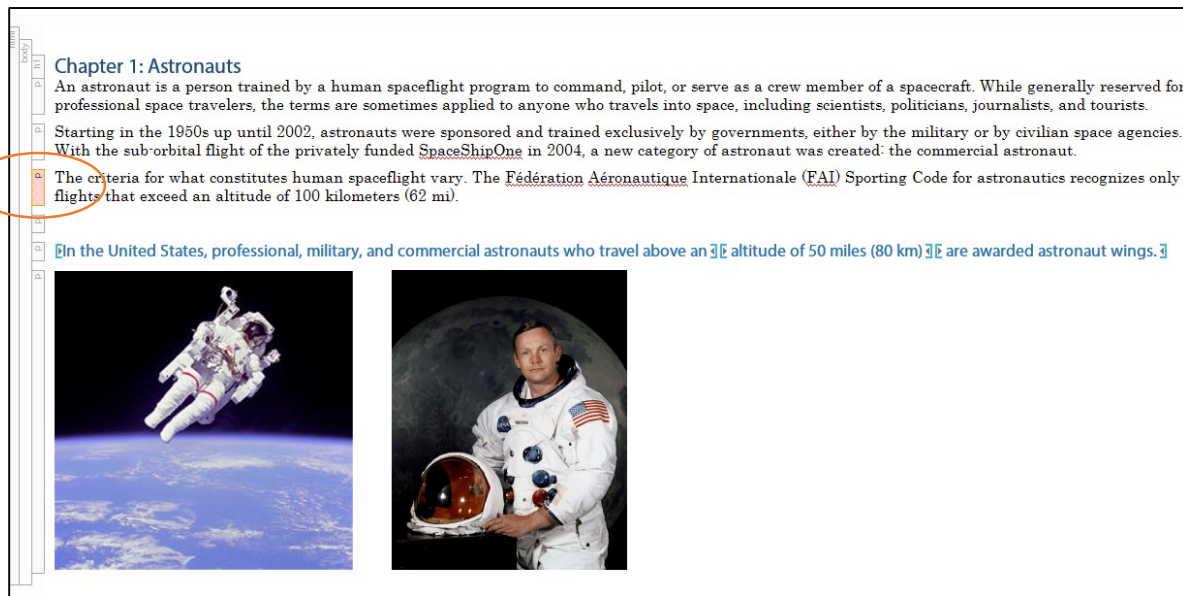


Figure 4: Conditional tags that tells MadCap to include the circled content to only be included in print renderings of the document.

4. When Flare generates a PDF of this document, it will include the conditional tag (Figure 6). When Flare creates an HTML page, it will not include the conditional content (Figure 7).

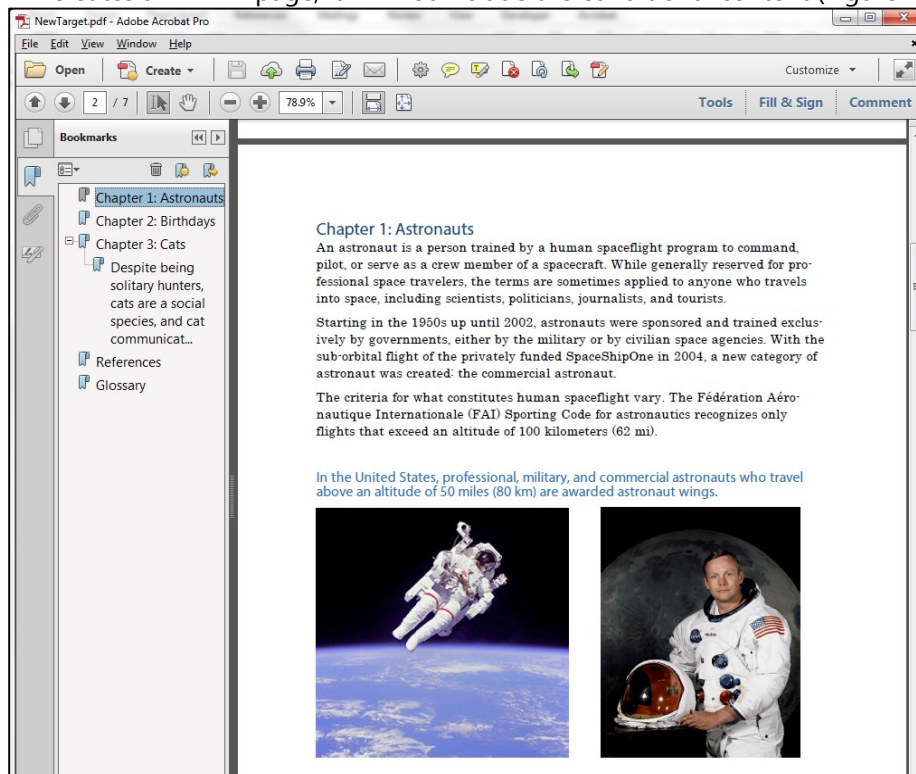


Figure 6: A PDF of the Flare Project

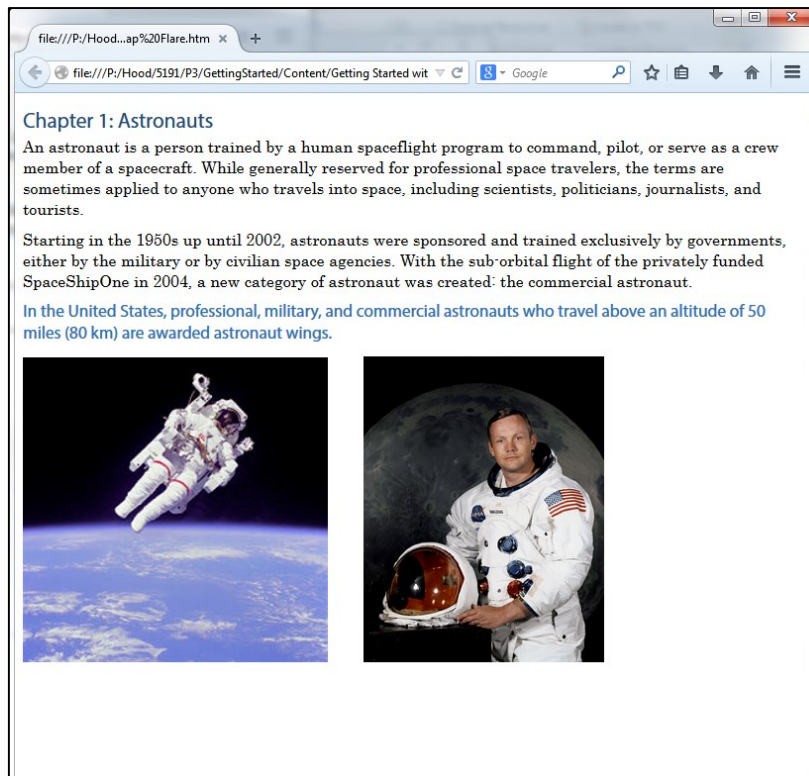


Figure 7: An HTML page of the Flare project

All of the styles (Figure 8), images (Figure 9), and content of the original Word document have been kept intact.

A screenshot of the MadCap Flare Stylesheet Editor. The window title is "Getting Started with MadCap Flare.css". The interface includes tabs for "Getting Started with MadCap Flare.css", "Styles.css", and "Modern.css". Below the tabs are buttons for "Show Paragraph Styles", "Advanced View", "Add Class", and "Add Pseudo Class". There are also checkboxes for "Hide Inherited" and "Hide Properties", and a "Medium: (d" dropdown. The main area is a table with columns: Name, Tag, Class, Pseudo Class, and Preview. The table lists various styles such as p, p.p_1, p.Subtitle, p.Title, h1, h1.Heading1, h3, h3.Heading3, and h2, each with its corresponding tag, class, and a preview of the text formatting.

Name	Tag	Class	Pseudo Class	Preview
p	p			MadCap Soft
p.p_1	p	p_1		MadCap Soft
p.Subtitle	p	Subtitle		MadCap Sof
p.Title	p	Title		Ma
h1	h1			MadCa
h1.Heading1	h1	Heading1		MadCap Sc
h3	h3			MadCap So
h3.Heading3	h3	Heading3		MadCap Softw
h2	h2			MadCap

Figure 8: Styles remain the same from the Word document

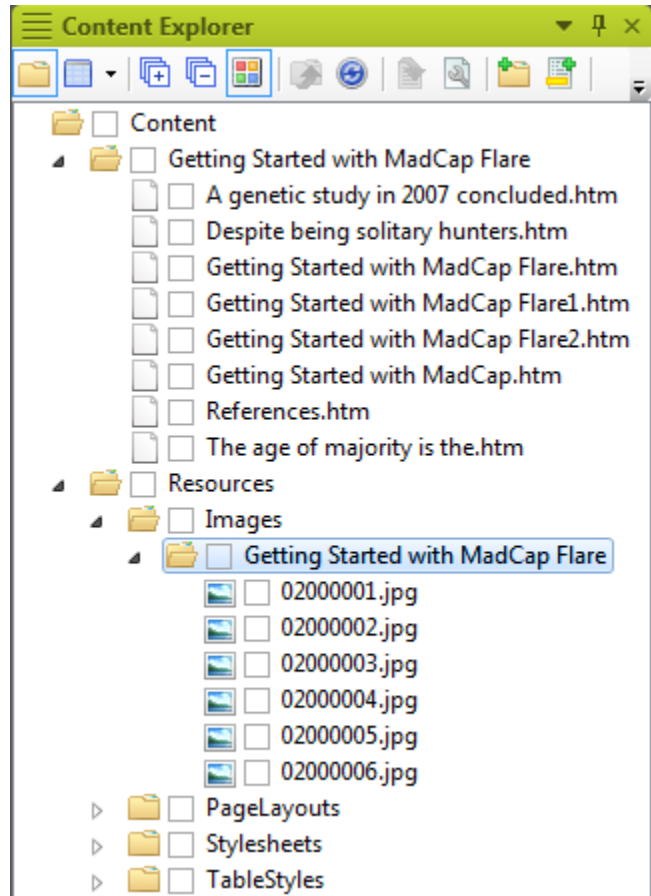


Figure 9: Images have been pulled from the document and stored as topics

This appendix has been a brief overview of some of the main functions of MadCap Flare. Learning these procedures and generating the outputs took roughly 1 hour. The only learning resources used were online help tutorials such as YouTube videos and MadCap published documentation.

If you have any questions or would like any source files, please do not hesitate to request them.

Appendix B: References

Please do not hesitate to contact me with any questions about my resources.

- [1]. Albers, M. (2003). Single Sourcing and the Technical Communication Career Path. *Technical Communication* 50 (3). 335-343.
- [2]. Clark, D. and Rebekka Anderson. (2005). Renegotiating with Technology: Training Towards More Sustainable Technical Communication. *Technical Communication* 52 (2). 289-301.
- [3]. N. Cobb. Personal Communication. November 6, 2014.
- [4]. Technical Communication Manager. Personal Communication. 13 November 2014.
- [5]. Reich, R. B. What is a Nation? (1991). *Political Science Quarterly* 106 (2). 193-209.
- [6]. Johnson-Eilola, J. (1996). Relocating the Value of Work: Technical Communication in a Post-Industrial Age. *Technical Communication Quarterly* 5 (3). 175-192.
- [7]. Modular Writing. (2010). Retrieved November 2014. http://www.documentationprocess.com/modular_writing