

# XML and Content Reuse Systems for Instructional Design

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## Abstract

XML as a content reuse methodology<sup>1</sup> is a very complex and technical topic. Instructional designers who seek to discover the impacts of XML technology to the field of instructional design very often are frustrated by the technical white papers available on this subject. Those white papers usually fail to speak to the practical needs of instructional design. This article is written for experienced instructional designers who wish to understand content reuse in an XML environment. It explains the basic underlying concepts at a non-technical level and relates those concepts to instructional design processes. Tools and options are discussed. The effects of content reuse are described for both print and online curricula. The costs, risks and benefits of both off-the-shelf and custom systems are examined.

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<sup>1</sup>A structured approach to more efficiently reuse static content in multiple deliverables.

# 1 Introduction



*Write it once ... use it many times.*

This simple statement describes the function and attraction of extensible markup language (XML) as an authoring methodology. This paper describes XML and discusses how XML can be used in an instructional design setting to manage and facilitate the definition, use, and distribution of learning objects.

In its simplest form, a learning object is some discrete information that speaks to a specific learning objective<sup>2</sup> That being said, learning objects are not simple things, but complex constructs of information, presentation and interaction. Designers traditionally have seen themselves as artisans who created unique learning tools for each new learning situation. They have been very slow to transition their thinking to a systematized approach to the development and delivery of learning. They have also spent long weary years learning how to use particular tools and will resist giving up their hard earned virtuosity, even when the tools in question are obviously a barrier to meaningful improvement.

At the same time, the enterprises for which most instructional designers work have been under increasing pressure to provide training more efficiently. Training departments, unwilling or unable to deliver substantial increases in efficiency, risk being replaced by outside contracting firms that promise to deliver these efficiencies.

XML has become a standard means of information interchange within the computer industry. Using XML to create and manage learning objects is not a theory but has a long track record of use in the real world. It offers greater efficiency without reducing the quality of the training deliverables.

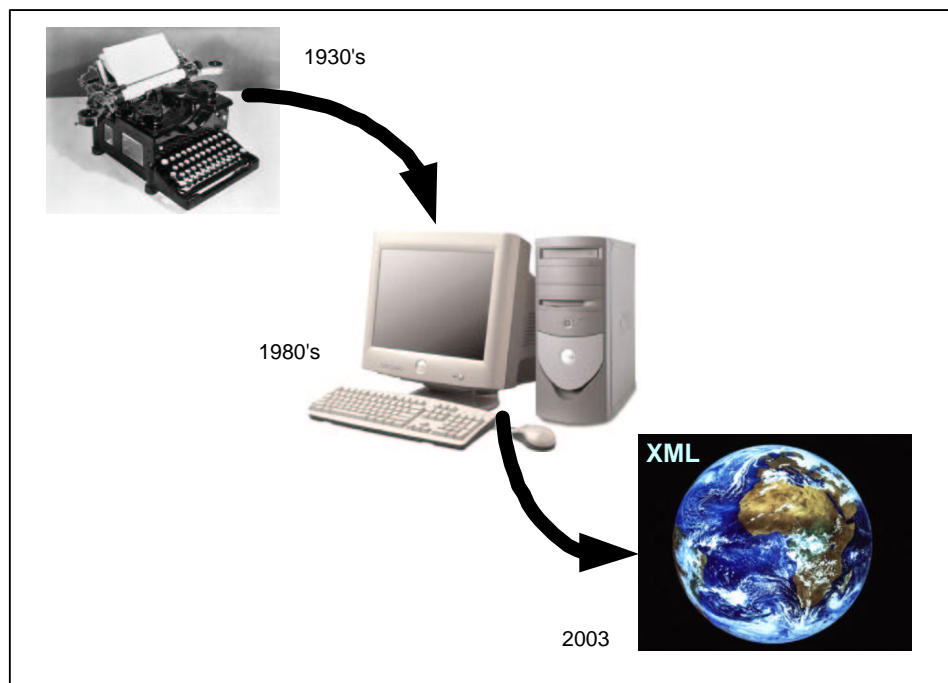
Working within an XML environment requires a change in perspective. Instead of approaching each task as the resolution to a specific obstacle to learning for a specific audience, the designer must analyze the task in a wider context. With whom does this audience share this learning requirement? How can this learning obstacle be resolved for all students? If this objective does not apply to other groups, are there components

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<sup>2</sup>Direct instruction typically employs clearly articulated external learning objectives. These tend to isolate critical information and concepts, organize to-be-learned concepts into carefully ordered sequences to reflect the presumed hierarchical nature of knowledge, and employ strategies that induce differential allocation of attention and cognitive resources.[17]

within it that do apply to a wider audience? What existing training can be pulled into this task and modified to work, without affecting the quality of the learning? What other training is relevant to the content currently under development? How can these new content objects be fitted to other uses?

Some experienced designers, who are more used to routine and repetitive iterations of vast waves of training materials, may find very little in the previous paragraph that speaks to their job description. Their organizations have identified deliverable requirements, methodologies and audiences for them and the designers are charged with producing the required quantity of training that meets a relatively low quality standard. The attractive feature of XML to these designers is that it offers a way to respond to practically impossible demands for training with substantially less drudgery, thus allowing designers to build at a higher standard of quality, which is (or should be) always on the nice-to-have list.



Instead of being a creative artist fashioning unique responses to specific learning requirements, the designer becomes a production professional who analyzes the learning needs of a specific group as those needs relate to the generalized requirements of the entire learning community. The importance of designers understanding the capabilities and rationale behind the content reuse system cannot be stated strongly enough.

The change over into an XML content development and production environment really represents the same quantum leap in capability as was achieved by replacing typewriters with word processing on computers. Managers must be evangelists of XML technology's liberating capabilities. They also must be zealous in training their staffs to understand these capabilities. There never has been a system so good that it could not be rendered totally ineffective by resistant participants.

One of the incidental benefits of operating in an XML learning object environment is that designers are exposed to content created by other designers much more than in traditional project environments. Properly managed, the specialized understanding of different teams is more effectively shared and the quality of the output is increased[15].

## 1.1 Terminology

Before launching into a discussion of XML[3] in more depth, it is important to understand some of the terminology that will be used throughout this paper.

**Attribute** - The characteristic of an XML element that defines the content. Example: If the elements are class, type, and color; corresponding attributes might be toy, rubber ball, and red.

**Chunking** - The process by which legacy content is tagged for inclusion in the content database.

**Content** - Content is information. It may take the form of text, graphics, audio, or video.

**Database** - A hierarchical distribution of data arranged in relationships that provides quick access to information of interest.

**Document** - Strictly speaking, when working in XML there is only one super document that contains all the content. This content fits into a common structure. We extract pieces of this super document and publish it as document instances, which may be either static or dynamic.

**Dynamic Instance** - When publishing a document instance, it may contain information that changes continuously. In defining the document publication instance, it may be desirable that every time a user opens the instance they see the most recently updated information. Contrast with static instance.

**Element** - An XML element is a definition for content. Any piece of content may be defined by one or several elements. Example: class, type, and color.

**HTML** - Hypertext Markup Language - developed from SGML as a means of conveying information on the web.

**Learning Object** - A functional component of training curriculum; a building block. Each learning object generally addresses a specific learning goal. Just how specific a goal is defined varies from system to system.

**Legacy Content** - Content, usually in electronic form, such as text, graphics, audio or video that has been developed outside of an XML content environment. Legacy content often resides in short-lived proprietary formats, which make reuse or conversion problematical.

**Metalanguage** - The language that is used to talk about (expressions of) another language, the object language. XML contains and identifies content, but the XML is not the content.

**Parse** - To divide into components from a larger set based upon some identifying feature or content.

**SCORM** - Sharable Courseware Object Reference Model - A set of specifications for developing, packaging and delivering high-quality education and training materials whenever and wherever they are needed.

**Static Instance** - When publishing a document instance, it may serve as a standard or reference. In defining the document publication instance, it may be desirable that users see a single, unchanging document, until any changes have been approved by a ruling/governing body. Contrast with dynamic instance.

**SGML** - Standard Generalized Markup Language - the international standard metalanguage for text markup systems<sup>3</sup>.

**Taxonomy** - a system for naming and organizing things, into groups which share similar qualities.

**XML** - eXtensible Markup Language - developed as a more manageable subset of SGML.

The next section introduces XML and discusses some of the features of XML that make it particularly appropriate for learning object development and learning content reuse.

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<sup>3</sup>ISO 8879

## 2 XML Basics



*The loftier the building, the deeper must the foundation be laid.* – Thomas Kempis.

What is XML? The typical definition of eXtensible Markup Language (XML):

XML is a new World Wide Web Consortium (W3C<sup>4</sup>) specification. XML is a pared-down version of SGML, designed especially for Web documents. It enables developers to create their own customized tags to provide functionality not available through HTML.[11]

This definition provides a lot of information about XML, but it obviously was written by someone who lacks an understanding of XML and its capabilities. XML was designed as a database metalanguage[8]. It was designed as a means to structure content so it could be put into and be retrieved from a database in a form that was useful for content reuse. Information content can be text, graphics, audio, video, or complex constructs of all these learning components.

The principal difference between XML and HTML is that the former uses "smart tags." Smart tags convey information about the content they contain. Because of this, you can use the structure you create to put your content into an easily retrievable form. One exciting aspect of XML is the ability to define your content your way, creating custom tags for different kinds of instructional objects such as objectives, test questions, feedback and other common components of the training content[6].

Your content management system reads the smart tags and parses your content into useful chunks that you can assemble into subsequent documents. When you need the same (or similar) content, you construct a query of your content database. You then review the resulting content and if it matches your current use, you use it. If you find nothing useful, you add new content for your current document – and future use.

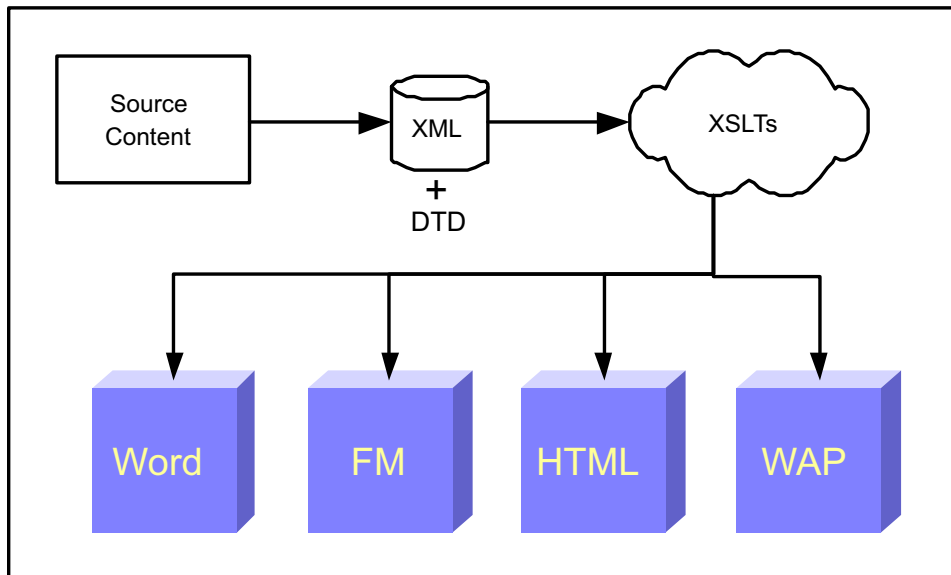
By using smart tags, it is also possible to define very specific criteria for making recursive changes. A branding change, which might take weeks to implement across an entire curriculum can be implemented in minutes. Editorial and style changes can be very exactly implemented in the precise circumstances defined by the editors. Legal reviews can be conducted on exemplar text, which is then recursively edited throughout the content library.

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<sup>4</sup>The same people who brought you SGML and HTML.

Each of the content elements is consistently tagged so that it fits together with other elements to form consistent document instances. In other words, each content object contains an introduction, main matter, illustrations (if any), conclusion and transitions. Several content objects are aggregated to form a document instance. Given a different use, it may be necessary to slightly modify some of the introductory or transitional materials. You also can structure your learning objects so that they can be specifically relevant to different user groups or to audiences of different aptitudes. The next document instance you require may contain the same content objects, which have been modified, just a little here and there, to meet the requirements of the different audience.

The process of defining these structural components is analogous to creation of animation cells from layers. Each layer contains a different quality of information pertaining to the same object. These objects are then added together to produce an instance of learning delivery.



There are three main components of XML objects with which instructional designers need to be concerned: XML, DTD and XSLT. The XML file contains the content, just the content and only the content. The Document Type Definition (DTD) specifies how the XML is structured. The XML Style sheet (XSLT) contains all the formatting information for the output document instance.

## 2.1 Document Type Definitions (DTD)

Most XML documents (and all SGML documents) refer to an external document type definition (DTD). The DTD provides a list of the elements, attributes, comments, notes, and entities contained in the document. It also indicates their relationship to

one another within the document. In other words, a DTD is the grammar of an XML document[16]. Without a DTD (or schema, see below), all you have is data. The DTD is rather like the header row in a table that identifies what lies below it. It does not itself contain any data, but makes the data that follows useful.

DTDs are complex and difficult to create from scratch. Luckily, there are thousands of open source DTDs from which to choose. Most of them are related to a specific industry or enterprise. Unless you have unlimited time and capital, there probably is no reason to even contemplate making a custom DTD that models your core organizational elements. The most widely distributed DTD is DocBook[12], which originally was developed for documenting computer software. Many popular DTDs, such as the Telecom Interchange Markup (TIM) are derivatives of DocBook. Because XML is extensible, you can begin with a DTD that meets your core requirements and then make minor modifications and additions to it at a later date without invalidating all your XML.

The DTD defines the taxonomy that you will use to parse information about the subject matter into re-usable form[4].

### 2.1.1 XML Schema

Considerable confusion exists about XML Schema. Simply put, XML Schema represent another, more flexible way to accomplish the same functions as DTDs. Just like the DTD, the XML schema is an external document referenced from the XML document. In terms of learning objects, XML Schema do very little additional, useful things, as compared with DTDs.

Where XML Schema do come into their own are in validation of numerical data. For example, if you are passing instructions to a machine that cuts precision parts from blocks of steel in XML format, it would be handy to have that data automatically validated before it is handed to the machine, since accidentally sending the wrong numbers can ruin not only the production piece but the very expensive machine as well.

It also is true that most of the document-handling software has been developed in an XML-with-DTD environment. If, in the future, as some forecast, XML Schema replace DTDs, there will be simple tools to convert DTDs to equivalently behaving XML Schema. For the time being, in regard to learning content management, it is not necessary to pay any attention to schema[18].



## 2.2 XSLT

XSLTs are the method used to transform raw XML data into useful content[20] - creating a Word document or a FrameMaker document from the same source files is accomplished by applying two different XSLTs to the same XML data files. They are referred to as style sheets, but they are not style sheets in the same way as a cascading style sheet defines the look of an HTML document instance.

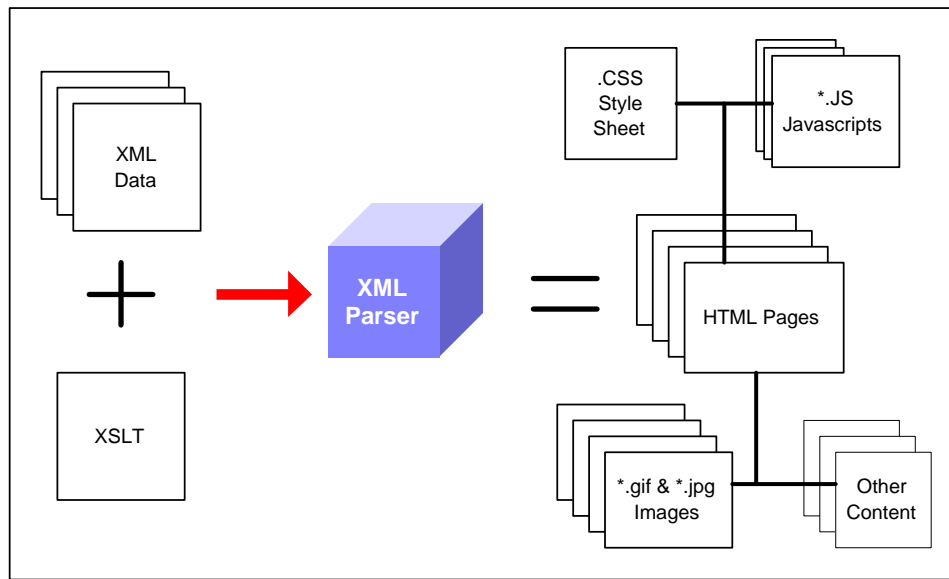
It is important to note that authoring in XML divorces the content from the format. The reason for this is quite simple: consistency. When you make a change to the source content of a series of deliverables, you should be able to produce those new versions with a minimum of intervention; ideally with no intervention. This is accomplished by creating an XSLT for each document instance type and then processing content through that common XSLT for all versions of that output deliverable type. The same revised content can be processed through XSLTs to produce an update for four different courses, which may be either web-based or paper-based.

This is a departure from traditional word processing and publication tools, which merge these two operations into a single work flow. Some tools used to author XML, such as FrameMaker, allow the designer the illusion of authoring content with format, but all formatting is defined in the XSLT, which authors very seldom modify. Rather than spending endless hours fiddling with documents to make the styles come out right, developers work with the content to make that right. When the words and graphics are right, they are done.

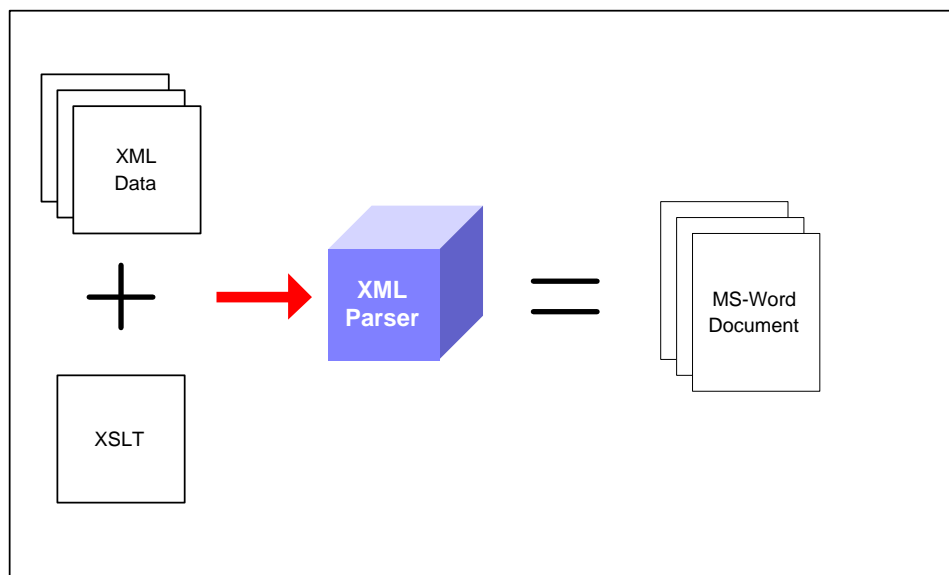
XML is data and contains no formatting. However, because it is structured data, the formatting can be applied to it programmatically. The XML data and the XSLT are parsed<sup>5</sup> to become a web site. The website contains the HTML pages, images, javascripts, style sheets and other content associated with a full-featured Web site. The same content can be parsed with a different XSLT to result in WAP fully featured web content.

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<sup>5</sup>There are many kinds of parsing engines, some written in C++, Perl, Python and Java.

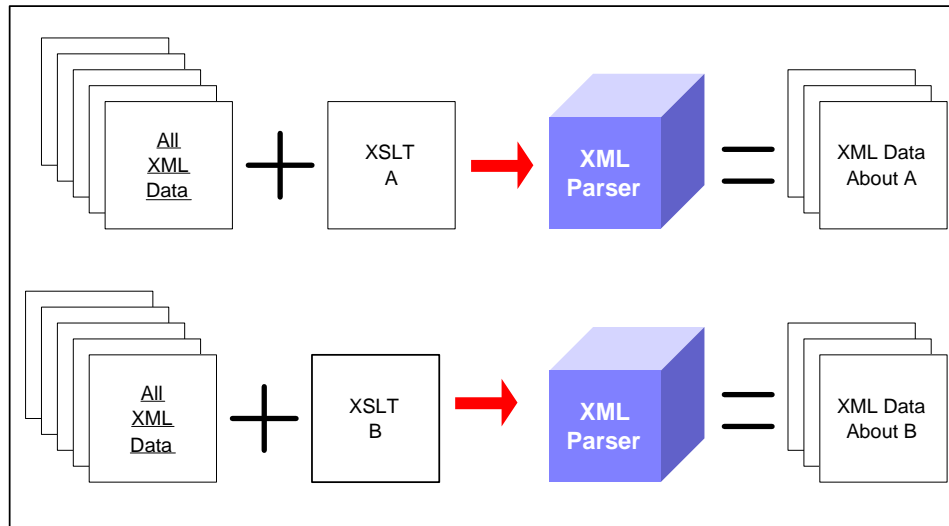


An XSLT also can convert the same content to an Microsoft Word document (or any other document format that is desired).



Lastly, an XSLT can be used as an intelligent query to result in the XML content that conforms to a specific set of rules. These rules can be very complex and can be a more efficient way to query data than a direct Structured Query Language (SQL) query to the database.

You may have all your content about a subject in XML format and use an XSLT to separate out from the total content only those passages which conform to specific criteria.



## 2.3 What about ...?

The following sections describe several initiatives and protocols that are related to XML.

### 2.3.1 SCORM

The Sharable Courseware Object Reference Model (SCORM) is very prominent in the marketing literature of a lot of content management vendors. To hear these vendors talk, if your XML is not SCORM compliant, there is something wrong with you. SCORM is a set of standards, implemented in XML, which passes instructions to a Learning Management System (LMS). It is analogous to an application program interface (API)<sup>6</sup>.

If your organization selects a SCORM-compliant LMS, then your repository should contain an XSLT to present your content with additional SCORM elements that enable

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<sup>6</sup>APIs are shortcuts for doing complicated things. For example, programmer A writes an accounting program and wants to allow programmer B to write a program that queries the accounting program for specific kinds of information. Programmer A does not want programmer B to know exactly how his accounting system works, so he writes an API that allows any application to send the accounting system a very specifically worded question, to which it will reply with the desired information. Programmer B now only needs to know how to ask the question and not how the account system handles the operation of answering it.

the LMS to know how to deal with it. The nice part about SCORM is that it is an open standard. If you decide that this LMS does not meet your needs, you will be able to select another SCORM-compliant LMS<sup>7</sup> and only have to tweak your repository here and there to make it all work correctly.

### 2.3.2 SOAP

The simple object access protocol (SOAP)[21] is a lightweight protocol for exchange of information in a decentralized, distributed environment. It is an XML-based protocol that consists of three parts: an envelope that defines a framework for describing what is in a message and how to process it, a set of encoding rules for expressing instances of application-defined data types, and a convention for representing remote procedure calls and responses.

Plain language version: You own an Internet-connected soft drink machine. Once a day, you want your soft drink machine to send information to the inventory management package. You then want the inventory management package to talk to your payroll system so that the salesman for the territory gets paid the right amount. Either you buy all these systems from the same vendor, or you buy each one from the lowest bidder and make sure they all talk SOAP to one another. You then only need one programmer to make it all work instead of a staff of fifteen programmers to write it from scratch.

Although usually associated with Microsoft, it is actually maintained by a consortium of companies, of which Microsoft is one.

### 2.3.3 .NET

Microsoft's "dot net" (.NET) is a "software platform". It's a proprietary language-neutral environment for writing programs that easily and securely inter-operate. Rather than targeting a particular hardware/OS combination, programs instead target ".NET", and run wherever .NET is implemented. In this way, it is just like java. .NET is also the collective name given to various bits of software built upon the .NET platform. These are both products (Visual Studio.NET and Windows.NET Server, for instance) and services (such as Passport, HailStorm, and so on).

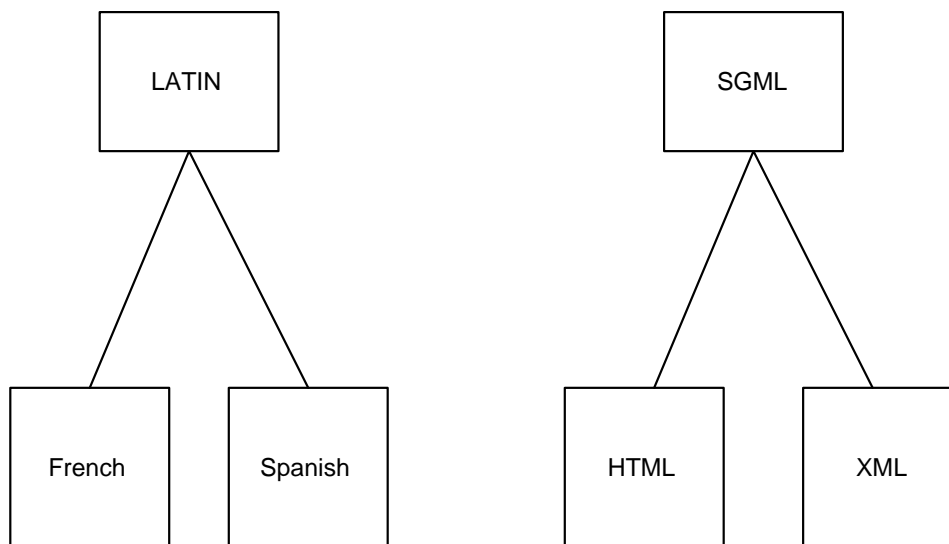
.NET uses XML in many instances, especially when complex data is transferred. It is a case of using what works best to accomplish some tasks. Other than this, it has very little to do with XML, despite the mounds of marketing that issue forth from Redmond which try to make .NET and XML seem synonymous.

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<sup>7</sup>Your mileage may vary. How SCORM-compliant is a piece of software? Unfortunately, it is often only as compliant as the maker says it is, without any testing or third party verification.

### 2.3.4 SGML

Standard Generalized Markup Language (SGML) is the root language for many other languages, such as HTML and XML. It has been around for a long time<sup>8</sup> and is still is a universal tool, both platform and system independent, for describing text. SGML is rather like Latin – the language from which other languages have been derived. Like Latin, it is more difficult to use in a contemporary context than are its children. Also, there are many more tools being developed every day to do things in XML. This is not true of SGML anymore.

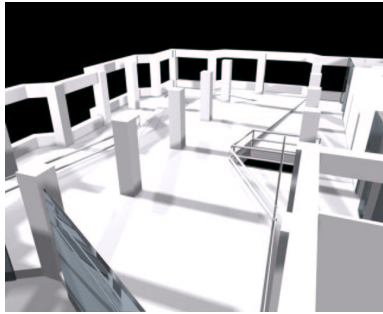


XML owes much of its functionality and usefulness to the lessons learned by people using SGML.

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<sup>8</sup>1968

## 3 Taxonomy



*Therefore, if you can't get them together again, there must be a reason. By all means, do not use a hammer. – IBM Training Manual 1925*

Our scientific understanding of any topic is founded upon taxonomic processes: we take things apart to see how they work. We can gain a better understanding of the intricate parts of a whole system by examining its parts and then combine them together, gradually coming to understand how those parts interrelate.

In a very basic sense, what a content reuse system does is to divide up content scientifically into associative, functional, or structural taxons<sup>9</sup>. This taxonomy of information makes useful reuse feasible. The application of this useful taxonomy to enterprise information is what determines whether the content reuse system produces benefits for the organization or becomes just another expensive good idea.

All learning objects are defined by taxonomies. These taxonomies express the way in which each object is understood, used and maintained. In evaluating how to construct learning object models for an XML repository, it is very important to understand that these are used to define queries. The value of the system depends upon the ease and accuracy of queries. Many organizations discovered too late that they had expended substantial resources in creating an XML (or SGML) repository that provided no additional benefit over cutting and pasting documents from a file server. This is because their content authors could not find anything that was placed into the repository.

### 3.1 Repository

A content repository has several different purposes:

- Store controlled versions of documents
- Store current versions of learning objects
- Store in-work versions of learning objects

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<sup>9</sup>A taxon is a category of information. An internally consistent collection of taxons constitutes a taxonomy

- Publish content to web servers
- Publish content to other servers (LMS)
- Function as ISO Repository

The most important reason for having a repository is to facilitate collaboration between content creators, editors and production staff. One mistake often made with a complex repository is to make customized views that are not shared between different team members. This can be frustrating and time consuming.

Once everyone has gone through the arduous task of chunking and labeling their legacy content, this content needs to be put into a repository where it can be easily accessed. The best way to do this, for instructional designers, is to put the content into a version control system that is linked to a database. ClearCase, for example, can present several different views of the repository for different uses. One view presents a virtual file server that contains all the most recent versions of the training documents. Another view presents selected documents to a web server or LMS. Yet another view presents the XML database elements.

Other views can be developed for specific uses, such as creating archives of content, presenting catalogs of approved artwork or source content for other servers such as Adobe Document Server or FrameMaker Server.

The road to XML content reuse is a simple progression of responses faced by learning organizations. Generally speaking, there are six steps taken on the path from no content sharing and reuse to a comprehensive XML repository system:

1. **File Server** - A "shared drive" accessible to all team members with read and write permissions to all.
2. **Version Control System** - A collection of documents, stored by document version to protect against accidentally overwriting files.
3. **Document Manager** - A software system that provides different levels of access to documents based upon selectable criteria.
4. **Learning Management System(LMS)** - A system that provides access to learning content for students, authors, and editors. The modern LMS usually provides some kind of virtual campus paradigm.
5. **Learning Content Management System(LCMS)** - A system that divides up learning content into manageable components, which can be dynamically revised in some or all of its instances in the curriculum.

6. **XML Repository** - A system that applies content taxonomies to organize content into associative, and structural classifications so that content can be created and managed with maximum efficiency.

Not every organization progresses through each step in an orderly manner. It is often the case that different groups within a learning organization implement different steps and different times and then face significant challenges integrating the results. The following table summarizes some of the objectives and limitations of each step in the progression:

Step	Objective	Limitation
<b>File Server</b>	To permit access and sharing of files between many users.	Slow, insecure and does not scale well
<b>Version Control System</b>	To maintain different versions of the same document so that the newest (best) can be identified.	Complex to maintain and difficult to use when additional features are added.
<b>Document Manager</b>	To automate more complex features (and rules).	Proprietary - software does not keep pace with new tools and processes.
<b>LMS</b>	To improve the efficiency of training content delivery and progress tracking.	Can limit designers in terms of format or delivery methods, may not accommodate editing and version control well.
<b>LCMS</b>	To improve the efficiency of training development through content management and reuse.	Often includes a poor user interface; extensive customization required.
<b>XML Repository</b>	To provide content reuse, multiple output formats, and extensibility to react to changing needs.	Requires rethinking of the development model by designers.

When computer networks became common in the workplace, people abandoned the file cabinet for the file server. They soon learned that file servers have their own defects when it comes to sharing important information. The next logical step was to try to remove the most glaring defects of the file server by implementing a version control system. The version control systems made it safer to put your documents onto the network and easier to find things, but when large numbers of people put large numbers of documents into the system, it became harder again. Enter the document management system, which made it simpler to find things, but which usually locked you into tools and processes, which rapidly became outmoded.

A good example of this last hurdle to progress is a large legal firm that implemented a complex macro-language driven documentation system that interoperated with their



document management system. When the next version of MS-Word arrived, they were very upset to find that there was no backward compatibility. So, they remained with the older version of MS-Word for ten years.

Learning management systems (LMS) are student-facing applications, primarily. Their purpose is to present training to a student population and to provide tracking of student performance. Over time, more and more content management facets have been sneaking into these learning delivery platforms. That is not their core function<sup>10</sup>. Although learning content management systems (LCMS) are designed to efficiently manage content, they suffer from a lack of flexibility and timeliness.

Everything that is true of the document management tools locking you into particular tools and processes is true of LMS/LCMS deployments, only much more so. Most LCMS systems have their own content creation tools, which may be very well intentioned, but which also fall very short of the functionality and finesse represented by other commercial applications. Of course, most will work with major content generators (more or less) such as MS-Word and Adobe FrameMaker, but they increase the complication of version upgrades by several orders of magnitude. This is a significant expense that must be factored into the cost of ownership and operation of these systems.

The best of the available LCMS systems are blended XML solutions. These systems use XML/XSLT technology as a transformation mechanism, but retain a proprietary data architecture for database functions. In this way, they have many of the advantages of XML technology, such as interoperability, SCORM-compliance, and access to XML enhancements, and they can also customize the database engine to provide better system performance for content management functions. OutStart Evolution®, and Aspen™, and learn eXact® are all examples of the blended XML systems.

Once you have an XML repository, your repository can inter-operate with other systems, such as LMS or even LCMS, but the content is organized for your exclusive needs and convenience. If your needs or tools change, so can the repository. You have created for yourself an "Open Source"<sup>11</sup> solution. For that reason, the XML repository is simpler and less difficult to upgrade than many proprietary solutions.

XML and SGML were developed specifically to provide a structure and methodology for content reuse. Many of the lessons learned from early SGML implementations were built into XML, which provides a more streamlined and less labor-intensive means of achieving high quality content reuse.

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<sup>10</sup>To deliver existing content to students efficiently.

<sup>11</sup>An open source application is one that you have access to every line of code. If you have the expertise, you can modify it in whatever way is necessary for your own purposes, rather than bartering with a vendor to get changes implemented second-hand.

### 3.1.1 Proprietary Footnote

Question: If XML Repositories are so great, then why doesn't anyone market an XML repository as an LCMS?

Answer: Practically all LCMS vendors are organized according to a service consulting business model. They invest massive amounts of time and money to create efficient systems, which they practically give away for free. They do this so that they can sell you customizations, service, training, maintenance, and support. A pure XML repository system could be serviced and maintained by a wide variety of vendors. They might never earn back the investment they made in creating the solution.

The proprietary product offer does tie the business to the vendor, but it also ties the vendor to the business. The vendor has a huge stake in the outcome of the LCMS implementation.

There are some pure XML repository LCMS solutions that have been developed by the Open Source community (principally by and for academic institutions). They are more like do-it-yourself kits than a fully-developed product offering and do not offer the reliability, features, or performance of COTS<sup>12</sup> solutions.

## 3.2 Reusing Content

Legacy content comes in many different forms. Most of these forms represent document instances. Most organizations attempt to maintain a repository of these document instances according to some meaningful hierarchy. ISO<sup>13</sup> documentation standards are an example of this kind of document-centric hierarchy. If documents are correctly named, stored and updated, then the information they contain can be reused, but the process is slow, laborious and susceptible to human error. The utility of simple file sharing is inversely proportional to the number of documents to be shared.

When existing content is chunked, it usually begins in documents that are broken down into component topics and then broken again into smaller pieces identified as introduction, main body, and transitions. Content should sound natural and appear to have been written specifically for each use. Content also is chunked by audience and complexity so that relevant material and more complex discussion can be added or removed easily.

Audience plays a big role in content reuse. Identifying specific blocks of informa-

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<sup>12</sup>COTS: commercial off-the-shelf.

<sup>13</sup>ISO. A network of national standards institutes from 147 countries working in partnership with international organizations, governments, industry, business and consumer representatives. A bridge between public and private sectors[13].

tion as appropriate or inappropriate for different audiences can simplify document creation immensely. It also is the hardest classification to accomplish.

For example, an Offer Brief: a document that quickly informs sales staff of new offers, pricing and conditions that apply to selling a product or service within a given market. These things are constantly changing. It is a Stygian task to keep this kind of training content accurate and timely. Most of the documents have a similar look and feel. There may be specific types for different audiences or products, but a single item of information may find its way into 30-40 different presentations. Along the way it may get a different style - it may appear in a table here and in a paragraph of text there, but the data behind it is identical. It is possible to do a keyword search through a documentation set and locate all known matches, copying in the revised information with each new iteration. That usually takes too much time and trouble to be worth doing on a regular basis, unless it is very special information.

In comparison, with a properly constituted XML repository, the process is much more direct. Instead of working backwards from finished documents to find the appearance of specific content in context, the source content is already organized according to what it contains. The author goes to that container, revises it, refreshes the repository and the next time the document instance is called, it collects its source content from the updated source, applies the proper formatting, and compiles the finished document. All 30-40 documents that touch this same source content are automatically updated.

There was more work done in the very beginning, to properly analyze and attribute the content, but as the content is used to create more and more instance documents, those documents become progressively less expensive to create, manage and update. It makes it possible to do the previously unthinkable:

- Individualized training syllabus for every employee.
- Weekly updates across training syllabi.
- Monthly updates to training.
- Global identification of misinformation; global liability reduction.
- Personalized web-based training tied to employee reviews.

By increasing the efficiency with which content can be created, the quality and timeliness of all the training deliverables can be increased without raising the cost into the stratosphere.

## 4 Process



*For every human problem, there is a neat, simple solution; and it is always wrong*  
– H. L. Mencken.

This section describes the development process to implement the XML content reuse system. Each description includes a discussion of the costs and benefits associated with each process.

### 4.1 Manual Reuse Systems

In traditional, project-oriented design settings, each new project was a separate entity. Analysis, development, and production were defined by the time line and requirements of each discrete project, and instructional designers produced design and content as an artisan custom-crafting a product for a customer. When this process has worked correctly, it has worked very well. Students receive curriculum that is specifically fashioned to address their needs. Trainers and designers can be student advocates at many different levels. Everybody wins. However, there are some important limitations to this methodology.

It is important to understand that these limitations and disadvantages are not a function of the skills or artistry of the designer. However dedicated and talented a designer might be, armed with a typewriter and a mimeograph machine, he will be at a disadvantage compared with someone of, perhaps more pedestrian talents, but provided with computers and web-based delivery options.

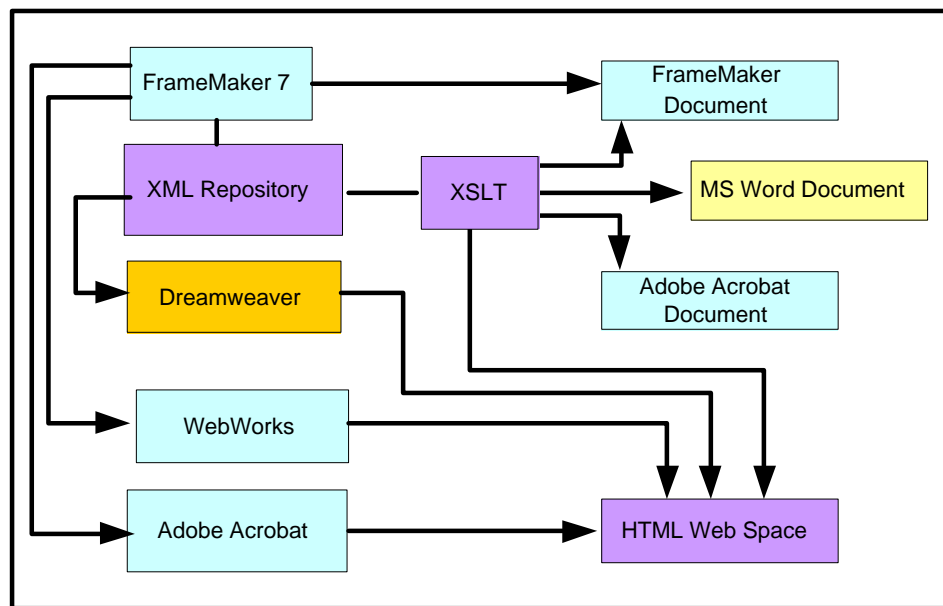
At the same time, it must be admitted that the best tools will not make a poor designer produce excellent training content. Really good tools have been used to camouflage poor design. It is certainly easier for a incompetent instructional designer to produce much more crummy training deliverables with an XML content reuse system than when working alone with MS-Word.

Assuming competent designers. some of the most important limitations and disadvantages of the cottage industry approach to instructional development are:

- **Inconsistency** - Since every project is independent of every other, it is very difficult to create and enforce standards. Even if templates are used, designers tend to create exceptions.
- **Inefficiency** - There are many opportunities for reusing content that are missed, either because designers are unaware of legacy content that could be adapted, or because the legacy content is in a format that makes it difficult to adapt to their current project.
- **Inaccuracy** - Because each project recasts some of the same information in a different way, there is no way to globally update information and reissue training when changes occur.
- **Scalability** - As workloads increase and staffing levels decline, there is no way to maintain output and quality levels. Designers become frustrated, being unable to meet the expectations of their audience.
- **Tool Costs** - Reliance on outmoded tools, different versions of standard tools and fringe tools complicates things and makes people less efficient. The cost of maintaining learning materials sourced in multiple tools is enormous. Standardization on a few tools and methods makes a substantial difference to the production cycle.

## 4.2 XML Automated Systems

The following figure describes a content authoring/delivery system for both online and hard copy training deliverables. In this example, light blue indicates tools from Adobe, orange Macromedia, yellow Microsoft, and purple for open source components or outputs. This is only one of many equivalent solutions.



The structured approach to instructional design is seen to have the following benefits[9]:

- The same courses are delivered across multiple media and delivery environments. Just because it happened to be developed by X with Y, this doesn't stand in the way of it being reused in a completely different environment or with different tools.
- The structured development model supports a consistent instructional design and development process. Designers have many new options that come from an efficient production design.
- XML content can be analyzed and repurposed much more efficiently than legacy content. The content does not hide in a forest of words. When needed, new and legacy content can be efficiently blended to create educational tools to suit different needs of different student audiences.
- Learning content is organized for use. Related content is accessible. Related procedures and policies are obvious - as are conflicts and inconsistencies.
- Because the relationships between concepts and ideas are mapped according to the taxonomy by which the content was chunked, identifying content for reuse and the updating of legacy materials is streamlined significantly.
- Conforms to Information Technology standards to ensure portability and long-term use.

There are three steps in the process of implementing an XML content reuse system: 1) Analysis, 2) Chunking, 3) Operation. The process is very simple, in theory:

- A DTD is selected and tested.
- The repository is created using tables that mirror the DTD.
- Legacy content is converted to XML.
- XML content is placed in the repository.
- Users query the database to construct new documents
- Users add new content to the repository as needed.

As mentioned before, the initial analysis is perhaps the most difficult stage of the implementation and it is the one stage that has the most persistent effects. Having once decided upon the one and only way the content will be parsed, staff members are trained carefully in how to accomplish the chunking of legacy content into the system.

### 4.3 Legacy Content Chunking

Whether this chunking process is slow and manual or quick and automated really depends on how much legacy content was created using standardized styles and templates properly. If practically none of the content was created using standard styles and templates, then there is a great deal of manual evaluation that must be done.

The most important aspect of the chunking process is to have the people doing the chunking UNDERSTAND what they are doing. This is best accomplished by providing them with thorough training, support, and supervision. Consistency is the key. Select a single process, train everyone in that process and execute the process without exception.

**NOTE:** The importance of thorough and consistent content editing increases by several orders of magnitude when content is entered into the database. *Enter it wrong once ... use it wrong many times.*

“Organizations that implement highly configurable or customizable products need to rely on their software vendors to meet the early training needs of the planners and technicians. To the degree that they wish to own or control product configuration, customization, and the ongoing support of those modifications, they also need to be prepared to invest in the staff development required to enable those capabilities.”[7]

There are two approaches to legacy content that are usually successful.

- Identify a small select team of designers who specialize in converting content. They do nothing else until the original body of required content has been put into the database.
- Spread the conversion duties among all the design team. Each member converts documents among their other duties, but at least a fixed minimum number of hours per week.

The advantage of the first method is that you generally obtain a more consistent conversion with fewer errors. The advantage of the second method is that you train your entire group in the XML database and process. You also may learn some things early on that allow you to modify the database or your processes so that they are more applicable to your training.

As with any complex operation, when there are advantages, there are also risks. The risk inherent in the first method is that it may result in a fully functional content base and no one trained to use it properly. The second method risks creating a database with so many inconsistencies that it is practically useless. The correct method for each organization depends upon the technical background of the team and their workload. Organizations with lower levels of technical proficiency and higher per capita workload generally do better with the first method.

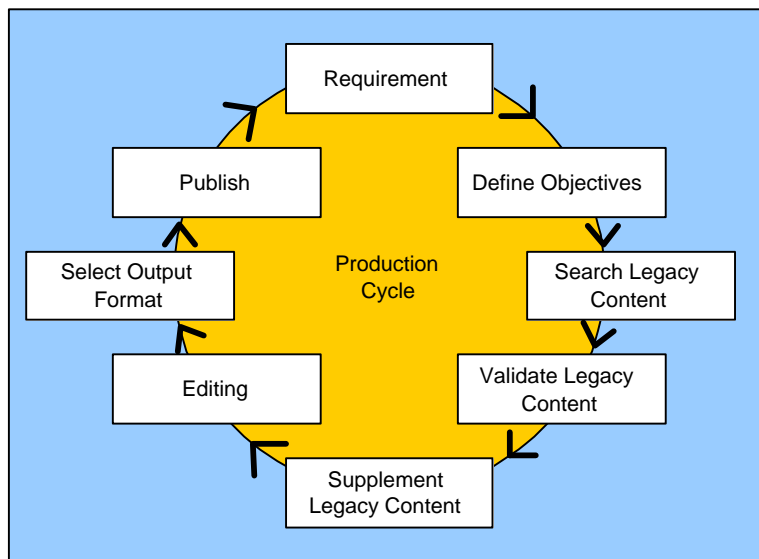
## 4.4 Using Chunked Content

The theory of developing new documents from legacy components is fairly simple, if the repository is implemented properly. First, the designer needs to know what previous training this new training is similar to. This is accomplished by querying the database and seeing what existing content comes fairly close to the current need. If it is completely new and dissimilar from other training, then the designer gets nothing from the repository but templates. Having made a shrewd guess about some other similar training, the designer has to define how this new training is different from the similar training that has been identified.

One method of handling the query process is by a web page containing drop down field list properties. Define 5 or 6 of these and then add in some more specific customizing terms, click submit and get a list back of matching content. It is just like doing a web search, except that the web you are searching is a discrete database. What is returned from the search can take many different forms: FrameMaker document, raw XML, Word document or HTML. When the query results in more "hits" than desired, then you reformulate it to be more specific. If little or nothing results, then you try a more general query until you get the desired results.



The authoring process is iterative, a succession of repetitive operations performed to collect, modify and upload new content.



As time goes by and the authors and production people get used to using the system to produce the required results, productivity increases and frustration decreases. There will be some people who cannot adjust to the new work methods, just as there were some very talented people who could produce marvelous typed documents who could never quite make a word processor work right.

Some authoring environments, such as Epic Editor, work from the data structure to the content. At the beginning, these tools can be difficult for some designers to understand and use efficiently. After the designers become familiar with the database structure, they rapidly learn to navigate through the maze of information they encounter on cross-functional teams to find the parcels they want. In practice, authors working with common, standardized documents rapidly learn what five or six elements they must identify to generate the greater portion of their training. It is more difficult, at the beginning, than cutting and pasting content, but once you get it into your stride, it becomes 10 times faster and easier to do your job. Even in a pure XML environment, designers still find invaluable the ability to easily query the database.

It should be noted here that no content management system can stand in for the designer's knowledge and understanding of the corpus for which training is developed. XML has no real impact upon the analysis or discovery phases of new training development. XML is a set of tools. Having the skills to manipulate those tools does not in and of itself result in training any more than reading a manual makes you an expert.

How the content is organized into new instances is a question of authoring tools, not XML.

## 4.5 Multi-Sourcing

Multi-Sourcing has been the Holy Grail of the documentation industry for a generation. Simply put: information goes in the hopper, press button A and a good marketing document results. Press button B and you get a User Manual, and pressing C creates the getting started pamphlet that goes in the box with the product. The heart of multi-sourcing is content reuse.

Until the advent of SGML, content reuse was impractical. Until the advent of XML, content reuse was out of the reach of all but the largest organizations and institutions. In the last 30 years, tremendous advances have been made in content reuse technology to enable multi-sourcing of documents.

Whenever the notion of content reuse is raised, one hears the same kinds of objections voiced time and time again. These kinds of questions are entirely typical and a natural reaction to the concept of content management and reuse. Adopting an XML or other reuse system asks people who already know how to do something well to change their process and to adopt methods they do not know. The following FAQ<sup>14</sup> address the four most common questions from seasoned designers:

Q1 How will XML help me to tailor my materials to meet the needs of my audience?

A1 When you are creating training now, if you have a good, useful piece of content that speaks to the same point in another class – don't you copy and paste it in? If you could do this more often, and maintain the same quality of output, would you do it? We all do that, within the body of our own work, and sometimes from other authors, too. We use our own documents as source for reuse more because we are intimately familiar with them. We know we can find that great paragraph we used to describe that weird thingamajig. More seasoned authors annotate their own works with notes that help them find those good opportunities to reuse content. If we work with another designer who does the same for long enough, we can get so that we can read each other's notes and make more use of each others' work as reuse content. XML, in this sense, is like a common form of notes with which we annotate each others' work so that we can access it and reuse it, when that is the best thing to do.

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<sup>14</sup>Frequently Asked Questions

- Q2 How can I leave out technical information in one document, but include it in another?
- A2 That gets to be something of a tool question. What are you authoring with? You may collect the entire content for a document, run through it, individualizing it for this instance, cleaning up any transitions and output the result. Instead of copying and pasting text between documents, you are attaching document objects to one another like a jigsaw puzzle. Pieces that work well consecutively have the right "shape" to fit together that way. They add up together, you edit them as needed and produce the finished product.
- Q3 What prevents this from resulting in documents that seem mechanized and impersonal?
- A3 This is not a machine imitation of human communication. This is human beings using a system of shortcuts to make their work easier and more productive. It certainly can sound mechanized and artificial, but it doesn't have to be so. When the same item or process is described identically in five different places in 4 different classes - is that mechanical or is it using repetition to reinforce?
- Q4 What about the shifting voices of the authors; won't that cause confusion?
- A4 Do you have more than one instructional designer on your staff now? Are your students confused by having to attend classes created by different people in isolation? When everyone else's work is more available and when opportunities for collaboration and knowledge sharing are facilitated by the system, instead of hampered by it, will not that help these different people find a more common voice. If you never sing in a choir, you never get the knack of singing like everyone else.

## 4.6 Single-Sourcing

All printed documents, since Gutenberg were multiple copies of a single original source (single-sourced documents) until quite late in the 20th century. Advanced printing technology allowed compositors to create multiple versions of documents by reusing the same printing plate sources in different permutations. Computers made practically anything possible, but a comparatively tiny slice of the possible became routine.

In an enterprise environment, there are many uses to which information is put. Some of those uses include documentation, training, knowledge-base applications and marketing. Traditionally, these disparate uses have all maintained their separate knowledge management environments. As a result, the information provided by these various sources is usually inconsistent. In the worst case, considerable misinformation results.

No one would think of using typewriters and mimeographs for corporate communication, although these were once ubiquitous. In the near future, single-source systems will seem just as antiquated.

When these information sources are unified into a single repository, from which all outputs derive, significant improvements in efficiency, consistency and overall quality of information result. Also, when the costs of implementing the content repository are spread among different organizations within the enterprise, a greater return on investment naturally occurs.

Communication is the unstated core competency of every successful business. When the information about its products, processes, policies and procedures is available to all associates, this has a unifying effect on all the organizations within the enterprise. Although the process and deliverables of different organizations vary tremendously, their need for accurate and timely information is identical.

In its best form, the XML content repository can be a significant competitive advantage to an enterprise, particularly one that operates in diverse markets. In this sense, the economies and productivity conferred to the training organization are a byproduct of a larger benefit to the entire enterprise.

## 5 Tools



*Our view of the possible is shaped by our tools.*  
– Carl Sagan.

This section analyzes some of the common tools that can be used with the XML content reuse repository. There are many tools available and one size does not fit all. The choice of tools is an important one, because the tools will have the biggest and most immediate effect on the designers. For that reason, it is very important to include designers in the tool selection process.

Anyone who grew up in the typewriter age might well be amazed at the layout, page formatting and document management capabilities of the current crop of software applications. As with all technology systems, there are prerequisites and agonizing revelations – and at least three ways to do something:

1. The RIGHT way - the way originally envisioned by the developer and facilitated by the program. This way works best in the long run.
2. The WRONG way - the way that someone found to make it work, because they didn't know what the right way was. This way complicates editing and later revision of the material.
3. The OTHER way - the way that outwits the program and allows you to do something that should not be done, but needs doing. This way has everything wrong in common with the WRONG way, with the added disadvantage that it may actually make your application or their documents unstable.

Unfortunately for anyone who is facing the prospect of converting documents from various formats to XML, there is a considerable amount more WRONG and OTHER than there is RIGHT out there to be converted. Computers are infinitely stupid and must be told precisely what to do. In order for consistent content to result from an automated conversion to XML, consistent base content must be available.

Consistency in the use of content creation applications is not a hallmark of most groups of instructional designers. Designers on a deadline are pragmatic and care more about making it work now than about finding out how to make it work right later. It is paradoxical that a less intuitive tool, which requires more instruction and has a steeper learning curve, may be used more correctly and consistently than the naturally intuitive tool that everybody figures out for themselves.

## 5.1 Microsoft Word

Microsoft Word is the ubiquitous tool that does not play well with others. It has a long history of file format changes and inscrutable macros. Whether it can be used in conjunction with an XML content repository – and how well it can be used – comes down to two things: styles and templates.

To use Microsoft Word as an authoring tool is certainly possible. It is a fairly simple process to create an XSLT to convert XML content into a \*.doc or \*.rtf format so that it can be brought into Word. For example, if you are working with an XML document instance, you can process that instance into an \*.rtf and send it to a reviewer who prefers to edit in Word. The problem happens when that review is returned to you and you wish to transfer those edits back into XML content.

Because users seldom use Microsoft Word properly<sup>15</sup>, it is rarely possible to convert Microsoft Word files to XML programmatically. Therefore, using Word decreases the productivity of the designers. Word does not operate in a manner consistent with structured documents. Using Word to author XML is like eating soup with a fork: you can do it, but it complicates things.

It is also true that practically every new version of Microsoft Word incorporates a plethora of undocumented changes in the file format. Changes in the format of the resulting Word files invalidates any programmatic automation that has been created. For this reason, most XML content systems use the more stable, but less capable, \*.rtf format to transfer files to and from Word.

Many people<sup>16</sup> consider that Microsoft Word has no place in an enterprise XML content reuse system. In this view, using word processor technology to author content objects is counter-intuitive, inefficient, and ineffective. Regardless, people resist trad-

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<sup>15</sup>People quite often learn to use Word by trial and error without instruction. They seldom know how to use templates or the styles they contain. When they want to have something in a different font or size, they apply that change from the tool bar, instead of applying a standard style to the text. Some Word users seem addicted to the space bar: instead of setting tabs appropriately, they achieve their indents through the use of multiple spaces. Word documents often contain revisions, highlighted text and complex section breaking. This kind of formatting makes programmatic chunking very difficult.

<sup>16</sup>"Microsoft Word is the most popular word-processing application on the planet, a fact often regretted by die-hard XML aficionados." - XML Workshop Ltd.

ing tools, even when they have good reason to do so. Some dedicated XML editors, such as Epic(see below) even include filters to import Word content to XML. Indeed, there has been a significant amount of effort to create robust, reliable conversion tools for making XML extracts from Word documents[5]. The newest generation of blended XML LCMS systems, such as OutStart Evolution, include an impressive amount of bi-directional filtering of content to and from MS-Word.

Some other Microsoft programs, such as PowerPoint, can be used to create content and have very similar advantages and disadvantages to Word. Other Microsoft programs, such as Publisher or Front Page, pose another order of magnitude of difficulty in interoperating with content reuse systems.

## 5.2 Adobe and FrameMaker

Adobe FrameMaker is the WYSIWYG authoring tool of choice for XML applications. FrameMaker 7.0 includes a wealth of features that make authoring XML content much more efficient and practical<sup>17</sup>. There are direct exports for both HTML and PDF document instances. Authoring in the structured view provides designers with an excellent means of understanding and using FrameMaker to create valid XML documents<sup>18</sup>

Adobe FrameMaker imports the XML data elements into a template. That template defines styles associated with the element definitions in the element definition document (EDD<sup>19</sup>). This means that it is not necessary to parse the XML and XSLT together to result in a formatted document instance. As the document is created, by adding structural components to the current document, the user sees the final format of their document. This only makes sense when you are using FrameMaker as your publication tool. Otherwise, what the author sees is only the best approximation the XML programmer can make with an XSLT of the normal output from FrameMaker styles.

Adobe FrameMaker can export files directly through Webworks to HTML<sup>20</sup>. This is an option for training projects that rely extensively on interrelated print and online media. It can be easier to coordinate and publish the learning materials required if they are developed as a single source project. The base content is available from the XML repository, either as FrameMaker files or directly as XML.

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<sup>17</sup>A structured document view for creating valid XML, several different levels of styles, the ability to discard exceptions to styles are three of the most important features that impact XML.

<sup>18</sup>Well-formed XML conforms to the syntax rules of XML: it is tagged correctly. Valid XML is well formed XML that conforms to the data structure defined in the Document Type Definition (DTD). All valid content is well-formed. Not all well-formed content is valid.

<sup>19</sup>The imported copy of the DTD used by Adobe FrameMaker to validate the XML content.

<sup>20</sup>See the notation under Dreamweaver about working with Webworks generated source code as an HTML output.

Adobe FrameMaker also exports into Adobe Acrobat very well. Creating Acrobat files with FrameMaker allows you to include a lot of advanced Acrobat features<sup>21</sup> directly in the FrameMaker document, rather than having to modify the resulting PDF with Acrobat later. Creating Acrobat files with other programs, such as Microsoft Word, is much less efficient, unless the advanced features of the Acrobat format are not needed.

The downside of Adobe FrameMaker is that all this additional capability comes at a cost: it is not really very intuitive, especially for designers who are accustomed to Microsoft Word. It requires specialized technical expertise to set up correctly. Once it is set up, designers must be extensively trained in how to use FrameMaker properly. Many Word users are frustrated by the additional structure imposed by using XML. On the plus side, FrameMaker helps users to construct valid XML and informs them when their content is not valid. Of course, once they know that their content is not valid, they may need to have someone handy who really knows FrameMaker and its templates to help them fix it.

Templates are the key. It is absolutely necessary to employ a dedicated Adobe FrameMaker expert to create templates. Most organizations do this on a consulting basis with one of the many Adobe/FrameMaker consulting firms.

Adobe has extensive training resources available, for a fee. They have a great deal of experience in implementing Adobe FrameMaker as an enterprise tool. If your organization makes the top-level commitment to pursuing an Adobe-enabled XML solution, the kind of support and expertise available from Adobe is unequaled elsewhere in the industry[2].

### 5.2.1 FrameMaker Server

Adobe FrameMaker Server provides an opportunity to create a variety of dynamic documents. These documents, when accessed, perform real-time lookups of information from databases. That allows designers to access current information in a printable form. That ability is a great advantage for customer-facing training that requires frequent updates. It also could impact differential training, allowing designers to fill in the blanks with volatile information, instead of constantly trying to keep up with maintenance changes.

FrameMaker server works with the FrameMaker software on the desktop to provide more groupware solutions to enterprise publication challenges. It is designed for working in a distributed networking environment and provides convenient document management functions from within FrameMaker itself that make many group collaborations simpler to manage.

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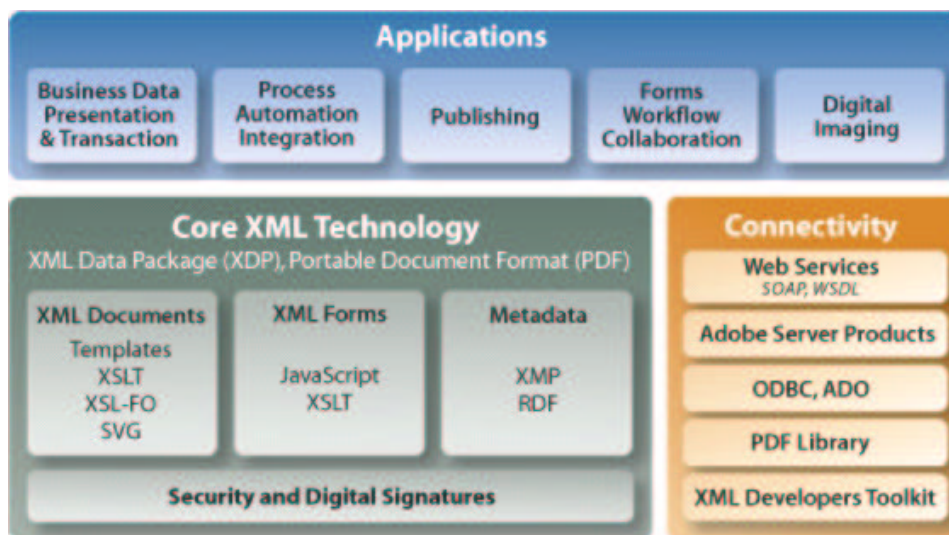
<sup>21</sup>Such as bookmarks, different kinds of linking, different security modes and so forth.



### 5.2.2 Adobe Document Server

Adobe Document Server[1] supports the dynamic creation of Adobe Acrobat documents from XML data. By flowing XML data retrieved from the XML database into document templates, you can generate instance documents and automated forms on demand. These document instances and forms can be highly complex, including graphics and audio to produce bi-fi<sup>22</sup> multimedia presentations. Because they draw their content directly from the XML database, users always get the most current information. In addition, documents can draw upon multiple sources to populate document instances: XML content, PeopleSoft, SAP, LMS and other server content can combine in a single document instance that the user receives.

Adobe has many products and services designed for XML-based solution environments. XML technology and Adobe software work together in a highly complementary fashion (See the figure below, representing the Adobe server solution implementation of XML). This is not an accident.



### 5.2.3 Adobe InDesign and GoLive

Adobe InDesign is a page-oriented<sup>23</sup> software that includes built-in, extensible support for importing and exporting XML files. InDesign also allows you to export pages directly to Adobe GoLive 6.0 to use in dynamically generating Web pages. It supports

<sup>22</sup>A term for selectable low-fidelity/thin bandwidth or high-fidelity/wide bandwidth distributed content.

<sup>23</sup>Page-oriented software allows a lot of flexibility and precision in placing content on each page; used for brochures and presentations. Document-oriented software is intended for larger, more complex documents where management of cross-references, indexes and other features is more important; used for manuals and other books.

Scalable Vector Graphics (SVG) and share native Photoshop and Illustrator files and can share these with GoLive. Through its tagged Adobe PDF support, InDesign exports graphically sophisticated eBooks that can be viewed on different devices. InDesign also supports Adobe Extensible Metadata Platform (XMP) for embedding metadata in documents.

Because it is a page-oriented development tool, as opposed to document-oriented, Adobe InDesign is a good choice for small 2-5 page documents where consistent look and feel is very important: marketing materials, offer briefs, and so forth. Many users find FrameMaker difficult to use in smaller, graphics intense documents. InDesign can be an excellent alternative.

Adobe GoLive is Adobe's competitor for Macromedia Dreamweaver. It does just about everything that Dreamweaver does, only a little differently. What it does not do as well as Dreamweaver is integrate as well with Authorware and Flash. Both GoLive and Dreamweaver will send you scurrying into the source code at edit time. The WYSIWYG editing mode is very nice and handy, but it is maddeningly imprecise. If Lo-Fi<sup>24</sup> Web development is practically all your output, then GoLive may be an excellent choice, particularly if you are wishing to integrate more closely with print-deliverable development using FrameMaker. If Hi-Fi Web content is the majority of your online offering, then Dreamweaver has the edge in integrating with Flash and Authorware.

### 5.3 Macromedia Dreamweaver

For online content, Macromedia Dreamweaver is one of the most popular WYSIWYG HTML editors. Unfortunately, like Microsoft Word, it is often misused<sup>25</sup>.

Dreamweaver's WYSIWYG editor is, as noted above, imprecise and you cannot make many edits without having recourse to the source code. Templates are very important. Dreamweaver uses templates much in the way that FrameMaker does to add format to XML content. Dreamweaver imports XML into templates and generates HTML directly. Dreamweaver also exports XML content, which is efficient for people who like to work in HTML, but want the advantages of an XML repository.

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<sup>24</sup>Lo-Fi Web content is primarily text with a few graphics and moderate interaction; it is suitable for thin client delivery. Hi-Fi Web content is highly graphical with strong user-interaction; video, Flash, and Authorware content are Hi-Fi.

<sup>25</sup>Many people learn Dreamweaver by using it, without any training. Like Word, Dreamweaver has many buttons and widgets that are convenient, but don't result in very good or consistent HTML. For example, someone may have extensive experience creating Web content with Dreamweaver but not have a clue about using templates.

**NOTE:** Dreamweaver does a good job of exporting the editable portions of templates as XML. However, it only checks whether the content is well-formed XML<sup>26</sup>, not whether it is valid XML.

HTML via Webworks-FrameMaker may not behave well in Macromedia Dreamweaver, since it has less tolerance of HTML code that it interprets as badly-formed XML<sup>27</sup>. It should be noted that using Adobe FrameMaker to write HTML results in Web sites that lack many of the features needed for richly interactive eLearning[6]. Webworks-FrameMaker works best for document based learning, where a large volume of information must be provided to the student as reference material.

The big advantage of Macromedia Dreamweaver is that many people feel comfortable with it. It is another learning step, but a relatively easy one to understand how to import and export XML in Dreamweaver. Again, it is of paramount importance that the templates into which XML is imported are used verbatim. It is a very good idea to have those templates generated by expert consultants if sufficient Dreamweaver-specific expertise does not exist in your organization.

### 5.3.1 Authorware and Flash

It is perfectly possible to create learning objects in Flash or Authorware and store them in the XML repository. It is usually a good idea to break up longer Flash and Authorware segments into scenes. In this way you can reuse particular content without having to modify a large, complicated segment when only part of it is desired.

## 5.4 Arbortext Epic Editor

Unlike other text editors that have been stretched to fit the function of authoring XML content, Arbortext Epic Editor was designed from the ground up as an XML editor. It handles a broad range of applications and does a good job of providing an editing interface for XML content. The user interface is user friendly, but not at all like the standard WYSIWYG document editing environment. Like Adobe FrameMaker, it is a groupware product that is specifically optimized to handle:

- Content collaboratively written and maintained by teams of authors working in multiple languages.
- Content created in reusable components independent of their formatting, stored in content management repositories, and dynamically assembled on demand.

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<sup>26</sup>Well-formed XML conforms to the syntax rules of XML: it is tagged correctly. Valid XML is well formed XML that conforms to the data structure defined in the Document Type Definition (DTD). All valid content is well-formed. Not all well-formed content is valid.

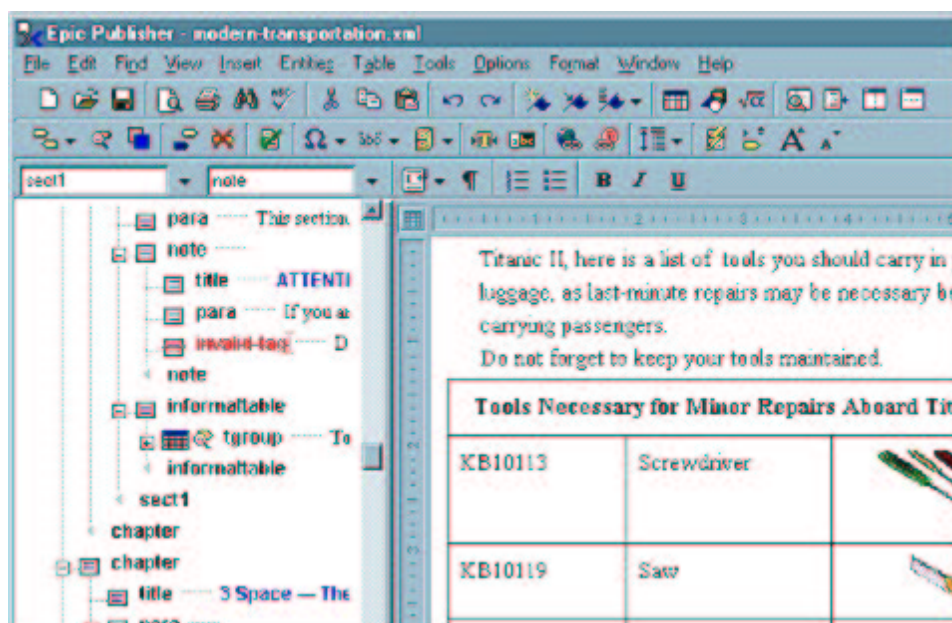
<sup>27</sup>HTML is well formed when it conforms to the syntax of the version of HTML supplied in the document definition

- Content personalized for specific audiences and formatted for delivery on multiple media: Web, CD-ROM, print and wireless.
- Content automation based on systems and software that are easily customized and leverage the broadest available support for XML and related standards.
- Content creation through client-based installations for occasionally disconnected users and through server-based installations accessed by Web browsers for users who are connected full-time.

Out of the box, Arbortext Epic Editor works with file systems and WebDAV-enabled repositories, and has configurable adapters for Documentum, Oracle CM SDK (formerly named iFS), and FileNet Panagon Content Services. Arbortext's other repository partners provide adapters to Epic Editor, including BroadVision One-To-One Enterprise, empolis SigmaLink, Progressive Information Technologies Target 2000, and XyEnterprise Content.

Arbortext offers separate products for content conversion and publishing. The Enterprise E-Content Engine (E3) converts content from Microsoft Word, Adobe FrameMaker and Interleaf documents to XML, and publishes dynamic content to print / PDF and Web / wireless. To publish to CD-ROM, Arbortext offers the CD-ROM Composer.

This E-content engine is an off-the-shelf parser that can be used to automate many different kinds of legacy chunking operations. It does not work miracles: Nothing will correctly parse badly formatted Microsoft Word files. That process requires human intervention and exercise of good judgment. It does provide to the enterprise a tool the equal of, or better than, many learning content parsers that typically require a much higher investment for the same return.



Arbortext Epic Editor is the best of a series of content editors that have attempted to get the most out of XML structure, which allowing users to see a visual representation of their output. Given that the designer understands XML and the learning content, Epic can out-perform FrameMaker as a tool for importing and creating new content. The Epic editor is very often imitated by LCMS vendors that work in structured document formats.

## 5.5 Corel XMetaL

Corel XMetaL is part of a suite of XML applications. It is an advanced structured editor that is relatively easy to use and highly customizable for applications based on well-known DTDs. It provides three views of an XML document: a plain text view in which you can view the underlying XML code; a tags-on view in which elements are represented as symbols in a formatted document; and a normal view that displays the formatted document and hides the markup. XMetaL supports use of cascading style sheets to control the formatted view of the document on screen.

Unlike an HTML editor, such as HoTMetaL, that works with a fixed tag set, XMetaL is meant to be used with any DTD and therefore requires customization. You will need a cascading style sheet and in most cases a set of macros for data entry for each new DTD. XMetaL supports the Windows Scripting Host, which means that you can write scripts in JScript, VBScript, Perl or Python to process XML documents or to create custom data entry interfaces.

XMetaL is intended to be integrated as a component of a broader XML solution, such as a content management system. The new Version 1.2 adds a built-in XSLT transformation engine.

## 5.6 Open Source Tools

In addition to the commercial offerings from vendors in the XML tools marketplace, there is a considerable body of other tools that have been produced to support SGML and XML content management by the academic and open source communities.

**NOTE:** This section is more technically oriented than the proceeding sections. In general, open source solutions require a more technically oriented user. To make up for this, they may contain extremely powerful features that are not available in other products at any price, let alone for free<sup>28</sup>  
Some examples of these include:

- **Bitflux Editor** - A browser-based WYSIWYG XML editor written in JavaScript that uses XML, XSLT, and CSS for rendering. It is usable with any XML document and features tables, lists, images, special characters, clipboard, undo/redo, and easy customization.
- **Ektron eWebEditPro+XML** - A browser-based XML word processor-like editor that enables business users to apply XML to Web content. It provides a user layer between the XML tags themselves and user actions. Scripting and commands work together to control which tags the user has access to, and where the tags can be used. Business users will not realize they are working with XML tags, but instead think they are working within a set of content parameters, definitions, and/or rules. Customization is required to implement the DTD and produce valid XML, but once this is done, there is little need for further integration.
- **GenDoc**(formerly GenDiapo) - An XML editor based on an existing project, MerlotXML. It can use two kinds of plug-ins (DTD and/or action). The DTD plug-in can be used to customize the editor for a DTD, and an action plug-in can be used to publish documents in HTML or PDF format. The editor is composed of three views: tree view, attribute view for current element, and a "styled view". The aim of styled view is to show the document with a visual aspect.
- **Morphon XML-Editor** - A validating WYSIWYG XML editor that lets you create and modify XML documents in an intuitive manner. Using DTDs and CSS, the editor guarantees the integrity of your XML documents and presents them in a consistent and user-friendly way. The XML editor is bundled with the Morphon CSS Editor that can be used to customize your CSS, allowing you to change every aspect of the way the XML editor presents your document while editing. The CSS editor can also be used stand-alone to directly create CSS for the Web.
- **exchanger** - The eXchaNGeR XML browser is a browser and editor framework, written in Java, that visualizes elements in a XML document. The user can browse through and manage the visible elements in the document with external services, he or she can make changes to the content of the XML document with the built-in XML editor.
- **Arsdigita CMS** - A powerful content management system. It has a task list for production staff to track assignments and the status of current work items; a

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<sup>28</sup>Many Open Source software solutions are available without acquisition cost, though the real cost of ownership may be considerably higher.

site map browser to view and organize pages and content items and determine access control to branches of the site; a standard interface for creating, editing, approving, and deploying content items; a template manager for creating, editing, and organizing presentation templates and related assets; a metadata manager for viewing and defining content types and associations; a category browser for managing a hierarchy of subject headings that may be applied to content items; and administrative and management tools for creating and editing user attributes and tracking global work flow statistics.

- **OpenLMS** - An LMS made at the Department of Geography, NTNU. The system is a fully functional LMS with support for group collaboration, file sharing, distribution of lectures, and other supporting features. It is a good tool for distributing lecture notes to groups of students, and for facilitating collaboration for groups of students and teachers.
- **Moodle** - An LMS for producing Internet-based course Web sites. It is written in PHP and is easy to install and use on Linux, Windows, and Mac OS X. It has been designed to support modern pedagogies based on social constructionist theory, and includes activity modules such as forums, resources, journals, quizzes, surveys, choices, and assignments. It has been translated into 30 languages, with more on the way. Moodle offers a free alternative to commercial software such as WebCT and Blackboard, and is being used by a growing number of universities, schools, and independent teachers for distance education or to supplement face-to-face teaching.
- And many more<sup>29</sup>...

## 5.7 Summary of Tools

The following table provides a quick reference for some of the important tools that have been discussed in this section. The following abbreviations are used in this table:

- **Word** - Microsoft Word, current XP version, some features available at additional cost.
- **FM** - Adobe FrameMaker + FM Server + Adobe Document Manager
- **ID/GL** - Adobe InDesign/GoLive combination
- **DW** - Macromedia Dreamweaver
- **AT** - Arbortext Editor
- **XM** - XMetaL
- **OS** - Open Source tools, in aggregate

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<sup>29</sup>See: <http://freshmeat.net> search topic Learning Management

Advantage	Word	FM	ID/GL	DW	AT	XM	OS
Documentation	Y	Y	Y	Y	Y	*	*
Format Conversions	Y	Y	Y	Y	*	Y	*
LMS Integration	*	Y	Y	*	*	*	Y
Native XML	*	Y	*	Y	Y	Y	Y
Online Help	Y	Y	Y	Y	Y	*	*
Support Available	*	Y	Y	Y	*	*	*
Training Available	Y	Y	Y	Y	*	Y	*
Valid XML Support	*	Y	*	*	Y	Y	Y
Well-Formed XML	*	Y	*	Y	Y	Y	Y
WYSIWYG	Y	Y	Y	Y	*	*	*
XML training	*	Y	*	*	*	*	*
Disadvantage	Word	FM	ID/GL	DW	AT	XM	OS
Costly	*	Y	*	*	*	*	*
Extensive Prep Required	*	Y	*	*	*	Y	Y
Conversions Required	Y	*	Y	Y	*	*	*
Inefficient	Y	*	Y	Y	*	*	*
Not an XML Application	Y	*	Y	*	*	Y	Y
Steep Learning Curve	*	Y	*	*	Y	Y	Y
Training Required	*	Y	*	*	Y	Y	Y
Uncertain Future	*	*	*	*	*	Y	Y
Very Technical	*	*	*	*	Y	*	Y
Primary Output	Word	FM	ID/GL	DW	AT	XM	OS
Paper	Y	Y	*	*	*	*	*
Web	*	Y	Y	Y	*	*	*
Other Online	*	*	Y	Y	*	Y	Y
XML	*	*	*	*	Y	Y	Y

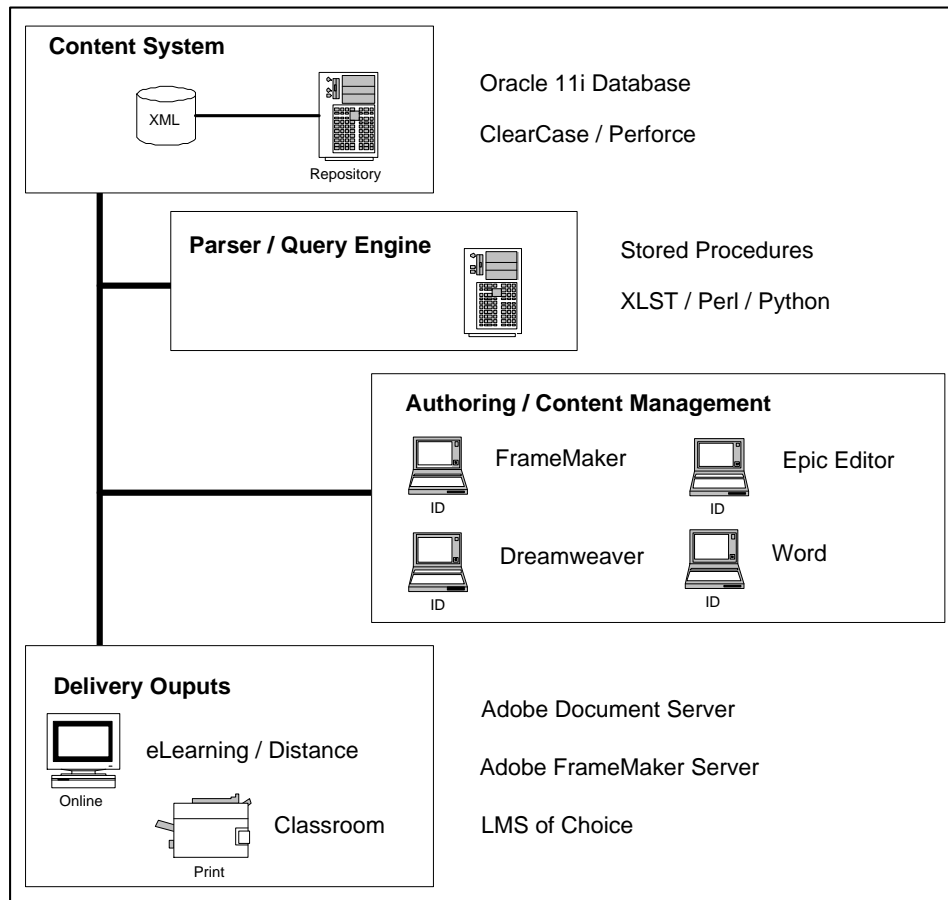


## 6 Implementing a Unified Content Strategy

The XML Content Reuse System (CRS) is composed of four parts:

- **Content System** - This is the repository. The repository is comprised of the database engine and may also include a version control system. In the accompanying diagram, the database component is shown as Oracle 11i, which is one of many possible choices. The most important consideration in selecting the database application to select is to ensure that the resulting database will have the capacity and throughput to handle your anticipated use. ClearCase and Perforce are both examples of version control systems.
- **Parser / Query Engine** - This is the selection of methods you have selected that allow users to get content back out of the repository and use it efficiently. In the diagram, Stored Procedures, XSLT, Perl, and Python are all examples of different means of serving complex queries to users.
- **Authoring Content Management** - This represents the user applications you have identified for authoring of new content. The examples listed in the diagram are FrameMaker, Epic Editor, Dreamweaver and Word.
- **Delivery Outputs** - Your deliver outputs encompass both the output formats (paper or on-line) together with the means provided to students for accessing the current instances, such as via a Learning Management System (LMS). Examples of delivery applications include Adobe Document Server, Adobe FrameMaker Server, or an LMS.

This diagram represents the four basic component areas of a content reuse system. The examples give could be included in any CRS that resulted from a unified content strategy.



Each piece of this larger system is associated with specific benefits and costs and must be weighed on its own merits, but also in the larger context of its performance within the larger system. System considerations can easily outweigh the benefits of any individual application choice. If the favored application, for example, does not play well with others then it will be of little use in the system. As discussed in the previous article in this series, a good example of an applications whose system behavior makes it a difficult choice is MS-Word. It is precisely because so many organizations are adopting content reuse strategies that Microsoft has intensified its efforts to make Word (and other Microsoft applications) XML friendly<sup>30</sup>.

There are basically two ways of achieving such a system: build your own from available components or buy one that does most of what you want and then customize that. If your organization has many specialized requirements and diverse processes, and your organization has considerable expertise and experience developing, implementing and maintaining software solutions, you will probably not save any money by buying a proprietary solution and then customizing it. If, on the other hand, your organization has much more general requirements for training, fewer audiences and simpler outputs, purchasing an off-the-shelf system may be a better solution. An

<sup>30</sup>The future will certainly bring successive versions of Word that integrate better and better into a unified content strategy.

vendor-supplied solution may also be in your future if your organization lacks in-house technical expertise and you normally contract out such projects.

## 6.1 Build Your Own

In order to devise your own content re-use system, you need to have some specific areas of expertise available:

- **Database Architect (DBA)** - The DBA creates a data library that exactly matches your DTD. These data tables are optimized to perform the most common search routines. The engineer should be experienced with hardware and network configurations appropriate to your organization's needs.
- **Interface Designer (DID)** - The DID is going to organize your query engine and make sure that all the routines operate properly to input and output data to your authoring and delivery environments.
- **Configuration Engineer (CM)** - The CM configures and maintains the version control repository. This should be an expert in the software you have selected (ClearCase, Perforce, etc.,...). Many DBA's think they can do this job, but very few can. Configuration engineering is very important to making the whole system reliable and expandable.
- **Template Designer** - You will need one of these for FrameMaker and another one for Dreamweaver, if you use these products. Many organizations contract this task, an acceptable alternative, as many excellent consultants exist in this field.
- **LMS/Server Engineer** - This is an expertise that is generally provided (for a fee) by the software vendor that supplies the LMS or server platform. As noted before, Adobe has a wide range of services in supporting and training for their enterprise server products.

You only get the full value of your analysis and planning if you carry out the results of that research by developing your own solution. Any other approach compromises your results. You also build a core competency in developing and delivering learning objects.

The principle requirement for success for such a venture is buy-in from top management. There must be a commitment and a requirement to achieve a workable system in a modest time frame for a realizable cost. Successfully completing such a system results in the biggest gains in productivity and largest reduction in cost per training hour. Any organization (of more than 10 training content designers) that has a sincere commitment to providing quality training programs, especially one that aims to increase the percentage of eLearning in its training offerings, should consider creating its own system.

Some of the main advantages and risks of developing your own content reuse system:

Advantage	Risk
What you design is what you get. It is not necessary to wage an endless battle with a vendor over features or functionality.	You are not purchasing a proven solution. Although the technology is sound, your implementation may fail.
The system that results will be more extensible and flexible. As the needs of your organization grow and change, your system will accommodate these changes better.	Unless you exercise restraint, your system may outgrow your needs and become a monster that consumes more resources than it returns.
Your system is entirely within your control. Because you own all the source, you are not at the mercy of a third party.	Your organization needs to be able to provide the development infrastructure to produce a satisfactory system and then maintain it enterprise-wide for many years.
Once the system is in place and in use, it is less expensive to maintain (unless you change it).	You can budget expenses better with an outside contract than with an internal development project.
You build a great deal of specialized competency in your designers and production staff	Replacing that expertise can be very difficult to do.
Designers and developers work together, keeping one another current in skills and development within the XML world	Designers and developers spend a lot of time integrating new software version updates and other less-productive tasks.
Because your system is driven entirely by your own needs, you don't need to put up with evolutionary changes created for someone else's benefit, but with you must train your people to use it.	When resources are scarce, you may find your development efforts are cut back precisely when you need more support.

## 6.2 Buy Existing System

The principal advantage to be gained by purchasing a system off-the-shelf is that someone else claims that it will work for you and further guarantees that they will support your implementation of their software. As with any vendor, you are negotiating a relationship of mutual benefit. Always spend more time researching the company and their references than you spend listening to the sales pitch.

Things to avoid when shopping for a system:

- Being the first customer, or being that vendor's first "big" customer.
- Buying a solution you do not understand - or one that the vendor is unwilling or unable to explain so that you can understand it.
- Becoming a client of a company whose primary imperative in software design is to lock you into their proprietary framework. This can be very dangerous, especially if the company disappears in 5 years.

- Purchasing a product that does not do some of the main things you require it to do, on promises that the company will customize it to do exactly what you want. At this point you might as well make it yourself.

Some of the main advantages and risks of buying an off-the-shelf content reuse system:

Advantage	Risk
You are buying a proven product: it worked somewhere else.	If it doesn't work for you, what's wrong with you?
Your business processes are constrained to follow a proven model.	Your processes are constrained whether or not that makes any sense for your organization.
Without spending a large amount of your own capital, you benefit from receiving regular software updates.	The updates may wander further and further from your core needs, requiring more and more expensive customization.
You can budget a more or less fixed cost for support and custom services	That budget may be inadequate to meet your organization's needs. The vendor may have no additional resources to meet extraordinary needs.
You are investing in a limited system, providing benefit against cost. Unlike a home grown system, which must be continually justified.	You cannot, with just a little more expense, or effort reap any more result from the system.

The deciding factor in whether to buy a vendor product, as opposed to creating a custom solution from other components, is resources. Getting any new system implemented is going to require resources. If the resources are not going to be available within your own organization, then you will need to purchase those hours from external vendors. Creating your own custom solution is going to require many more hours of development than implementing a vendor solution. If your training department is small, or your organization does not have the budget to spend on developing future capabilities, at the expense of deliverable training hours today then you may have insufficient resources to properly design and implement your own system.

No system that has insufficient development resources allocated to it can compete with an off-the-shelf product. In developing that solution, the vendor can amortize development costs across many different clients. Continuing development and maintenance costs are similarly shared. Many organizations have a cultural bias toward purchasing turn-key solutions, even if they do not perform as well as custom applications. Regardless of the technical benefits bestowed by one kind of system or another, it is often better to pick the right solution that matches the business realities of the enterprise.

### 6.3 Implementation Scenarios

The following scenarios represent three different approaches to implementing a unified content management strategy. Though each is based upon a concrete case history, some details have been specifically altered to avoid the identification of the businesses or their employees.

#### 6.3.1 Scenario A - Aerospace

Business A is an aerospace company with a very large and capable IT organization. It has a history of developing very complex, very customized solutions that meet exacting business and regulatory requirements.

When Business A went into the content management marketplace, they did extensive research of many different vendors with competing products. They had a tendency to "study a product to death." The IT and engineering organizations generated thousands of pages of conflicting and contradictory requirements, which no vendor was able to meet.

Business A purchased an off-the-shelf product whose vendor promised to customized to fit the needs of the enterprise. The IT organization fought the project tooth and nail from start to release. When eventually implemented, the system was largely ignored by many of the divisions of the organization, despite having been specifically tailored to meet their needs. The Director of information services and communication then used this software as a club to bring each of the disparate organizations into line - to streamline their procedures and to regularize their methods for producing documentation and training for each of their markets on 5 continents.

Though training productivity initially suffered, after all was said and done, the system achieved a 40% increase in training hours per designer. The resulting training was consistent, won numerous industry awards and was instrumental in creating a truly global training organization.

#### 6.3.2 Scenario B - Manufacturing

Business B is a large manufacturer of consumer products, with a relatively small and under-appreciated IT organization. It regularly purchases software solutions and maintenance contracts that provide for the special needs of specific user communities within the organization.

When Business B went into the content management marketplace, their aim was to find a state-of-the-art product that they could purchase to perform a limited set of very specific tasks. They concentrated on vendors with associations to their existing vendors and very quickly narrowed the choice down to two competing products.

Business B hired a team of three consultants to work with every division to develop a customized solution from open source components. In the process of analyzing the communi-

cation and training needs across the different divisions, the team discovered large pockets of inefficiency and waste. During the three year development cycle, the development program cost the organization approximately \$17 million.

In the ensuing 5 years, it produced higher quality training deliverables consistently throughout the enterprise and contributed significantly to lowering the training costs for new employees by 38%, resulting in an average cost savings of \$12 million per annum. By selecting this solution path the company identified training as one of their core competencies.

### 6.3.3 Scenario C - Retail

Business C is a major force in retail, with both corporate and franchise operations operating world-wide. Their stated aim in adopting content reuse stemmed from a dissatisfaction with the results of their training programs. They felt that they could achieve better, more consistent training outcomes by creating better and more consistent training content.

Business C quickly selected a content management package from one of their existing vendors and implemented it on a trial basis in a single division whose training outcomes were dead average for the organization as a whole. Although the system did result in economies in the production of training content consistent with the vendor's promises, the training outcomes did not improve.

The trial implementation was written off to experience and a new vendor was selected with a different content management solution offering. The results of this trial in a different but equivalent division produced approximately the same economies and the same mediocre training outcomes.

Leaping to the correct conclusion that garbage in results in garbage out, business C conducted another trial of the second system within the organization that had the best track record for producing positive training outcomes. To their great surprise, the training resulting from this trial was as indifferent to the technology as the others had been.

An expensive consulting firm was brought in to study these three trials and to find the silver lining in having apparently wasted several million dollars. Half a year later, the consultants returned their verdict: business C was attempting to solve the wrong problem with the right solution. The consultants recommended that the organization implement the second vendor's solution across the entire enterprise. This would produce economies in production of training, but more importantly it would save tremendously in localization costs for training materials.

The consultants pointed out that the poor outcomes from training indicated that training was being used inappropriately as the cure for problems that did not arise from a lack of good training. By reducing their focus on training as a cure for all ills, the company was able to concentrate on better internal communication. The same content management system that was adopted for training was the perfect solution for most of the new communications initiatives.

## 7 Return on Investment



*If we don't change direction soon, we'll end up where we're going.* – Professor Irwin Corey.

In today's competitive training market, it is increasingly important to provide management with measures of performance that can be used to quantify the return on investment in training. Traditional resistance on the part of instructional design practitioners has resulted in lowered funding levels and the dilution of the importance once accorded to training programs. This result is diametrically opposed to the stated aims of the training development organization: to achieve the greatest performance improvement. Therefore, if the aims of the training development organization are to be realized, the demonstration of measurable return on investment for training is just as important as creation of processes whereby performance can be improved.

### 7.1 ROI Basics

Return on Investment (ROI)[19] is a percentage calculated as the ratio of net program or project benefits to program or project costs times 100. In order to determine this ratio, three questions must be answered:

- What is the reason for training?
- What is the investment in training?
- How is the return measured?

#### 7.1.1 Assessing the Benefits

What are the benefits associated with training? Generally, training is supposed to provide people with the capacity to perform a particular function. Theoretically, the better the training is, the better the function is performed. Performing a function better is usually measured by the time required to successfully execute tasks, the number of mistakes made per thousand operations performed, and the ability of the student to extend these skills into new and more complex operations.

When implementing a costly new Unified Content Strategy(UCS), it is important to understand the perceived benefits of the existing training development organization. Careful thought



must be given to the affect the UCS will have on achieving those benefits. When this is understood, any additional benefits can be added to the equation - but it is important to note that the legacy benefits are a given, while any benefits from innovation must be carefully examined and justified.

Collection of metrics and the evaluation of that data is an important function of Performance Engineering. Measuring time sensitive tasks before, during, and after training provides a simple measure of performance. Unfortunately, like almost any simple measures of performance, it isn't worth much out of context. Without an understanding of the context, it is impossible to attribute any change to training. One important reason why many training development people neglect this kind of in-depth analysis of results in context is that they know how to do what they are doing well and don't want to know if they will be required to do something different. Performance problems are almost never solved by training alone, just as they are almost never solved without training.

The adoption of a UCS that incorporates an XML repository does not directly impact the quality or effectiveness of training. It is an investment in indirect benefits. Given the same resources, UCS allows you to accomplish either a) the production of more training hours per development hour OR b) the production of higher quality training for the same development hours.

If your organization needs to provide more training of the current or better standard, then you need to describe how the UCS will create efficiencies within the development cycle that produce a higher volume of deliverables per unit time. An example of this kind of need would be a training department supporting a sales organization. Things change so fast in sales that the training is never able to keep up. Implementing the right UCS can provide you with many different Just-in-time training options that are not feasible for manual systems.

If your organization needs to provide a higher quality standard of training, the UCS can allow your training designers to spend more time conducting analysis and evaluating curriculum while spending less time in the production and publication of the results. An example of this kind of need would be a training department for a medical equipment manufacturer. In this setting, accuracy and effectiveness of the training is as important as the QA of the hardware. The right UCS can provide an accurate and reliable information path for training, as well as the ability to leverage successful training methods more quickly into different training.

### 7.1.2 Projecting the Costs

What is true for the assessment of benefits also applies to the evaluation of costs. The organization's management has confidence in the costs associated with the current training programs. In order for the costs of the new project to be confidently accepted, the same accounting methods and measures must be used for any new program costs.

There are direct costs associated with the implementation of a Unified Content Strategy (UCS) and there are very few direct cost savings to offset them. In making comparisons with the current production methodology, it is very important to stress the fact that the UCS is designed

to permit the repetition of successful responses to training needs. The new system is the next step in the process that began with manual typewriters and ended up (more or less) with word processing. The future of distributed communications lies in this technology and in order to maintain their competitive advantage, organizations need to adopt and master this technology.

### 7.1.3 Putting it all together

The hallmark of the best training programs is that they provide a foundation for additional skills that were outside of the scope of the original training. All training ought to be designed to make the acquisition of more knowledge likely from the knowledge the student already has. There is a depressing amount of training with blinders on out in the real world - training developed so exclusively within its own defined competencies that it offers nothing to any companion curriculum. In measuring the effectiveness of training, it is important to measure these secondary impacts which lower the cost of subsequent training.

## 7.2 ROI by the Numbers

When looking at ROI and cost benefit analysis[14], it is important to remember that:

- Improving efficiency means achieving the same results with lower costs.
- Improving effectiveness means achieving better results with the same costs.
- It is possible to get better results with lower costs, and this is called improved productivity.

The following scenarios are examples of different ways organizations look at ROI of training and how a Unified Content Strategy (UCG) and the investment in an XML repository is justified.

### Scenario of a small training organization:

In this company no one has put a dollar figure on the value of training to the company. Some training is sold to customers, but most of it is internal. There are no statistics on the performance of employees before and after training, nor is there any budget to collect them. The training manager discusses this with the other department managers and between them they arrive at a figure of 20% as the increase in productivity produced by training.

The employees receiving training produce \$1 million net revenue to the company. Therefore, training has produced a net benefit of \$200,000 to the company. The budget of the training is

\$150,000 per annum, so the net return on investment is:  $ROI = \$200,000 - \$150,000 = \$50,000$  or  $(\$50,000/\$150,000) * 100 = 33\%$

Assuming that the cost of implementing the UCS is also \$50,000, the task of the training manager is to show where \$50,000 of benefit (or more) will result from the new system. It is also important to note that this kind of content repository works best as an enterprise implementation: a repository used by anyone who has need of accurate and consistent content, not just training.

The following graph shows the annual savings per numbers of employees<sup>31</sup>. The following assumptions were made:

- Burdened rate = \$100/hr.
- Hours per year = 2000
- Percent of time spent creating content = 75
- Percent of content reuse = 50



### Scenario of a larger training organization:

According to Microsoft[10], if you have 100 employees using a system that cost you \$1,120,000 initially and requires a staff of 4 IT professionals to run it, the system must return an increase in productivity of 16% to break even the first year. Whether you spent this money on developing your own system or purchasing someone else's system, it is money well spent.

<sup>31</sup>Employees here means those employees who are using the content repository. This may include instructional designers, technical writers, marketing writers, programmers writing software specifications, and so forth.

Collecting increased productivity from instructional designers depends on a number of factors:

- How much of the designer's time is spent actually developing content, as opposed to time spent developing curricula?
- How much of your content would actually get reused? In some organizations, the quantity might be almost nil and in others it could approach 50% or even more.
- How many repetitive training operations do your designers perform in order to get content to the students?
- Do your designers have the willingness and ability to change their methods?
- Does your organization possess the infrastructure and the commitment to design or customize, implement and use the content reuse system?

Assume that the instructional designers in your organization spend approximately 60% of their time accomplishing some aspect of content development. Further assume that of this time, roughly two-thirds would be generally unaffected by content reuse. If the content reuse system you implement results in that employee becoming 15% more productive in these tasks, then the net result for that employee is a  $(1/3) * .6 * .15 = 3\%$  increase in productivity overall. Using the above example from Microsoft, this organization could spend  $(0.03/0.16) * \$1,100,000 = \$206,250$  and break even in the first year.

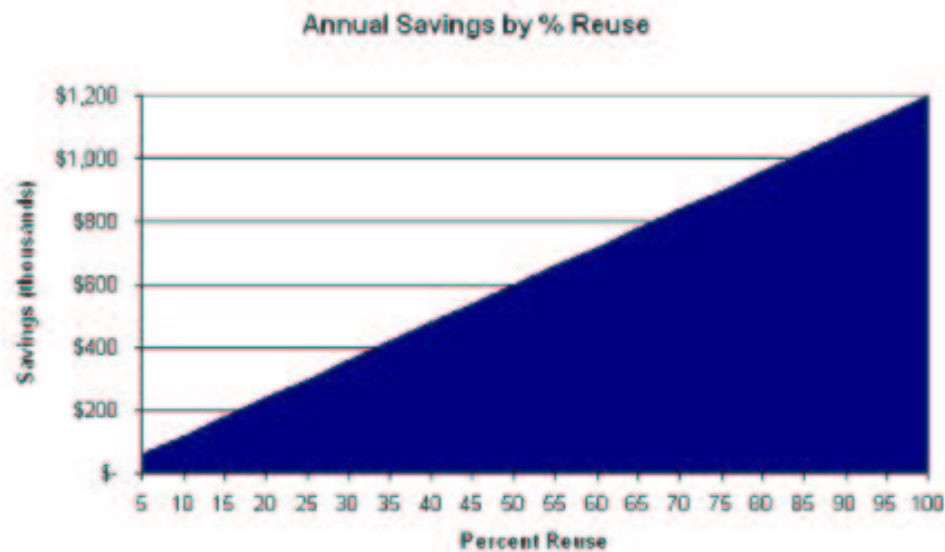
As mentioned above, it is also important to note that this kind of content repository works best as an enterprise implementation: a repository used by anyone who has need of accurate and consistent content, not just training. For larger organizations, training can take the lead with this new technology and prove its benefits and efficiencies to the rest of the enterprise. It should always be the intent to have one shared repository, or at most a very few repositories used by different organizations within the enterprise.

The following graph shows the annual savings by the percentage of reuse of content for training. The following assumptions were made:

- Burdened rate = \$100/hr.
- Hours per year = 2000
- Number of employees<sup>32</sup> = 50
- Percent of time spent creating content = 75

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<sup>32</sup>Employees here means those employees who are using the content repository. This may include instructional designers, technical writers, marketing writers, programmers writing software specifications, and so forth.



For every organization, there is some training that is mandatory, some that is essential, some that is preferred, and some that is optional. Mandatory training represents those training hours that must be delivered to meet statutory or contractual obligations. Essential training provides to the employees the skills and knowledge they need to perform their jobs to a minimum standard. Optional training provides the employees with the skills and knowledge to excel. In today's tough economic conditions, many organizations have been trimming their training efforts to such an extent that they are beginning to see negative productivity results<sup>33</sup>

Faced with such realities, these organizations are faced with the challenge of providing a competitive, sustainable solution to obtaining quality training that facilitates excellence. An XML-based content-reuse system qualifies as an excellent example of such a solution.

### 7.3 Competing with Consultants

Outsourcing is all the rage today<sup>34</sup>. In a world run by bookkeepers, the outsourcing firm has many advantages over the internal training organization. In the first place, they will have a great deal of experience working with a variety of different training programs. They can amortize the costs of providing high-technology solutions across many different clients, so that their unit cost to any one customer for any one project is much smaller than for an internal department. They will also have developed a broad range of metrics and evaluation strategies and will be able to provide impressive statistics to prove that their economies are not paid for by any collateral damage to the company.

<sup>33</sup>The cycle of what I call BSNT (Business Sucks No Training).. The series of steps goes as follows: bad economy, training cutbacks, service levels declining, customer dissatisfaction increasing, resulting in loss of business. At the end of this cycle the need for training is triggered. - Dolly Konzelmann, President, International Customer Service Association, Toronto November 2003

<sup>34</sup>Finance & Accounting Outsourcing Picks Up Speed as Suppliers Offer Wider Value By Beth Ellyn Rosenthal, Editor ©2004 Everest Partners LP - <http://www.outsourcing-journal.com/feb2004-everest.html>

In order to compete with this kind of marketing machine, the internal training department must diversify both in terms of offerings and in terms of processes. If the internal training department already provides the flexibility and economy that the outsourcing firm promises, there is less incentive for the business to switch from a proven performer to a promised one. If the internal training department diversifies to provide full performance improvement services to the business, then the training deliverables portion is only a small segment of their value to the organization. The other performance enhancements they provide, such as analysis, are intrinsically internal core competencies of an organization. Having a flexible and powerful XML content management system allows the performance improvement organization to offer a wide variety of blended solutions to different performance problems. The kind of responsiveness and flexibility offered to the business is much harder for the outsourcing firm to provide, or even promise.

## 8 Conclusion



*Even if you're on the right track, you'll get run over if you just sit there. – Will Rogers.*

Implementing a robust content-reuse management system for the enterprise is not just an idea whose time has come, but an idea long overdue. Far too often, training departments must make hard decisions in hard times that end up being false economies. The underlying technology of XML has been proven in numerous settings over the past 20 years, first in government and then in the private sector. It is rapidly getting to be the case that if your enterprise does not implement such a system, you will compete at a considerable disadvantage in your marketplace.

In summary, the advantages conferred by the XML content repository and reuse system are:

- **Economy** - Provides the same economies of scale as automating any labor intensive, customized process.
- **Communication** - Provides a naturally unifying influence on the organizational communication; both internally and customer-facing.
- **Quality** - Provides the ability to attain higher quality levels and increased consistency across all training and similarly-sourced deliverables.
- **Productivity** - Provides additional capacity to produce mandatory training at a lower cost. Confers surplus capacity that can be used to develop more effective training that raises enterprise-wide productivity.

Once those advantages have been delivered, they facilitate the effectiveness of the unified content strategy. The unified content strategy affects the efficiency and productivity of not only training but of all corporate communications. This is the future of communication within the enterprise – training professionals and performance technologists can either be a driving force within these changes or just go along for the ride.

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