



Structured Authoring: A First Step to Content Management

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About Mary & Pamela

~ Mary is...

- ~ the Content Management Leader at Trane
- ~ an expert in leading projects & inspiring her colleagues
- ~ an expert in setting strategy
- ~ an advocate of quality & consistency

~ Pamela is...

- ~ a Partner in Parallax Communications
- ~ a specialist in content management & content reuse consulting
- ~ an advocate of structure, usability, & consistency
- ~ passionate about making content work



Agenda

- ~ Content management initiative
- ~ Content and process analysis
- ~ Arbortext pilot
- ~ Where are we now?

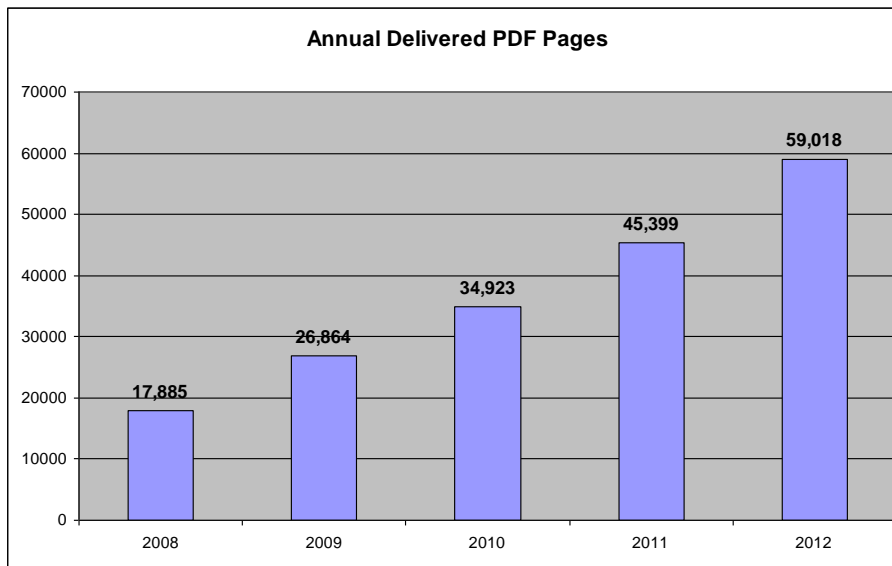
Content management initiative

- Technology platform to streamline and improve customer technical information
 - Develop and manage content at a component level
 - Build outputs from structured, reusable XML modules
 - Publish multiple outputs from a single source
 - Integrate with engineering data and Pro/E CAD
 - Automate manual tasks
- Ingersoll Rand enterprise initiative
 - Implement standard PTC-based tools
 - Begin with Trane Climate & Residential Solutions
 - Expand to other Ingersoll Rand sectors



Increasing literature output...

2008 - 2012



- 35% increase from 2008 to 2009
- 30% increase from 2009 to 2010
- 30% projected increase year over year
 - Increased new product offerings
 - Shortened development cycles
- Maximized existing technology
- New technology required to handle increased volume and faster speed to market with existing resources

Current tools & processes are...

~ Inefficient

- ~ Writers spend time on non-value add tasks
- ~ Review and approval workflows are manual
- ~ Difficult for writers to retrieve reusable content
- ~ Lack of integration with engineering systems

~ Inconsistent

- ~ Difficult to leverage consistency across product documentation
- ~ Difficult to keep reused content consistent in multiple documents
- ~ Difficult to find reused content in all affected documents

~ Not future ready

- ~ Increased workload cannot be handled by existing writers
- ~ Current tools restrict innovation that is required to remain an industry leader

“Business as usual costs us money.”

Key factors for moving into a CCMS

Reduce Publications Operations Costs

- Deliver information electronically rather than paper
- Eliminate manual layout and formatting
- Enable efficient and parallel content creation and review
- Eliminate redundant and manual updating of content used in multiple documents
- Improve illustration capability by leveraging Pro/E data to create isometric drawings
- Handle increased volume and faster speed to market with existing resources

Reduce Translation Costs

- Send only new and changed content for translation
- Eliminate translation vendor desktop publishing costs
- Enable more content to be translated

Reduce Outsourcing Costs

- Eliminate need for headcount increase; maintain existing number of technical writers
- Implement outsourcing strategy to reduce peak workload only

Improve Information Accuracy & Consistency

- Systematic updates to reusable content
- Change management and version control
- Content traceability

Consolidate to a Single Global System

- Allow collaboration within as well as across organizations
- Simplify product information sharing and distribution
- Improve content maintenance, integrity, and security

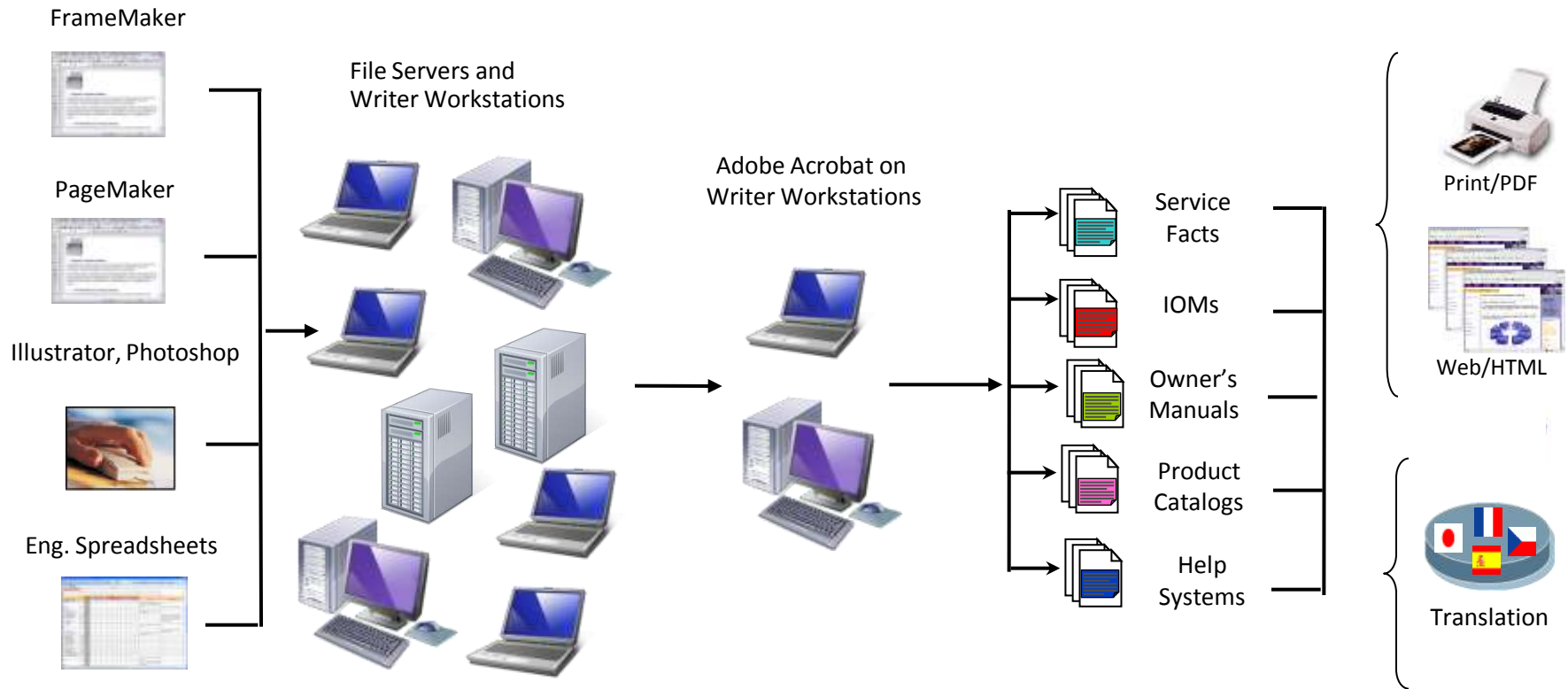


The current environment...

CREATE

STORE (Document-Based)

COMMUNICATE

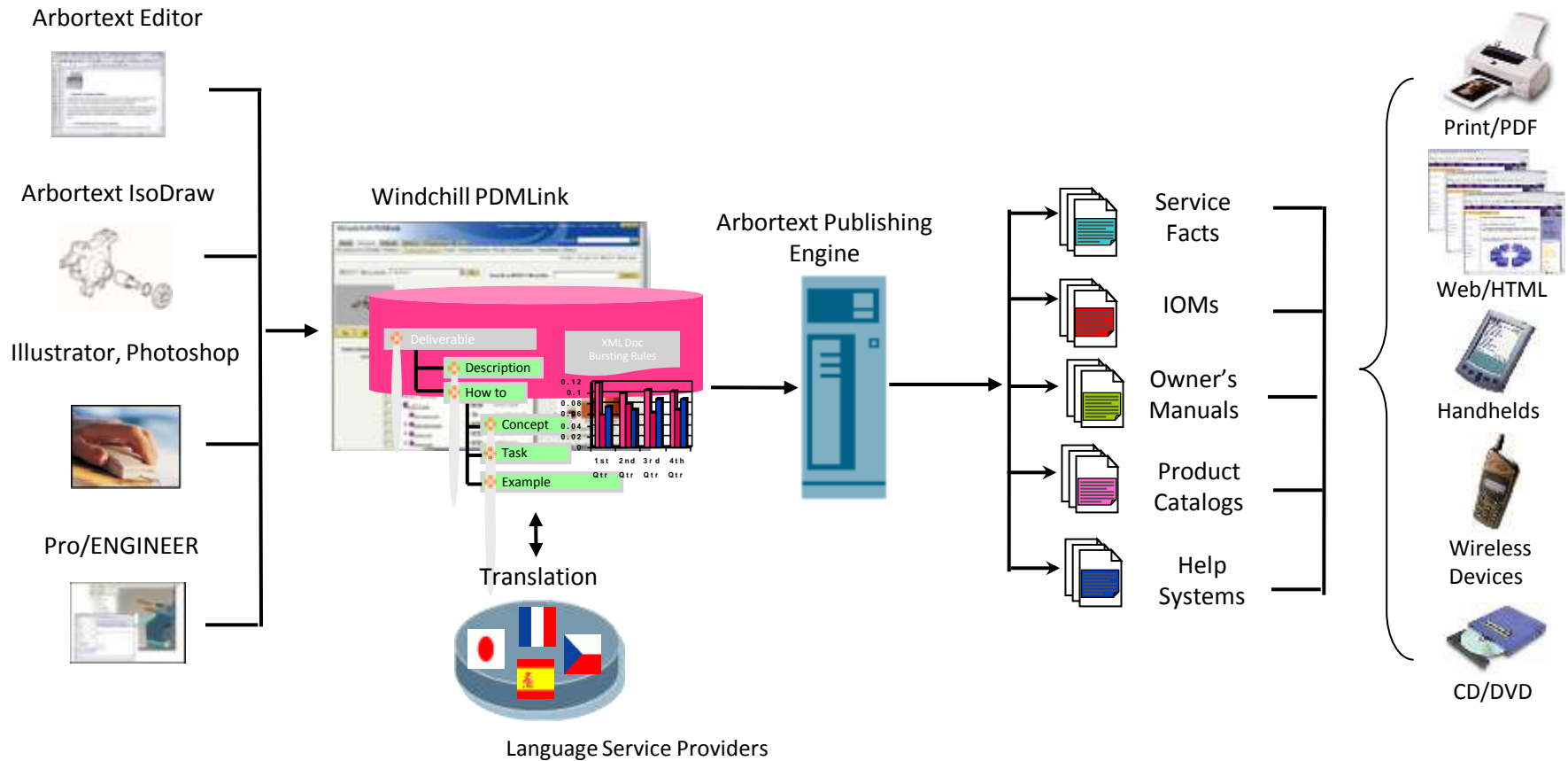


The future environment...

CREATE

STORE (Repository-Based)

COMMUNICATE



CCMS objectives

- ~ Develop information as content modules that can be reused in multiple deliverables, resulting in
 - ~ A more efficient authoring and publishing environment
 - ~ Improve literature time to market by up to 50%
 - ~ Increase writer time spent on developing content by up to 40%
 - ~ Reduce translation DTP costs by at least 25%
 - ~ Greater consistency and accuracy in documentation
 - ~ Reuse content up to 65% within a product line
 - ~ Reduce legal liabilities; mitigate safety risks
- ~ Implement a technology solution that complements enterprise standards and process improvements, resulting in
 - ~ Opportunities to leverage resources across sectors as well as globally
 - ~ Documentation that better meets customer expectations

Before...inconsistent structure

- Product Description**
- Trane wireless zone sensor set (model WZS)
- Trane wireless temperature sensor set (model WTS)
- Part Numbers
- Dimensional Diagrams

Setting the Address, Mounting, Wiring, and Associating and Sensor

- Choosing a Location for Mounting the Receiver and Sensor
 - Location Considerations for the Receiver
 - Location Considerations for the Sensor
- Setting the Rotary Address Switches on the Receiver and the Sensor
 - Setting the Receiver Address
 - Setting the Sensor Address
- Mounting the Base Plate of the Receiver
- Wiring the Receiver to the Unit Controller
- Power Requirements
- Wiring Procedures
- Transformer Wiring
- Replacing and Securing the Receiver Cover
- Applying Power to the Receiver
- Receiver Indicates Readiness to Associate
- Powering the Sensor and Associating the Sensor to the Receiver
- Testing Signal and Battery Strength
- Automatic Association
- Manual Association
- Disassembly
- Mounting the Base Plate of the Sensor
- To Mount Sensor Directly to Drywall or Plaster
- To Mount Sensor Directly to an Electrical Junction Box

Wireless Sensor IOM

- Product Description**
- Models and accessories
- Dimensional diagrams

- Components**
- Cover
- Circuit Board
- COMM Module (Optional)
- Back Plate

- Installation**
- Pre-Installation Information
- Installation Procedure

- Specifications**
- Zone Sensor Specifications
- Zone Temperature/Resistance Cross Reference
- Setpoint Temperature/Resistance Cross Reference

- Wiring Diagrams**

Wired Sensor IOM



After...more consistent structure

General Information	General Information
Product Description	Product Description
Part Numbers	Part Numbers
Dimensions	Dimensions
Pre-Installation	Pre-installation
Location Considerations	Location Considerations
Receiver	Height Requirements
Sensor	Mounting Surfaces
Height Requirements	Installation
Mounting Surfaces	Mounting the Back Plate
Address Setting	Wiring the Sensor
Installation	Replacing and Securing the Cover
Mounting the Receiver Back Plate	Operation
Wiring the Receiver to the Unit Controller	Timed Override
Power Requirements	LEDs
Wiring Procedure	Temperature Setpoint Thumb Wheel
Replacing the Receiver Cover	Dual Temperature Setpoint
Applying Power to the Receiver
Observing the Receiver for Readiness to Associate
Wireless Sensor IOM	Wired Sensor IOM

Before...inconsistent content

Wireless Sensor IOM

Mount the base plate of the sensor directly to any flat surface, including sheet rock or a standard 2 in. x 4 in. electrical box, at a maximum height of 54 in. above the floor. Mounting hardware is included with the sensor.

Note: *When only parallel approach by a person in a wheelchair is possible, mount the sensor at a maximum height of 48 inches above the floor. Consult section 4.27.3 of the 2002 ADA (Americans with Disability Act) guideline, and local building codes, for further details.*

Wired Sensor IOM

Height requirements

Height requirements for mounting zone sensors are:

- Maximum height of 54 in. between bottom of sensor enclosure and floor
- Maximum height of 48 in. between bottom of sensor enclosure and floor, when allowing for a parallel approach by a wheelchair

Note: *Consult section 4.27.3 of the 2002 Americans with Disability Act (ADA) guideline and local building codes for further details concerning wheelchair requirements.*



After...more consistent content

Wireless Sensor IOM

Height Requirements

It is recommended that you mount the back plate a maximum distance of 54 inches above the floor. If a parallel approach by a person in a wheelchair is required, reduce the maximum height to 48 inches.

***Note:** Consult section 4.27.3 of the 2002 ADA (Americans with Disability Act) guideline, and local building codes, for further details regarding wheelchair requirements.*

Wired Sensor IOM

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It is recommended to mount the back plate a maximum distance of 54 inches above the floor. If a parallel approach by a person in a wheelchair is required, reduce the maximum height to 48 inches.

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But where do you start?

- ~ Realized existing tools and processes wouldn't ensure success in the future
- ~ Realized that moving to structured content in a managed environment was a necessary change
- ~ And had the good sense to realize that technology enables success IF “good” content is managed and “good” processes are put in place
- ~ Hired consultant (Parallax) to help with content and process analysis...

Analysis...it starts here

- ~ Analysis informs your entire project
- ~ Analysis helps you to figure out what's going on
 - ~ With the content
 - ~ With everyone involved in the content life cycle
- ~ Analysis shows you the issues you must resolve to help you meet your goals

Content analysis

- ~ We selected content from both Trane Commercial and Residential Solutions
- ~ We dug in, identifying topics and where they appeared
- ~ Then, we compared the topics to see how/if they differed in content and structure
- ~ We also compared the structure of the various documents



Content/topics (not necessarily in this order)	Catalogs		IOMs							
	SS- PRC002	SS- PRC003	SS- SVX08A	TTA- SVX03A	TWE- SVX09A	BAS- SVX04C	BAS- SVX10B	BAS- SVX17A	TTA- SVF59A	S
Literature change history				X	X					
Intro blurb about product	X	X								
Optional equipment									X	
Refrigerant circuit									X	
Product specs						X	X	X	X	
Refrigerant/tubing									X	
Agency compliance						X				
Blurb about cautions & warnings			X	X	X	X	X	X		
Features & benefits	X	X								
Application considerations	X	X								
Selection procedure	X	X								
Cooling capacity	X	X								
Heating capacity	X	X								
Model number desc	X	X	X		X					
General data	X	X								
Performance data	X	X								
Controls	X	X								
Electrical data	X	X	X	X	X					
Jobsite connections	X	X								
Typical wiring	X	X								
Dimensional data/ Dimensions	X	X	X	X	X	X	X	X		
Weights	X	X								
Mechanical specs	X	X								
General info			X	X	X	X	X	X		
Product description						X	X	X		
Part numbers						X	X			
Installation checklist			X							

Content issues

- ~ Discovered potential to reuse content such as product descriptions, features, tasks, cautions and warnings, and many more!
- ~ Discovered potential to redefine technical documents, e.g.:
 - ~ What is an Installation and Operations Manual and what goes in it?
- ~ Discovered potential to standardize approaches to content, e.g.:
 - ~ What is a procedure?

A few examples...

Low Outdoor Ambient Cooling

The Evaporator Defrost Control is standard equipment on Air Handlers and will permit low ambient cooling down to 50°F. For cooling operation down to 0°F, use an Accessory Head Pressure Control on the outdoor unit.

Found in the Pre-start section under Safety Controls

Low Ambient Cooling

As manufactured, these units can operate to 50° F in the cooling mode of operation. An accessory head pressure control will allow operation to 0° F outdoor ambient. When using these units with control systems such as bypass changeover Variable Air Volume, make sure you consider the requirement for a head pressure control to allow low ambient cooling.

Found in the Application Considerations section



Installation Checklist

Complete this checklist once the unit is installed to verify that all recommended procedures have been accomplished before starting the system. Do not operate the system until all items covered by this checklist are complete.

☐ Inspect unit location for proper required service clearances.

☐ Inspect unit location for proper free air clearances.

☐ Inspect unit location for secure, level mounting position.

Refrigerant Piping

☐ Performed initial leak test?

☐ Connected properly sized and constructed liquid and suction lines to the connection stubs at both the indoor and outdoor units?

☐ Insulated the entire suction line?

☐ Insulated portions of liquid line exposed to extremes in temperature?

☐ Evacuated each refrigerant circuit to 350 microns?

☐ Charged each circuit with proper amount of R410A?

Electrical Wiring

☐ Provided unit power wiring (with disconnect) to proper terminals in the unit control section?

☐ Installed system indoor thermostat?

☐ Installed system low voltage interconnecting wiring to proper terminals of outdoor unit, indoor unit and system thermostat?

Different
approaches to
checklists

Installation Checklist

Complete this checklist once the unit is installed to verify that all recommended procedures have been accomplished before the system is started. Operational checks cannot be performed until the outdoor unit is installed and system interconnection is complete.

- Verify that the unit electrical power is disconnected.
- Inspect all field wiring connections. All connections should be clean and tight.
- Inspect unit ground connection(s). Ground must comply with all applicable codes.
- Inspect unit suspension arrangement (if used). Unit position must be secure. Remove any tools or debris found in or near the unit.
- Inspect duct outlets. Outlets must be open and unrestricted.
- Inspect unit drain lines. Pipe connections must be tight and drain line unrestricted.
- Inspect fan assembly to insure all moving parts move freely.
- If unit is horizontally mounted, make sure secondary drain pan has been installed.
- Inspect unit for proper filters, securely installed. All cabinet panels must be secure.
- Instruct owner/operator on proper system operating and maintenance procedure.



TTA150B/TWE180B
TTA180B/TWE180B
TTA240B/TWE240B
TTA240F/TWE240E
TTA180C/TWE180B

Field Wiring:

- A. 3 power wires, line voltage.
- B. 3 power wires, line voltage.
- C. Cooling only thermostat: 5 wires, 24 volts.
 - One Stage Electric heat: add 1 additional wire, 24 volts.
 - Two Stage Electric heat: add 2 additional wires, 24 volts.
- D. 5 wires, 24 volts.

TTA240F/TWE240E

Field Wiring:

- 1. 3 power wires, line voltage
- 2. 3 power wires, line voltage for 3 phase; 2 wires for single phase
- 3. Cooling only thermostat: 4 wires, 24 volts***
 - a. One stage electric heat: add 1 additional wire, 24 volts
 - b. Two stage electric heat: add 2 additional wires, 24 volts
- 4. Add 5 wires, 24 volts

TTA240F/TWE240E

Field Wiring:

- A. 3 power wires, line voltage
- B. 3 power wires, line voltage for 3 phase; 2 wires for single phase
- C. Cooling only thermostat: 5 wires, 24 volts***
 - One stage electric heat: add 1 additional wire, 24 volts
 - Two stage electric heat: add 2 additional wires, 24 volts
- D. 5 wires, 24 volts



1. To remove the cover, firmly press the thumb tab at the bottom of the cover and pull the cover away from the back plate.

Note: If present, remove the security screw before removing the cover.

2. Remove the circuit board by pressing the thumb catch on the left side of the board. Use the terminal block to lift the circuit board from the back plate.
3. Feed the wires through the opening in the back plate.











Locate cloth bag(s) attached to the refrigerant tube of the coil that contains two (2) brass clamps (straps) and cork impregnated insulation material approximately 9" long by 4" wide. This is for attaching and insulating the expansion valve bulb(s) to the suction line(s).

On air handlers that will have refrigerant lines entering the cabinet from the left side, remove the split rubber grommet from the knockout in the end of the air handler. Uncoil the cap tube with the bulb attached at the expansion valve and place the grommet on the cap tube. With the grommet around the tube, push the bulb through the hole and position the grommet back into it's original position (one bulb and cap tube on single circuit units and two bulbs and cap tubes on dual circuit units).

Attach the bulb(s) approximately 45 degrees off vertical, 10 to 12 inches outside of the air handler.

On air handlers that will have refrigerant lines entering the cabinet from the right side, the bulb(s) should be attached to the suction tube(s) inside the cabinet in the same manner as above, approximately 10" from the right end of the unit.

Changing the Fan Setting

	Indicates that the fan will operate as needed to reach the selected temperature.	1. From the home screen, activate the fan setting menu by pressing  and then  .
	Indicates that the fan setting is On. The number of arrows indicates fan speed (3: high, 2: medium, 1: low). The example shown indicates a fan on high speed. Not all systems offer all three speeds.	2. Press  or  to choose the desired fan setting.
	Indicates that the fan setting is Off.	3. When the symbol for the desired setting appears, confirm your choice by <ul style="list-style-type: none"> • Pressing  (the home screen will appear), or • Pressing  or  (the next menu will appear), or • Waiting five seconds.

started. Operational checks cannot be performed until the outdoor unit is installed and system interconnection is complete.

- Verify that the unit electrical power is disconnected.
- Inspect all field wiring connections. All connections should be clean and tight.

3. The support pad must NOT be in direct contact with any structure. Unit must be positioned a minimum of 12" from any wall or surrounding shrubbery to insure adequate airflow. Clearance must be provided in front of control box (access panels) & any other side requiring service access to meet National Electrical Code. Also, the unit location must be far enough away from any structure to prevent excess roof run-off water from pouring directly on the unit. When choosing the location of the unit(s), sound transmission through air and

1. Power wiring and grounding of equipment must comply with local codes.
2. Power supply must agree with equipment nameplate.
3. Install a separate disconnect switch at the outdoor unit.



⚠ WARNING: HAZARDOUS VOLTAGE-DISCONNECT POWER BEFORE SERVICING

Failure to **DISCONNECT POWER** before servicing

could lead to severe **personal injury** or death.

SAFETY NOTICE

This information is intended for use by individuals possessing adequate backgrounds of electrical and mechanical experience. Any attempt to repair a central air conditioning product may result in personal injury and/or property damage. The manufacturer of seller cannot be responsible for the interpretation of this information, nor can it assume any liability in connection with its use.

RE-CONNECT

ALL GROUNDING DEVICES

All parts of this product capable of conducting electrical current are grounded. If grounding wires, screws, straps, clips, nuts or washers used to complete a path to ground are removed for service, they must be returned to their original position and properly fastened.

⚠ WARNING Hazardous Voltage!

Disconnect all electric power, including remote disconnects before servicing. Follow proper lockout/tagout procedures to ensure the power can not be inadvertently energized. Failure to disconnect power before servicing could result in death or serious injury.

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All parts of this product capable of conducting electrical current are grounded. If grounding wires, screws, straps, clips, nuts or washers used to complete a path to ground are removed for service, they must be returned to their original position and properly fastened.

⚠ WARNING Hazardous Voltage w/Capacitors!

Disconnect all electric power, including remote disconnects and discharge all motor start/run capacitors before servicing. Follow proper lockout/tagout procedures to ensure the power cannot be inadvertently energized. Verify with an appropriate voltmeter that all capacitors have discharged. Failure to disconnect power and discharge capacitors before servicing could result in death or serious injury.

Note: For additional information regarding the safe discharge of capacitors, see PROD-SVB06A-EN or PROD-SVB06A-FR.

⚠ WARNING Hazardous voltage!

Disconnect all electric power, including remote disconnects before servicing. Follow proper lockout/tagout procedures to ensure the power cannot be inadvertently energized. Failure to disconnect power before servicing could result in death or serious injury.



Process analysis

- ~ We talked to
 - ~ Technical writers
 - ~ Technical writing managers
 - ~ Content reviewers and SMEs (engineering, product management, and legal)
 - ~ Content users/customer support who represent users
 - ~ IT staff

Talking to people

- ~ Adds another dimension
- ~ Helps us to understand their involvement, needs, and issues
- ~ Makes it real!



Process issues

- ~ Writers and SMEs spend way too much time up front
 - ~ Figuring out what to create (what type of document is required?)
 - ~ Figuring out what to include (what goes into it?)
 - ~ Looking for content (where can I find it?)
- ~ Writers also spend too much time doing non-writing tasks, e.g. DTP

Costs to Trane

- ~ The lack of standards and reusable content cost Trane significant time
- ~ Time is spent:
 - ~ Recreating content that already exists
 - ~ Looking for a standard (in the form of another document) or for content to reuse
 - ~ Modifying a previous document
 - ~ Looking for all instances of revised content to update it
 - ~ Reviewing content that has already been reviewed
 - ~ Translating content that has already been translated



Establishing standards was critical!

Structure/topic map	Freq.	Usage		Content Reuse
		Splits (PILOT)	For TCS (PILOT)	
Schematics	1	M	M	
Intro & advance organizer	1	M	M	
Unit wiring diagram	rep	M		IOM, across service facts
Schematic diagram	rep	M		IOM, across service facts
Field wiring diagram	rep	M		
Outline drawing	rep			
Refrigerant circuits	rep	M		service facts, product catalog, submittals
Heating	rep	O		
Cooling	rep	M		

Intro & advance organizer	Concept		
	Title	M	In this section:
	shortdesc	M	Stem sentence describing the purpose of the section, introducing the list, e.g., This section tells you how to charge the unit, including:
	conbody	M	This is the list of items in the section, generated from the headings in the section. Ensure all headings have the same grammatical form.
	related links	O	Identify any related information that users can follow up on. E.g. To see a list of drive components, refer to Tell users specifically what the related links are for.

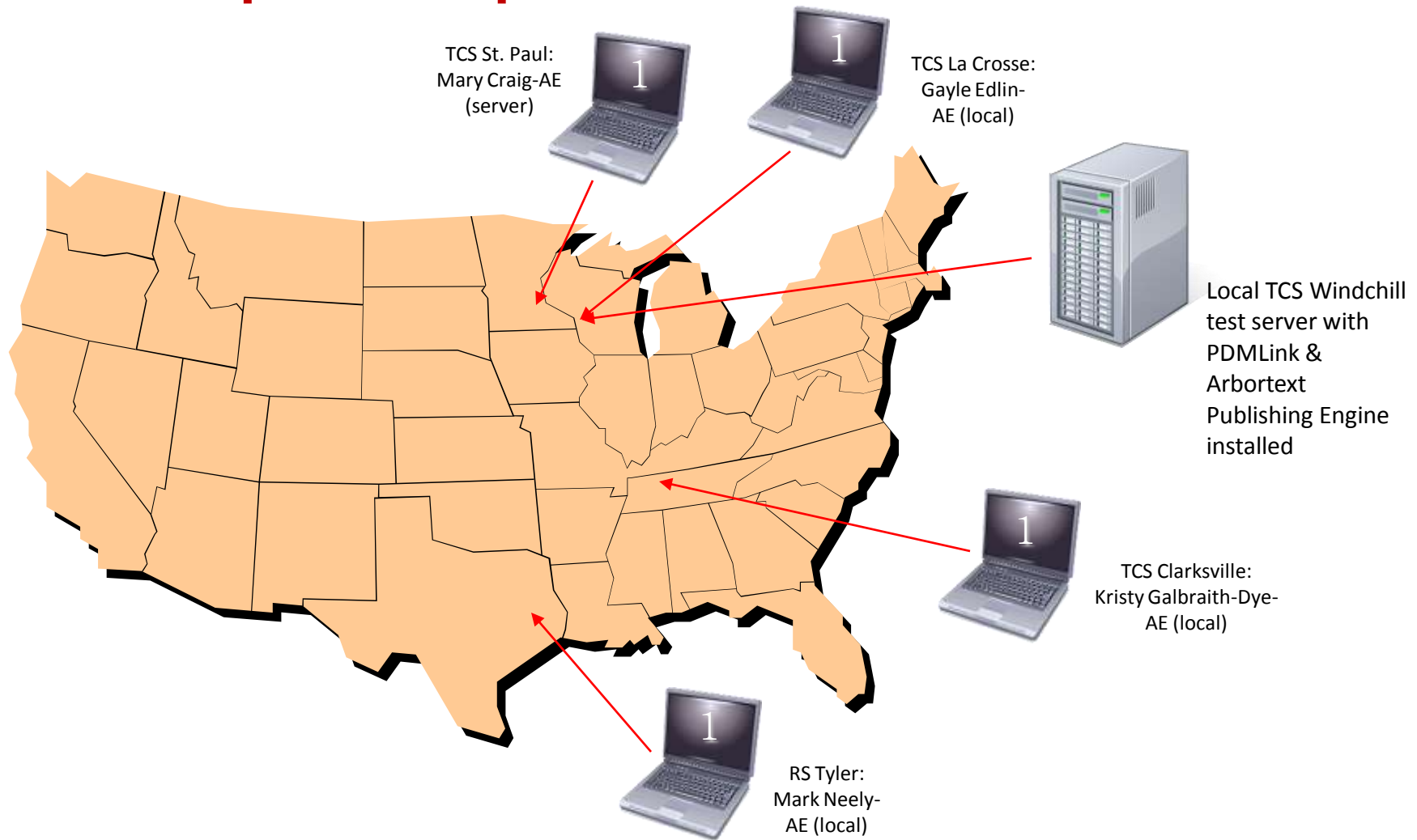
So, what to do with what we learned?

- ~ Redefine and standardize technical documents and all their components (info architecture)
- ~ Establish writing guidelines
- ~ Start building library of standardized reusable content
- ~ Establish editorial and review processes
- ~ Implement in a CM environment, with DTDs and repository
- ~ Test...

Pilot objectives

- ~ Test how well Arbortext/SMA meets our needs for . . .
 - ~ Content development and management
 - ~ Document publishing
- ~ Obtain feedback from pilot participants
 - ~ Success of online training for learning
 - ~ Paradigm shift in authoring, managing and publishing
 - ~ Process changes
- ~ Through pilot tests . . .
 - ~ Assess pilot participant capability; not the people
 - ~ Gather information to be used in business case
 - ~ Prove technology direction and gather data for ROI

Pilot participants & environment



Pilot training

	Title	Duration (Hours)	Week
1	SGML, XML and Arbortext 5.3 - Understanding the Need for Structured Information	2	2/2 – 2/6
2	SGML, XML and Arbortext 5.3 - Structured Application Concepts	0.05	2/2 – 2/6
3	SGML, XML and Arbortext 5.3 - Structured Authoring Concepts and Product Overview	3	2/2 – 2/6
4	Arbortext Editor 5.3 - Structured Information and Document Structure	1	2/9 – 2/13
5	Arbortext Editor 5.3 - Arbortext Editor End User Orientation	3	2/9 – 2/13
6	Arbortext Editor 5.3 - Working with Structured Markup	4	2/16 – 2/20
7	Arbortext Editor 5.3 - Creating Tables	2	2/23 – 2/27
8	Arbortext Editor 5.3 - Authoring and Editing Management Tools and Final Workshop	2	2/23 – 2/27
9	Understanding DITA - Introduction to Structured Information	1	3/2- 3/6
10	Understanding DITA – Introduction to XML Data Models and the DITA Model	2	3/2- 3/6
11	Understanding DITA – Authoring and Publishing Topics	2	3/9 – 3/13
12	Understanding DITA – DTD Architecture and Specialization	1	3/9 – 3/13
13	DITA and Arbortext 5.3 - The Information Typing Architecture Overview	3	3/16 – 3/20
14	DITA and Arbortext 5.3 - Arbortext Editor Orientation for DITA Authors	1	3/16 – 3/20
15	DITA and Arbortext 5.3 - Creating DITA Topics, Concepts, and Tasks	4	3/23 – 3/27
16	DITA and Arbortext 5.3 - Using DITA Attributes	2	3/30 – 4/3
17	DITA and Arbortext 5.3 - DITA Cross-References, Links, and Content References	3	3/30 – 4/3
18	DITA and Arbortext 5.3 - Creating Tables and Using Arbortext Editor Tools	4	4/6 – 4/10
19	DITA and Arbortext 5.3 - Creating DITA Maps and Relationship Tables	4	4/13 - 4/17
20	DITA and Arbortext 5.3 - Previewing and Printing and DITA Specialization	3	4/20 – 4/24
		47.05 hrs	

Almost
50 hrs of
online
training



Pilot definition

- ~ Conduct mini trial of a “production” environment
 - ~ Use Service Facts documents (12 out of 400+)
 - ~ Participants . . .
 - ~ Develop new/revised content per Information Architecture (IA) and structured writing guidelines
 - ~ Manage content within the CMS
 - ~ Find “reusable” content in the CMS
 - ~ Build and publish documents using the CMS
 - ~ Basic features learned and used; more advanced features for further reuse optimization in follow-on activities
- ~ Hold weekly kick-off meetings; individuals complete tasks, fill out instruction sheet forms and schedule weekly reviews; all records stored in central location on a file server

Pilot planning

- Developed plan to identify
 - Tasks to be completed each week
 - What has to be in place to complete the tasks

Trane CMS Pilot Tasks

Pilot activities are scheduled to start the week of May 4 and end the week of June 22. Writers have approximately four hours per week to devote to pilot activities. Pilot activities will include working on some or all of the following Service Facts documents:

RS Service Facts

- 4TEE3D01B-SF-1A
- 4WCZ6060A-SF-4A
- 4TWZ0024-SF-1
- 4TWZ0036-SF-1
- 4TWZ0048-SF-1
- 4TWZ0060-SF-1
- UX-DX-SF-1D

TCS Service Facts

- TTA-SVF62A-EN
- TTA-SVF63A-EN
- TWA-SVF12A-EN
- TWA-SVF13A-EN
- TWE-SVF38A-EN
- TWE-SVF39A-EN
- TC-SVF-42C

Week 1 - Playing with Arbortext Editor - done

Week 1 is about assessing how well the writers can work with Arbortext Editor, performing tasks such as creating topics, tables, and previewing content. Week 1 doesn't include working on the Service Facts or in the context of the CMS; rather, it's about using the editor to perform different editor functions.

Tasks	What needs to be in place for it to happen?	Evaluation
<ul style="list-style-type: none">• Create a new topic by replicating a piece of Service Facts content (topic TBD), including:<ul style="list-style-type: none">• DITA topic• DITA concept• DITA task• Save the topics• Work with DITA mark-up within topics• Insert and delete sentences in a topic• Cut, copy and paste sentences in a topic• Search for and replace a sentence in a topic• Create a simple table (e.g., a tubing	<ul style="list-style-type: none">• All self-paced training modules complete• Authoring tool set up on writers' computers; access to DTD• Place for content to be saved set up• Instruction sheet for the weeks' tasks including:<ul style="list-style-type: none">• Content on which to base topics• Where to save content• "Test" for writers to demonstrate what they've learned• Metrics sheet for writers to fill in throughout the week, as they perform their tasks	Demonstration session with Mary. Success indicated by: <ul style="list-style-type: none">• Error free completion of pilot tasks• Completed metrics sheet

Weekly preparation for pilot tasks

- ~ Worked weekly with Pamela to
 - ~ Review previous week's tasks/results
 - ~ Finalize current week's tasks and supporting materials
 - ~ Prepare/finalize next week's tasks and supporting materials

Trane CMS Pilot: Weeks 7 & 8

We're on the home stretch! For the next two weeks, you'll be putting it all together, building entire Service Facts documents.

What you'll need

You'll need:

- the pilot topics spreadsheet, which shows your document assignments
- copies (paper or electronic) of the pilot Service Facts documents

What to do

The following table lists your tasks for both weeks 7 and 8. During week 8, please keep track of the time you spend creating each document. There's a chart for tracking your time following the table. When you're finished all tasks, answer the questions following the table:

Task	Completed successfully without help from another source (person, reference material, etc.)?	If you answered no, explain what you needed to do to complete the task and why (e.g., what difficulties were you having). You can also enter any comments related to the task here.
During week 7, your focus is to get any remaining content you need into the CMS, build one document and send it for review.		
1. Your first task is to get all the content you'll need into the CMS. <ul style="list-style-type: none"> a. Refer to the pilot topics spreadsheet, document tab. It lists the documents that are assigned to you for the next two weeks, and shows you what content is already in the CMS. Also, look in the CMS to see what's there. (There may be content in the CMS that is not entered on the spreadsheet.) b. Create any remaining content for the pilot documents assigned to you and check it into the CMS. 	<input type="checkbox"/> Yes <input type="checkbox"/> No	
2. Create one Service Facts document. (Let Mary know which one you decide to work on in week 7.) Retrieve the content	<input type="checkbox"/> Yes <input type="checkbox"/> No	

What did we learn from the pilot?

~ Authoring for reuse

- ~ Rewriting content for reuse is necessary
- ~ Rewriting effort takes more time than anticipated
- ~ Involvement from SMEs is required

~ Arbortext environment

- ~ Learning curve when introducing a new tool and environment
- ~ Instructor-led training in addition to online training would have been beneficial
- ~ Owning/authoring “chunks” of information (i.e., topics) is very different from complete documents
- ~ Need to determine most effective ways to use the technology

What did we learn from the pilot?

~ Managing content

- ~ More to learn about storing and retrieving content
- ~ Metadata is central to finding content
- ~ More to learn about how to best handle graphics

~ Arbortext publishing

- ~ See the power in building documents using reusable content
- ~ More to learn about DITA maps
- ~ Need to develop our own templates and style sheets
- ~ Not yet comfortable “trusting” the PE to do what it’s supposed to do

What did we learn from the pilot?

~ Process changes

- ~ Authoring topics for reuse; when to check content into the CMS to begin managing it there
- ~ Review of topics in addition to documents
- ~ Workflow
 - ~ Didn't used Windchill workflow; will implement in a production environment; affects content "state"
 - ~ All reviewers must use PDMLink and have access to the Windchill server

~ SMA architecture works quite well; minor issue with alert types

Detailed assessment report completed

Where are we now?

- ~ Writers have been applying what they learned about structured authoring in current desktop environment
- ~ Business case approved by all levels of management for the Component Content Management System
- ~ Vendor chosen for architecture and implementation

Summary

- ~ The most important part of any content management implementation is the content
- ~ Content is paramount, but so are the people creating/reviewing the content
 - ~ Working in a CM environment is a big change
 - ~ Allow time for learning and to adopt the change

Summary, continued

- ~ The technology solution has to
 - ~ Support reusable, usable content
 - ~ Facilitate processes
 - ~ Make your life easier!

Trane is well on their way to doing all of this!



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