DITA Adoption Process: Roles, Responsibilities, and Skills

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DITA Adoption Process: Roles, Responsibilities, and Skills

As an organization investigates moving to a Darwin Information Typing Architecture (DITA) writing environment, new roles, responsibilities, and skills must be identified. We highly suggest that you consider a resource strategy at the same time that you consider a content strategy. We have identified several roles that are required for a successful DITA implementation. As you progress through your DITA implementation, the number and types of roles might change. The roles required during the investigation phase are significantly different than the roles required for a fully established DITA environment.

As you develop your resource strategy, consider these guidelines:

- One or more individuals might assume responsibilities for a single role.
- One individual might assume responsibility for one or more roles.
- Individuals might change roles as your organization progresses through the phases of implementation.
- The responsibilities for a role might change slightly as your organization progresses through the phases of implementation.

The table in *DITA Roles, Responsibilities, and Skills* summarizes each role.

Table 1: Suggested Roles During the Phases of DITA Implementation

The different phases of a DITA implementation and the suggested roles for each implementation phase.

Role	Investigation	Selling to Management	Pilot	Adoption	Established DITA Environment
Authors				X	X
Content Management Specialist	X		X	X	X
Conversion Specialist	X		X	X	In some circumstances
Information Architect/Content Strategist	X	X	X	X	X
Lead Authors	X		X	X	X
Project Manager	X		X	X	
Publishing Expert	X		X	X	X
Sponsor	X	X	X		
Technical Editor			X	X	X
Trainer			X	X	X
Translation Manager	Optional		X	X	X
User Experience Designer	X		X	X	X

Investigation Phase

As an organization investigates moving to a DITA writing environment, many facets of the investigation require new roles and responsibilities. The investigation phase is when you gather information that lets you accurately estimate, plan, and build your business case for the subsequent phases.

Content Management Specialist

This individual investigates the different options for managing content. This individual works with Component Content Management System (CCMS) vendors to develop a solution for the organization.

Conversion Specialist

Moving legacy content to DITA requires a deep understanding of the conversion process. This individual investigates the options for converting content. Conversion options range from manually converting content in-house to using tools that automate the process to contracting with vendors who perform the conversion.

Information Architect/Content Strategist

This individual understands the current content life cycle. This individual is very familiar with the organization's content and is a visionary who sees the potential for content reuse and the benefit of metadata.

Lead Authors

These individuals provide feedback on the tools and the workflow that are associated with a DITA writing environment.

Project Manager

Because the move to a DITA writing environment can be a difficult transition, this individual provides direction and accountability to the team as it investigates the move. This individual tracks schedules and work assignments and starts a budget for the investigation team.

Publishing Expert

This individual understands the various publishing tools that are available to support DITA source content and understands DITA. This individual develops and maintains templates.

Sponsor

Each organization requires a management sponsor or champion to support the move to a DITA writing environment. This individual is a visionary who understands the benefits and the costs of moving to a DITA environment at a high level and can understand the opportunities for the enterprise adoption possibilities as well, including, but not limited to, training and marketing.

Translation Manager (optional)

If an organization translates content (or wants to translate content in the future), including this individual in the investigation phase is an important part of developing a complete and efficient long-term content strategy (particularly, although not limited to, tool selection).

User Experience Designer

During the investigation phase, this individual performs preliminary investigation to determine requirements and to identify possible solutions for delivering the content to users.

Selling Phase

After an organization decides to move to a DITA writing environment, several individuals must sell the idea to upper-level management and key stakeholders (such as IT). The individuals in this phase rely on the information gathered from the individuals involved in the investigation phase.

Information Architect/Content Strategist   This individual is very familiar with the organization's content and is a strategist who sees the potential for content reuse and the benefit of metadata. This individual understands and can clearly communicate the benefits of a DITA writing environment to executives and other key stakeholders who do not necessarily understand XML or legacy content processes or inefficiencies.

Sponsor   This individual is the liaison between upper-level management and the investigation team. This individual understands the tools required, the changes to work environment, and the effort required for a successful DITA implementation. This individual understands the benefits and the costs of moving to a DITA writing environment.

Pilot Phase

After an organization receives approval and funding to move to a DITA writing environment, many individuals must work together to develop tools, procedures, and processes for the new environment. A successful pilot phase relies on the information gathered from the individuals involved in the investigation phase.

Content Management Specialist   This individual understands the DITA architecture. If a CCMS is used, this individual defines the CCMS requirements and drives the vendor selection and CCMS pilot processes.

Conversion Specialist   This individual performs the initial conversion for the pilot project, working in collaboration with the Information Architect/Content Strategist, the Content Management Specialist, and the Publishing Expert to preserve and add any vital metadata and to conform to the DITA model identified in the content strategy. The initial converted content is used in multiple ways: to test and refine the content strategy, to provide actual samples during the tool selection and customization process, and to provide working samples for the Publishing Expert to start creating documents for delivery.

Information Architect/Content Strategist   This individual looks for opportunities to enhance existing content, to automate processes, and to improve existing tools. This individual determines the best practices for single sourcing and the best practices for leveraging metadata. This individual has a deep knowledge of DITA architecture, including the need to develop specializations. This individual works closely with the Publishing Expert and the Content Management Specialist to develop and maintain the tools used by the organization.

Lead Authors   As an organization starts moving to a DITA writing environment, Lead Authors work with pilot content and begin to establish writing guidelines and production processes. In the pilot phase, these individuals work closely with all other roles to identify and rectify gaps or errors in the strategies, tools, or processes.

Project Manager

This individual drives the pilot and makes sure that all components are developed on time and that all risks are appropriately managed. This individual ensures that all vital facets of the pilot are completed in order and on time. The Project Manager also ensures that the lines of communication remain open between all stakeholders within the pilot phase as well as communication with the rest of the company.

Publishing Expert

This individual works closely with the Information Architect/Content Strategist and the Content Management Specialist to develop and maintain the chosen means of publishing XML files used by the organization for one or two output types. This individual drives the publishing process and identifies specific publishing tool requirements.

Sponsor

This individual is the liaison between upper-level management and the pilot team. The Sponsor's role during the pilot phase is to keep the pilot from being canceled before it can be completed and to address the wider concerns that the enterprise might have.

Technical Editor

This individual provides input, helps create the editing workflows, and develops a style guide that includes DITA markup guidelines, grammar and writing style guidelines, and topic-based writing guidelines.

Trainer

This individual works closely with all persons responsible for the pilot phase. The Trainer develops training materials and curriculum based on the procedures and processes developed during the pilot phase. This individual must be familiar with all tools and processes used in the DITA writing environment.

Translation Manager

If translation is a requirement, this individual starts to develop a work strategy for managing the core language and all required translated languages.

User Experience Designer

This individual uses the pilot phase to develop the user experience of content, develop use cases and scenarios, create wireframes, list functional requirements, and interview and test all stakeholders, but focuses on internal and external end users.

Adoption Phase

A successful pilot phase leads to a roll-out or phased roll-out of the DITA solution to one or more teams in the company: the adoption phase. All individuals involved in the pilot phase act as mentors to the entire team during the adoption phase. The adoption phase includes all roles.

Authors

These individuals receive training and begin writing content in DITA, learning the tools and processes as they go.

Content Management Specialist

This individual manages and customizes all aspects of content management and the CCMS tools.

Conversion Specialist	This individual continues to convert legacy material, as required.
Information Architect/Content Strategist	This individual continues to develop best practices for single sourcing and best practices for using metadata.
Lead Authors	These individuals help the Authors make the move to DITA adoption, as well as continuing to write new content and manage maps.
Project Manager	This individual keeps all projects on track.
Publishing Expert	This individual works closely with the Information Architect/Content Strategist and the Content Management Specialist to develop and maintain the chosen means of publishing XML files used by the organization for all remaining output types.
Sponsor	This individual continues to act as the liaison between upper-level management and the writing team.
Technical Editor	This individual ensures that all authors are using the DITA elements and attribute values consistently, that language and structure meet requirements for usability and clarity, and that all possible reuse is being employed.
Trainer	This individual ensures that all authors acquire specific, task-oriented training on the tools, processes, and strategies determined in the pilot phase. The Trainer also provides ongoing training and support for all authors.
Translation Manager	This individual starts the translation and localization of content to one or more languages and implements the entire process. The Translation Manager ensures quality translations and efficiently manages maps and topics in multiple languages.
User Experience Designer	This individual continuously monitors metrics, search terms, findability, stale content, user feedback, and user experience. The User Experience Designer works in coordination with the Information Architect/Content Strategist and the Publishing Expert to prioritize improvements in the user experience and pass on information about content and product improvements from the end users.

Established Phase

After the DITA adoption process is established, you must continually manage your content, implement enhancements, and fine-tune your tools, solutions, and processes.

Authors	These individuals continue writing new content and updating existing content.
Content Management Specialist	This individual manages and customizes all aspects of content management and the CCMS tools. The Content Management Specialist updates the CCMS tools and procedures with the current releases and new features.

Conversion Specialist	After the DITA project is established, this individual continues to convert any required legacy content, including converting content from other departments.
Information Architect/Content Strategist	This individual stays current with industry trends and new areas of thought. This individual determines new requirements, modifies the strategy, and attempts to streamline all processes.
Lead Authors	These individuals continue writing new content and updating existing content.
Publishing Expert	This individual stays current with industry trends and new areas of thought. This individual develops and maintains all means of publishing XML files used by the organization for all output types. The Publishing Expert updates the publishing tools and procedures with the current releases and new features.
Technical Editor	This individual ensures that all authors are using elements and attribute values consistently, that language and structure meet requirements for usability and clarity, and that all possible reuse is being employed.
Trainer	This individual develops and updates training material and ensures that all Authors receive training in tool changes, new features, and process changes.
Translation Manager	This individual manages ongoing translations to all required languages.
User Experience Designer	This individual monitors the user experience including search terms, findability, and metrics. The User Experience Designer recommends changes to the design and experience of content and updates the user experience as required by the users.

DITA Roles, Responsibilities, and Skills

Role	Responsibilities	Skills
Information Architect/ Content Strategist	• Understands the current state of every phase of the content life cycle • Defines the content strategy, including tools, processes, and strategies for publishing, translation, and single sourcing • Define, develop, or both any DITA specializations • Defines the DITA model for the organization • With Publishing Expert, develop constraints that meet the DITA model • Plans projects, including identifying key resources • Attends and participates in webinars and conferences • Identifies opportunities for enhancements in content, automation, translation or single	• Proficient with the DITA architecture • Knowledge of end users • Knowledge of the breadth of content • Knowledge of business drivers and goals • Requirement gathering • Ability to visualize cutting-edge theories, tools, and practices • High-level thinker and strategic planner • Ability to determine the best way to single sourcing and leverage metadata • Knowledge of relevant tools (CCMS, XML editors, and publishing options)

Role	Responsibilities	Skills
	sourcing using new tools, strategies, or processes as they emerge	
Publishing Expert	• With the Information Architect/Content Strategist develops constraints, if needed • With the Information Architect/Content Strategist develops specializations, if needed • Develops and maintains style sheets • Develops and maintains templates	• Proficient in: • DTDs/XSDs • XSL and XQuery • XSLT-FO • DITA Open Toolkit • XEP and Antenna House • Knowledge of XML, HTML, CSS, Java, and Ant • Proficient with the DITA architecture • Proficient with XML editors • Ability to code functionality (programming languages)
Content Management Specialist	• Defines the CCMS requirements • Analyses and selects an appropriate CCMS • Manages CCMS, including organization, workflow, user management, and automation • Determines and follows best practices for content management • Creates reports describing content and content management, including reuse, stale information, and so on • Trains the trainer in use of the CCMS • Manages integrations with other tools • Installs and upgrades the CCMS	• Proficient with the DITA architecture • Proficient with a variety of CCMSs • Ability to troubleshoot errors • Ability to provide initial and ongoing training • Ability to provide support for the team
Authors	• Author content • Write to organization standards • Follow the established DITA model	• Knowledge of DITA and DITA best practices • Experience with an XML editor • Ability to learn new tools and processes • Ability to adapt writing style to topic-based authoring
Lead Authors	• Manages maps • Implements reuse strategy	• Knowledge of DITA and DITA best practices • Experience with an XML editor • Ability to learn new tools and processes • Ability to adapt writing style to topic-based authoring
Technical Editor	• Ensures consistency in both content and structure • Identifies opportunities for single sourcing • Ensures the content meets end-user requirements • Identifies areas where authors need more training or must confer with the Information Architect/Content Strategist	• Knowledge of DITA best practices • Knowledge of single sourcing • Understanding of DITA reuse mechanisms • Proficient in DITA elements and attributes • Proficient in minimalism and topic-based writing

Role	Responsibilities	Skills
	• Creates and maintains a writing style guide and DITA markup guide	
User Experience Designer	• Defines, designs, and implements how users experience published content including navigation, custom content, and searching • Works with the Content Management Specialist to deploy content from the CCMS to the publishing location • Works with Content Management Specialist and the Publishing Expert to define and implement requirements for user experience (such as leveraging profiling metadata and searching metadata) • Manages dynamic or periodic updates of content • Manages the user experience and implements upgrades and improvements • Gathers metrics and details on users, user behavior, user feedback, search terms, stale content, and so on • Manages and builds user communities	• Expertise with all types of users • Proficient at gathering user feedback using a variety of tools • Knowledge of HTML and CSS • Familiarity with search engine customization • Experience with Search Engine Optimization (SEO) best practices • Expert in accessibility and legal requirements for public access of information • Proficient with the DITA architecture • Understanding of DITA best practices, linking strategies, and single sourcing
Translation Manager	• Plans and implements ongoing translation management using in-house translators or using a translation service provider • Oversees translation results • Develops and maintains translation workflow mechanisms • Investigates and implements ongoing improvements to the translation process, including tools and strategies	• Expertise in localization best practices • Knowledge of CCMS translation functionality • Knowledge of DITA best practices and reuse mechanisms • Experience with translation in a DITA environment • Knowledge of translation tools and trends

Conversion Specialist	• Audits legacy content
	• Works with the Content Management Specialist to define the requirements for the conversion
	• Reworks legacy content prior to conversion
	• Identifies areas of concern
	• Converts or selects conversion process of legacy content to DITA XML
	• Performs quality assurance checks on converted content
		• Proficient with conversion tables or equivalent conversion tools
		• Proficient in:
		  • XML
		  • XQuery
		  • Scripting languages (such as ExtendScript or equivalent)
		• Proficient with the DITA architecture and DITA best practices
		• Knowledge of content strategy
		• Understanding of the breadth of content and users

Trainer	• With input from the Content Management Specialist, determines the training requirements including curriculum, method of delivery, and frequency of delivery • Develops training content, including real examples for various types of trainees	• Expertise with DITA, XML editors, and CCMSs • Proficient at creating and delivering in-person and online training • Proficient with the DITA architecure, DITA best practices, tools and related processes

Role	Responsibilities	Skills

	• Trains authors, reviewers, translators, and any other stakeholders in:
	
	   • DITA foundations
	   • DITA best practices
	   • Processes
	   • Tools including, the XML editor, the CCMS, and the publishing tools
		• Ability to tailor training content for specific learners
		 • Ability to lead learners through hands-on exercises

Sponsor	• Acts as the advocate for the project to get corporate alignment and budget approval • Explains the benefits of DITA to other members of management	• Executive communication skills (ability to get cross-functional interest and agreement) • Aware of the benefits of streamlining content life cycle • Familiar with the current content creation, publishing, and management processes
Project Manager	• Engages all stakeholders • Develops and adheres to the budget • Manages resources and time lines • Develops and meets milestones	• Project planning • Resource management • Appreciation of the value of XML