# DITA 1.2 Feature Article:
# Roles and Responsibilities

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OASIS (Organization for the Advancement of Structured Information Standards) is a not-for-profit, international consortium that drives the development, convergence, and adoption of e-business standards. Members themselves set the OASIS technical agenda, using a lightweight, open process expressly designed to promote industry consensus and unite disparate efforts. The consortium produces open standards for Web services, security, e-business, and standardization efforts in the public sector and for application-specific markets. OASIS was founded in 1993. More information can be found on the OASIS website at http://www.oasis-open.org.

The OASIS DITA Adoption Technical Committee members collaborate to provide expertise and resources to educate the marketplace on the value of the DITA OASIS standard. By raising awareness of the benefits offered by DITA, the DITA Adoption Technical Committee expects the demand for, and availability of, DITA conforming products and services to increase, resulting in a greater choice of tools and platforms and an expanded DITA community of users, suppliers, and consultants.

**DISCLAIMER: All examples presented in this article were produced using one or more tools chosen at the author's discretion and in no way reflect endorsement of the tools by the OASIS DITA Adoption Technical Committee.**

This white paper was produced and approved by the OASIS DITA Adoption Technical Committee as a Committee Draft. It has not been reviewed and/or approved by the OASIS membership at-large.

## Document History

| Revision | Date | Author | Summary |
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# Contents

# DITA Adoption Process: Roles, Responsibilities, and Skills

As an organization investigates moving to a Darwin Information Typing Architecture (DITA) writing environment, new roles, responsibilities, and skills must be identified. We highly suggest that you consider a resource strategy at the same time that you consider a content strategy. We have identified several roles that are required for a successful DITA implementation. As you progress through your DITA implementation, the number and types of roles might change. The roles required during the investigation phase are significantly different than the roles required for a fully established DITA environment.

As you develop your resource strategy, consider these guidelines:

• One or more individuals might assume responsibilities for a single role.
• One individual might assume responsibility for one or more roles.
• Individuals might change roles as your organization progresses through the phases of implementation.
• The responsibilities for a role might change slightly as your organization progresses through the phases of implementation.
• You may need to outsource some of the responsibilities.

The table in *DITA Roles, Responsibilities, and Skills* summarizes each role.

**Table 1: Suggested Roles During the Phases of DITA Implementation**

*The different phases of a DITA implementation and the suggested roles for each implementation phase.*

| Role | Investigation | Selling to Management | Pilot | Adoption | Established DITA Environment |
|------|------|------|------|------|------|
| Authors | | | | X | X |
| Content Management Specialist | X | | X | X | X |
| Conversion Specialist | X | | X | X | In some circumstances |
| Information Architect/Content Strategist | X | X | X | X | X |
| Technical Communications Manager | X | X | X | X | X |
| Lead Authors | X | | X | X | X |
| Project Manager | X | | X | X | |
| Technical/Publishing Expert | X | | X | X | X |
| Sponsor | X | X | X | | |
| Subject Matter Experts as Authors | | | | X | X |
| Subject Matter Experts as Reviewers | | | | X | X |
| Technical Editor | | | X | X | X |
| Trainer | | | X | X | X |
| Localization Coordinator | Optional | | X | X | X |
| User Experience Designer | X | | X | X | X |

# DITA Roles, Responsibilities, and Skills

| Role | Responsibilities | Skills |
|---|---|---|
| Information Architect/ Content Strategist | • Understands the current state of every phase of the content life cycle<br>• Defines the content strategy, including tools, processes, and strategies for publishing, translation, and single sourcing<br>• Defines the DITA model for the organization<br>• Define and develop any DITA specializations<br>• With Publishing Expert, develop constraints that meet the DITA model<br>• Plans projects, including identifying key resources<br>• Attends and participates in webinars and conferences<br>• Identifies opportunities for enhancements in content, automation, translation or single sourcing using new tools, strategies, or processes as they emerge<br>• Develops and maintains authoring templates<br>• Manages authoring environment | • Proficient with the DITA architecture<br>• Knowledge of end users<br>• Knowledge of the breadth of content<br>• Knowledge of business drivers and goals<br>• Requirement gathering<br>• Ability to visualize cutting-edge theories, tools, and practices<br>• High-level thinker and strategic planner<br>• Ability to determine the best way to single sourcing and leverage metadata<br>• Knowledge of relevant tools (CCMS, XML editors, and publishing options)<br>• DTD/XSD expertise |
| Technical/Publishing Expert | • Establishes and customizes the publishing pipeline for all required deliverable outputs<br>• With the Information Architect/Content Strategist develops constraints, if needed<br>• With the Information Architect/Content Strategist develops specializations, if needed<br>• Develops and maintains style sheets | • Proficient in:<br>  • DTDs/XSDs<br>  • XSL and XQuery<br>  • XSLT-FO<br>  • DITA Open Toolkit<br>  • XEP and Antenna House<br>• Knowledge of XML, HTML, CSS, Java, and Ant<br>• Proficient with the DITA architecture<br>• Proficient with XML editors<br>• Ability to code functionality (programming languages) |
| Content Management Specialist | • Defines the CCMS requirements<br>• Analyses and selects an appropriate CCMS<br>• Manages CCMS, including organization, workflow, user management, and automation<br>• Determines and follows best practices for content management | • Proficient with the DITA architecture<br>• Proficient with a variety of CCMSs<br>• Ability to troubleshoot errors<br>• Ability to provide initial and ongoing training<br>• Ability to provide support for the team |

| Role | Responsibilities | Skills |
|---|---|---|
| | • Creates reports describing content and content management, including reuse, stale information, and so on<br>• Trains the trainer in use of the CCMS<br>• Manages integrations with other tools<br>• Installs and upgrades the CCMS | |
| Technical Communications Manager | • Manage personnel involved in the DITA Adoption process<br>• Identify key players in the DITA adoption process both inside and outside of the Technical Communications department<br>• Manage finances associated with the DITA adoption process<br><br>   • Personnel salaries<br>   • Training expenses<br>   • Tool licenses<br><br>• Ensure that all individuals receive adequate training<br>• Ensure that all individuals have access to the required tools | • Resource planning<br>• Knowledge of available funding<br>• Ability to track and manages expenses<br>• Ability to analyze and forecast costs |
| Lead Authors | • Plan, manage, and deliver content, reuse, and translation requirements for projects and documents<br>• Manage high-level maps<br>• Implement reuse strategy<br>• Work with Information Architect/ Content Strategist to identify new possibilities for reuse and new requirements for the model<br>• Identify knowledge gaps (lack of training on tools, for example) of authors | • Deep knowledge of end users<br>• Knowledge of DITA and DITA best practices<br>• Experience with an XML editor<br>• Ability to learn new tools and processes<br>• Ability to adapt writing style to topic-based authoring<br>• Ability to consider, manage, and plan for complex content requirements and consider various strategies to deliver the content that is needed while streamlining internal content creation processes |
| Authors | • Author content<br>• Use the CCMS<br>• Create and manage sub-maps<br>• Follow the established DITA model<br>• Write to organization standards | • Knowledge of DITA and DITA best practices<br>• Experience with an XML editor<br>• Ability to learn new tools and processes<br>• Ability to adapt writing style to topic-based authoring |
| Subject Matter Experts as Authors | • Author topics<br>• Write to organization standards | • Ability to write topics that are self contained and have an appropriate level of detail |
| Subject Matter Experts as Reviewers | • Review content in or out of the context of a "book" (topics or maps) | • Nothing that is specific to a DITA environment. |

| Role | Responsibilities | Skills |
|------|-----------------|--------|
| Technical Editor | • Ensures consistency in both content and structure<br>• Identifies opportunities for single sourcing<br>• Ensures the content meets end-user requirements<br>• Identifies areas where authors need more training or must confer with the Information Architect/Content Strategist<br>• Creates and maintains a writing style guide and DITA markup guide | • Knowledge of DITA best practices<br>• Knowledge of single sourcing<br>• Understanding of DITA reuse mechanisms<br>• Proficient in DITA elements and attributes<br>• Proficient in minimalism and topic-based writing |
| User Experience Designer | • Researches how end users will access and experience the content<br>• Defines, designs, and implements how users experience published content including navigation, custom content, and searching<br>• Works with the Content Management Specialist to deploy content from the CCMS to the publishing location<br>• Works with various departments (including but not limited to IT/Website Team/Development/Marketing) to make user experience of content a seamless experience with the rest of the company content/products<br>• Works with Content Management Specialist and the Technical/Publishing Expert to define and implement requirements for user experience (such as leveraging profiling metadata and searching metadata)<br>• Manages dynamic or periodic updates of content<br>• Manages the user experience and implements upgrades and improvements<br>• Gathers metrics and details on users, user behavior, user feedback, search terms, stale content, and so on<br>• Plans, builds, and manages user communities | • Expertise with all types of users<br>• Proficient at gathering user feedback using a variety of tools<br>• Experienced at performing user analyses and user researcch<br>• Knowledge of HTML and CSS<br>• Familiarity with search engine customization<br>• Experience with Search Engine Optimization (SEO) best practices<br>• Expert in accessibility and legal requirements for public access of information<br>• Proficient with the DITA architecture<br>• Understanding of DITA best practices, linking strategies, and single sourcing |
| Localization Coordinator | • Plans and implements ongoing translation management using in-house translators or using a translation service provider<br>• Oversees translation results | • Expertise in localization best practices<br>• Experience with XLIFF standard<br>• Experience with translation in a DITA environment |

| Role | Responsibilities | Skills |
|---|---|---|
| | • Manages costs, including collecting estimates, monitoring costs, and optimizing costs<br>• Develops and maintains translation workflow mechanisms<br>• Investigates and implements ongoing improvements to the translation process, including tools and strategies | • Knowledge of CCMS translation functionality<br>• Knowledge of DITA best practices and reuse mechanisms<br>• Knowledge of translation tools and trends |
| Conversion Specialist | • Performs a content audit of legacy materials<br>• Performs a content inventory and prioritizes content for conversion (determines what and when to convert)<br>• Prepares the content for conversion<br>• Reworks legacy content prior to conversion (or directs the re-work)<br>• Identifies inconsistencies to be addressed<br>• Works with the Content Management Specialist to define the requirements for the conversion<br>• Converts or selects conversion process of legacy content to DITA XML<br>• Performs quality assurance checks on converted content | • Proficient with conversion tables or equivalent conversion tools<br>• Proficient in:<br>  • XML<br>  • XQuery<br>  • Scripting languages (such as ExtendScript or equivalent)<br>• Proficient with the DITA architecture and DITA best practices<br>• Knowledge of content strategy<br>• Understanding of the breadth of content and users |
| Trainer | • With input from the Content Management Specialist, determines the training requirements including curriculum, method of delivery, and frequency of delivery<br>• Develops training content, including real examples for various types of trainees<br>• Trains authors, reviewers, translators, and any other stakeholders in:<br>  • DITA foundations<br>  • DITA best practices<br>  • Processes<br>  • Tools including, the XML editor, the CCMS, and the publishing tools<br>• Provide on-demand training | • Expertise with DITA, XML editors, and CCMSs<br>• Proficient at creating and delivering in-person and online training<br>• Proficient with the DITA architecure, DITA best practices, tools and related processes<br>• Ability to tailor training content for specific learners<br>• Ability to lead learners through hands-on exercises |
| Sponsor | • Develops the project vision<br>• Acts as the advocate for the project to get corporate alignment and budget approval | • Executive communication skills (ability to get cross-functional interest and agreement)<br>• Aware of the benefits of streamlining content life cycle |

| Role | Responsibilities | Skills |
|------|------------------|--------|
| | • Explains the benefits of DITA to other members of management and key stakeholders throughout the enterprise<br>• Introduces and communicates the possibilities of implementing an enterprise DITA solution<br>• Can communicate advantages of DITA in terms of business value for various departments or divisions | • A visionary, capable of understanding the business value of expanding the DITA solution to the enterprise<br>• Can connect the content strategy to the business strategy<br>• Familiar with the current content creation, publishing, and management processes |
| Project Manager | • Engages all stakeholders<br>• Develops and adheres to the budget<br>• Manages resources and time lines<br>• Develops and meets milestones<br>• Acts as liaison and communicator between initial project and key stakeholders in the enterprise | • Executive communication skills (ability to get cross-functional interest and agreement)<br>• Project planning<br>• Resource management<br>• Appreciation of the value of XML |

## Collaboration as Strength

*We chose to describe the roles associated for each phase separately. The individuals that assume the responsibilities for these roles work together to evolve the content for the entire organization.*

A DITA adoption project is more than simply placing XML tags around content. The adoption project is a transformation of static legacy content into a dynamic body of knowledge. The transformed content is more easily used, more easily found, and more easily accessed. This body of knowledge evolves to meet current and future requirements. The agility and flexibility of DITA introduces many cutting-edge possibilities to your content life-cycle processes and expands your delivery options and consumption options. This transformation requires knowledge of what is possible, including tools and techniques, and also requires a deep understanding of the content subject matter and the end users.

The vision, planning, and implementation of a DITA adoption project is vastly enhanced by bringing together the many roles to communicate ideas, challenges and goals through an ongoing series of working sessions. Although each role brings its own perspective and understanding to the project, the multi-faceted view of the project generates a cohesive solution that makes the DITA adoption project successful. The success of the project spreads beyond adoption to include increased return on investment (ROI), improved quality of content, and higher user satisfaction.

Involving key enterprise stakeholders, such as the Chief Information Officer (CIO), early in the collaborative process ensures that your DITA adoption project can scale to other departments or divisions within your enterprise when the time comes.

## Investigation Phase

As an organization investigates moving to a DITA writing environment, many facets of the investigation require new roles and responsibilities. The investigation phase is when you gather information that lets you accurately estimate, plan, and build your business case for the subsequent phases.

**Content Management Specialist**

This individual investigates the different options for managing content. This individual works with

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| | Component Content Management System (CCMS) vendors to develop a solution for the organization. |
| **Conversion Specialist** | Moving legacy content to DITA requires a deep understanding of the conversion process. This individual investigates the options for converting content. Conversion options range from manually converting content in-house to using tools that automate the process to contracting with vendors who perform the conversion. |
| **Information Architect/Content Strategist** | This individual understands the current content life cycle. This individual is very familiar with the organization's content and is a visionary who sees the potential for content reuse and the benefit of metadata. |
| **Lead Authors** | These individuals provide feedback on the tools and the workflow that are associated with a DITA writing environment. |
| **Project Manager** | Because the move to a DITA writing environment can be a challenging transition, this individual provides direction and accountability to the team as it investigates the move. This individual tracks schedules and work assignments and starts a budget for the investigation team. |
| **Technical Communications Manager** | This individual works with many of the key players to identify resources that will investigate a DITA writing environment. This individual manages personnel schedules to allow individuals time to investigate DITA. This individual begins a cost analysis for tools, equipment, and resources required to implement a DITA writing environment. |
| **Technical/Publishing Expert** | This individual understands the various publishing tools that are available to support DITA source content and understands DITA. This individual develops and maintains templates. |
| **Sponsor** | Each organization requires a management sponsor or champion to support the move to a DITA writing environment. This individual is a visionary who understands the benefits and the costs of moving to a DITA environment at a high level and can understand the opportunities for the enterprise adoption possibilities as well, including, but not limited to, training and marketing. |
| **Localization Coordinator (optional)** | If an organization translates content (or wants to translate content in the future), including this individual in the investigation phase is an important part of developing a complete and efficient long-term content strategy (particularly, although not limited to, tool selection). |
| **User Experience Designer** | During the investigation phase, this individual performs preliminary investigation to determine |

requirements and to identify possible solutions for delivering the content to users.

# Selling Phase

After an organization decides to move to a DITA writing environment, several individuals must sell the idea to upper-level management and key stakeholders (such as IT). The individuals in this phase rely on the information gathered from the individuals involved in the investigation phase.

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| **Information Architect/Content Strategist** | This individual is very familiar with the organization's content and is a strategist who sees the potential for content reuse and the benefit of metadata. This individual understands and can clearly communicate the benefits of a DITA writing environment to executives and other key stakeholders who do not necessarily understand XML or legacy content processes or inefficiencies. |
| **Sponsor** | This individual is the liaison between upper-level management and the investigation team. This individual understands the tools required, the changes to work environment, and the effort required for a successful DITA implementation. This individual understands the benefits and the costs of moving to a DITA writing environment. |
| **Technical Communications Manager** | This individual works closely with the Information Architect/Content Strategist and the Sponsor to prepare a proposal to upper-level management. This individual understands and manages the expenditures involved in moving to a DITA writing environment, including personnel, tools, and training. |

# Pilot Phase

After an organization receives approval and funding to move to a DITA writing environment, many individuals must work together to develop tools, procedures, and processes for the new environment. A successful pilot phase relies on the information gathered from the individuals involved in the investigation phase.

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| **Content Management Specialist** | This individual understands the DITA architecture. If a CCMS is used, this individual defines the CCMS requirements and drives the vendor selection and CCMS pilot processes. |
| **Conversion Specialist** | This individual performs the initial conversion for the pilot project, working in collaboration with the Information Architect/Content Strategist, the Content Management Specialist, and the Technical/Publishing Expert to preserve and add any vital metadata and to conform to the DITA model identified in the content strategy. The initial converted content is used in multiple ways: to test and refine the content strategy, to provide actual samples during the tool selection and customization |

process, and to provide working samples for the Technical/Publishing Expert to start creating documents for delivery.

**Information Architect/Content Strategist**

This individual looks for opportunities to enhance existing content, to automate processes, and to improve existing tools. This individual determines the best practices for single sourcing and the best practices for leveraging metadata. This individual has a deep knowledge of DITA architecture, including the need to develop specializations. This individual works closely with the Technical/ Publishing Expert and the Content Management Specialist to develop and maintain the tools used by the organization.

**Technical Communications Manager**

Developing a sound pilot project requires resources. These resources affect the department expenses. Performing a successful pilot project requires dedicated personnel, tools, and training. This individual manages and controls the costs associated with the pilot project, ensuring that the project adheres to budget. This individual maintains open communication with upper-level management. This individual is responsible for providing regular progress updates and budgetary updates for the pilot project.

**Lead Authors**

As an organization starts moving to a DITA writing environment, Lead Authors work with pilot content and begin to establish writing guidelines and production processes. In the pilot phase, these individuals work closely with all other roles to identify and rectify gaps or errors in the strategies, tools, or processes.

**Project Manager**

This individual drives the pilot and makes sure that all components are developed on time and that all risks are appropriately managed. This individual ensures that all vital facets of the pilot are completed in order and on time. The Project Manager also ensures that the lines of communication remain open between all stakeholders within the pilot phase as well as communication with the rest of the company.

**Technical/Publishing Expert**

This individual works closely with the Information Architect/Content Strategist and the Content Management Specialist to develop and maintain the chosen means of publishing XML files used by the organization for one or two output types. This individual drives the publishing process and identifies specific publishing tool requirements.

**Sponsor**

This individual is the liaison between upper-level management and the pilot team. The Sponsor's role during the pilot phase is to keep the pilot from being canceled before it can be completed and to address

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| | the wider concerns that the enterprise might have. The individual is also tasked with introducing the wider, enterprise possibilties of a DITA solution. |
| **Technical Editor** | This individual provides input, helps create the editing workflows, and develops a style guide that includes DITA markup guidelines, grammar and writing style guidelines, and topic-based writing guidelines. |
| **Trainer** | This individual works closely with all persons responsible for the pilot phase. The Trainer develops training materials and curriculum based on the procedures and processes developed during the pilot phase. This individual must be familiar with all tools and processes used in the DITA writing environment. |
| **Localization Coordinator** | If translation is a requirement, this individual starts to develop a work strategy for managing the core language and all required translated languages. |
| **User Experience Designer** | This individual uses the pilot phase to develop the user experience of content, develop use cases and scenarios, create wireframes, list functional requirements, and interview and test all stakeholders, but focuses on internal and external end users. |

# Adoption Phase

A successful pilot phase leads to a roll-out or phased roll-out of the DITA solution to one or more teams in the company: the adoption phase. All individuals involved in the pilot phase act as mentors to the entire team during the adoption phase. The adoption phase includes all roles.

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| **Content Management Specialist** | This individual manages and customizes all aspects of content management and the CCMS tools. |
| **Conversion Specialist** | This individual continues to convert legacy material, as required. |
| **Information Architect/Content Strategist** | This individual continues to develop best practices for single sourcing and best practices for using metadata. |
| **Technical Communications Manager** | This individual continues to monitor resources and expenditures. Following a successful pilot phase, this individual will have a new budget, new schedule, and additional resources to manage. The Technical Communications Manager is responsible for managing personnel, ensuring that all individuals have access to tools, have received training, and have equipment necessary to work in a DITA writing environment. This individual is responsible for meeting goals, meeting schedules, and meeting budgetary requirements during the adoption phase. This individual continues to make regular progress reports to upper-level management. |

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| **Lead Authors** | These individuals help the Authors make the move to DITA adoption, as well as continuing to write new content and manage maps. |
| **Authors** | These individuals receive training and begin writing content in DITA, learning the tools and processes as they go. |
| **Subject Matter Experts as Authors** | These optional individuals author content in their domain of knowledge either through an XML editor (with training) or using a simplified interface that hides XML tags. Typically, authors then review what the SME has written, checking for lanugage, style, and XML tag use. |
| **Subject Matter Experts as Reviewers** | These individuals review the draft or final content and provide suggestions for corrections and enhancements. |
| **Project Manager** | This individual keeps all projects on track. |
| **Technical/Publishing Expert** | This individual works closely with the Information Architect/Content Strategist and the Content Management Specialist to develop and maintain the chosen means of publishing XML files used by the organization for all remaining output types. |
| **Sponsor** | This individual continues to act as the liaison between upper-level management and the writing team. |
| **Technical Editor** | This individual ensures that all authors are using the DITA elements and attribute values consistently, that language and structure meet requirements for usability and clarity, and that all possible reuse is being employed. |
| **Trainer** | This individual ensures that all authors acquire specific, task-oriented training on the tools, processes, and strategies determined in the pilot phase. The Trainer also provides ongoing training and support for all authors. |
| **Localization Coordinator** | This individual starts the translation and localization of content to one or more languages and implements the entire process. The Localization Coordinator ensures quality translations and efficiently manages maps and topics in multiple languages. |
| **User Experience Designer** | This individual continuously monitors metrics, search terms, findability, stale content, user feedback, and user experience. The User Experience Designer works in coordination with the Information Architect/Content Strategist and the Technical/Publishing Expert to prioritize improvements in the user experience and pass on information about content and product improvements from the end users. |

# Established Phase

After the DITA adoption process is established, you must continually manage your content, implement enhancements, and fine-tune your tools, solutions, and processes.

**Content Management Specialist**

This individual manages and customizes all aspects of content management and the CCMS tools. TheContent Management Specialist updates the CCMS tools and procedures with the current releases and new features.

**Conversion Specialist**

After the DITA project is established, this individual continues to convert any required legacy content, including converting content from other departments.

**Information Architect/Content Strategist**

This individual stays current with industry trends and new areas of thought. This individual determines new requirements, modifies the strategy, and attempts to streamline all processes.

**Technical Communications Manager**

This individual continues to monitor resources and expenditures. As the DITA writing environment evolves, this individual continues to manage and develop the department finances and budget making allowances for tool updates, equipment updates, and consultation services that might be required. This individual continues to make regular progress reports to upper-level management.

**Lead Authors**

These individuals continue writing new content and updating existing content.

**Authors**

These individuals continue writing new content and updating existing content.

**Subject Matter Experts as Authors**

These optional individuals author content in their domain of knowledge either through an XML editor (with training) or using a simplified interface that hides XML tags. Typically, authors then review what the SME has written, checking for lanuage, style, and XML tag use.

**Subject Matter Experts as Reviewers**

These individuals review the draft or final content and provide suggestions for corrections and enhancements.

**Technical/Publishing Expert**

This individual stays current with industry trends and new areas of thought. This individual develops and maintains all means of publishing XML files used by the organization for all output types. The Technical/Publishing Expert updates the publishing tools and procedures with the current releases and new features.

**Technical Editor**

This individual ensures that all authors are using elements and attribute values consistently, that language and structure meet requirements for

usability and clarity, and that all possible reuse is being employed.

**Trainer**

This individual develops and updates training material and ensures that all Authors receive training in tool changes, new features, and process changes.

**Localization Coordinator**

This individual manages ongoing translations to all required languages.

**User Experience Designer**

This individual monitors the user experience including search terms, findability, and metrics. The User Experience Designer recommends changes to the design and experience of content and updates the user experience as required by the users.

**Sponsor**

This individual continues to communicate the business advantages of using DITA across the enterprise and how it might be possible to expand the solution out of techincal publications into other areas.