

DITA and SharePoint FAQ

Note: The following questions were transcribed from the February 17th KMWorld webinar “*Strategic Content is Good for Business: How DITA and SharePoint Work Together for Information Sharing*” presented by Dr. JoAnn T. Hackos, President, Comtech Services and Su-Laine Yeo, Interaction Design Specialist, JustSystems.

Questions	Answers
<p>1. Is there a preferred/standardized workflow in SharePoint for publishing DITA output? Or can any variant be employed (wikis, publishing sites, lists)? What, roughly, are the individual steps in such a workflow? What would be the best way to import content - for example HTML files created using the DITA Open Toolkit - that is created outside SharePoint (e.g. in a CMS such as Documentum)?</p>	<p>SharePoint is a versatile environment and can be used in many ways. JustSystems is not a SharePoint integrator, but a producer of tools for structured XML authoring. XMetaL Author Enterprise for SharePoint comes with import and export utilities, so you can import into or export out from your DITA documents.</p>
<p>2. Do we first need to convert every single document we have in Word or Excel, for example, to DITA's structure?</p>	<p>DITA is a document format, as Word, or PDF, or many others are. You have to convert your legacy documents from one format to the other if you want to harvest the benefits of the new one. We believe that depending of the goal that you have there are often compelling reasons to do the conversion; in particular, to move towards DITA.</p>
<p>3. I use SharePoint quite a bit... how does SharePoint store chunks of content? I only know of storing a document but not pieces of content unless you create one document for each chunk of content. Could you share with us how to check-in content chunks?</p>	<p>If you're using DITA with SharePoint, you would still only be able to check in whole documents, not parts of documents. The difference with DITA is that you can make those documents smaller and then link those small documents into one big document. For example, if you are writing a book that is 100 pages long, you could write it as 100 one-page documents and use a DITA map file to pull together those 100 documents into one big document.</p>
<p>4. JSR170 had all the hype but did not really go anywhere... will DITA follow the same path? If not then why not?</p>	<p>We believe, as well as the growing community of DITA users, that DITA is here to stay.</p>
<p>5. When I change a module and I don't want the change to appear in past documents - only in day-forward documents it should appear - how do we achieve this?</p>	<p>Based on the assumption that "changing the module" was used in the sense: having a new version of the module that is pointed by some old documents. The current paradigm supported by the authoring environment is to work with the Tip version. While this model lacks direct support for the use-case described, it reduces the complexity an author would have to be exposed to. The process that we suggest is to create new modules when the new baseline of documentation is needed.</p>

<p>6. What rule of thumb do you use to determine what should be a topic and its granularity (e.g. in an example that was presented, the "topic" had only one sentence)?</p>	<p>A topic is usually about half a page to a page long. It should be long enough to stand on its own. Examples of topics are a 10-step procedure, a three-paragraph overview of something, a definition, or a Wikipedia article. The one-sentence example in the webinar was not a topic per se, but it was still reusable because in DITA you can reuse pieces of content that are smaller than topics.</p>
<p>7. How do I change the styles? These examples are not very attractive for external use.</p>	<p>You can change the styling of HTML output from DITA by modifying a CSS stylesheet. To change the styling of PDF output, you can set parameters in XMetaL configuration files, and/or for deeper changes you can use the XSL-FO page layout language to modify XSL-FO files. It is also possible, with some limitations, to lay out DITA documents using solutions based on Adobe FrameMaker or Microsoft Word.</p>
<p>8. What if my policies need more detail/structure than is in the DITA Topic?</p>	<p>DITA can be specialized to enforce a wide variety of structural rules, and can even accommodate element types that are unique to your own company.</p>
<p>9. Can you use dialog boxes (similar to the conditional text examples) to create a document map?</p>	<p>Yes, XMetaL Author Enterprise has dialog boxes for creating maps and inserting references to topics into maps.</p>
<p>10. How easy is it to get an entire enterprise to come to terms with a single voice and style guidelines? In my experience, there seems to be different guidelines for different organizations.</p>	<p>XML in general and DITA in particular should help in making steps toward standardization. First by separating the content from the styling, and then through DITA offering richer semantic units that map into the writer's domain. For example, a step in a procedure in DITA is recognized as a semantic unit, and not just as differently styled text, whereas an item in a numbered list has less semantic meaning.</p>
<p>11. Is there any way to control the base content yet create a delta that would leverage the draft-comment element? Could be useful for review workflow.</p>	<p>For those interested in document reviewing, you can refer to XMetaL Reviewer, a complementary product to JustSystems' XMetaL Author Enterprise.</p>
<p>12. How do you apply the DITA DTD to SharePoint content - for example, if I have an SME writing content, how do I make sure he is using DITA elements to markup his content?</p>	<p>If the SME is using XMetaL Author Enterprise, you can easily configure it so that all new documents are DITA documents. When working with a DITA document, XMetaL Author Enterprise constantly validates the document to ensure that only DITA tags, in valid DITA structures, are used.</p>
<p>13. Is there a rule of thumb on the level of granularity to apply to content modules?</p>	<p>See question 5.</p>
<p>14. Does XMetaL integrate with the free version of SharePoint, or only the MOSS part?</p>	<p>XMetaL integrates with Microsoft Windows SharePoint Services 3.0 or later, or Microsoft Office SharePoint Server 3.0 or later.</p>

<p>15. With the intense scrutiny on managing expenses, how can we leverage our existing use of MSWord and SharePoint to use DITA-XML?</p>	<p>MSWord does not come with any of the features that you would realistically need to write DITA documents, such as the ability to display images that are referenced using DITA markup, or menu items for inserting any kind of DITA markup. Commercial add-ons are available to make MSWord a more feasible DITA editor, however this will not necessarily be less expensive than adopting a dedicated XML editing tool. One thing we can suggest is to post a message briefly outlining your requirements (e.g. what kinds of problems you would like to solve by moving to DITA) to the DITA Users Yahoo! group and see if anyone has suggestions for technologies that would both fit your budget and meet your requirements.</p>
<p>16. How would you import XML topics stored in SharePoint, into PowerPoint or Word? Or would the organization need to use an XML editor.</p>	<p>You need an XML editor to write the DITA topics. However, for people who just need to read the content that was written as DITA topics, you can set up a system to automatically generate RTF (Word) files from the DITA files. This is not difficult; a basic RTF output option is available in the trial version of XMetaL. Generating PowerPoint files from DITA is more difficult, but it can be done.</p>
<p>17. How does this solution scale if you have thousands of images and files?</p>	<p>SharePoint is certainly capable of storing those amounts of data, and XMetaL Author Enterprise for SharePoint does not have any particular limitations in that respect. There are in general two aspects of scalability: the totality of information available for document assembly and the size of the individual documents. The first aspect is really a question of how you organize your data within the CMS (such as SharePoint) and what tools SharePoint provides for organizing the data. The second aspect is very interesting and often a problem in non-structured formats. DITA, however, has a particular answer to this problem, which is that topic oriented authoring ensures authoring and reviewing happen at a more granular level than in monolithic giant documents.</p>
<p>18. What is involved in establishing SharePoint as the front-end with an XML editing system?</p>	<p>I would rather call it a back-end (our point of view, I'm sure that others might insist on the opposite). Basically, you need a SharePoint account, and you should store the DITA templates somewhere. You are ready to go (I'm assuming you have followed installation instructions for XMetaL Author Enterprise for SharePoint. You can also import templates using XMetaL's import utility.)</p>
<p>19. In this model, how do you manage reproducibility or maintainability for older versions of documents?</p>	<p>See question 5. The current recommendation is to make a copy for the new baseline and start from there. We are planning to address this use-case in more detail in future releases.</p>
<p>20. Would localization be handled with Conditional text?</p>	<p>You can use Conditional Text to handle localization for different dialects of the same language, such as British and American English. For completely different languages, such as translating an English document into German, it is usually simpler to use a separate set of files for each language.</p>

<p>21. Is the SharePoint environment powerful enough for a tech comm DITA implementation, or is it more for the other less intensive apps you are referring to (HR process and procedures)?</p>	<p>Yes, it would be powerful enough for many tech comm DITA implementations.</p>
<p>22. What is a "TOC" - discussed on the Enterprise solution slide, step 2?</p>	<p>TOC stands for "Table of Contents", or the heading structure of a document.</p>
<p>23. Does a SharePoint implementation support working locally and syncing to a server location, or must you always work directly on the server?</p>	<p>Yes, it supports working locally and syncing. When you check out a document from SharePoint, a copy of that document is automatically downloaded to a temp folder on your hard drive. When you check the document back in, the temporary document is cleaned up from your hard drive.</p>
<p>24. Is it possible to use DITA with SharePoint server 2003?</p>	<p>This version has not been officially endorsed by QA for XMetaL Author Enterprise for SharePoint.</p>
<p>25. What mechanism does XMetaL use for link tracking within SharePoint? Does it happen on the server?</p>	<p>This implementation does not require any server side configuration or programming that would be specific for DITA documents. The server side customizations are left completely to an organization's discretion to implement as they see fit. XMetaL's authoring environment ensures that references between documents are represented by URLs that can be used to retrieve those documents from the SharePoint repository.</p>
<p>26. How do you incorporate and manage images in DITA content?</p>	<p>Incorporating images in DITA is very similar to incorporating images in HTML. You put markup in the DITA document pointing to an image file that you want to include. DITA users can use more file formats than HTML users, such as SVG and EPS, because DITA documents go through processing before being put on the web.</p>
<p>27. Will XMetaL feature a "SharePoint" menu to facilitate access to XML/DITA content stored in SharePoint?</p>	<p>XMetaL includes a "repository menu". If XMetaL is configured to connect to a SharePoint repository, the menu will facilitate access to XML/DITA content stored in SharePoint.</p>
<p>28. I noticed that the list of companies using DITA is large. Is it reasonable for smaller companies to use this method?</p>	<p>Yes. A list of companies using DITA is at http://dita.xml.org/book/list-of-organizations-using-dita</p>
<p>29. What is the advantage of DITA over other XML types?</p>	<p>There is no universal answer to this. DITA might or might not have some advantages over other XML vocabularies, depending on the problem that you are trying to address. We believe that DITA is supreme in supporting the topic-oriented paradigm, the paradigm that most technical, and other formal types of documentation adhere to.</p>

<p>30. What does SharePoint/XMetaL offer in terms of management of content on a more granular level (specifically building conrefs)?</p>	<p>In XMetaL, you can use conref to transclude any element into any other valid location. To facilitate this, XMetaL has an "Insert Element with Content Reference" command. The user can use this dialog to browse either the local file system or the content repository (such as a SharePoint server), and choose an element to conref into the current location. XMetaL also has a feature for creating and inserting "Reusable Components", which for some organizations makes it easier to keep track of frequently-reused content.</p>
<p>31. How do I single-source if my printed manuals provide step-by-step instructions and my online help files provide context-sensitive information (2 different types of content)?</p>	<p>You will most likely find that the same information is actually present in both cases. DITA should help you organize your information at the right granularity level, and additional tools such as conditional text should help you to hold a tight grip on the variations. However, there is no magic answer, only the set of good tools that will help you - and DITA is, we believe, a powerful tool for achieving this.</p>
<p>32. Is it possible to use XMetaL to manage the content of an "Internet-facing" Web site built with MOSS?</p>	<p>XMetaL Author for Microsoft SharePoint is an XML (DITA) editing tool. So, if the content of the "internet-facing" web site is in this format, then the answer is yes. However, if that is not the case (you want to manage your HTML directly), then XMetaL is not the tool that you need.</p>
<p>33. Is it possible to have a validated MOSS environment?</p>	<p>I don't know. However, XMetaL always warns the user before saving a file that contains invalid XML. In addition, it is possible to configure XMetaL to give additional warnings if the user tries to check in a document that breaks an organization's specific business rules.</p>
<p>34. Is a link to a file within a folder within a SharePoint repository folder independent?</p>	<p>The link to a file is the URL that SharePoint provides for retrieving the given document from it. This URL is therefore path-dependent.</p>
<p>35. To what extent are those firms using DITA? For example, is IBM using DITA for all of its enterprise-wide communications initiatives, or is DITA use limited to a few workgroups?</p>	<p>That's a good question. As far as we know, few or no companies are using DITA for all communications across the enterprise, and larger companies take longer to change. A relevant quote from IBM in 2008 is:</p> <p><i>"IBM has realized tremendous business value through our adoption of DITA as the centerpiece of our global technical publishing operation. We see the DITA Adoption Technical Committee as a valuable means of advancing the use and deployment of DITA across even more industries and clients, in a world in which DITA truly represents a common currency."</i></p> <p>- Bernice Casey, Distinguished Engineer, IBM Information Strategy.</p>

<p>36. A big challenge is determining, clearly, whether the benefits of using a content-management system outweigh the increase in management, training, software and hardware needed to execute and maintain the approach over time. It seems that the larger and more complicated any implementation becomes, the less likely leadership will continue supporting it, especially as leadership changes over time. Your thoughts?</p>	<p>The mitigation of this risk is possibly the real sweet spot for XMetaL Author Enterprise for SharePoint. XMetaL Author Enterprise for SharePoint will enable you to use the infrastructure that you most likely have within the organization. It will use it in a light - not big-commitment way - providing you with the basic but crucial functionality.</p>
<p>37. How much do you need to adjust SharePoint to make it work as a repository for DITA content?</p>	<p>See question 18.</p>
<p>38. I am trying to understand the whole picture: DITA is the technology, the XML files are input, XMetaL is the editing tool, and SharePoint is the delivery mechanism. So in the end, I will need something like SharePoint to have a document delivered to an individual. Can you please provide some more information?</p>	<p>Almost. The XML files are input, XMetaL is the editing tool, and SharePoint is where XML files are stored. Readers don't read XML files directly; they will want to read HTML or PDF files that have been created by processing XML files. You can use the "Generate Output" feature of XMetaL to process XML files into HTML or PDF files, and then distribute these HTML or PDF files to your readers either using SharePoint or using any other method.</p>
<p>39. Does Microsoft TechNet, MSDN portals employ DITA?</p>	<p>I don't know about these particular sites. However, we know of at least one group in Microsoft using DITA with XMetaL, and other Microsoft groups using other XML languages with XMetaL.</p>