Taxonomy as a Catalyst for Content Reuse

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Company Overview

- Founded in 1995
- HQ in San Jose
- Industry's leading provider of hardware and software-based networking infrastructure solutions, Brocade provides scalable server virtualization and cloud strategies
- Over 4,500 employees in 36 countries
- $2+ billion in annual revenue
- NASDAQ: BRCD

Technical Communications

- ~60 member distributed team (US, Europe, and India), includes a 10-person CCMS support team
- Using hosted SDL LiveContent 2104, XMetaL9.0, and WorldServer
- Corporate website uses Adobe Experience Manager
- 54,000 objects in the CCMS
- 1,729 publications
- 67 products in 9 product areas
- 713 publications released out of the CCMS in FY2015
Agenda

Where we are today and where we are going

Phase 1
Migration
- Migrated 40,000 pages of unstructured legacy content
- Established basic infrastructure & processes
- Trained writers

Phase 2
Strategy
- Taxonomy & metadata strategy
- Reuse strategy – prove ROI
- Corporate CCMS-adoption Strategy

Phase 3
Integration
- Tools and system integration
- Metadata-based smart publishing & SEO
- Personalization/self-service

We are here
Content Migration

Phase 1 (2013 - 2014)
Moving to XML with unstructured content?

Really?

Insane or stupid?
Migration strategy

State of legacy content

• Unstructured
• No DITA typing, reference content mixed with configuration content
• 1000 to 2500-page configuration and reference guides
• Antiquated authoring & collaboration tools
• PDF only, book-centric model
• No customer feedback

Phase 1 goals

• Convert as is, modest goals: Re-create what you had before
• Get EVERYONE and EVERYTHING into the system. Align and rework in the CCMS as part of phase 2 goals.
• Create supporting infrastructure (templates, variables, info-models, workflow style sheets)
• Provide basic processes & training
• Break books into smaller guides, no reworking of content
• Publish HTML
Post-migration

Phase 2 (2015)
Post-migration blues

Customers still can’t find what they need!

What are you delivering different now?

PROVE YOUR WORTH!

Where’s the ROI?

How do we get other groups into the system?

METRICS?

Content still stuck in silos

NEXT STEPS???

DITA typing & compliance

What’s your metadata strategy?

Consistency Accuracy Usability

How do we Improve Documentation quality?

SEARCH SUCKS!

What about content reuse?
Enter taxonomy...

...the missing link between structured CCMS authoring and customer self-service
Change management drivers

Two independent mandates coming together to drive and catalyze a successful content reuse and metadata strategy

- Organizational mandate (TechCom):
  - Redefine content ownership. Instead of owning features in a single product line, establish technology-based ownership across product lines
  - Integrate Best Practices content (Marketing) into the CCMS

- Corporate mandate: a corporate taxonomy to support content classification and metadata tagging for
  - Migration to new corporate website: improve customer experience
  - Software defect tracking and reporting
  - Knowledge base content filtering
Brocade corporate taxonomy

Started by defining the best practices content types
... and then our product content types
... and then involved others in defining their content types
... and then created a corporate ownership model

Broader context: Brocade Web Transformation & Rebranding
- Improve customer experience, findability, drive sales
- How are users accessing and consuming Brocade content?
- Content migration to new Web CMS

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Brocade corporate taxonomy baseline
How we created the software technology hierarchy

1. Defined our basic content units and categories
2. Analyzed our content in terms of these units (work as a team in parallel on multiple products)
3. Recorded our findings in a comparative grid
4. Cross-validated by adding other products
5. Resolved corner cases in team meetings
6. Reviewed and signed off with product teams

Don’t wait for completion to reap the taxonomy’s benefits. A taxonomy is a living construct!
Defining basic content units and categories

- **Software Technology**: basic semantic unit, suitable for categorizing and documenting networking products. Working definition:
  - An industry standard (or proprietary) protocol, framework, service, or solution (you can search for the name and find information, such as RFCs online for many of these technologies)
  - Typically corresponds to a documentation unit (a chapter or section in a publication)
  - Has “features” associated with it that define the flavor of a product-specific implementation.

- **Software Technology Groups**: Security, Management, Monitoring, Layer 2 switching, Layer 3 Routing, etc. Maps to a publication, for example, *Brocade NetIron Layer 2 Configuration Guide*

- **Operating system/platform**: NetIron, FastIron, Fabric OS, Network OS, Vyatta Network OS. Maps to a documentation set
Content analysis

1. Split up the work per platform
2. Go through each publication deliverable
3. Identify technology candidates
4. Validate against criteria, assign a score
5. Resolve corner cases with team
Creating a content map and putting it to work

The taxonomy does not need to be complete to start implementing your content and metadata strategy.
Putting the software technology hierarchy to work

Phase 2 (2015) continued
Leveraging the software technology hierarchy

The software technology hierarchy provides us with a conceptual representation of our content that we can use to:

• Compare and map technical documentation for various product lines
• Identify under-documented areas
• Define the basic unit of reuse (“Software Technology”)
• Derive reuse metrics and measure success as a percentage of reusable content
• Define content units based on the hierarchy, and rework the content using task-based writing guidelines
• Derive a content ownership model; horizontally across product lines
• Derive metadata for search, filtering, dynamic publishing, and self-service
Technology ownership challenges

New alignment of writers by technology instead of platform

Before: Different technology writer per platform

After: Technology owners across platforms
Benefits

- Owning technologies across platforms allows writers to perform “deep dives” into the content and gain expertise in the technology
- Reusing content across platforms gives consistency for customers
- Less content for SMEs and editors to review leads to higher quality content
- Writers working across platform groups leads to fewer silos: All one TechCom team
- Content in SDL LiveContent ensures DITA-compliance for ease of creating self-service delivery options

Techniques

For single-sourcing, we set a condition at the element level if there are differences between platforms

1. Configure the interfaces on which VRRP service is to be enabled.

```plaintext
[[Platform=FastIron]]
device(config-vlan-200)# tag ethernet 1/1/1 to 1/1/8
</codeblock>

[[Platform=Netiron]]
device(config-vlan-200)# tag ethernet 1/1 to 1/8
</codeblock>

We also add conditions at the sub-map level to use different task topics

- Track ports and track priority with VRRP and VRRP-E
- Port tracking using VRRPv3
- Tracking ports and setting VRRP priority using VRRPv3_FL_NI
Task-based content vs. unstructured content

**Before:** Unstructured/un-typed content with one-command topics

- Configuring basic VSRP parameters
- Configuring optional VSRP parameters
- Disabling or re-enabling VSRP
- Changing the backup priority
- Changing the TTL setting
- Changing the hello interval setting
- Changing the dead interval setting
- Changing the backup hello state and interval setting
- Displaying VRID information

Each topic contains one command with several pages of output for show commands. Customers must read many pages to gather the syntax for one task.

**After:** New task-based content on the right

- Configuring device redundancy using VSRP
- Reenabling VSRP on Layer 3 devices

Each topic is a customer use case with command syntax or output appropriate to the task step. Separate command pages are now in the command reference with full syntax and examples or show command output, and field descriptions.
Measuring content reuse by technology

- We can measure reuse by technology where the target is reusing single-sourced sub-maps for technologies that are shared across platforms.

- Some technologies are not used across platforms and we want to measure only the percentage of reusable technologies.

- Our single-sourcing process involves reworking and retyping objects; this has improved the percentage of content reused and gives the customer consistency across our documentation sets.
Leveraging taxonomy to define and implement a metadata strategy

• Phase 3 (2016 - 2017)
Metadata strategy - Corporate drivers

All Brocade content (regardless of owner) is tagged with corporate taxonomy metadata for three independent subsystems: (1) Corporate website content migration and publishing, (2) Defect tracking and reporting, and (3) Knowledge Base content aggregation and filtering.
Opportunities and next steps

• Formal Taxonomy management
  – New Corporate Governance Boards and central Governance Council
  – New Content Strategist in the Marketing organization

• Using WorldServer Terminology Database to manage terminology corporate-wide

• Implementation of taxonomy support in the CCMS to support metadata content tagging as part of the authoring process

• CCMS integration with AEM web content management system and other subsystems

• Using content tagged with metadata from the software technology hierarchy to support dynamic self-service delivery
Objective - A fully integrated, automated CCMS publishing solution

- Integrated taxonomy support for content metadata tagging
- Metadata embedded in PDF and HTML output
- Publishing UI for staging, target selection, and publishing

**Taxonomy Gatekeeper**
Formal review & approval of changes for x-product consistency and validity

**Taxonomy Manager**

**Live Content Architect (CCMS)**

**Localization**

**WorldServer**

**Publication Export/Staging**
Production checks Validation

**AEM**

**Brocade Web CMS**
Adobe Experience Manager

**Country sites**

**Brocade.com**

**Internal Support**

**CCMS - AEM integration via APIs**
- Reads metadata on staging docs
- Auto-tagging in AEM
- Upload docs to AEM server
  - Validates upload and URL

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Questions?