

Use Case: Technical Documentation Team

SmartDocs for creating and maintaining customer-facing document sets

Challenge

Many of our customers have in-house technical writing teams that create, edit, and maintain product documentation. One particular customer was experiencing associated challenges with their creation and maintenance of customized, modular content. They needed a system that would help them produce customized manuals for their customers on-demand to accompany each unique sale. The organization's technical writing team recognized the benefits of applying content reuse and conditional text to their content in an effort to streamline the process and get documents into their customers' hands faster.

When the team came to 36Software for a solution, they were maintaining hundreds of documents individually that had the potential for up to 80% crossover content. Each document was consistently edited and updated to satisfy a unique combination of products and services for each customer. Each update to products or services required an arduous assessment of existing documents to determine where changes needed to be made. Clearly this type of manual approach to updates led to inconsistencies, missed updates, and an unmanageable volume of work.

Requirements

The writers sought a solution that would accommodate their modular documentation approach. The technical teams use diagrams, graphics, and screen captures which change frequently depending upon the products and features. What's more, the teams needed a collaborative environment and methods for ensuring everyone has access to, and is actively using, the most current content.

The engineering team also required access to the solution so they could contribute up-to-date product descriptions, images, screen captures, etc. The solution must allow engineers to provide this information in such a way that didn't require manual email distributions to the writing team. Writers should have immediate access and clarity about new information as it becomes available. To satisfy the team's desired process, their solution must provide the following:

- Accelerated document production by providing writers with suggested content, practical, consistent templates, and document automation capabilities to be able to respond to ever-changing customer needs.
- Ability to easily track usage in order to push the new versions of reusable content and graphics into existing documents. Traceability of content within documents is critical so that they know each customer reliable has the most current version of their unique guides.
- Conditional text capabilities in order to allow push-button customization of content.
- Centralized access to the same content and easy-to-use templates available to all writers and editors.
- Opportunities for an efficient review and approval process for all content contributors, SMEs, reviewers, etc. to eliminate the current "bottleneck".
- Content managers must be able to control content, versioning, usage, permissions, etc.

Resources

The company's technical team consists of 20 technical writers and a team of product managers (engineers), all of whom contribute to the documents and content in some capacity. The company wants to use Word as their authoring environment; Microsoft Word and SharePoint having already proven to be valuable and efficient tools for them.

The company's large volume of legacy content needs to be centralized and made accessible to all writers with minimal down-time for migrating into a new environment.

SmartDocs Solution

The cost-efficient SmartDocs licensing options allowed this organization to scale a SmartDocs environment specifically to their team. A combination of Professional and Express licenses provides them an affordable, centralized environment for storing, tracking, accessing, updating, and managing information and templates. Every team member has access to the same content which is managed by permissions and version control.

By applying conditional tags to identify content specific to particular products, features, and services, writers can easily generate highly detailed, unique versions of product descriptions, features, procedures, and graphic elements. Taking conditional text a step further, the team also created Document Snapshots which define some of the most common document outputs for quick publishing and distribution.

Content managers designed practical templates with SmartDocs' powerful document assembly automation features applied to vastly improve productivity and accuracy. Now the Express users simply answer a series of questions in the customized SmartBuilder embedded in their templates and SmartDocs builds their documents out of existing content automatically for them.

With SmartDocs in place, the review and approval process is now streamlined in such a way that information can be reviewed, edited, and approved without routing several versions of the same document. Everything is centralized including task allocation, tracking, feedback collection, and change implementation.

Results

Up-to-date, customized documentation is in their customers' hands faster than ever!

The writing team reported an immediate increase in productivity with the creation of the first snippet. During implementation of SmartDocs, the team could work on current projects while simultaneously building their content library. With SmartDocs online training and minimal consulting from the 36Software experts, the team was able to navigate SmartDocs, create useful templates, and implement the powerful document assembly capabilities. Their existing customers are also experiencing immediate benefits because they receive up-to-date manuals as products and requirements evolve. The inclusion of SharePoint allows the team to track the lifecycle of each customer's document, allowing the team to know exactly when a document has been updated with current information. Document creation and finalization productivity improved by over 50% in the first year. As the company grows, new hires will easily learn the SmartDocs environment.