Capabilities of Content Management Solutions

This document provides an overview of capabilities to consider when searching for a content reuse and management solution. Not all of these characteristics will be important to you. Once you have determined the types of improvements that your company needs to make as a result of implementing a solution, you will be able to use this list to prioritize.

As you review these capabilities, you will answer the questions: Which are *Must Haves*? Which are *Nice to Haves*? And which are not relevant to your needs? By answering these questions, you will develop a comprehensive list of requirements to present to any potential vendor. Vendors will help you explore their solution to determine if it is a good fit for you.

CAPABILITY	DESCRIPTION	CONSIDERATIONS
Component Reuse	The ability to reuse a chunk of content across documentation.	• This is a fundamental capability that any reuse solution should have. • Components can be text, formatted content, graphics, tables, or other media. • Reusable components should be stored in a centralized library that supports versioning. • Other terms for "component" include chunk, topic, snippet, block, etc.
Metadata and Taxonomy	The ability to classify your reusable components so you can easily find and reuse them later on.	• This is a fundamental capability that any reuse solution should have. • Metadata is stored with your reusable components so you can search for them later. • Taxonomy provides a logical classification (think folder structure) for your component library. • Ensure your solution's metadata and taxonomy capabilities are easily configurable so you can customize them to meet your needs.
Variables	The ability to centralize the definition of placeholder text that used within and across documentation. **Examples:** Company name, client name, client address, product name, etc.	• This is a fundamental capability that any reuse solution should have. • Variables simplify updates by minimizing the use of search-and-replace to update content. • Variables also increase the reusability of your components.
Notifications	The ability to automatically notify authors when reusable content they have used has been updated.	• This is an important capability if you will be reusing content in **living documentation**. • Do not rely on people to communicate content updates; the solution should do this for you. • Notifications can be proactive (e.g., you are emailed as soon as reusable content is changed) or contextual (e.g., you are alerted to the change next time you are working in the document).

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		• Rely on your content reuse strategy to determine what level of notification is important to you.
Where Used	The ability to track where, when, and who reused content.	• This is an important capability if you will be reusing content in **living documentation**. • Facilitates impact assessment and content updates by showing you what documentation is using a reusable component.
Conditional Content	The ability to generate multiple variations of output from a single master source.	• Reduces the amount of content you have to maintain. • Tremendous ROI potential – simple to implement and you'll see immediate value. • Increases the reusability of your components.
Document Assembly	The ability to easily assemble new documents from existing content.	• This is an important capability if you will be using reusable content to generate **repetitive documentation**. • The solution automatically finds relevant content based on the context of the documentation the user is generating. (example: a sales associate answers a series of questions and the solution auto-generates a draft of a sales proposal using reusable components)
Relationship Management	The ability to know reusable components are related even though the content is not exactly the same.	• This is an important capability if your reuse strategy calls for **conceptual reuse** (also known as derivative reuse). • Allows you to relate similar reusable components even though the content is not exactly the same. • **Example:** You may have multiple company overviews that are industry specific (generic company overview, company overview for life sciences, company overview for manufacturing, etc.)
Bulk Update	The ability to update reusable content in many documents at one time.	• This capability can be used in conjunction with "where used" to update reusable components in many documents at one time. • This capability can also be used to update variables across sets of documentation at one time. (Example: your company generates a product that has an installation guide, user guide, training manual, marketing data sheet, etc.)

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Support for legacy content	The ability for the reuse solution to support legacy content your company has already authored and approved.	- Does the solution work with your legacy content as-is? - Does the solution require an import/conversion process to utilize your legacy content? *Be skeptical of claims that technology can automatically import your content! (typically a lot of manual work is still required before and after this import process)*
Support for non-users	The ability for people who don't have the solution installed to still view, review, and approve the reusable content.	- This capability is critical for your review and approval process. - Does everyone need to have the solution installed to review and approve content? (typically you'll have more reviewers and approvers than writers) - This can be a challenge for XML based solutions. You can't route XML documents as-is for review. You either need a review tool or the XML document needs to be rendered to a "reviewable" format (e.g., PDF, Word, etc.). Even if you render to a reviewable format, then you face the challenge of incorporating the reviewer's comments back into the source XML (the source XML is separated from the reviewer's comments).
Support for translation	The ability to store translated versions of reusable components alongside the source language component.	- This capability is critical if you translate (or will translate) content. - You should easily be able to see what languages a component has been translated into. - You should be able to leverage these translations to minimize the amount of content that is sent off for translation. (tremendous time and cost savings)
Security	The ability to control access to your reusable content at a granular level.	- Your content reuse strategy will address and identify who can access the content and what type of access they have. - Does the reuse solution support the granularity that you need? (Read, write, update, delete, approve, etc.) - Can security be controlled on a per-library basis? (e.g., one set of security for reusable marketing content and a different set of security for reusable tech pubs content)

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Storage Format	The ability to store your reusable content in an open or widely accepted format so it can be used elsewhere.	- Does the solution store your reusable content in a proprietary vender-specific format or database? If so, be wary of vendor lock-in. - What happens if you decide to move away from that vendor? What happens if that vendor goes out of business? You need to be able to use you're your reusable content going forward. - Your reusable content should be stored in an open format or standard (XML, DITA, OpenXML, etc.) or a widely accepted industry format.
Disconnectedness	The ability to use the solution while offline.	The airplane test: Can you use some or all of the solution while on an airplane? Or must you always be online to use any part of the solution?