IDBS

IDBS unites help documentation, simulations, and other engaging materials into single, cohesive suite using Adobe® Technical Communication Suite 2 software

IDBS
www.idbs.com

Industry
Software (Electronic Lab Notebooks)

Challenges
• Provide relevant content to disparate audiences
• Help researchers transition to using Electronic Lab Notebooks (ELNs)
• Create a single source for help content that can be repurposed and published through multiple channels
• Enhance training initiatives and documentation

Solution
• Help documentation delivered via various channels
IDBS used Adobe Technical Communication Suite 2 to reinvent its help documentation, as well as to support creation and delivery of training materials.

Results
• Provided use-case examples and simulations
• Worked from a single help file for central updates
• Enabled easy output across multiple channels
• Established a single, cohesive style
• Enhanced training sessions by tapping into help content

Systems at a glance
• Adobe Technical Communication Suite 2. Components used include:
  Adobe FrameMaker 9
  Adobe RoboHelp 8
  Adobe Captivate 4
• Adobe RoboHelp Server 8

Commitment to scientific results

With the motto "Enabling Science," IDBS is committed to empowering researchers around the world to more efficiently capture, analyze, research, and report experimental data. To help achieve this goal, one of the product suites the company offers is a family of electronic lab notebooks: the E-WorkBook Suite. The solutions are vital for biologists and chemists to advance and accelerate the research efforts of top organizations such as Pfizer, The University of Cambridge, and Total Petrochemicals—and the more scientists know about how to better use the E-WorkBook Suite solutions, the more power they deliver. This is why, for IDBS and its customers, help documentation is mission-critical.

When it came to dramatically improving the user experience, IDBS needed to help ensure the content was consistent and was easy to navigate between the different elements. The challenge was to present voluminous information in a categorically organized, quickly searchable, easily consumable, and immediately actionable format. It turned to the Adobe Technical Communication Suite 2 including Adobe FrameMaker®, Adobe RoboHelp®, and Adobe Captivate® software with Adobe RoboHelp Server to reinvent the way it develops and delivers help documentation.

"As long-term successful Adobe RoboHelp and FrameMaker users and, more recently, Adobe Captivate users, we knew Adobe Technical Communication Suite 2 was the right choice for us," says Colum McAndrew, senior technical author for IDBS. "We were especially drawn to the integration among the applications in the suite."

A paradigm shift for researchers

Equipped with Adobe Technical Communication Suite 2, the IDBS team embarked on a yearlong project to reshape its E-WorkBook Suite help documentation. A major goal of this project was to continue helping scientists successfully make the shift toward capturing, analyzing, and reporting data digitally. Traditionally, researchers logged experiments in paper notebooks, writing down details about experiment setup, procedures, and outcomes. However manual recordkeeping makes it difficult to manage and secure details about every experiment, establish reliable audit trails for compliance purposes, and facilitate knowledge sharing and collaborative synergy among researchers.

With the E-WorkBook Suite, researchers have a versatile electronic lab notebook (ELN) that captures and stores both contextual and experimental fact data in a searchable, secure, traceable, and fully compliant environment. E-WorkBook is highly adaptable to meet the needs of all researchers, from biologists to medicinal or synthetic chemists. To help ensure that they are taking full advantage of the E-WorkBook Suite solution, researchers often turn to the help tools provided by IDBS.

"Our key goal is to provide documentation in a manner that enables scientists to quickly and easily find relevant information, whilst acknowledging the different levels of user expertise," says McAndrew. "With Technical Communication Suite 2, we set out to create more engaging, interactive content that would be available in a single, centrally maintained help file, yet be easily repurposed and published to multiple channels."

Laying the foundation

To start out, the technical writing team had several items to work from: three separate product suite help files produced using Adobe RoboHelp and output to CHM files; an Administration Guide produced using Adobe FrameMaker and output to PDF; Training Reference Guides, also produced in FrameMaker and output to PDF; and assorted white papers and user guides.

IDBS chose Adobe Technical Communication Suite 2, including Adobe FrameMaker, Adobe RoboHelp, and Adobe Captivate software, to reinvent the way it develops and delivers help documentation. The new online help offers advanced user options as well as assistance delivered in a variety of engaging formats, from movie clips to sample work examples. Also, with the Adobe Captivate integration among Adobe Technical Communication Suite applications, IDBS is able to deliver assistance in a variety of engaging formats, including sample files that can be downloaded to the end user's PC.
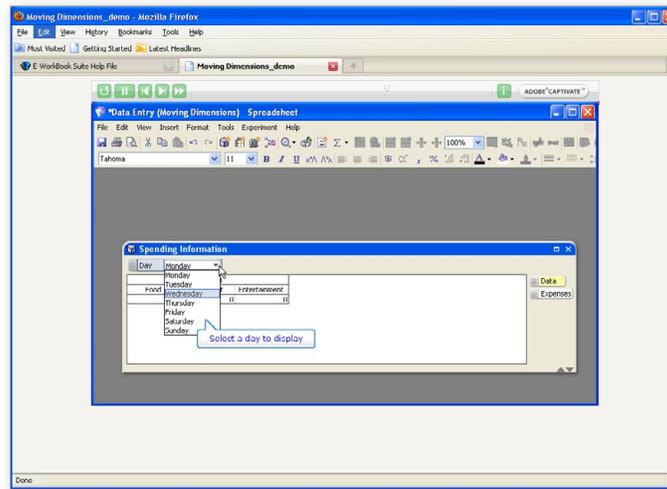
"As long-term successful Adobe RoboHelp and FrameMaker users and, more recently, Adobe Captivate users, we knew Adobe Technical Communication Suite 2 was the right choice for us."

Colum McAndrew,
Senior technical author, IDBS

With these materials as a starting point, the team began establishing the project requirements. The first priority was to make the information available to all users directly from a single, easily maintained help file with a cohesive style. A second requirement was the use of simulations inside help content to demonstrate complex workflows and provide practical work examples. Within the layout, the team wanted to provide notes, tips, warnings, and best practices—all in a way that would cater to users of different experience levels.

Aligned with these requirements, a key goal was to provide three output types: online help, CHM files installed locally in case users did not have an Internet connection, and output to printable PDF files for product consultants setting up the application at customer sites. Finally, the team wanted to be able to immediately deploy updates and gather usage statistics by creating a centralized online system.

To work with the large amount of content involved in the project, the team split the content into 12 separate RoboHelp projects, with all the content output to a shared drive. A 13th RoboHelp project was created into which the others were eventually merged. According to McAndrew, the integration between FrameMaker and RoboHelp made it easy to incorporate the Administration Guide and other content initially created in FrameMaker into the RoboHelp projects.

Clear communications through simulations
As the Technical Writers were fine-tuning the existing content and making it more consistent and accessible, other members of the team began creating simulations using Adobe Captivate software. "Implementing the simulations using Adobe Captivate was made easier with the greater level of integration among the applications in Adobe Technical Communication Suite 2," says McAndrew. "We now deliver user assistance in a variety of engaging formats, including sample files that can be downloaded to the end user's PC. The feedback we've received as a result of these initiatives has been positive."

To further enhance the user experience, the team made extensive use of DHTML drop-downs and the multi-level list functionality in RoboHelp. The DHTML drop-downs allowed them to provide different levels of information for those that needed it without cluttering up the core help. The multi-level lists supplemented this by allowing a new procedure to be documented within an existing procedure with the click of an icon. They also created text boxes for notes, tips, warnings, and best practices, using simple tables, all highlighted with appropriate icons throughout. "RoboHelp provided the tools we needed to make the help experience more engaging by drawing the user's attention to areas of interest and breaking the text up into easily consumed sections," says McAndrew.

Delivery to multiple channels
The IDBS team then began using RoboHelp to help ensure reliable delivery to various channels. RoboHelp provided robust features such as conditional build tags to handle output to different channels. Throughout the project, Adobe Technical Communication Suite 2 enabled the team to make reliable links between the various projects and use snippets to easily reuse content. Advanced cross-referencing of related content across various sections of projects facilitated easier look up, thus optimizing search productivity. IDBS also used RoboScreenCapture to quickly capture and edit screenshots when needed to generate imagery for the help.

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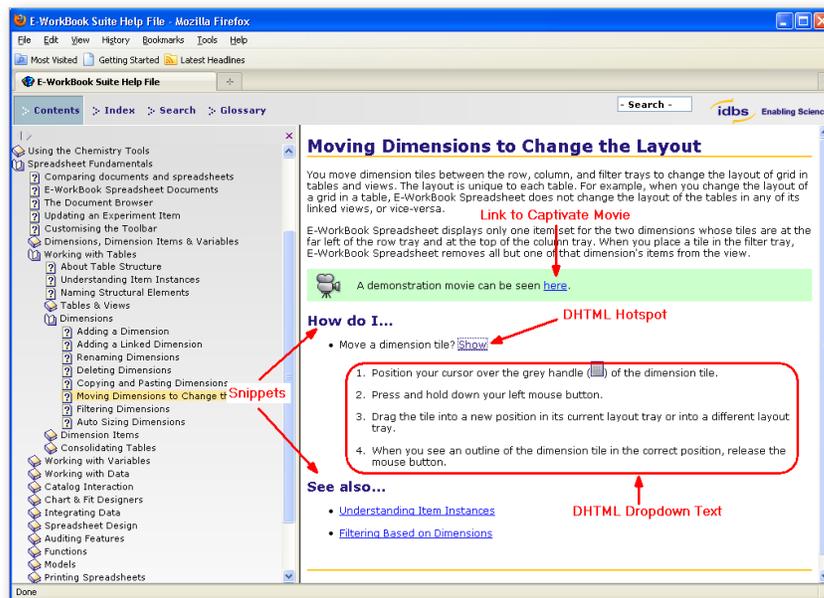
"The feedback we received on the help documentation made all our work worthwhile. We delivered a documentation set that raised the bar for what could be achieved—and we know that with Adobe Technical Communication Suite 2, we can raise the bar even further."

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The company ultimately published the documentation to an online server, created a local CHM file copy installed on each user's PC as a backup, and delivered a PDF file to enable printing of hard-copy output for onsite consultants. McAndrew chose to output WebHelp Pro from the RoboHelp client to utilize RoboHelp Server as their delivery engine for the online server-based help solution. "The latest version of Adobe RoboHelp Server was easy to set up," says McAndrew. "It also enables us to publish to the server from the RoboHelp client whenever we require. We have also started to utilize the usage reports showing us how many people read the documentation and what areas they are looking at. In the future this will allow us to optimize the content where required."

Advantages for training as well

The benefits of adopting Technical Communication Suite 2 also extend to IDBS Training Consultants, where Adobe FrameMaker and Adobe Captivate have long been mainstays for producing print and computer-based training materials. The training team makes extensive use of Training Reference Guides maintained in FrameMaker that are provided to each client that attends one of its IDBS training courses.

"The Training Reference Guide content is maintained separately, but content is regularly leveraged from our help files and amended as required," says Kim Gionis, education services manager for IDBS. "With highly engaging help content, trainers are also increasingly using the help documentation and simulations during training sessions to illustrate concepts, which they had never done before. Going forward, we hope that this directly results in higher user adoption rates, shorter learning curves, and lower training costs for IDBS customers."

A bright future

The ease of maintainability of Adobe RoboHelp allows IDBS to periodically upgrade help content centrally at one single place, and seamlessly propagate the changes across all relevant sections to preserve content integrity. Looking back over the last year, McAndrew, Gionis, and the rest of the team are understandably proud of their accomplishments. Prior to full release, the team sent a beta release to key customers and internal staff. "The feedback we received on the help documentation made all our work worthwhile," says McAndrew. "We delivered a documentation set that raised the bar for what could be achieved—and we know that with Adobe Technical Communication Suite 2, we can raise the bar even further."

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