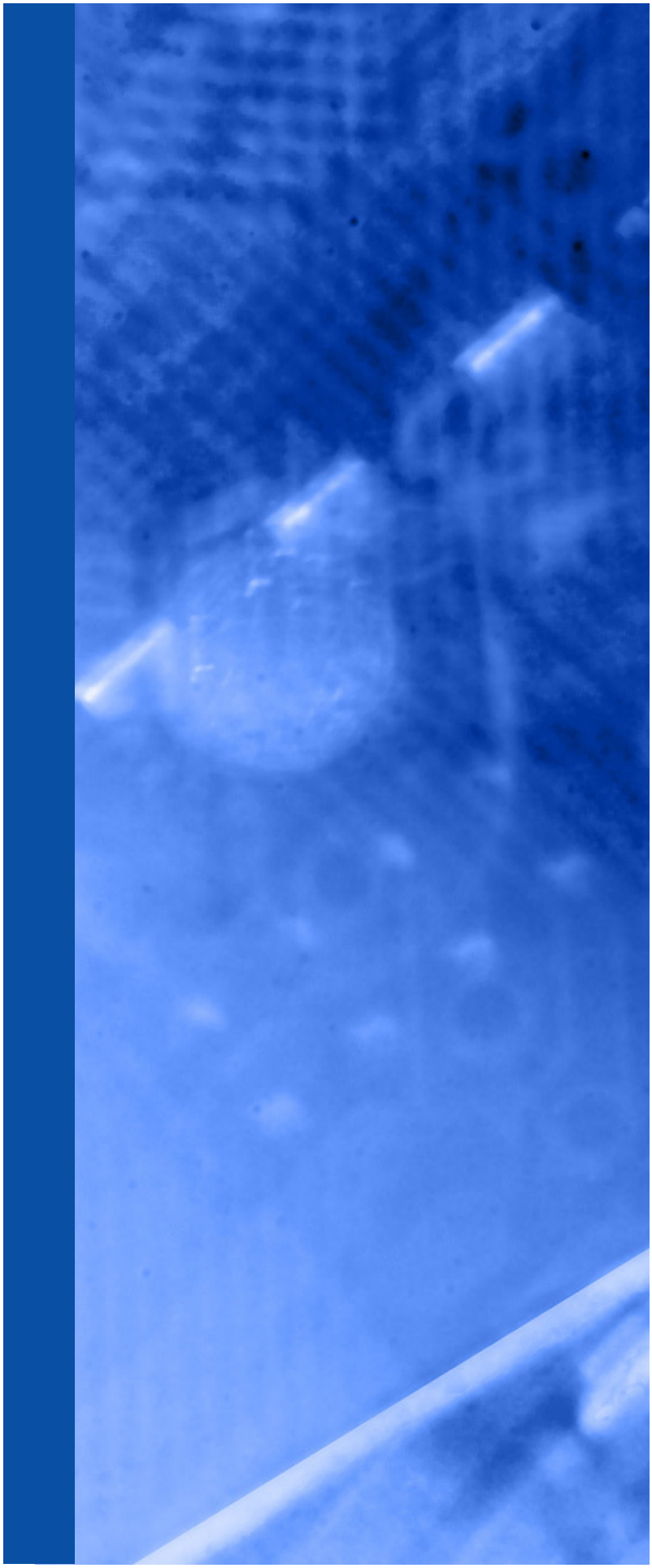

A Case Study from *Smart Content in the Enterprise*

Symitar Solutions for Credit Union Management

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Symitar Solutions for Credit Union Management

Documenting Software Modules

Symitar™, a division of Jack Henry & Associates, Inc.®, is a leading provider of core processing software solutions for credit unions. Symitar's Episys® solution consists of a suite of software components, based on a modular design, that allows the system to be deployed in custom configurations that best meet each credit union's operational requirements.

Software modules provide key functionality for teller operations, reporting, online banking, system installation and setup, trouble-shooting, and many other processes used to operate and manage credit unions of all sizes. Modules encompass business functions that are readily understood by customers -- the staff members of credit unions using the solutions. Symitar produces documentation in HTML and PDF to support users of their products. The company also provides credit unions with training materials for tellers and other employees who use the Symitar system components.

The Support Department at Symitar creates and manages over 40,000 pages of documentation. The support and training documentation is delivered and consumed as PDF documents and in the HTML help format called CHM (for the .chm file extension). CHM is a compiled set of HTML pages with generated navigation aid (e.g., table of contents and linking). Symitar has developed and enhanced the CHM files delivered with custom features that integrate the help file information with training materials to improve the usefulness of the materials and the overall customer experience.

Toward a Modular Solution

Improving Customer Service

In 2005, Symitar management began looking for ways to improve customer service by providing better documentation. At the time, the company produced large, monolithic documents for each product and each type of guide. These documents were comprehensive and self-contained. They were designed to provide everything one needed to know about a particular area of the system. However, they were not organized around performing specific tasks.

Symitar decided to adopt a modular approach to its documentation and training materials, and restructure them into a set of modules that corresponded to the software modules (or subsystems) themselves. The company focused on content reuse at the module level. The company sought to provide the documentation that corresponds to the system configuration deployed by each credit union.

Modeling and Prototyping with DITA

Symitar embarked on a transition toward modular, integrated content tied to the software development process. Technical Publications, a unit within the Support Department, began

by prototyping several approaches to modeling and managing content. After considering various approaches to structuring XML tagged content, the group leaders decided to adopt DITA (Darwin Information Typing Architecture).

Organized around topics, concepts, tasks, and references, DITA provided sets of predefined content component objects and tags. Content was segmented into modules addressing specific system components and operations. Content components were then created or updated in parallel with system components. DITA could be readily adapted to Symitar's need to document predefined software modules. No specialization of DITA components was required.

Technical Publications at Symitar took time to prototype new ways to organize the content. Transitioning to the modular topics used in a DITA-based architecture required thoughtful reworking of the content into self-contained modules. Some rewording and style changes had to be made to the content along with chunking it into logical topical divisions.

DITA also required planning the navigation methods and links that the end users needed to consume the information. Technical Publications adopted a task-oriented approach to documenting software capabilities, and sought to improve the clarity and effectiveness of the writing.

Master Topic Areas

Over several years, Technical Publications restructured the product manuals into 90 master topic areas that cover the entire system functionality and administration. Some functionality is common to all configurations of the system (e.g., "logging in"). Documentation for all configurations of the system shares a single topic for these common features, while other topics may have several variations to support the different configurations.

This strategy emphasizes reuse of content and eliminates much duplication. Also, some topics are similar, but not identical, and may have slight variations for specific product lines. Strategic use of conditional references for subtle variations, termed CONREFs, allows a balance of customized output and minimal redundant preparation of content.

An XML Editor and a File System

Symitar has deployed JustSystems' XMetaL XML editor for creating and updating its content using the DITA data model without any specializations. XMetaL was selected because it is similar to the tools used previously to edit the content, and the learning curve for content creators would be reduced significantly. XMetaL is also used to create and edit the DITA maps.

Symitar's content is currently stored as flat files in the file directory. The Information Architect and three technical writers have migrated certain document sets to DITA by focusing on document type and audience. They began with the user guides, and then migrated the programming guides, back office support guides, and troubleshooting guides.

Symitar has created a large collection of topics, with multiple views into the content for each deliverable product that may share content with other products. All new content for these

document types are developed in DITA from scratch. Release notes are still created in the legacy system but will eventually be migrated to the new environment.

Improved Efficiency and Higher Quality

Content Reuse

By reorganizing product information into reusable content components, Symitar has been able to develop a well-integrated and accurate knowledge base, from which the bulk of its product documentation is now produced. The DITA-based system is both more efficient and produces higher quality support documentation.

Many content components are now reused in multiple product manuals. Some of these even include subtle variable information specific to product line or even jurisdiction in which the credit union operates. Even when managing flat files in a directory, Technical Publications is able to streamline editing processes and free up writers to do value-add content enhancement. Symitar has been able to eliminate some of the reformatting and cutting and pasting required for content reuse in the old approach.

Managing Content Components

Currently, document content is managed with a system of "outrageous spreadsheets," as described by Kathryn Showers, the Information Architect leading the DITA adoption efforts. She also leads initiatives to establish best practices and policies for creating and maintaining the content.

Symitar is considering adding a content management system in the future to further streamline processing, add workflow tracking, and improve content management and navigation. The CMS is expected to provide search tools to improve researching topics for inclusion in product guides. The CMS will also help authors and editors to tie content development activities more closely to the software development cycles they are designed to support.

Combining Product Documentation and Training

Ultimately, Symitar defines success for this content and the system in terms of reducing or eliminating technical support calls. The new approach has also brought the documentation and training teams much closer together

While it began as grass roots evangelism, the DITA-based system has expanded into a leading example of best practices across the organization. In addition to the technical publications and training groups, other groups within Symitar are looking at expanding their approaches for producing software design and test documentation, and are expecting comparable benefits. Disparate groups are now able to more closely work together, and to better coordinate their business activities.

Smart Content Insights

Symitar has found that migrating to topic-oriented modular content helps to improve the quality of documentation and align results towards meeting business objectives. More is required than just defining and developing topic modules. Also essential is a thoughtful information architecture, writing guidelines, and a strategic view of how the information is going to be used.

With a well-defined approach to content components, one system can address the requirements of another. At Symitar, the success of DITA for product documentation leads to its adoption for training modules – and the merger of two groups into a more comprehensive one that focuses on customer information.

The combination of DITA, good governance policies, and an information architecture has better aligned various teams toward meeting the underlying business goals. Content reuse is the organizing principle driving the transformation of Symitar's product content practices.

Content Delivery: The granularity and structure of content depends on careful consideration of how the content is consumed and how it is best organized to solve a specific problem. Consumers of the Symitar support and training documentation are provided with enhanced content that is organized to teach or support specific tasks, improving their ability to perform their work without relying on technical support calls. The customers are more efficient and Symitar is able to reduce its technical support costs.

Content Enrichment: Symitar enriches content (defined by DITA topics) at the module level. Content components map to software modules. By including topical information and metadata, and organizing content into clearly identified topics, Symitar improves its documentation processes, and facilitates its ability to reuse content components in multiple manuals.

In addition, content enrichment is spreading. Other groups within Symitar are learning from the experiences of Technical Publications about the business benefits of DITA, and enriching content components with various kinds of semantic and syntactic information.

Content Creation: Writing for stand-alone modules requires consistency of voice and care in creating complete, useful information objects that can be combined into integrated guides and training materials. Collaboration across product content requires governance of processes and style. Management of content in modules increases the number of objects being managed and can quickly become difficult without the aid of a content management system and workflow tools. Fortunately, with DITA-aware editing tools, some of this complexity is made manageable.