Topic-based Authoring for Training

SANDRA WHEELER

About This Presentation

- This presentation assumes a basic understanding of:
  - Conditional text
  - Cross references
  - Training documentation terms
- Software instructions are for MadCap Flare 2018, but similar results may be achieved using other programs.

What We'll Cover

- Overview of topic-based authoring.
- Content re-use for training:
  - Multiple outputs
  - Multiple audiences
- Advanced tool functionality:
  - Auto-populating answer key
  - Margin notes

Topic-based Authoring

AN OVERVIEW

Topic-based Authoring Overview

▶ Authors create a library of complete topics.

▶ Authors draw from that library for each output and audience.

▶ Content becomes modular; export to various outputs:

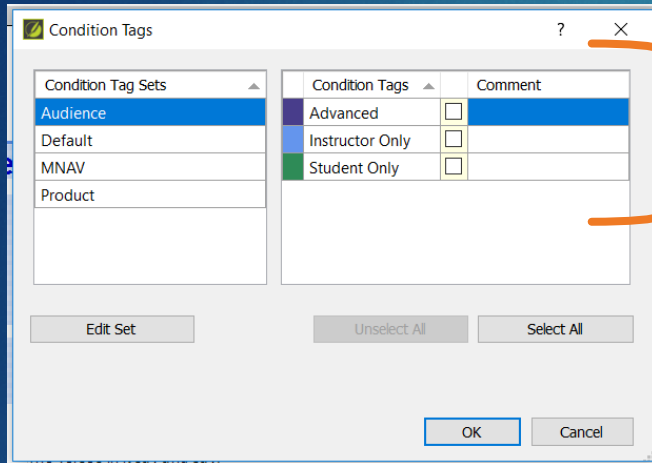   ▶ Handouts

   ▶ Manuals

   ▶ Tests

   ▶ Websites

Content Re-use

OUTPUTS, AUDIENCES, AND MORE

Content Re-use: Training

- Content is easily re-used:
  - User and training documents
  - Documents for different versions of a products
  - Different types of training documents
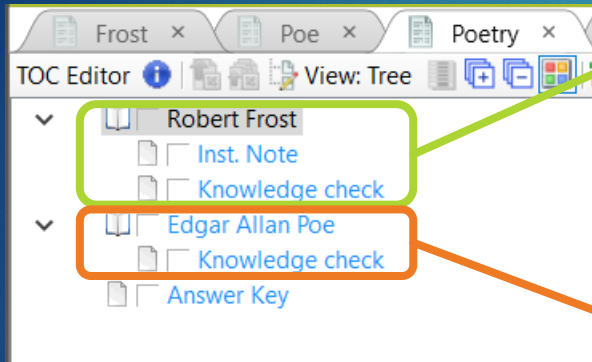 - Training documents for different audiences

Choose Your Audience

- Untagged text applies to all audiences.
- Instructor Only can be combined with Advanced (or similar).
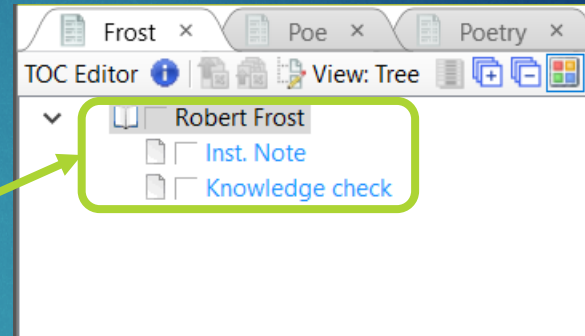- Student/Instructor tags (or similar opposites) cannot be combined.
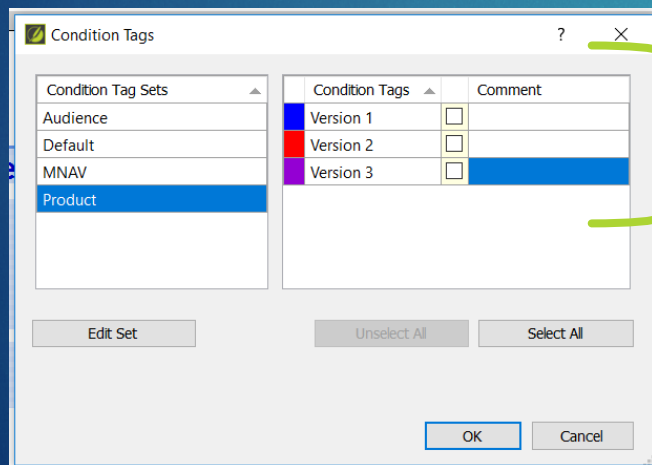
- Untagged text applies to all versions.
- Any version can be combined with any Audience tag(s).
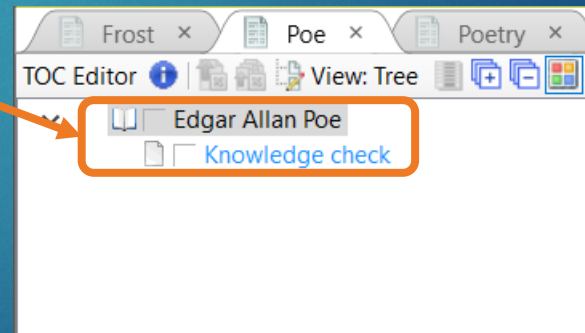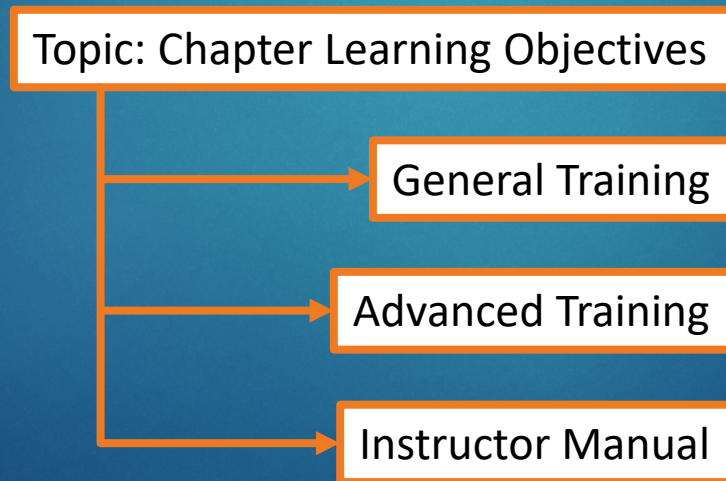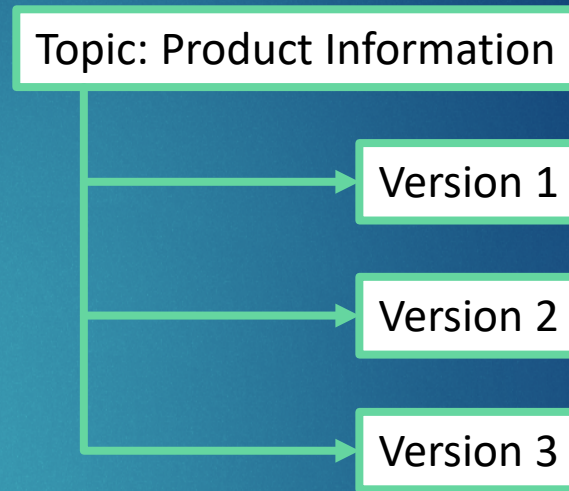
Choose Your Output

Frost Only Handout
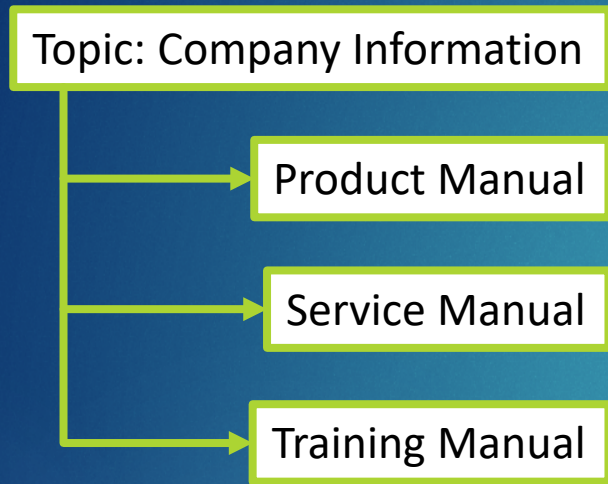
Training Manual

Poe Only Handout

Content Re-use Examples

Topic: Company Information
→ Product Manual
→ Service Manual
→ Training Manual

Topic: Product Information
→ Version 1
→ Version 2
→ Version 3

Topic: Chapter Learning Objectives
→ General Training
→ Advanced Training
→ Instructor Manual

Margin Notes

ADD NOTES BESIDE YOUR CONENT

Margin Notes Overview

▶ Create notes outside the running text to call out:

  ▶ Instructor notes

  ▶ Activities

  ▶ Important quotes

  ▶ Other information

▶ Placing the notes in the margin keeps them outside the flow of the content.

▶ Achieved with page layout design and styles.

Margin Notes Examples

Provide extra content for instructors

Call out tests and activities for learners.

Margin Notes: Page Layout

5.75" Body Frame (Regular content)

Built-in 2" Margin
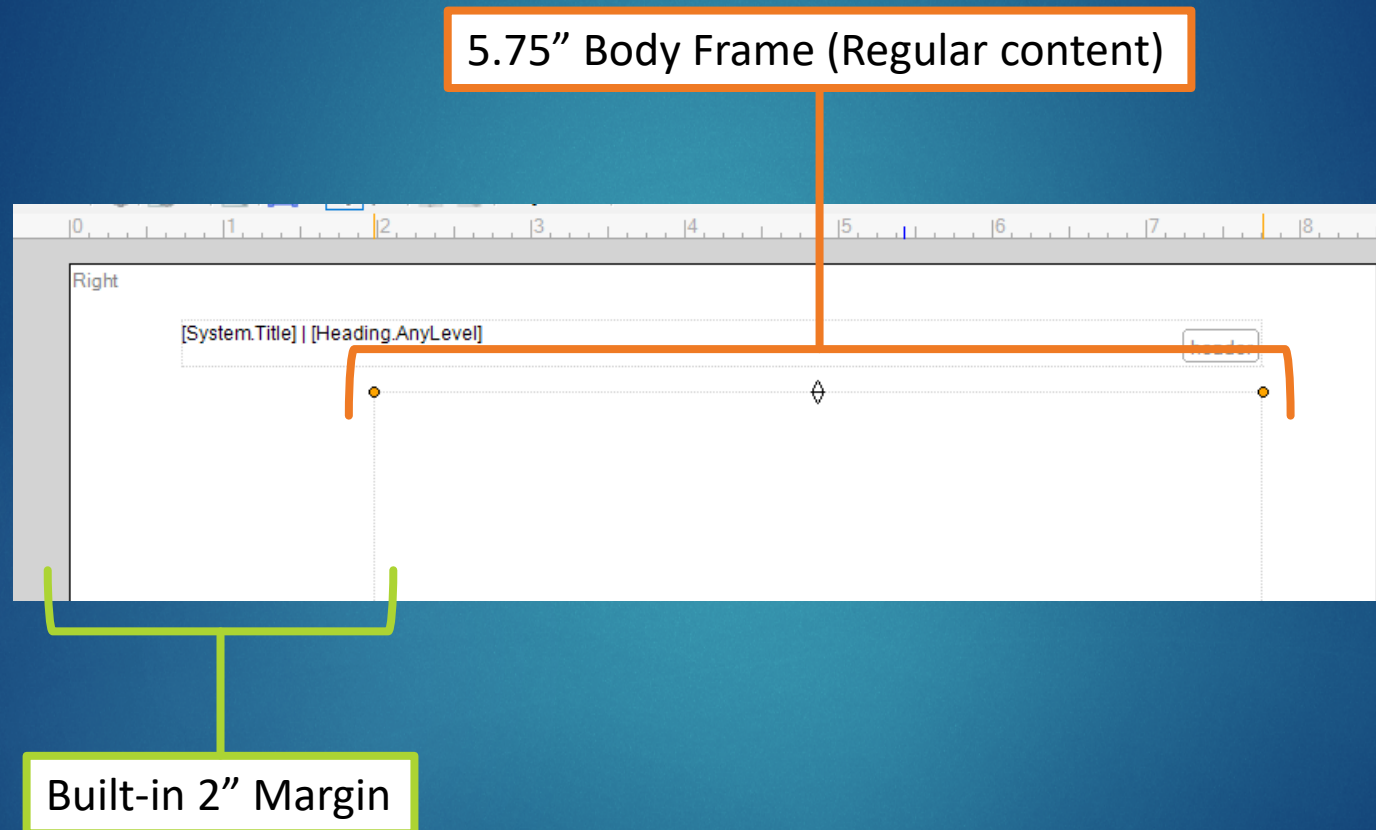
Margin Note Styles: Heading

Set *border-top* settings to create the top border line.

Style based on *h2*

Set *margin-left* to -1.25"

Margin Note Styles: Image

Style based on *p*

Set *margin-left* to -1.25"

Image sized to 1" wide

Margin Note Styles: Notes

Style based on *p*

```
<body>
    <h1 class="ChapterTitle" MadCap:autonum="1 ">Ec
    <h2 class="InstructorNote" MadCap:conditions="A
    <p class="SideBar" MadCap:conditions="Audience
        <img src="../images/Icons/Notes.png" />
    </p>
    <div style="width: 1.25in;height: 1in;">
        <p class="InstructorNote" MadCap:condition
    </div>
    <p class="ActivityOverride"> </p>
    <h4> The Raven</h4>
```

In the text editor, place a *div style* around the note. This acts like a text box.

2   *Edgar Allan Poe*

Inst Note

The Raven

Once upon a midnight dreary, while I pondered, weak and weary,

Over many a quaint and curious volume of forgotten lore—

While I nodded, nearly napping, suddenly there came a tapping,

As of some one gently rapping, rapping at my chamber door.

"'Tis some visitor," I muttered, "tapping at my chamber door—

Only this and nothing more."

The Raven was first published in 1845.

Margin Note Styles: Override

Medium: print
h2.Override

▲ Box

clear:	
float:	
height:	
margin:	.75em 0
margin-bottom:	.75em
margin-left:	0in
margin-right:	0
margin-top:	-2.5in
padding:	

Style based on *h2*
Base style will vary depending on your needs.

Set *margin-top* to -2.5"
This measurement will vary depending on the height of your notes.

2   ***Edgar Allan Poe***

Inst. Note

The Raven was first published in 1845.

The Raven

Once upon a midnight dreary, while I pondered, weak and weary,

Over many a quaint and curious volume of forgotten lore—

While I nodded, nearly napping, suddenly there came a tapping,

As of some one gently rapping, rapping at my chamber door.

"'Tis some visitor," I muttered, "tapping at my chamber door—

Only this and nothing more."

Margin Note Styles: Override

Override style eliminates this blank space.

Auto-populating Answer Key

UPDATES WITH MINIMAL MAINTENANCE

Auto-populating Answer Key Overview

- This process works best for printed training manuals.

- Student and Instructor versions share content within the same project file.

- Student book shows blanks, allowing students to write in their answers.

- Instructor book shows all answers throughout the book.

- The answer key should auto-populate with changes from activities and tests, to minimize maintenance.

- If answers are conditioned out for students, they also disappear in the answer key.

Create the Activity or Test

Table (bottom line only)

"Question" style

"Answer" style

Review the chapter.

When did the events of The Raven occur?

Once upon a midnight dreary.

What did I find when I opened wide the door?

Darkness there and nothing more.

Upon whose bust did the raven perch?

Upon a bust of Pallas just above my chamber door.

What did the raven say?

Quoth the Raven "Nevermore."

Add Activities to Answer Key

Review the chapter.

When did the events of The Raven occur?

Once upon a midnight dreary.

What did I find when I opened wide the door?

Darkness there and nothing more.

Upon whose bust did the raven perch?

Upon a bust of Pallas just above my chamber door.

What did the raven say?

Quoth the Raven "Nevermore."

Copy activity from chapter.

Paste into answer key.
This maintains the table layout.

Edgar Allan Poe

When did the events of The Raven occur?

Once upon a midnight dreary.

What did I find when I opened wide the door?

Darkness there and nothing more.
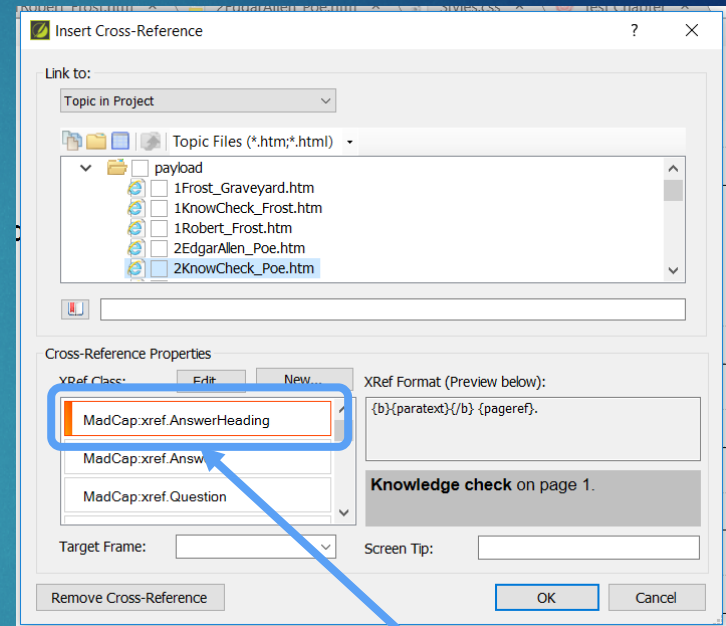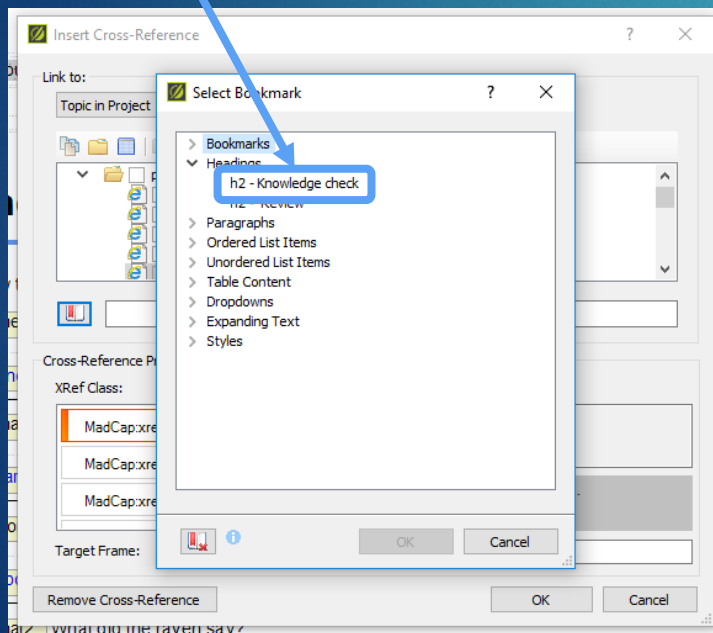
Upon whose bust did the raven perch?

Upon a bust of Pallas just above my chamber door.

What did the raven say?

Quoth the Raven "Nevermore."
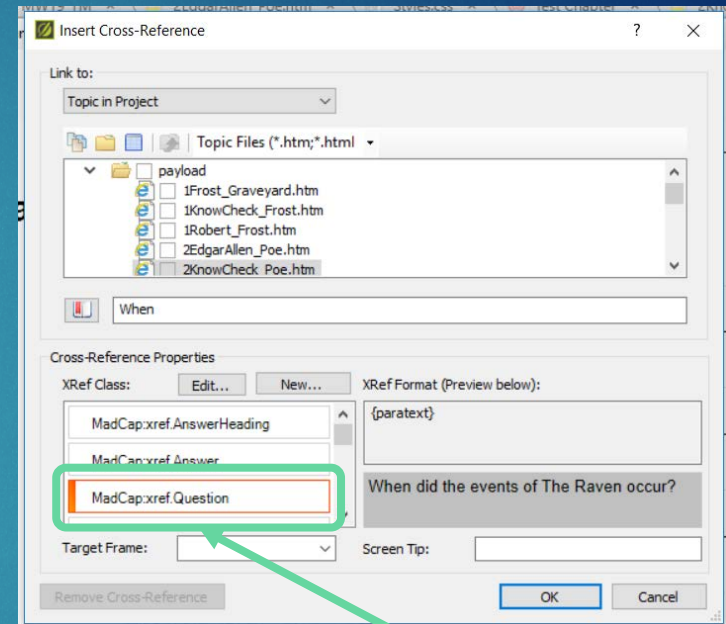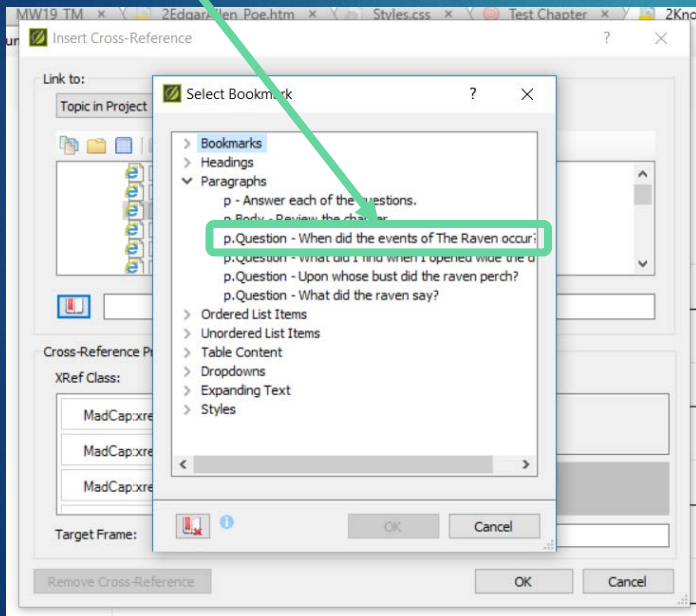
Link Activity Name and Page

Select activity title.

Use cross-reference style to display heading and page number as plain text.
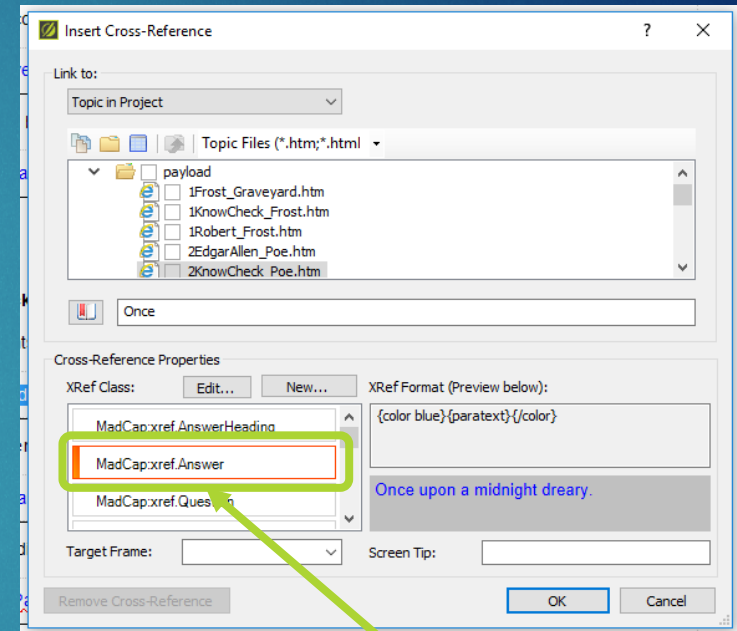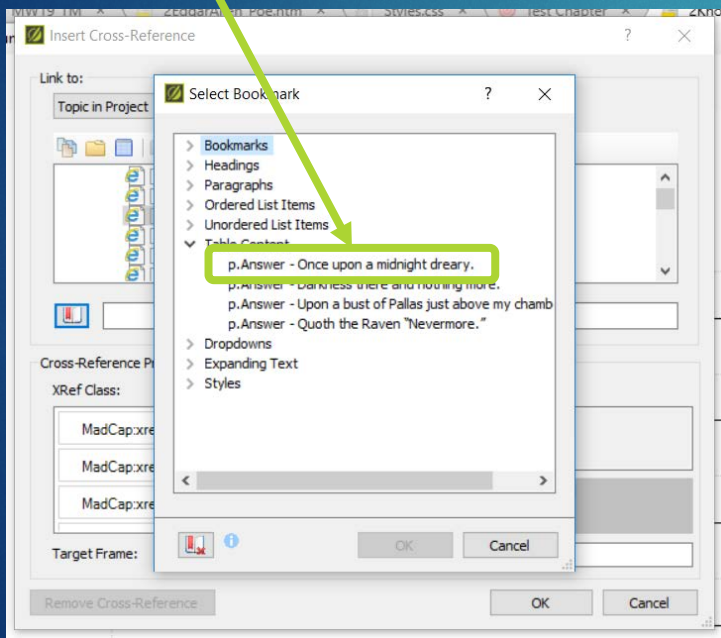
Link Questions

Select the question.

Use cross-reference style to display question as plain text.

Link Answers

Select the answer.

Use cross-reference style to display answer as plain text, colored to stand out.

Instructor v. Student Books

Questions?

Your opinion is important to both the speaker and the Summit!

Please post your feedback about this session using the AttendeeHub app.