

Consultant Versus Training

This paper outlines some tasks and when it is best to use a consultant and when it is best to seek training.

Consultant versus Training

To determine whether to out-source work, estimate the frequency of the task; if the task will recur regularly, have in-house staff trained to perform the specific task. If it is not possible to create a specific set of procedures, general expertise may need to be developed by in-house staff. Training is a good way to start developing expertise by learning the correct way to use tools from the start. If the task will happen only once, training may be too expensive to justify the cost.

Table 1: Comparing the Expense and Effort of Using a Consultant to Investing in Training

	Consultant	Custom Tools, Processes, & Training	Standard Training
Overview of Different Methods	(This is the fastest method. Everything is done on time and staff is not disrupted.)	The consultant creates tools and processes, runs a confirmation process, writes a process document, and provides training on the custom process (This is the most comprehensive method; the expertise is transferred to in-house staff.)	Trainer/consultant trains in-house staff to perform the generic processes described in base training manuals. In-house staff integrates knowledge and figures out how to customize the process for their specific needs (This method has the longest development time, and may have the lowest up-front cost.)
Legacy Document Conversion <ul style="list-style-type: none"> • Word to FM • InterLeaf to FM (Interleaf to FrameMaker is similar to the Word to FM process) 	Use a consultant when: <ul style="list-style-type: none"> • Deadlines are too tight to allow for training • Conversion is a one-time effort • Fewer than 1000 pages need to be converted • Staff cannot be diverted from other crucial tasks 	A custom process and custom training is cost-effective when: <ul style="list-style-type: none"> • Thousands of pages must be converted • The conversion process requires a conversion script or custom filters. When the process is perfected, we document how to use the process and train your users how to run the process. 	Standard training is cost-effective when: <ul style="list-style-type: none"> • The conversion process is simple • Source documents have only a few pages each • Contributing authors submit content from Word continually <p>We wrote an excellent self-paced instruction manual, <i>Transforming Word to FrameMaker</i></p>

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	Consultant	Custom Tools, Processes, & Training	Standard Training
Criteria	If the expertise will not be needed again, why invest in training? Training might be more expensive than just having the work done. Also consider deadlines; if time does not allow in-house staff to complete training and do the work, contracting out the work may be the best option.		
FM to SFM	There are two separate processes involved in converting FrameMaker documents to Structued FrameMaker documents: <ul style="list-style-type: none"> • Creating a Conversion Table • Running the Conversion Process (See “What is a Conversion Table?” on page 4.)		
Creating a Conversion Table	Use a Consultant to create a Conversion Table because it is the most cost-effective solution. Conversion Tables are complex, customized solutions and the task is rarely repeated. We are experts at creating Conversion Tables; we’ve created many.	A custom process is for creating Conversion Tables is not cost-effective because Conversion Tables are customized for each combination of EDD and document template. The amount of training required to transfer all the required knowledge would be prohibitively expensive.	The available training for creating a Conversion Table only introduces the subject. The process of creating a Conversion Table is similar to creating an EDD—tricky to master, and if not used regularly, skills may be lost.
Running the Conversion Process	Use a Consultant to run the process when: <ul style="list-style-type: none"> • Deadlines are too tight to allow for training • Conversion is a one-time effort • Fewer than 1000 pages need to be converted • Staff cannot be diverted from other crucial tasks 	Customized training for running the conversion process is cost-effective when: <ul style="list-style-type: none"> • There are thousands of pages of content to be structured and they all use the same document template and will all use the same EDD. • The effort to convert the documents can be spread out over a long time and staff can accomodate the effort into their normal work schedules without compromising other dead-lines 	There is minimal generic training available for running the conversion process. Since each Conversion Table is unique, the procedures for running the process are unique.
Criteria	Will the skills be used again and soon enough for the knowledge to be retained?		

	Consultant	Custom Tools, Processes, & Training	Standard Training
EDD Creation (See “What is an EDD?” on page 4.)	Consultants offer expertise out of the box and the ability to meet tight deadlines when staff can’t postpone daily duties.	A custom process is for creating an EDD is not cost-effective because EDDs are customized for each document type. The amount of training required to transfer all the required knowledge would be prohibitively expensive.	Training is available. The real investment comes after staff has been trained: they must integrate the information learned and spend months experimenting and learning the nuances of all the possible choices and ramifications of those choices. Creating an EDD from scratch is a complex and lengthy process. The best way to start is with training. However, it may take several months of trial and error to produce an initial EDD. Before the EDD can be considered a final product, it must be tested and revised using representative data.
Criteria	This is the type of task that does not often recur. More often, after an EDD is created, minor modifications are needed.		
Infrequent tasks			
Modify EDD and structured templates	Modifying the formatting information in an EDD is easier to learn than how to modify the structure rules.		We can train your staff how to create and modify EDDs, Structured Application, and templates. If your deadlines permit it, this can be a great way to understand the process and know the EDD/Structured Application inside out by creating it from scratch.
Create / Modify Structured Application (See “What is a Structured Application?” on page 4.)	Structured Applications are not complex tools, but the knowledge of what to modify and how to modify it is fairly involved.		
Criteria	<ul style="list-style-type: none"> • How frequently will the task recur? • Will the task recur frequently enough so staff remember the process? • Will staff have the time available? 		
Recurring tasks			

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XML -> Structured FrameMaker	Outsourcing recurring tasks may be a viable short-term option		We can train your staff to perform any Structured FrameMaker tasks. We can create customized process documentation to help staff learn (and relearn) how to perform specific tasks.
Structured FrameMaker -> XML			
Criteria	Tasks are likely to recur, so having staff learn and master the skills is a wise investment		

A Manager's View of FrameMaker Tools

A Manager's View of Structured FrameMaker Tools

ormats, 2) using

semantic formatting instructions, or 3) a combination of the two.

- What is a Conversion Table?

Conversion Tables are EDD-specific and document-specific. They use the FM paragraph format and character format names to map the content into SFM elements. The source format names (or tags) are the handles by which the Conversion Table can transform the content to match the Structure Rules in the target EDD. Conversion Tables are completely customized; they are a unique bridge between the formats in the source document and the elements in the EDD. Think of a Conversion Table as a marriage between the FM formats and the EDD elements. If the FM format names are consistent across a set of documents, a Conversion Table can be used to convert all of the document set to SFM. However, if the source has different format names, the Conversion Table must be modified or rewritten to perform the transformation. A Conversion Table is a Mapping table; for example, a FM paragraph format can be converted or mapped to an element definition. The Conversion Table wraps in an element all the content in that paragraph.

- What is a Structured Application?

Structured Applications contain several components: Read/Write Rules, Structured Template, Entity Declarations, Target DTD

- What are Read/Write Rules?

Read/Write Rules are sets of instructions to correctly convert a Structured FrameMaker file into XML or SGML instance or the other way around. The process of writing a Structured FrameMaker file out to XML/SGML and then back into Structured FrameMaker is referred to as "Round-tripping" or a "Round Trip".

