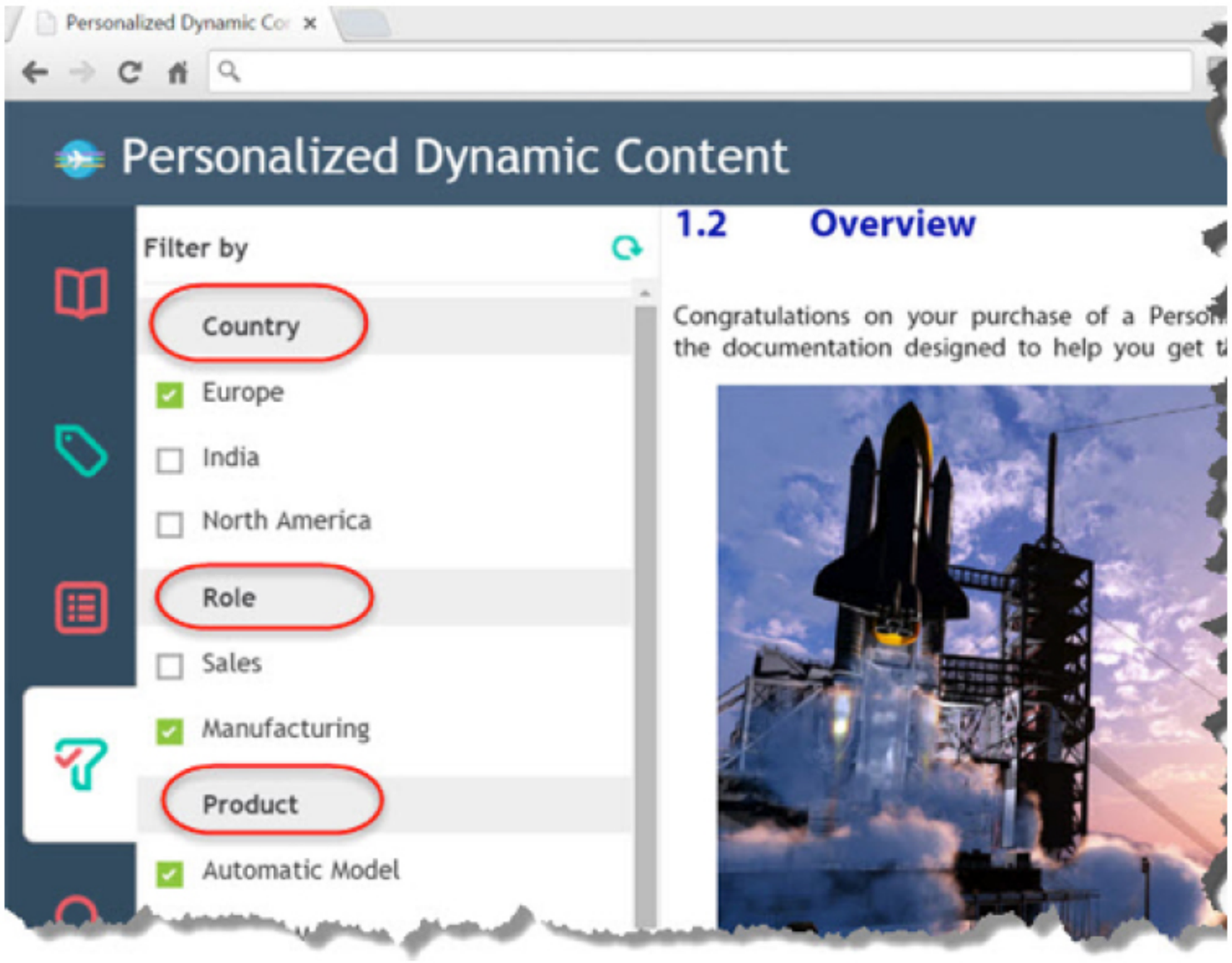
Personalized Dynamic Content

An easy way to provide the end user with filters to "self-select" the content most relevant to their role, location, product or other criteria



Introduction: A new solution to an old problem.

As technical authors we want to help our end users cut through the clutter of information that is not relevant to their "personal profile." As you can see from the example above, the information presented to the user depends on the selection of filters according to Country, Role and Product.

In the past, our tools have been limited. Conditional build tags are great, but this often means generating redundant sets of content for each audience. Now, with the 2015 release of both Adobe FrameMaker and Adobe RoboHelp, a greatly enhanced technique of conditionalizing called Dynamic Content Filtering gives the user a way to filter their content "on the fly".

The biggest new advantages:

- Users "self-select" and personalize the content they want to view
- The Table of Contents, Index and Search as well as the Topic content changes "on the fly" according to the combination of filters the reader selects
- "Context Sensitive" personalized content can be delivered (already filtered) using a customized URL
- Authors are not limited to role or location as filter criteria. They are free to define any audience segment that fits the need. For example, novices vs. power users, administrators vs. customer-facing users, etc.

Where to find the Sample Projects files illustrated in this white paper

The Dynamic Content Filtering features discussed in this white paper are available in both Adobe FrameMaker (2015 release) and Adobe RoboHelp (2015 release).

To experience these examples in action, you are encouraged to download a trial of Adobe RoboHelp (2015 release) or Adobe FrameMaker (2015 release) or the full Adobe Technical Communication Suite which contains both products.

For Adobe RoboHelp (2015 release) sample files:

To illustrate the scenarios in this paper, we use a sample project installed with Adobe RoboHelp called, "Travel the Whirls". This depicts a fictional travel company as a way to show the filtering examples. This sample project is typically installed along this path:

C:\Program Files (x86)\Adobe\Adobe RoboHelp 2015\RoboHTML\Samples\en_US\Travel_the_Whirls

For Adobe FrameMaker (2015 release) sample files:

For a hands-on tour of the new Dynamic Content Filtering features, open the "User Guide" sample project found along this path where FrameMaker is installed:

C:\Program Files (x86)\Adobe\AdobeFrameMaker2015\Samples\UserGuide(Arabic,English, Hebrew)

In that folder, there are step by step instructions for publishing various outputs in FrameMaker: Personal Spaceship User Guide - EN-US.pdf.

How the end user views the filtered content

The following examples of Dynamic Content Filtering can be found in the Travel the Whirls sample project which is installed with Adobe RoboHelp as described in the Tips section above. The sample output has also been published to a "live" website so you can see it in action: whirltheworld.com/csh.

TOC, Index, Search and Topic Content all change at the same time

When Dynamic Content Filters have been configured, a new icon is presented in the toolbar used for choosing the TOC, Index, Glossary and Search as shown in the examples below.

What the end user sees depends on the screen size

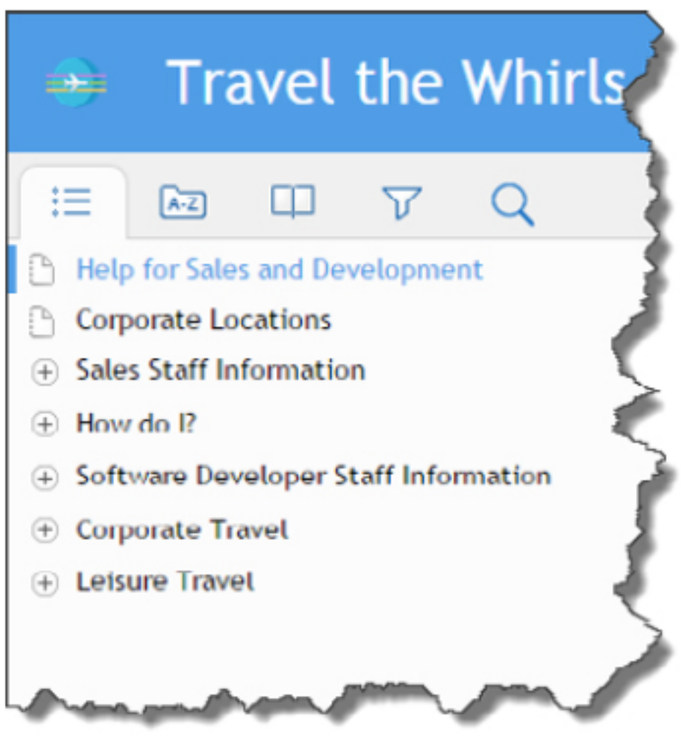
The user clicks on the "funnel" icon and the Dynamic Content Filters panel is presented. The icons will be arranged horizontally or vertically depending on the screen size and orientation (e.g., Desktop, Tablet, Smartphone). Items are then selected in the Filter panel to enable the filter(s) the user wishes to apply as shown below.

Customization tip—the color scheme, icons and branding shown in these examples are all completely customizable using the Responsive HTML5 Layout Editor.

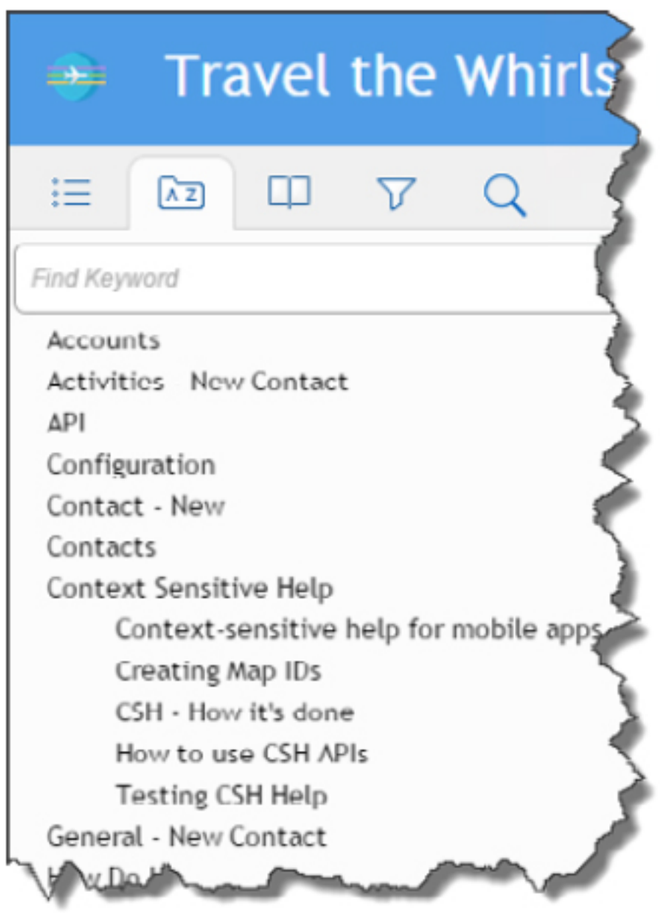
Scenario One - Using Filters to personalize an end user's Table of Contents and Index

In this scenario, perhaps the user has a specific Role. Whirl the World Travel has employees that are **Software Developers** and employees that are **Sales Staff**. With no filter applied, your table of contents and index may look like this:

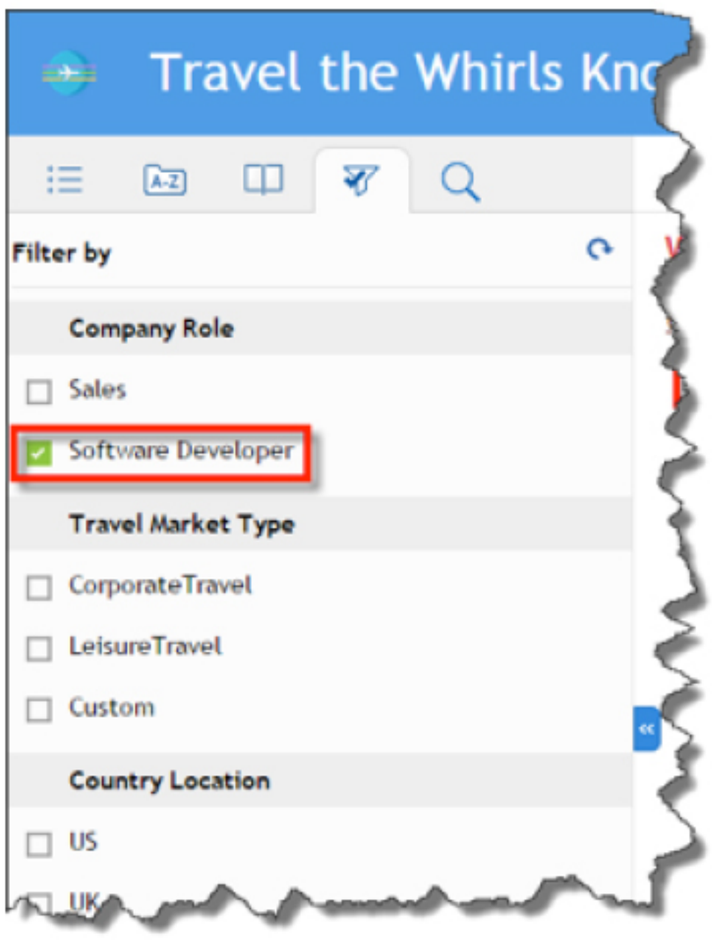
Table of Contents



Index



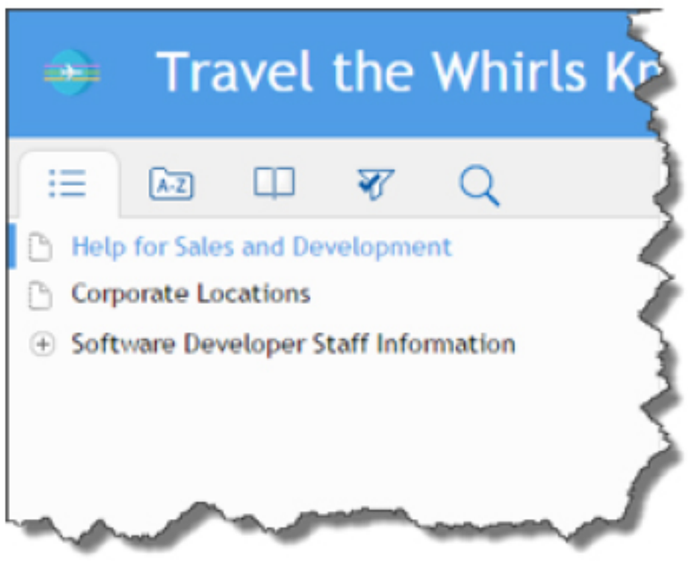
If your role happens to be that of a **Software Developer**, you would prefer to focus only on topics that are related to your role. You select the Dynamic Content Filters icon in the main toolbar , then select to enable the check box labeled **Software Developer** as shown below.



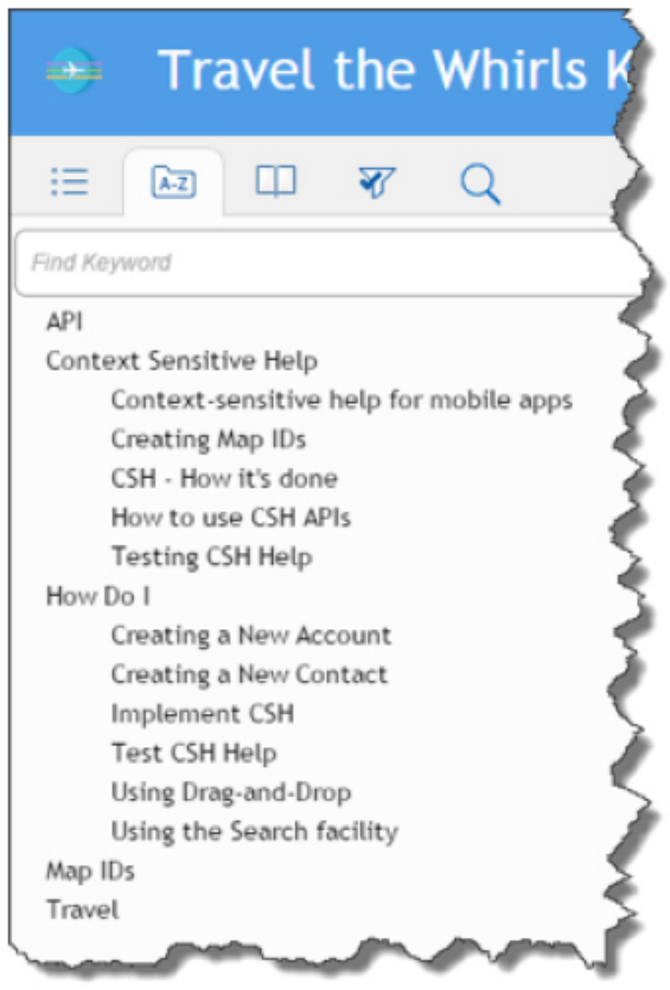
As you select the TOC icon to view the TOC again, notice how it has now changed to filter out the undesired content.

Note the appearance of the Dynamic Content Filters icon. The presence of the check mark superimposed on the icon is an indication that Dynamic Content Filters are in effect and what is shown is a filtered view.

Table of Contents



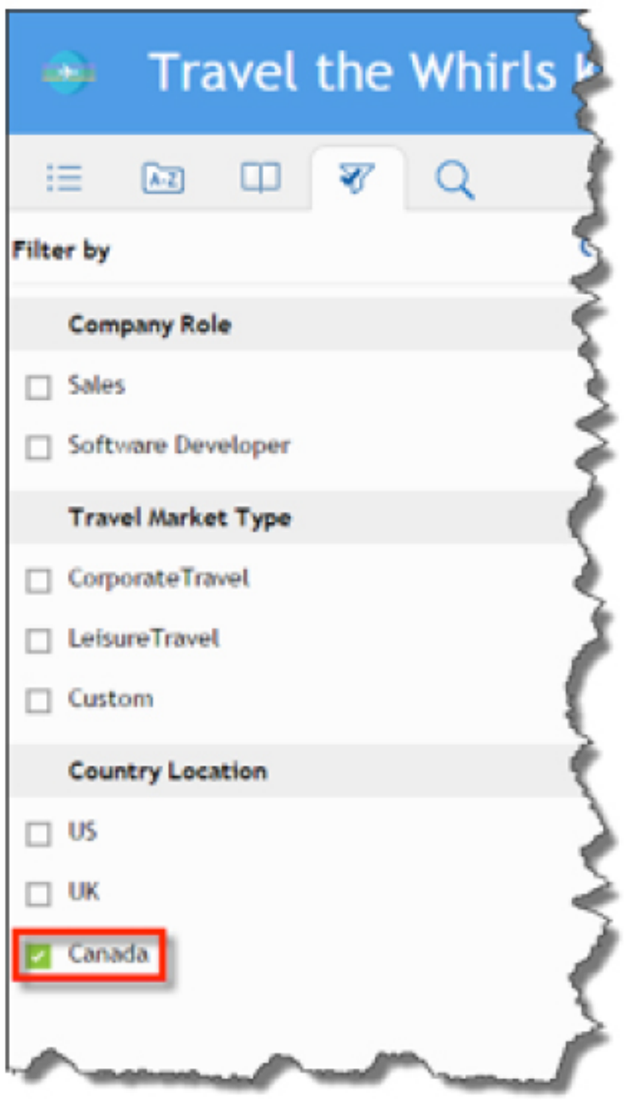
Index



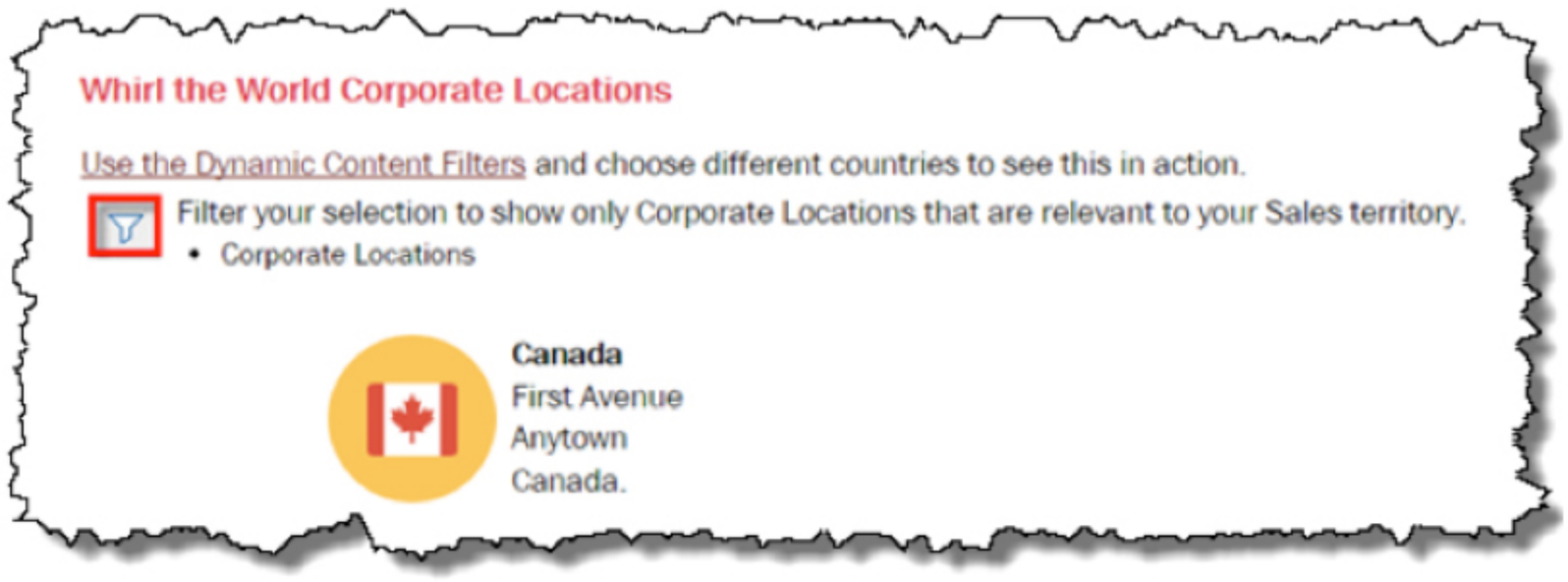
Scenario 2 - Filtering basic content inside a topic

In this scenario, perhaps the user is only interested in content that may be **Country Location** specific. Whirl the World Travel operates in three countries. **Canada, United Kingdom** and the **United States**. Perhaps the end user has opened the Corporate Addresses topic and wishes to see content that would apply only to Canada.

The end user selects the Dynamic Content Filters icon in the main toolbar  , and enables the **Canada** filter as shown below.

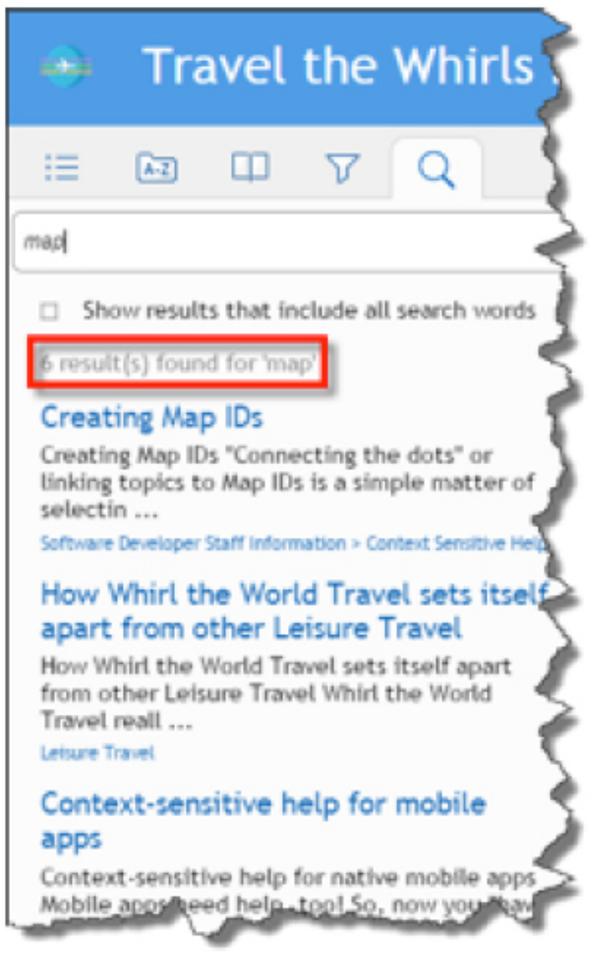


At the moment the filter is enabled, the end user will see that the **United Kingdom** and **United States** addresses and images perform a magical disappearing act as they are filtered out.

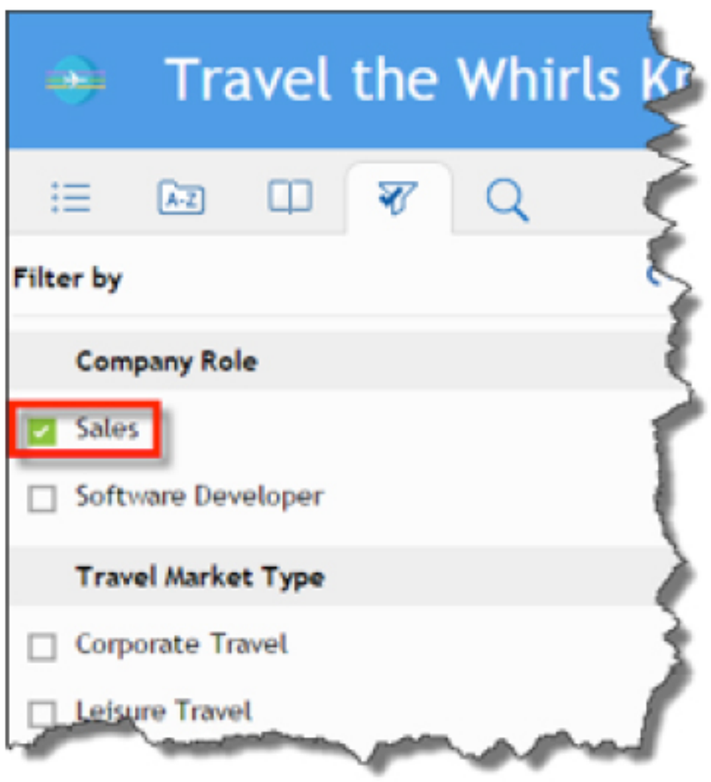


Scenario 3 - Filtering what is available by searching

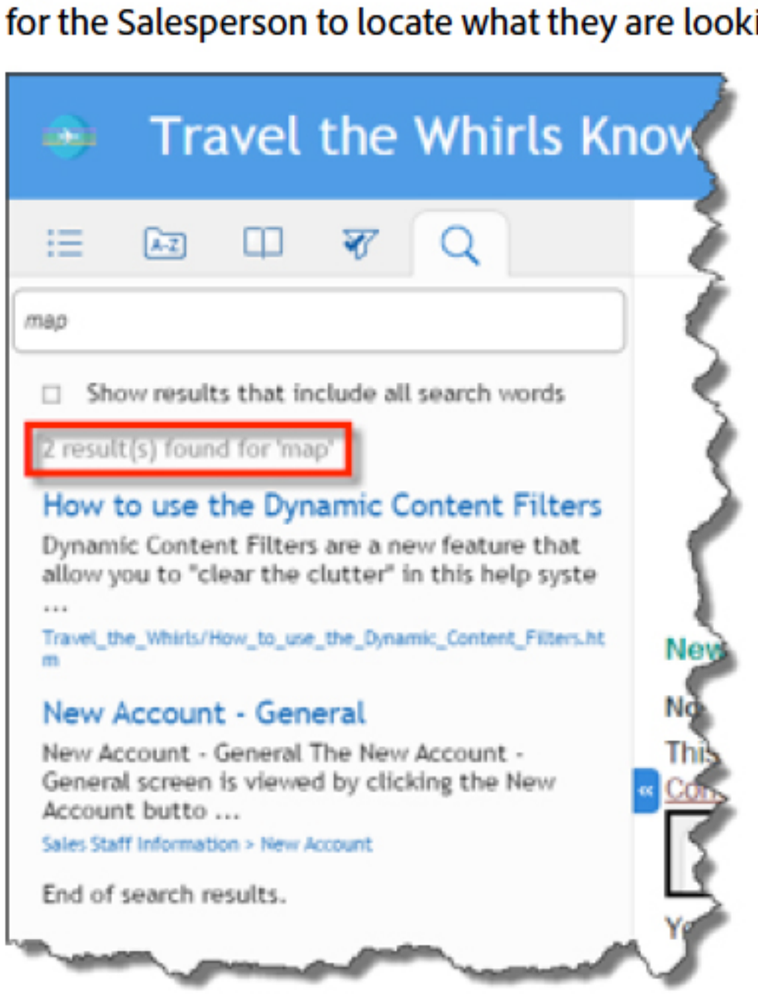
Just as with the TOC and Index, the same filter choice is reflected in the Search results. Perhaps the user is a member of the Sales staff. They are planning to call on some customers and they seem to recall someone mentioning that the Salesbuilder software application offered an ability to store maps listing the account location. With no Dynamic Content Filters enabled, a generic search is performed for the word "map". And many irrelevant results are returned as shown below:



The end user selects the Dynamic Content Filters icon in the main toolbar  , and enables the **Sales** filter as shown below.



Upon returning to the Search Results, only two possible topics are listed. Thus making it much easier for the Salesperson to locate what they are looking for.



How the author creates the filters and publishes content

Responsive HTML5 layouts in Adobe RoboHelp (2015 release) and Adobe FrameMaker (2015 release) allow your content to be viewed on desktops, tablets and smartphones. New responsive layouts also enable dynamic content filtering.

The Author as Curator of Content Filters

To create and present the best combination of content filters means the author must analyze each sub-set of the audience and "tag" content that best suits each segment. This tagging of content is the first step toward narrowing the scope of choices and helps the user zero-in on the content "prize".

Technical communicators can tag entire topics or very small parts of a topic. Content can be selected and tagged with a name that helps the author include or exclude that content when ready to build an output. That output can viewed online in a web browser or in print such as an MS Word document or Adobe PDF; whether on the desktop or for mobile delivery.

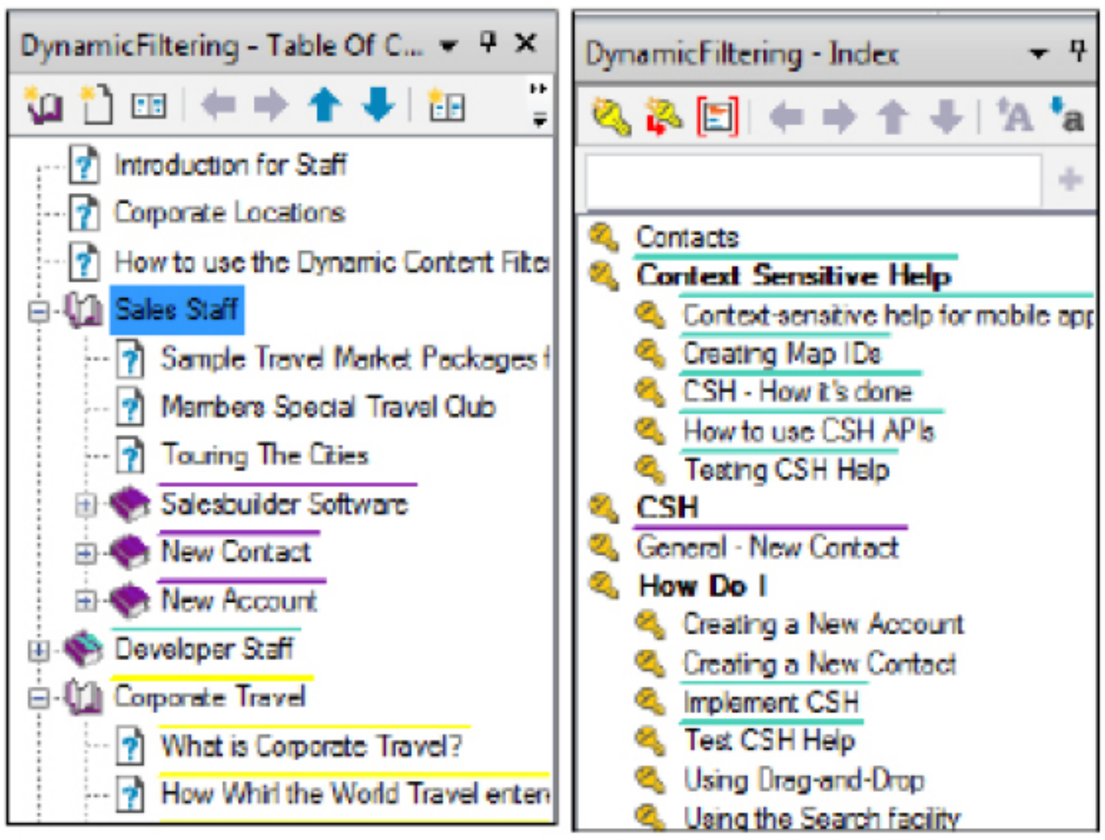
The author creates and applies the Conditional Build Tags (CBT)

In both, Adobe RoboHelp as well as Adobe FrameMaker, a conditional build tag (CBT) is first created in the Conditional Build Tag pod. Create a tag, give it a name and assign a color. Then select and apply the tag to some text, a table, an image or any part of the topic content so that you can create simple or complex build expressions to exclude or include that content when you generate an output. You can even apply the tag to an entire topic. More than one tag can also be applied to the same content.

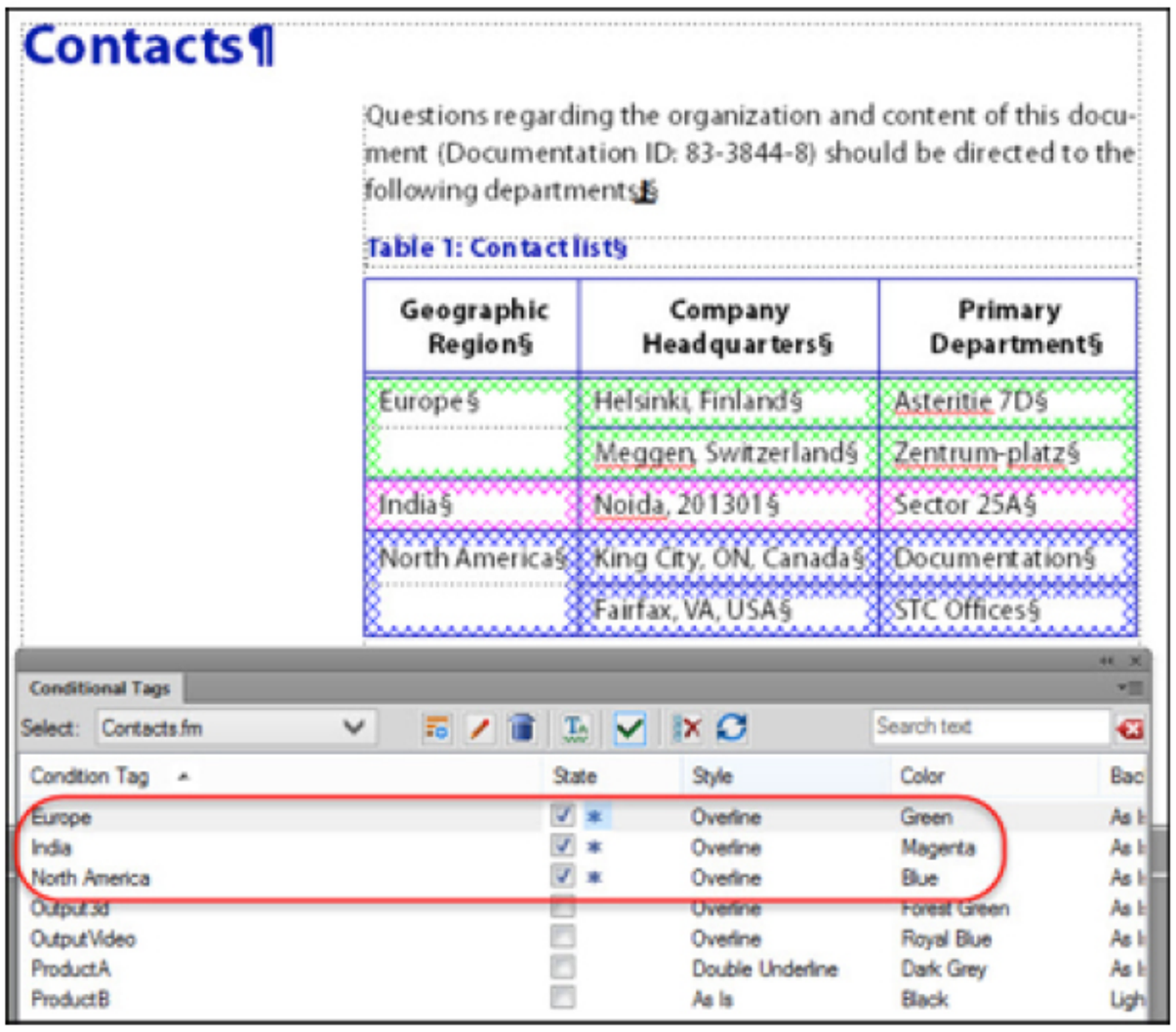
Dynamic Content Filtering allows you to use the CBTs and / or build expressions so that the end user can choose what they want to see.

As the Conditional Build Tags are applied, they show up in the Design Editor View as color-coded overlining (in this example, RoboHelp). In addition, tooltips reveal the specific tag names when hovered over. This overlining is also reflected in the Project Manager, TOC and Index pods which show when an entire topic, TOC entry or Index keyword may be tagged.

The Table of Contents and Index can be "tagged" as well, as seen in the side by side view below in a RoboHelp example. Further, if Topic Level tags are applied, those can be used to configure filters as well. This offers the author more flexibility and control over the content that is included or excluded in the build and filtering process.



Here is a similar example showing the result of Conditional Tagging done in Adobe FrameMaker:



More efficient delivery of Dynamic User-Centric Content

If you are an author who is already using Content Categories (Dynamic User-Centric Content) in an earlier version of Adobe RoboHelp or Adobe FrameMaker, you will note there are many more options with Dynamic Content Filtering. Also, only one set of output files is generated rather than for each Content Category; a much more efficient delivery. Fortunately, all of the work you may have done with applying CBTs for Content Categories can be reused in the new Dynamic Content Filtering workflow.

Publishing for delivery to Desktop, Tablet or Smartphone

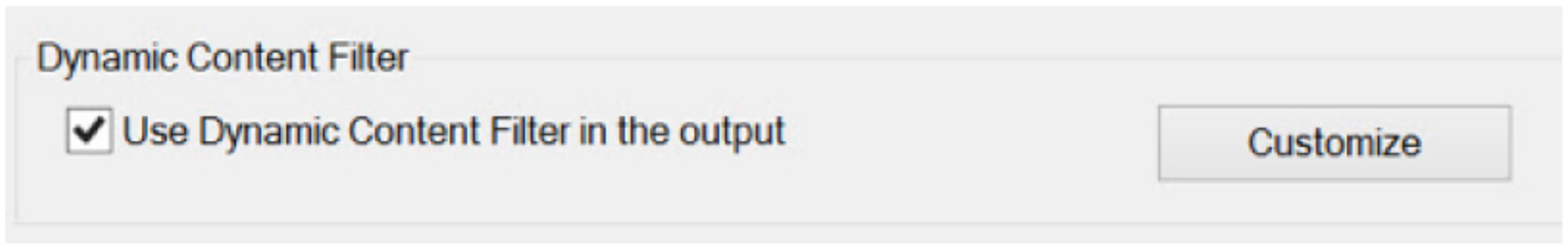
Once the tagging is done, it's time to publish to the appropriate devices and formats. Because Responsive HTML5 is used, this means the published content will appear comfortably regardless of the screen size or orientation. (We can also easily create an installable iOS or Android Mobile App which is discussed below.)

Create a Responsive HTML5 Layout

In Adobe RoboHelp (Outputs pod, right-click Properties) or Adobe FrameMaker (Publish pod, right-click Edit Settings)

Create Filter Groups and Criteria

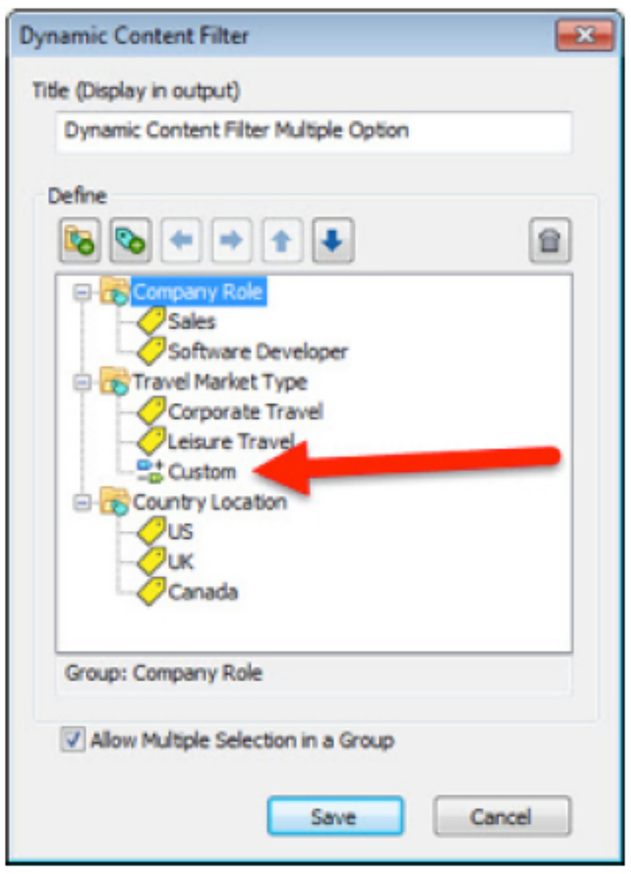
We now need to set up the actual filters according to whatever choices are the most helpful to the end user. To do this in either Adobe RoboHelp or Adobe FrameMaker, from the Responsive HTML5 publish settings dialog check the Use Dynamic Content Filter check-box and click the Customize button.



Define the Groups and Criteria in the Dynamic Content Filter dialog

The Customize button will open the Dynamic Content Filter dialog shown in the image below. By default, RoboHelp and FrameMaker will display the options in alphabetical order. However, you can reorder options by using the arrow keys or with drag and drop. The title can be whatever you decide is most helpful to the end user. Here we have used it to provide an instruction to end users.

As we want end users to select any number of criteria, we check the Allow Multiple Selection option.



By clicking on the first icon from the left under Define, we can now set up groups, in this example we want three:

- Company Role
- Travel Market Types
- Country Locations

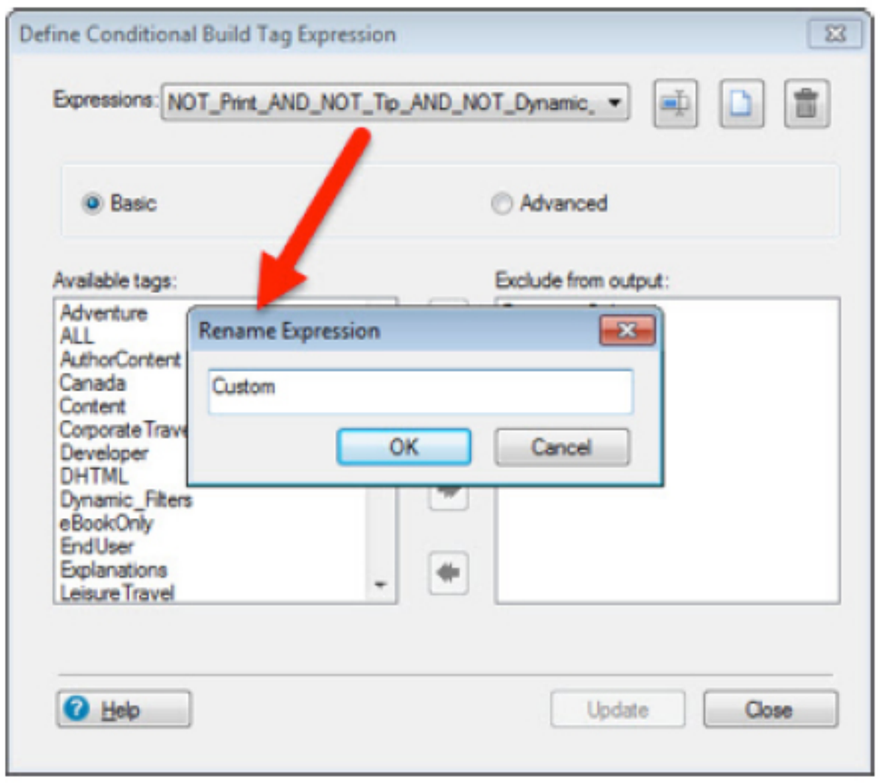
Note: The arrow above shows an example of a Renamed Build Expression (Custom), explained in the next section.

Clicking on the "Add Criteria" icon in the Define section, will bring up the Tags and Expressions dialog so that criteria for each group can be created.

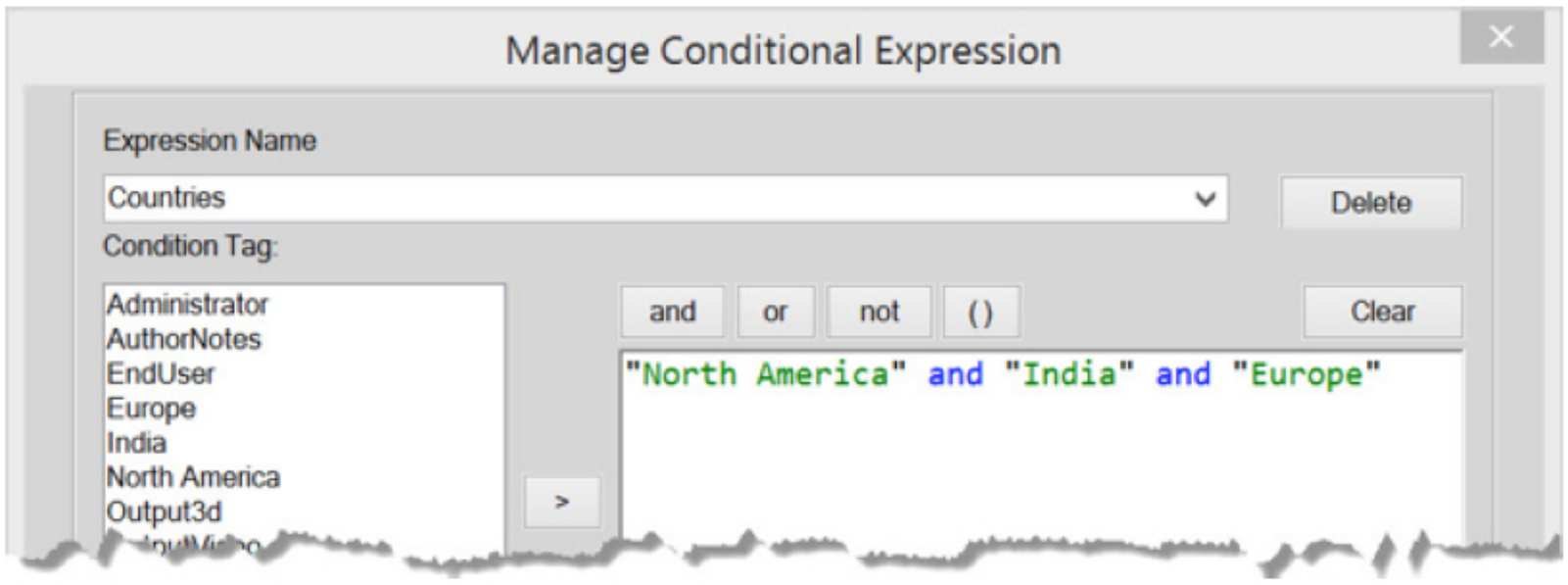
Save time by giving complex build expressions "friendly names"

As shown below, the dialog initially shows all the tags and expressions that have been set up in the project. In Adobe RoboHelp and Adobe FrameMaker complex expressions can be renamed to more author-friendly names.

Here is an example in Adobe RoboHelp...



...followed by Adobe FrameMaker's "Manage Conditional Expression" dialog.



Once the Groups and Criteria are complete and saved, the author can then publish the output and view the results in a web browser for testing.

Create installable iOS and Android Mobile Apps

The same Dynamic Content Filtering process can also be used to create Mobile Apps that can be offered on iTunes or Google Play or even installed directly on mobile devices. The author simply chooses the Mobile App Output option instead of the Responsive HTML5 Output. The workflow for configuring the Dynamic Content Filtering is virtually the same.

Additional features to assist the author

Authors can "Show Tagged Output" to validate tagging

For the author, it can be very helpful to see the CBT tagging "in action" before actually distributing content to the end user. In this way, they can make sure content is tagged the way they intend. For most browsers, this can be accomplished with a new command in the Single Source Layout pod by right-clicking on the layout to see the "Show Tagged Output". This view (seen only by the author) reveals the applied tags in green text and (when hovered) yellow highlight as seen in the screenshot below. These tags can also be seen by using the following "showtags" syntax in a URL:

www.whirltheworld.com/csh/?showtags=true#t=Travel_the_Whirls%2FIntroduction_for_Staff.htm

Calling Filtered Content in Context Sensitive Help scenarios

Dynamic Content Filtering can also be delivered for Context Sensitive Help in applications.

In this example, the active Filter Groups are Company Role and Country Location. The items are Sales and Software Developer; then US, UK and Canada. The URL is formed by Group Name and Item Separator (the colon and comma) in a straightforward syntax. (The %20 is to account for the space character.)
http://www.whirltheworld.com/csh/?filter=Country%20Location:UK,Company%20Role:Sales

As you travel the live site you can paste in that URL which not only takes us to the topic, but is already filtered with the preferences established by the technical author. Select the TOC and click the Corporate Locations topic and notice that UK is the only location showing. Thus, we have formed Context Sensitive and Filtered Help, personalized for the end user.

Conclusion and tips for personalizing your user's content

Our readers want more personalized and relevant content. They want to avoid the "drill down" and quickly arrive at the content relevant for their role, location or situation. The 2015 releases of Adobe FrameMaker and Adobe RoboHelp offer a unique and innovative solution with Dynamic Content Filtering. It is also gives us an opportunity to take a fresh look at our audiences and our content to take maximum advantage of the new feature. Here are a few thoughts:

- For those of us using conditional text or conditional build tags, we are accustomed to "excluding" content from output rather than "including" it. So, the build expressions created in the Dynamic Content Filtering dialog gives us a new way to think about how we organize and present the content.
- Other tools have addressed the idea of "search filters." Make no mistake, dynamically personalizing content on-the-fly is far more powerful because it can affect parts of topic content as well as the TOC, Index and Search. At the same time, this new release offers the ability for the author to customize the "search context" phrases topic by topic, so that users landing on search results can more easily discern the best choice.
- For your users to get the most out of the new personalization, you will want to research their information needs and anticipate their choices to provide the most successful set of filters.

Acknowledgements—The author would like to thank Adobe Community Professionals, Peter Grainge, Rick Stone and Willam van Weelden for providing additional content.

John S. Daigle - Biography

John Daigle is president of Evergreen Online Learning, LLC, based in Evergreen, Colorado. A frequent speaker at national online help conferences, John is a certified Adobe RoboHelp and Adobe Captivate Instructor as well as an Adobe Community Professional. He has taught RoboHelp since 1992 and Adobe Captivate since it was introduced. His speaking engagements include the STC Summits in Minneapolis, Atlanta, Philadelphia and WritersUA in Seattle, Rhode Island, South Carolina and Austin, Texas.

John spoke at the Society for Technical Communications Summit in Atlanta, Georgia. His topic was, "Enjoying a Smooth Ride on the Mobile Documentation Highway."

John is a member of the Society for Technical Communication (Rocky Mountain Chapter) and has a Bachelor of Science degree in Journalism from the University of Houston. He began his career in broadcast news as a reporter for the NBC television affiliate in Houston, Texas.

He is also a member of the Adjunct Faculty of Metro State University of Denver where he teaches Adobe RoboHelp and Adobe Captivate for college credit toward a four year degree in Technical Communications.

Adobe

Adobe Systems Incorporated
345 Park Avenue
San Jose, CA 95110-2704
USA
www.adobe.com

7/15