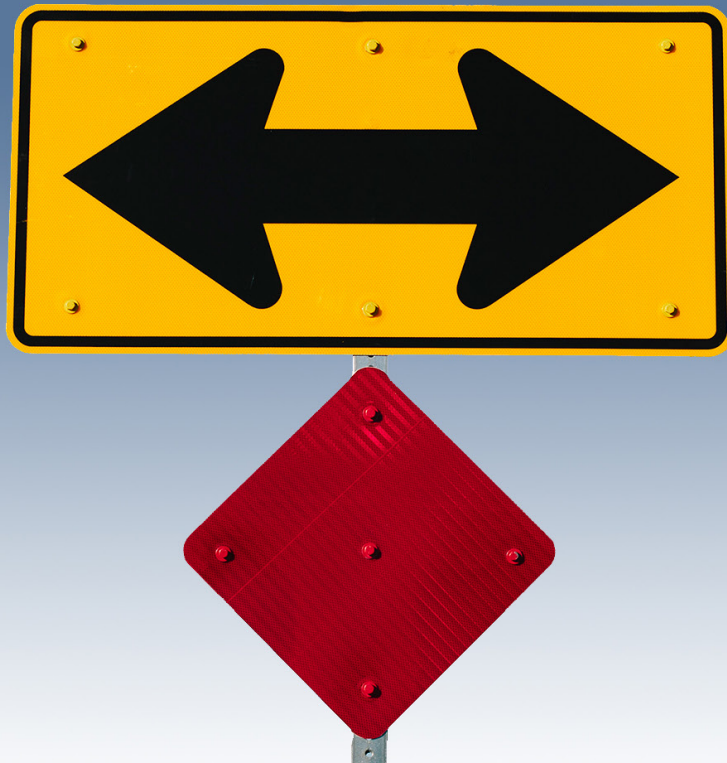


Open Standard vs Proprietary

What should you consider?



White Paper



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Synopsis

The adoption of a content authoring and management strategy using tools with proprietary formats may mean you are effectively segregating your content within your organization, and limiting the ability of others to use and benefit from it. Choosing content authoring and management tools with proprietary formats has broad strategic implications that you may not have considered. This white paper visits five scenarios and looks at how this decision may materially limit your options from a broader business perspective.

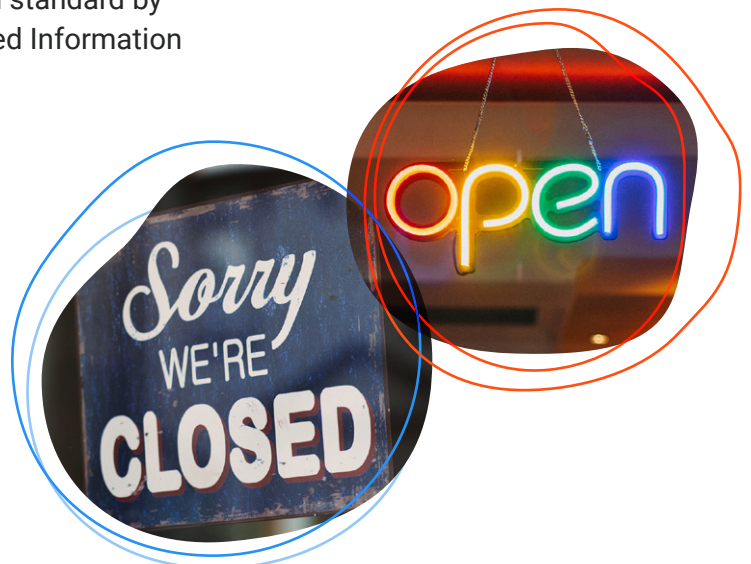
Defining “Proprietary” and “Open” in the context of content management

For our purposes in this white paper, we follow these definitions of Proprietary and Open formats for content:

Proprietary formats are only usable if you have the application that created the content or applications licensed to work with that content.

Open standards are file formats and standards that can work with any environment that can read that standard. Further, they are typically free to developers under a common type of license offered by a regulating body, usually a not-for-profit organization. The open format means files can be transferred between a variety of applications via APIs.

In content management, unstructured Framemaker files are an example of proprietary format and XML files are an example of an open format. DITA (Darwin Information Typing Architecture) is an example of an open standard that defines global rules and architecture for the use of XML in documentation. It was created by IBM for their own documentation requirements and released as an open standard by OASIS (Organization for the Advancement of Structured Information Standards) in 2005.



Scenario 1: Non-standard, closed formats are Often rejected by development teams

Technical documentation is increasingly a service area that interacts with many departments in a company or organization. In fact, it might be more properly described as 'business information'. Product development, sales, customer service, marketing, and human resources are all areas that require documentation. With the advent of centralized document creation and management teams, the ability to share information with a consistent style becomes a requirement.

Sharing

For example, an employee training program for customer support (CS) staff might be developed with input from both CS and human resources. Product manuals require interaction between technical writers, engineers and Subject Matter Experts (SMEs). They may also be utilized by marketing as part of a content marketing initiative or repurposed in packaging copy.

When documentation is created in proprietary formats, this interaction can be difficult to impossible without extensive copying and pasting of information from one format to another. Many proprietary formats can publish to other formats but the content does not retain its connection to those formats in consistent ways, which can mean problems with errors, version control, and omissions.

Consistency

Consistency issues arise when different departments are producing redundant documentation in different authoring applications that can't share files. The content management team can't control variable factors like style, voice, and formatting when file formats are siloed in their various applications. Changes made to content on a PowerPoint slide, for example, are not reflected in an instance of that same content in a Word document

Cultural bias

There are important cultural distinctions to be made in this scenario. Programmers and engineers typically prefer open standards. It is not uncommon for these departments to resist the adoption of proprietary formats for the convenience of the documentation group. The result can be an unintended form of segregation between teams in a company or organization. Using an open standard like XML means files can move among interdisciplinary groups without losing their consistency.

"When dealing with multiple departments, it's easier to **standardize to a standard** than a tool."

Patrick Bosek, Heretto



Scenario 2: Structured content strategy is about liberating content from silos

Proprietary formats are silos

The move to a structured content strategy is principally about moving away from siloed content that is not a part of a unifying architecture like DITA. Documents created in proprietary formats like Word or unstructured Framemaker, exist as standalone, unconnected files. They cannot easily be searched through as a group, reviewing and approvals are impaired by the need to define most recent versions, and duplication of effort is common.

Structured content is manageable data

When the move is made to a structured open standard solution, documents exist in one central repository. They are created there with XML authoring tools and the underlying architecture of the open standard database controls how they are used. Instead of copying or attaching a document or topic to share it, access to the doc in the database is shared and a writer, reviewer or approver knows they are working on the version that is most current. Topics are easily sorted by taxonomies (subjects), tagged with metadata attributes to make them easily searchable, and organized into maps to create end-user documents.

Any edits are instantly reflected in any usage of that topic within the system and versions can be saved in a history. Reviews are assigned, inline commenting is enabled, and topics finalized—all within a single source document. Reuse of content 'chunks' or topics is greatly simplified by creating a map or reorganizing an existing map that links back to each content piece without duplicating or copying it.

For a content manager who works across departments, this availability and control not only saves time and avoids version issues; it also means the ability to move documents among groups without format changes by simply sharing access to the central file repository for review and approval.



Scenario 3: Developing content in closed formats limits future capabilities

Choosing a file format to centralize on is a strategic decision from a content management perspective. Converting documentation from legacy (proprietary) solutions can be a complex, lengthy, and costly process. If you are facing that decision or going through it, it is important to consider the content 'lock-in' issue. Lock-in occurs when you are required to use a specific application to access your documents in their original format. When using a proprietary format, the only way you can leave that format is to add a conversion step, usually with a third party tool or via manual reformatting.

The content migration problem

Let's look at a common example, moving documents from Word to XML. Most tools that enable conversion are dependent on the way the documents were formatted in Word. If the author used Word's styles (Title, H1, H2, H3, paragraph, etc.) then there are tools that can handle the conversion. However, if they were formatted in non-standard ways such as setting sub-titles via font sizes, you may be required to manually reformat the documents before doing the conversion. In situations with thousands of legacy documents this becomes a major headache. In fact, we have seen that many content creation teams decide to redo all of their content from scratch rather than take on this conversion process. They bite the bullet and painfully realize that this may be their best option.

The 'lock-in' problem limits your future options

Creating your content in a standards-based format like XML, that is readable across a variety of applications, means you will not experience lock-in or conversion nightmares should you decide to change your authoring and management tools in the future.

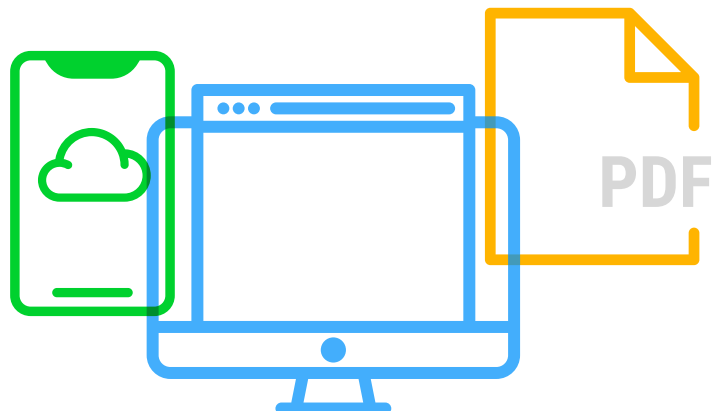


Scenario 4: Open formats are inherently agnostic to subject matter

Are you using applications designed to work with specific types of content? For example, we recently saw a presentation on a migration of technical documentation from Adobe InDesign to a DITA environment. InDesign was never designed as an authoring tool. It is principally used for graphic design for print and PDF (print-friendly) output and uses a file format (.indd) that cannot be read by other applications without licensing. The company had previously only delivered their product manuals as PDFs or print materials and the use of InDesign came out of the decision to eliminate a step by authoring directly in their graphic design application. As they grew and began selling into global markets they had a need to offer translated content in multiple languages and the ability to publish to the web and mobile. The constraints inherent in their content management process hit a major bottleneck when faced with these requirements. The result was a costly situation where millions of dollars of product sat in warehouses waiting for translation and publishing of documentation into a new language and media format.

Open XML-based content can be published to multiple media formats

Faced with the painful reality of a particularly constrained proprietary format, they began to search for a new solution that would not limit their ability to publish to various outputs and that would streamline their translation process, eliminating redundant work in the process. They chose a DITA Component Content Management System (CCMS) because it was not tied to any specific kind of output. The application was agnostic to any final publishing need. In addition, the structured environment meant docs could move through the translation vendor workflow without the need to convert from format to format and back again.



Scenario 5: Open standards enable interoperability

In all of these examples, the open format referred to is XML (eXtensible Markup Language). Like HTML, XML can be read by many applications. HTML tells web browsers how to display content while XML tells applications how to classify content (it is machine-readable). Once classifications are determined, via pre-defined taxonomies, metadata and maps within DITA, those classifications tell applications how to find and display that content. Any tool that can read XML, an open standard format, can 'understand' the content.

A widening landscape of content consumption formats

Users of documentation consume that content via a wide range of media formats: Web, mobile, knowledge bases, PDFs, slides, print, video, etc. When that content is created in a proprietary format it must be converted to a language like XML or HTML (for web delivery) before it can be used across these applications. Authoring and managing content in an open standard like XML eliminates these time-consuming conversion steps.



Conclusion

Choosing Open vs. Proprietary has strategic long term implications

The move to structured content creation and management based on an open standard is radically reinventing the entire documentation process. Because of the inherent nature of the XML language, document creation involves classifying chunks of information within that documentation when it is authored. Known as topic-based authoring, this methodology classifies each chunk of information by Topic and Topic type. Examples of Topic types include Concepts (descriptive text), Tasks (lists of steps to complete a task) and References (resource information like Specifications, Parts Lists, Diagrams, etc.). Documents are assembled by creating these topics, classifying them, and then linking them together with a map that organizes them into a longer document. This classification and organization system is saved in the XML code and transfers with the document, regardless of where it is being published.

This, and the extensive ability to associate metadata about the content with that content, enables easy reuse, deep searchability, and centralized access to that content without version control issues. Because the content is in an open standard format, these classifications move with that content, should it need to be moved to another authoring and management environment in the future.

Structured content creation and management simplifies writing and streamlines content reuse.



Conclusion

Open formats don't limit your future options

The strategic long term implications of this choice cannot be underestimated. Choosing a proprietary format can mean being locked into that format, may create conversion issues both with moving existing content in and publishing to other formats, and the potential loss of classification metadata that enables search and reuse of that content in the future.

Any of these issues can become a costly and time-consuming bottleneck and may limit your future options when it comes to utilizing your content. As businesses start to see the expanded potential of documentation as marketing, sales, and customer retention tools, that content is recognized as a valued asset. The decision to create and manage that asset in a proprietary vs. open format can materially affect the bottom line.



Further resources

With DITA you can more efficiently:

- Update your documentation
- Manage your single source of truth
- Review your work
- Localize your content
- Publish to multiple channels with ease

If you want to learn more about how DITA enables all of this and more, contact us directly or check out our resources written by our structured authoring enthusiasts. Visit our [Resources page](#).

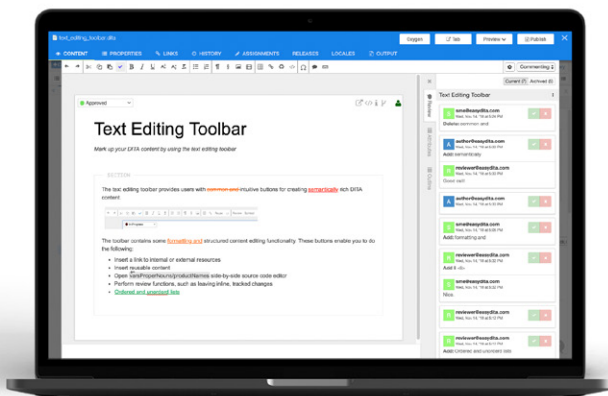
For more about DITA strategies, best practices, guides, or answers to common questions, visit our [Documentation Site](#). We are excited to help you along your journey to a faster, more efficient document creation process.



Heretto, Building Better Knowledge Experiences

We're here to help companies transform their knowledge, product, and reference content into customer and employee experiences worth talking about.

Our solution is a leading Content Operations platform designed to optimize creating, controlling, and deploying knowledge, product, and reference content for companies with complex products and services, global audiences, and intricate regulatory requirements.



Join us for a [demo](#) to get started today!

About Heretto

Heretto, a content operations platform for knowledge management, is a SaaS-based solution used by many of the world's top brands. Heretto increases customer satisfaction, efficiency and time-to-market by providing organizations with a powerful platform to create, control, and deploy knowledge, product, and reference content to any audience at any time. Content can be authored, updated, recycled, translated and published to web, PDF, chatbots, and applications in an intuitive workflow. Teams can collaborate on a single document simultaneously to minimize cost of content and increase quality and consistency from anywhere in the world. Clients include many of the world's top companies across industries such as high-technology, manufacturing, insurance, and medical devices. Heretto is a global company headquartered in Rochester, New York.

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