



From Legacy Systems to DITA: Case Studies in Successful Migration

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If a decision for DITA has been made:

- | Based on two use cases we want to show, that you can migrate from any legacy CCMS to DITA.
- | We show how this works.
- | We want to convince indecisive teams to go this way.
- | We outline a clear roadmap for such a DITA introduction and migration project.



Who are we?

Short introduction



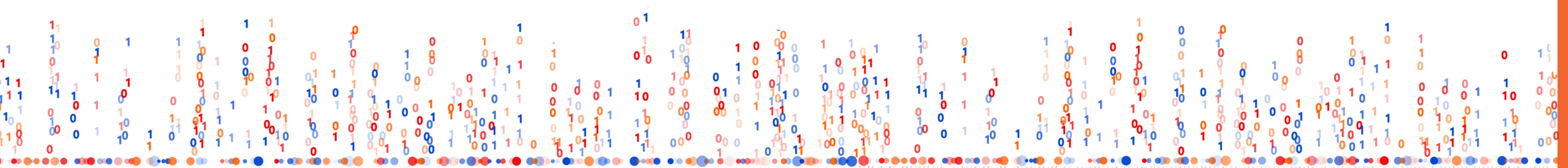


Intelligent Solutions for Technical Communication

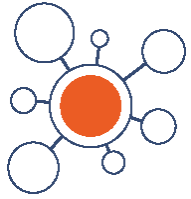
We empower our customers to step confidently into their digital future.

Together, we're crafting the intelligent information landscape of tomorrow.

With exceptional consulting expertise and cutting-edge technological innovation.

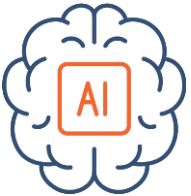


Turning information into value



Knowledge Graphs

Connecting information silos with the help of semantic technologies.



AI-powered Solutions

AI as a driver for intelligent provision of information.



Content Management & Delivery

Conception, configuration, migration and integration.



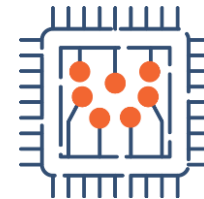
iiRDS

The technical standard enables a content-neutral transfer of information.



Data Pipelines

Transformation, publication and migration of data. Automated and intelligent.



DITA

Topic-based creation, distribution and use of technical information.

About the Speaker



Sofia Darie

Consultant



Karsten Schrempp

Founder & Manager Director

DITA Introduction and Migration

Point of Departure



Background

The DITA projects with our customers started within the following context:

- | A CCMS was already in place for authoring and publishing technical documentation.
 - | KAESER was already based on a “pseudo” DITA authoring model
- | An IT project is underway to introduce a new CCMS.
- | The authoring team is just one of several key stakeholders.
- | A decision has been made to adopt DITA and implement a DITA-based CCMS.
- | The purchasing process is either in progress or completed.
- | The authoring team requires support for the system's introduction and the migration of existing content.

The Project Roadmap

From Legacy System to DITA



Main Phases



- | Introduction to DITA
- | Adjust DITA to the authors need
- | Start authoring sample content
- | **Migrate content**
- | Define authoring rules for migrated content
- | Use CCMS
- | Continuous improvement process

Getting started

From Legacy System to DITA



First Steps

Get to know DITA

- | Understand the idea and the model
- | (Re)Turn to topic orientation
- | Topics and Topic Types
- | Maps
- | Linking
- | Attributes
- | Profiling
- | Domains
- | ...

Learn to use the new CCMS

- | Understand how the concepts from DITA are implemented and accessible in the new CCMS,
- | Learn to work with the new tool.
- | See, where you have more or less DITA in the tool.
- | Get to know how to work with a new editor and the bridge to the CCMS

Transfer and keep content?

- | Let it go?
- | ... or keep as much as possible?
- | Keep (necessary) structures which have been successfully been used over the last years?
- | Constraints or extensions visible?

Parallel Tracks – with Key-Users

..who are curious and driving the project

Get to know DITA

- | DITA Training

Learn to use the new CCMS

- | CCMS Training
- | Create new content
- | Adjust DITA to the authors need

Transfer and/or keep content?

- | (later)

Adjust DITA to the authors need

Customize the model

| DITA allows constrains, which we use to simplify the schema on different levels

Topic Types:

- Decide which topic types to use
- Decide about nesting (consider CCMS functionality)
- Decide if new topic types need to be specialized

Topic content model:

- Decide on blocks/major elements
- Remove elements that are not necessary
- Add new custom blocks/elements if the semantic is needed

Writing level:

- Decide which subdomains to use
- Restrict elements to a simple writing environment
- Support authors by XML Editor features
- Support authors by Schematron

Start Authoring Sample Content



- | Authors begin editing, preferably start with creating new documentation projects.
- | Get DITA and CCMS experience on using it.
- | The encountered challenges are documented.
- | Continuous feedback loop for adjusting the ways to work into best practices, improve the data model and support authoring.
- | The DITA model is updated/refined.

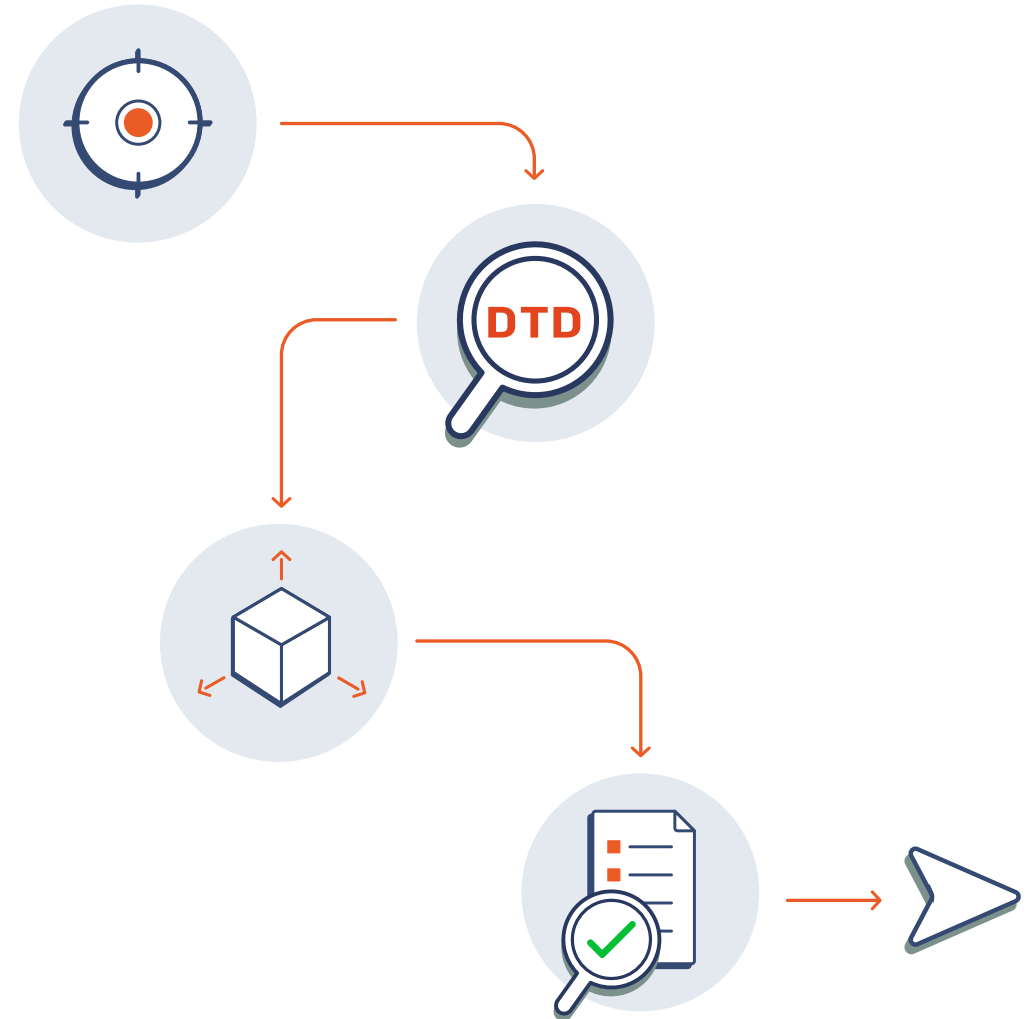
The Migration Roadmap

From Legacy System to DITA



Overview

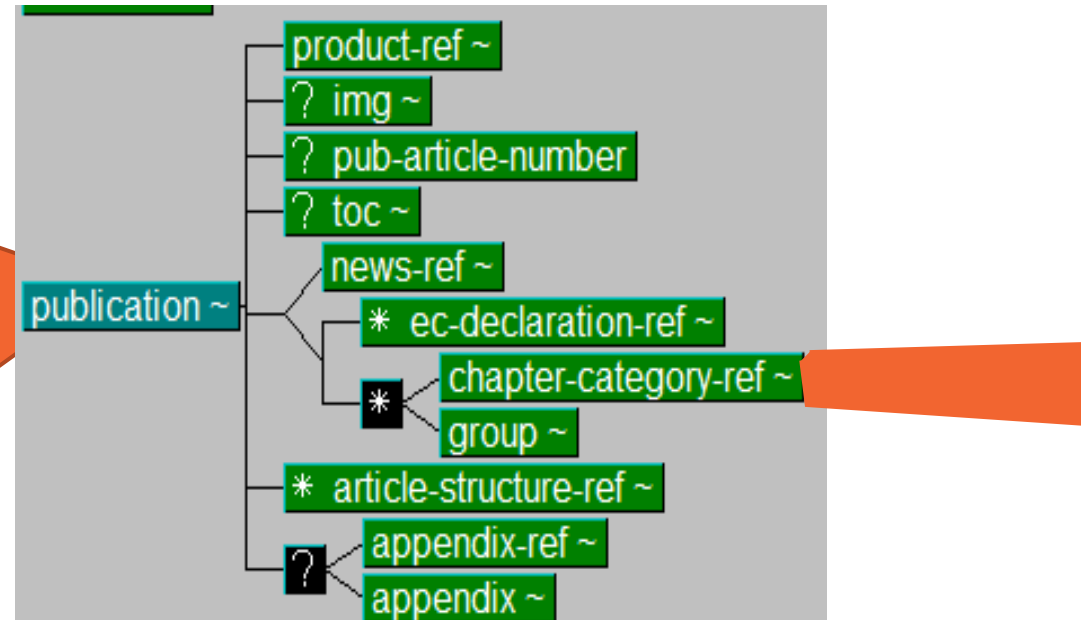
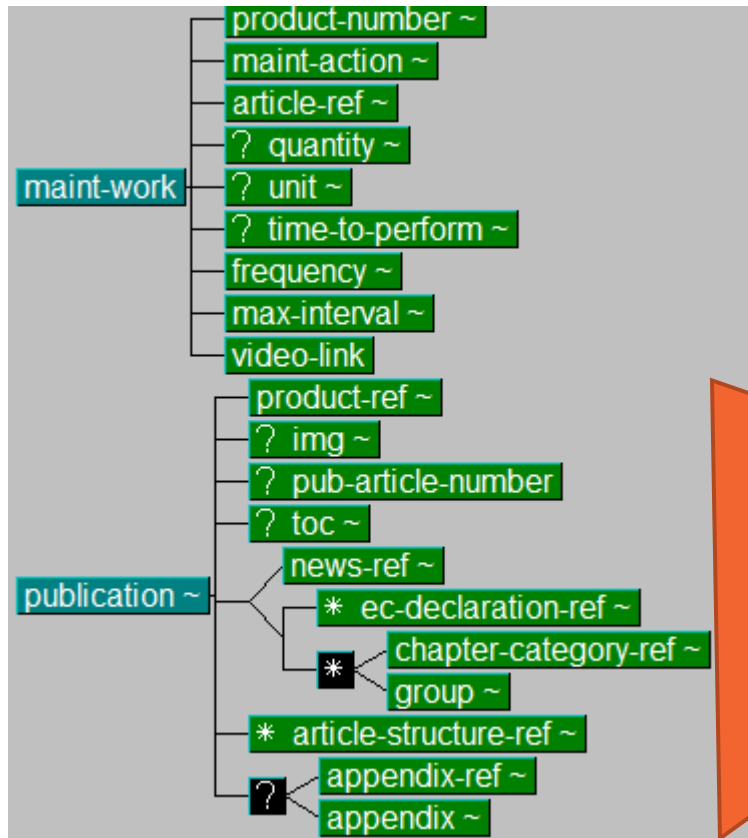
- Define goal
- Analyze existing DTD
- Define mapping and transformation rules
- Implement transformation and import rules
- Test and refine
- Migrate (over the hill or continuously?)



Define Goal

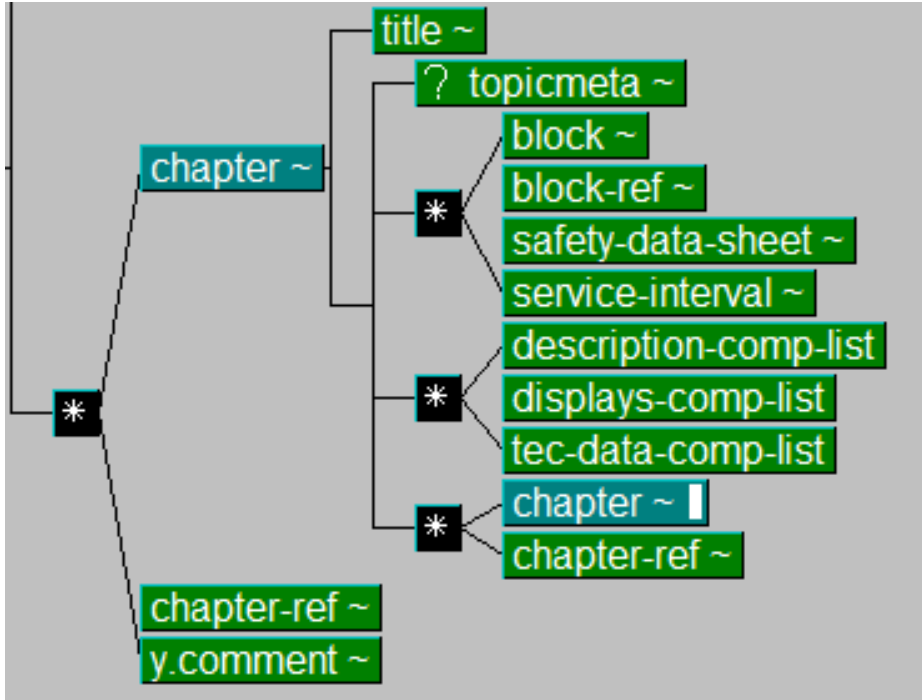
- | Identify all content types (user manuals, troubleshooting guides, FAQs, etc.).
- | Analyze the structure, formatting, and inconsistencies in the existing content.
- | Identify **reusable** content to leverage DITA's modularity.
- | Check for outdated, duplicate, or unnecessary content.
- | Determine which documents **must be migrated** and which can be archived.
- | Set **key objectives** (e.g., improve reuse, better metadata, enhance content delivery).
- | Define a **content prioritization** strategy (e.g., most-used documents first).
- | Write it down!

Analyze Legacy DTD (1/3)



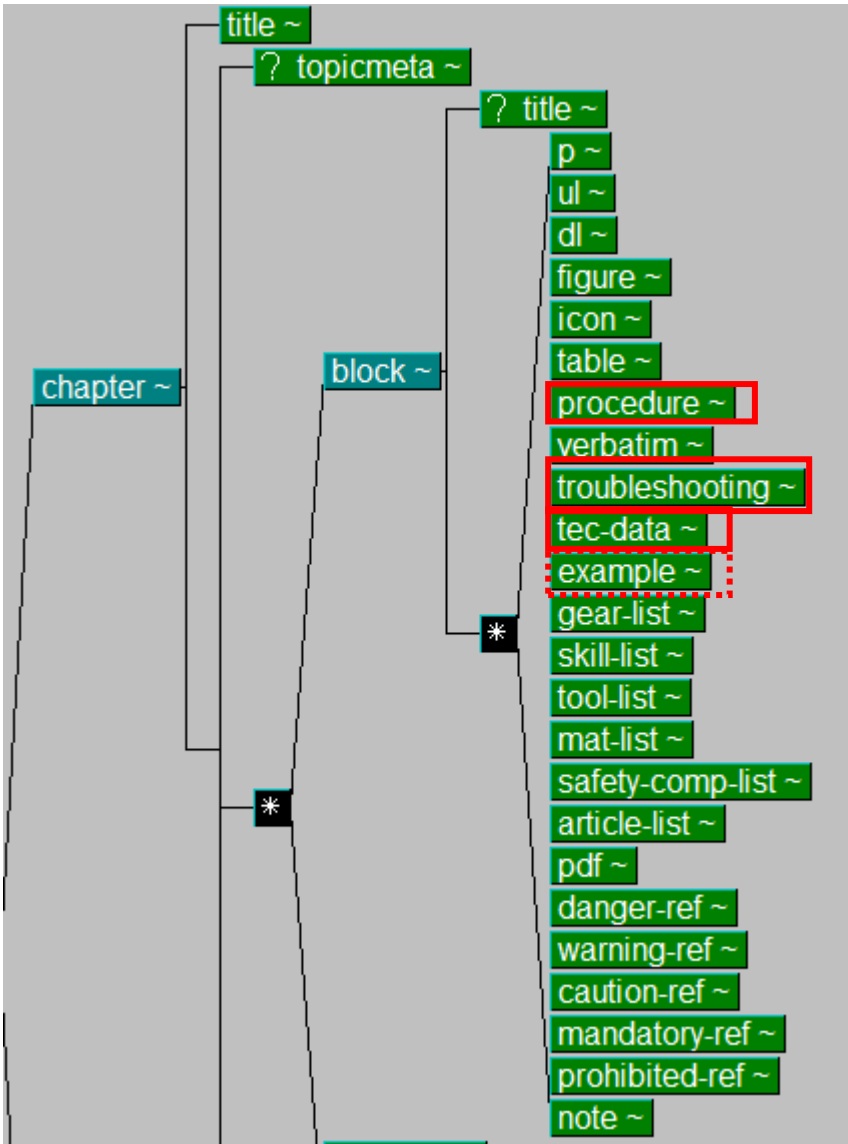
Analyze Legacy DTD (2/3)

Sample for migration rules



- | A <chapter> becomes a topic, if it contains only one block, and no special rule applies for the block.
- | If there is only a title for the chapter (no title for the block), then the title of the chapter becomes the title of the concept.
- | If there is (additionally) a title for the <block>, this title goes into the <required-cleanup> for the title of the concept.

Analyze Legacy DTD (3/3)



| A <chapter> becomes a single topic, if it contains only one block, and no special rule applies for the block.

| ...

| ...

| The topic type of the topic depends on:

| | If there is no element of the red marked ones, and if an <example> appears only at the end, which contains no procedure, then it becomes a concept.

| | If there is only and exactly one procedure, it becomes a machinery task.

| | If there is only and exactly one troubleshooting, it becomes a troubleshooting.

| | If there is only and exactly one tec-data it becomes a reference.

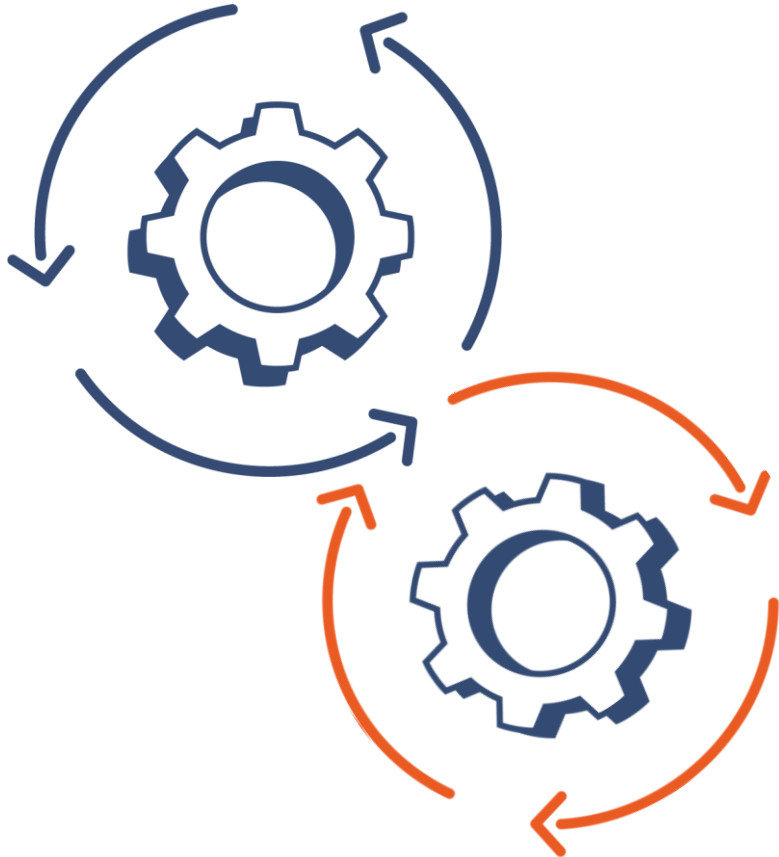
| | If there are only tables it becomes a reference.

| | In all other cases the chapter with the block is transformed into a map, see special rules for <block>.

On Element Level: Define Mapping and Transformation Rules

A	B	F	G	H	I	J	K
		-->	DITA				
Element name		-->	Rules	Element name	Element description	checked	remark
block-ref			ignore				
verbatim			with all contained subelements	required-cleanup			
verbatim.text			goes into required cleanup				
dt				dt			
dd				dd			
danger				hazardstatement			
warning				hazardstatement			
caution				hazardstatement			
danger warning caution \ title				hazardstatement\typeofhazard			
danger warning caution \ p				hazardstatement\consequence			
danger warning caution \ ul \ li				hazardstatement\howtoavoid			
danger warning caution \ p ul				xml comment			
mandatory				hazardstatement			
prohibited				hazardstatement			
note				note, @type=note			
example			spec rule needed, order/placement (to the end of the concept)	example			
figure				fig			
figure\subtitle			map to	fig\title			
legend			map to	fig\dl			
legentry				<d\entry>			
sy				<dt>			
desc				<dd>			
intro			part of the root topic for the chapter-category map	concept			

Technical Steps



| Derive/implement/refine transformation and import rules (XSLT) based on

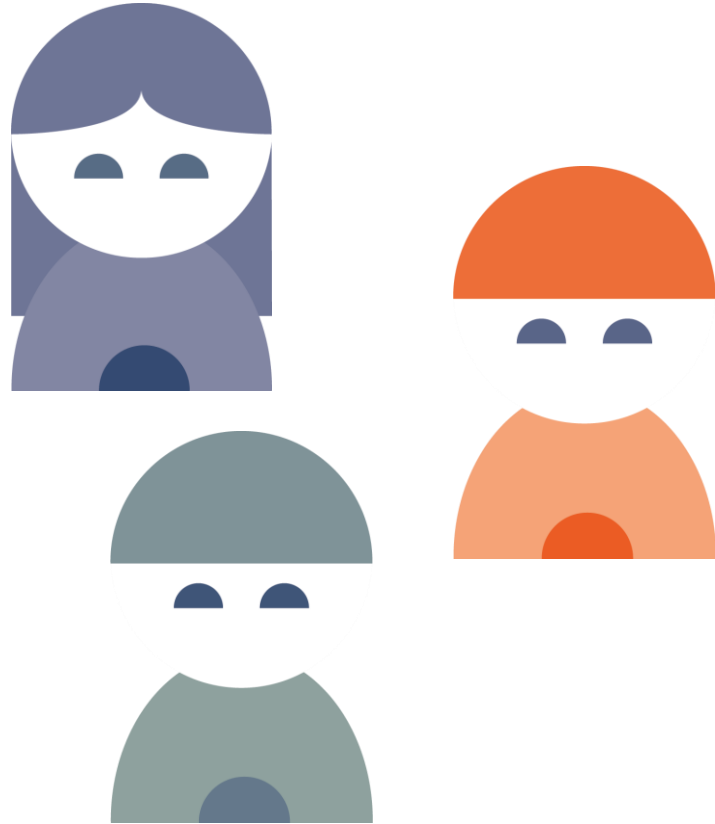
- | Element/block context
- | Attribute values

| Test and refine

| Migrate content

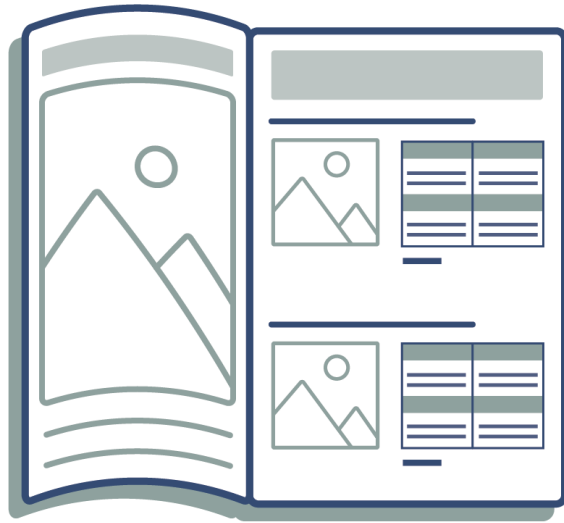
- | Over the hill
- | Continuously
- | “park” before the door

Content Re-work



- | Work on migrated content with the new CCMS
- | Define authoring rules for migrated content
- | Refine loop for the technical process
- | Continuous improvement process

Remark for non-XML-Content



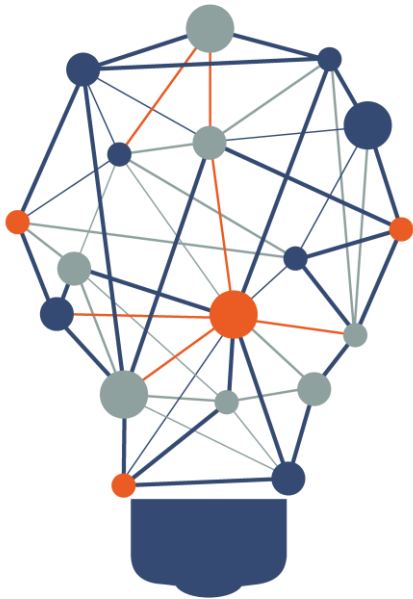
The process of migrating content from Desktop Publishing (DTP) tools like Adobe InDesign, FrameMaker, or Microsoft Word to DITA depends on how structured the original documents are.

- | If the documents are well-organized e.g., with Word styles or FrameMaker templates, the transition is easier.
- | If they are unstructured (e.g., PDFs, Interleaf files), additional work is needed to standardize the content before converting.
- | Also, a complex layout can pose migration challenges

Benefits and challenges of this approach



Lessons Learned



++ Existing content is available in the new DITA CCMS without copy & paste.

++ Existing content is available in topic structure. It has to be adjusted to the new structure.

-- Topic generation happens based on structure not on content.

➔ Real topic oriented writing should be main focus for new or reworked content - as a continuous process.

Thank you!

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