DITA and Tridion Docs Work Instructions and Guidelines

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Contents

Chapter 1: Content model overview

Content model

The Avaya content model provides an organizational framework for categorizing and organizing Avaya product content so that it can be delivered and reused in a variety of ways.

The Avaya content model defines the types of content we develop and the structure of that content, and is based on the principles of topic-based authoring, information typing, structured authoring, content relevance, and semantic intent.

The content model includes a collection of standard information types and deliverable standards:

- Each information type represents one type of content that we create, at a topic level, and has a specific intent.
- Each information type is made up of a series of content elements, in a prescribed order.
- Each deliverable standard is designed to meet a specific need of one or more of our defined user types. The typed content topics are “mapped” into the standard outline. The standards are available in Compas and the supporting files are in SDL repository.

The content model is independent of any particular technology or tools. The technology and the tools are enablers; the content is still the focus. We can apply our model to different technologies and authoring tools. The content model is the foundation of what we do and sets us up for the future.

The goal of developing the content model is to enable us to create relevant, consistent content that supports our users’ goals, and supports our goals for our outputs in the future.

Metadata can also be applied to content at the element, topic, or map level. Metadata is information about the content, like audience, product, platform, and version. This information describes the context in which the content should be used. Metadata can be used during processing to filter content for outputs, to customize navigation, or to prepare search indexes, to name a few.

Related links

Publications on page 29
DITA on page 13

Why XML

The following are the primary reasons why the Avaya Global Information Solutions (GIS) team moved to an XML environment:

- Separate content from presentation
- Structural integrity
- Semantic markup

Separate content from presentation

In an XML environment, the creation of the content is separated from the presentation of that content, which provides the following benefits:

- Writers work with greater efficiency when they no longer have responsibility for presentation.
- Common look and feel is achieved because the production system applies presentation styles rather than individual authors.
- Content is easier to include in multiple information products.
- Translations costs are reduced because multiple outputs are derived from the same source and content production is done by the production system rather than by translations vendors.
- Presentation is out of the way until it is needed.
- Vendor independence; no conversion required to move to another vendor.

Structural integrity

With XML, content has a prescribed structure to which the authors must adhere. With this, authors can focus more on the actual content, since the topic structure prescribes the elements that must be included. Structural integrity has the following additional benefits:

- Despite the change in ownership from one writer to another, document structure remains consistent.
- Documents across projects owned by different writers remain consistent.
- Consistent structure makes it much easier to get consistent, successful results from automated production tools.

Semantic markup

In XML, DTDs can express the semantics of a writing methodology through element naming and element content rules. This enables a shift in focus of the writing effort from presentation to the underlying semantics of the content. This shift in focus can enhance an author's ability to create content that more closely adheres to the intent of the writing methodology. Each author must consider the purpose of the content they're creating, which helps produce more relevant content and reduces the inclusion of irrelevant content.

DITA

The Darwin Information Typing Architecture (DITA) is an OASIS-standard XML framework for creating topic-oriented, information-typed content that is rapidly becoming the standard in the information development community. Many of the principles behind DITA are aligned with the authoring principles and user-focused strategy that we're moving to for content development. DITA provides a standard set of DTDs that prescribe content structure, but allows customization to meet our specific needs (through a feature of DITA called specialization).

In DITA, a topic is the basic unit of authoring and of reuse. A topic is a unit of information with a title and some form of content, short enough to be specific to a single subject or answer a single question, but long enough to make sense on its own and written as a unit.

The following basic topic types are defined in DITA:

- Task: Describes the steps to perform a task.
- Concept: Introduces the background or overview information for tasks or reference topics.
- Reference: Describes regular features of sets of things, such as commands in a programming language and specifications of a hardware component.

In addition to these basic topic types, we have defined three additional information types for our model: Resolution, Scenario, and Structure.

Topics are mapped into deliverables using a special object type called a DITA map. A DITA map identifies the sequence and hierarchy (outline) of the topics in a deliverable. Different output types (PDF, Web content, application-embedded assistance, online help, etc.) can all be constructed from the same set of underlying topic content. However, there may be some topics that are unique to a particular deliverable type, and the organization of topics may differ to take advantage of the unique capabilities of each delivery mechanism.

Related links

Content model on page 12

Content relevance guidelines

The following are some tips for creating relevant content in our content model:

- Identify user goals and validate them with your users
- Keep the sentences simple that your user can read once and understand
- Trim the fat:
  - Use active voice—find the true subject and verb to improve clarity
  - Remove unnecessary adjectives and adverbs
  - Remove redundancy
  - Use one word instead of many
- Rewrite and restructure existing content as it transitions to XML to remove unnecessary content

- Remove “glue” text:
  - No transitional text between topics
  - No mini TOCs at the start of components, unless required for context-sensitive help
  - No stem sentences in tasks
- Eliminate unneeded introductory explanations. Write only the overviews that users need
- Do not explain what’s obvious
- Do not present the entire screen image, crop the required portion of the image
- If there are more than one way, explain the most common way
- Layer the information for different users (progressive disclosure)

Starting a new DITA project

Procedure

1. Contact the information architect to discuss about the project, including the current content and any requirements such as any specific requirements for context-sensitive help.
2. Determine if any use cases are available for the project. If available, use the use cases, any project requirements/design documents, and any recent user research to help determine the content that must be developed for the release.
3. Review the common patterns for deliverables and map the current project content into the structure at a high level.
4. Look at the common topics and reusable elements available in the `/Common` directory in the repository to see if any element can be reused in your content.
5. Start developing new topics using the appropriate topic types.
6. Begin developing maps based on initial structures you defined, and start including the topics you create in the maps.
7. Identify any initial candidates for reuse in the new content, including topics or elements that you think are good candidates for common topics or elements for multiple projects.
8. Update or create reusable element topics (project names, application names, glossary topics, etc.) as necessary for your project.
9. Continue to build topics, component DITA Maps, and deliverable DITA Maps.

Chapter 2: Topic types

Concept topics

Concept contains information that helps a reader understand something. Conceptual information can define a term, describe a product or a feature, or provide other information that can help a reader to reach a goal. Examples of concepts include definitions of features, product descriptions, and so on.

Definition

Conceptual information explains ideas to a reader. Examples include:

- Functional descriptions
- Terminology
- Scenarios
- Abstractions

Purpose

Writers include conceptual information for several reasons:

- Provide supporting information for tasks
- Define terminology
- Furnish context
- Increase understanding

Role in product content

Concept topics support tasks in information domains where tasks can be concretely described. Concept topics assume more importance in information domains where readers must synthesize tasks to accomplish their goals. For example, an API guide for a product would not lend itself to task-oriented documentation. In this case, the content would have to furnish enough concept and reference information so that the reader would have enough background to synthesize tasks.

Concept types

A Description concept provides background information that users must know before they can successfully work with a product or interface.

A type of description concept is a process, which will be presented in an ordered list. It’s a concept rather than a task because, while events are taking place in a sequence, the user is not performing actions. For example, a series of functions that the system performs would be considered a process but a high-level set of steps that a user performs would be a task.

Concept topic templates

The `Concept.dita` template is available in SDL repository for concept topics.

Task topics

Task contains procedural information.

Definition

Task is exactly what you think it would be. It consists of the following:

- Prerequisites
- Context
- Steps
- Results
- Post-requisites (next steps)

Purpose

Writers include task information to tell readers how to perform a task.

Role in product content

Task topics are the focal point of task-oriented content. Other information types are often used to support tasks. You can also use task topics to present scenarios that include steps.

Task types

Standard task
: The Standard task provides the information a user needs to perform a procedure that requires more than one step. At a minimum, a Standard task must include all steps the user must perform and the correct order of those steps. A Standard task can also provide:

  - Notes and other useful details
  - Expected results of the procedure
  - Any prerequisites or postrequisites

Graphical task
: A Graphical task is a series of steps that are expressed in a graphical format. At a minimum, a Graphical task must include a single step that includes the image file that depicts the steps the user must perform. A Graphical task can also provide:

  - Notes and other useful details
  - Expected results of the procedure
  - Any prerequisites or postrequisites

Task topic templates

The following templates are available in SDL repository for the Task topic types:

Standard task: A template named Task.dita is available for standard task topics.

Graphical task: A template named GraphicalTask.dita is available for tasks that are a graphical representation of a task.

Scenario task: A template named ScenarioTask.dita is available for tasks that depict a scenario.

Reference topics

Reference contains factual information that readers need to look up. This data or facts can be necessary to understand a concept or perform a task correctly.

Definition

Reference information contains facts, specifications, or data that readers might want to access. Examples include:

- API descriptions
- Command syntax
- Specifications
- Requirements
- Performance data
- Database schema definitions

Purpose

Writers include reference information to:

- Provide supporting information for tasks
- Make facts available

Role in product content

Reference topics support tasks in information domains where tasks can be concretely described. Reference topics gain more importance in information domains that do not lend themselves to task-oriented content.

Reference types

Requirements	The Requirements type provides values for required elements, such as required hardware, software, and tools.
Specifications	The Specifications type provides values for hardware-related elements of a system that includes the following: • dimensions, such as height and weight • environmental, such as temperature and density • capacities, such as memory and bandwidth • system or components, such as power, jumper settings, and pinouts

Command Reference	The Command Reference provides a list of system commands and can include command names, descriptions, variables, and examples. Sections of this information can be used in other topics.
Worksheet	The worksheets type includes information the user must gather and record or lists of tasks that the user must complete in sequence.
General reference	The General Reference type includes lists and tables of reference information that does not fit into one of the other defined reference types. An example of a general reference is a related documents list.
API	The API type provides API information and can include description, syntax, example, and usage.

Reference topic templates

The following templates are available to create reference type topics:

Topic type	Template name
Requirements	Requirements
Specifications	Specifications
Command Reference	Command
Worksheet	Checklist
	Worksheet — simple table, use for worksheets with a simple structure
	Worksheet — complex table, use for worksheets that require a more complex structure.
General reference	Reference
API	API name

In addition to the standard templates, you can also use the specific reference-type templates: Documentation, Document titles, and Prerequisites.

Structure topics

Structure contains information describes the parts that make up a collection.

Definition

Structure information describes the constituent parts of a collection or assembly, such as

- Part descriptions for any assembly
- Field descriptions for a user interface screen

Note:

For field descriptions that are very complicated and require additional structure, such as tables within a field description, you can use a separate concept topic for each field and then aggregate the topics together in the map.

Purpose

Writers include structure information to quickly describe the function or purpose of each part in a collection.

Role in product content

Structure topics support tasks in information domains where tasks can be concretely described. Structure topics gain more importance in information domains that do not lend themselves to task-oriented content.

This information is also an Avaya specialization. Before deciding to do that, we tried to classify this sort of information as either concept or reference. We found that equally convincing arguments could be given for either choice. At that point, we decided that the information was really its own type, so we created a specialization for it.

Structure topic template

The following templates are available to create the Structure type topic:

Structure: Use the Structure template for standard structure topics.

Graphical structure: Use the Graphical Structure template for structure topics that describe the components in a container depicted graphically, such as the back view of a server. A callout table is included in the template.

Scenario topics

A Scenario type is a topic-length example that helps a user to understand a concept or a task.

Definition

A scenario can include both text and graphics, and can also include an example task. A scenario can be a concept or a task, depending on the type of information being included in the scenario.

Purpose

Writers include scenarios to provide a long example to help users understand a concept or how to perform a task.

Scenario topic templates

The following templates are available to create Scenario type topics:

Concept scenario: Use the Scenario Concept template for scenario topics that provide a conceptual-based illustration of a scenario.

Task scenario: Use the Scenario Task template for scenario topics that provide a task-based illustration of a scenario.

Resolution topics

Resolution contains information about system state and corrective actions.

Definition

Resolution includes information and corrective actions for:

- Alarms
- Errors
- Events
- Troubleshooting

This topic type is based on the troubleshooting topic model in DITA.

Purpose

Writers include resolution information for these reasons:

- Describe a system state that may occur
- Present procedures for resolving problems when the system is in an undesirable state

Resolution topic templates

The following templates are available to create the resolution type topics:

Alarm, event, error: Use the Event alarm error template.

Troubleshooting: Use the Troubleshooting template.

Related links

Creating troubleshooting, alarm, event, and error topics on page 77

Glossary topic

The Glossary topic type provides a term and its definition.

Glossary topic templates

Use the Glossary template to create a glossary term.

Chapter 3: Working with the repository

Browsing the repository

Browsing the repository from Publication Manager

About this task

Use the Browse Repository window to create a topic or map, check out a topic, view properties for a topic, map, or image, import an image, and other tasks.

Before you begin

Start Publication Manager.

Procedure

1. On the Publication Manager menu bar, click **Tools** > **Browse Repository**.

   The Browse Repository window is displayed.
2. In the navigation pane, select the folder that you want to browse.

   The contents of the folder are displayed in the right pane.

Browsing the repository from Oxygen XML Author

Before you begin

Start Oxygen XML Author.

About this task

Use the Browse Repository window to create a topic or map, check out a topic, view properties for a topic, map, or image, import an image, and other tasks.

Procedure

1. In Oxygen XML Author, click **SDL Tridion Docs** > **Browse Repository**.

   The page displays the Browse Repository window.
2. In the navigation pane, select the folder that you want to browse.

   The contents of the folder are displayed in the right pane.

Previewing an object in the repository

You can preview topics, maps, or graphics in the repository. Previewing is really helpful to look for content to reuse and you do not have permissions to check it out or you want to use a graphic and the names are not descriptive.

Procedure

1. On the Publication Manager menu bar, click **Tools** > **Browse Repository**.

   The Browse Repository window is displayed.
2. In the navigation pane, select the folder that contains the topic, map, or graphic to preview.

   The contents of the folder display in the right pane.
3. To view a preview of an object, click the object, and then click **Views** > **Preview** in the tool bar.

   To close the preview, click **Views** > **List** in the tool bar.

Folders

Content in the SDL Tridion Docs repository is stored in folders. When creating a folder, you define the type of content that the folder can contain. Tridion Docs does not use the file name or location of an object for addressing or linking. Therefore, folders are created for organizing, storing, and locating objects.

Tridion Docs assigns each object a unique ID (*GUID*). Therefore, you can move or rename objects or folders to different locations without breaking links or references.

Content folders contain objects, such as DITA maps, DITA topics, reuse files, folders, or images. When you create a folder, you must specify the type of object to be stored in the folder. The folder and the subfolders can contain objects only of the specified type.

The types are:

- Image: Illustrations or photographs
- Map: DITA maps that include, Bookmap, maps, and Avaya-specified maps
- Topic: DITA topics
- Publications
- Other (Word, PDF, ...): Non-XML documents, such as Microsoft Word, Excel, PDF, PowerPoint files, and Zip files.
- Library topic: Currently the Library topic folder type is not in use.

If you need a new project folder in the repository, create a request on the Infosolutions project. There are additional steps required when adding a new project in Tridion Docs. After the project folder is created, you can create subfolders for each deliverable and common content.

Information to create a new project in Tridion Docs

To request for a new project folder in Tridion Docs, you need to create a ticket on Infosolutions project with the following information:

- Product name: To set this metadata when you create topics and maps for this project.
- User group: To set the permissions to the project folder.
- Project name. Project name
- Parent folder: To set a parent folder for the new project folder if the new project does not belong to the existing high-level solution or product family folder. You must check with GIS Program Manager or Program Owner of the project, and let Information Architect know.
- Permissions: Get writer permissions to the new project.
- Product name that must be added in the Product names topic.
- Localization: Inform the localization coordinator to add the new user group to the ServiceUser user.

  Add the localization coordinator to the ticket.
- Conditions.
- Product name and release number, if the documents need to be published on Avaya Documentation Center.

Creating a new folder from Browse Repository

About this task

You can also create a new folder from the web client.

Before you begin

Ensure that you have write permission to the parent folder.

Submit an issue on the Infosolutions project.

Procedure

1. Right-click the folder under which you want to create the new folder and select **New** > **Folder**.
2. In the Add Folder dialog box, type the folder name and set the type of content that the folder should contain.

   To create a folder for one deliverable, for example deploying, set the content type as **None**. Within the deliverable folder, you can create the following subfolders, and set the appropriate content type for each subfolder:

   - Images
   - Maps
   - Publications

- Topics

3. On the Security tab, in the **Owner** field, select the correct user group that is appropriate for the project.

   Important:

   All indicates that anyone with RWS account can access your project folder and modify the content. This could be a major concern.

4. Click **OK**.

Related links

Importing images on page 259

Moving objects across folders in Browse Repository

About this task

Use this procedure to move a map, topic, or graphic from one folder to another.

Note that the movement of the object does not impact the references that made to this object.

Before you begin

- You require write permissions to the source and destination folders.

  You might not have write permissions to most high-level folders.

- If you do not have permissions to the destination folder, submit an issue to the Infosolutions project with a request to move the objects to the destination folder.

Procedure

1. On the Publication Manager menu bar, click **Tools** > **Browse Repository**.

   The Browse Repository window is displayed.

2. In the navigation pane, select the folder that has the object you want to move.
3. In the right pane, select one or more objects that you want to move, and do one of the following:
   - Do the following:
     a. Right-click and select **Move to folder**.
     b. On the Move Object dialog box, browse to the destination folder to which you want to move the objects.
     c. Click **Move**.
   - Drag and drop the objects in the destination folder.

Moving folder from one location to another

About this task

You can move a folder from one location to another in the repository.

Note that the permissions set to the folder might impact the access to the folder.

Before you begin

- You require write permissions to the source and destination folders.

  You might not have write permissions to most high-level folders.
- If you do not have permissions to the destination folder, submit an issue to the Infosolutions project with a request to move the objects to the destination folder.

Procedure

1. On the Publication Manager menu bar, click **Tools** > **Browse Repository**.

   The Browse Repository window is displayed.
2. In the left navigation pane, select the folder that you want to move.
3. At the top of the navigation pane, click the Move folder icon ().
4. In Move folder, browse to the folder to which you want to move the folder.
5. Click **Move**.

   The folder is now available in the new location.

Logging on to the Tridion Docs web interface

About this task

Tridion Docs supports Internet Explorer 11, and latest versions of Google Chrome and Mozilla Firefox.

Procedure

1. On the web browser, type https://avaya001.sdlproducts.com/ISHCM.
2. Type your SDL username and password, and then click **Login**.

Viewing checkin history for an object

About this task

Every time you check in a topic, map, or image, Tridion Docs creates a new revision. This helps in tracking changes made in every checkin. You can use the revision to identify when the error has occurred, and resolve the issue or roll back to the previous revision.

You can view the changes made in a topic, map, or image in each revision of a version, which is checkout and checkin. This feature helps in identifying any error that must have crept in and roll back to previous revision.

Procedure

1. Log in to the web interface.
2. Browse to and select the folder where the object, that is a topic or map, is located.

   The objects in the folder are displayed in the right pane.
3. Select the check box for the object.

   Versions of the object display in the lower pane.
4. Scroll the list of versions to the far right, and select the version that you want to view.

   You must select a version, even if only one version exists. Do not select the check box at the far left. You cannot perform the next step if the check box on the far left is selected.
5. Click **Show History**.

   A new window opens and displays the history of the object.
6. Click **Show/Hide Revision** to view all versions.

   This button toggles the display between all checkins and only first and last checkin.
7. Click **Preview** to compare between revisions.

Changing your SDL account password

About this task

Do not change your password in the Tridion Docs web interface because you will be required to reenter it when you try to perform an action in Publication Manager.

Procedure

1. On the Publication Manager menu bar, click **Tools** > **Account**.
2. In the Accounts dialog box, select your account and then click **Change Password** on the toolbar.

   The Change Password dialog box is displayed.

3. In **Old Password**, type your current password.
4. In **New password**, type a new password.
5. In **Confirm password**, retype the new password.
6. Click **OK**.

Importing non-DITA files to Tridion Docs

About this task

You can import non-DITA files to the Tridion Docs repository to reference in an HTML output or to store for safekeeping. Do not import a lot of non-DITA files into Tridion Docs repository that are not intended to be used in HTML outputs.

Before you begin

Create a folder with the **Content type** set to **Other (Word, PDF, ..)** if you don not already have one. The folder name can be anything, usually, we provide the name Template.

Procedure

1. On the Publication Manager menu bar, click **Tools** > **Browse Repository**.
2. In the navigation pane, browse to and select the folder to which you want to upload the file.
3. On the toolbar of the right pane, click the import icon, which is second to the left .
4. On the Import File dialog box, browse and select the file to import, and then click **Open**.

   You can select multiple files to import simultaneously from a directory. The file types must be word, PDF, excel, zip that the **Other (Word, PDF, ..)** category supports.

   The file is imported to the Tridion Docs repository.
5. Add a title in the repository to a descriptive name rather than the filename:
   a. Right-click the file and select **Properties**.
   b. On the Properties dialog box, modify the value in **Title**.
   c. Click **OK**.

Related links

Adding a non-DITA file to a map on page 51

You can reference a non-DITA files, such as PDF and Excel in a map.

Chapter 4: Working with publications

Publications

In Tridion Docs, you can manage your deliverables by using *publications*.

Publications control the following factors:

- Versions of referenced objects (topics, DITA maps, and images) that are included. The list of referenced objects is called the baseline of the publication.
- Values of variables
- Values of conditions that are included or excluded
- Output format

Each publication references a single DITA map or book map that serves as the deliverable map. The deliverable map can reference as many topics and DITA maps as are needed.

Publication lifecycle

Publications can have multiple versions. When a version is released, no additional changes can be made to it or any of its content. Releasing a publication ensures that the output can always be reproduced exactly. Before a publication can be released, all objects within it must be in the Release state.

Once all of the content is released, you can freeze the baseline. This means that you cannot change the content. However, you can change condition settings and output formats. When output formats generate correctly, you can release the publication. After a publication is released, no changes can be made to that version of the publication.

The sequence of steps in the lifecycle of a publication are:

1. Move the status of all publication components (topics, images, and so on) to Release.
2. Freeze the baseline.
3. Adjust condition settings, output formats.
4. Release the publication.

   You cannot make any changes to the frozen version of the publication. To make changes, you must create a new version of the publication.

Starting Publication Manager

Procedure

From the **Start** menu, click **SDL Tridion Docs** > **Publication Manager 14.0**.

Opening a publication

Procedure

1. On the Publication Manager menu bar, click **Publication** > **Open**.
2. In the Open Publication dialog box, browse to and select the folder where the publication is located.

   The publications in the folder are displayed in the right pane of the dialog box.
3. To view the latest version of a publication, select the publication, and then click **Open**.

   The publication can take a few minutes to open, depending on the size. The system displays the progress. Make sure that you allow the publication to fully open before trying to view other tabs, like the Baseline or Output tabs. If you go to them before the publication is fully open, they'll appear as blank.
4. To open a specific version of a publication:
   a. Click the **Versions** button.
   b. Select the version you want to open.
   c. Click **OK**.
   d. Click **Open**.
5. To view specific version of a publication:
   a. Select the publication, and then click **Versions**.
   b. In the Select Version dialog box, select the version that you want to open, and then click **OK**.
   c. In the Open Publication dialog box, click **Open**.

Creating a publication

Creating a new publication

About this task

Create a new publication when you are creating a brand new deliverable. If you are updating an existing deliverable, create a new version of the existing publication.

Procedure

1. On the Publication Manager menu bar, click **Tools** > **Browse Repository**.

   The Browse Repository window is displayed.

2. In the navigation pane, select the folder where you want the publication saved.

   Publications must be saved in a folder that is named `Publications` and has the **Content type** set to **Publications**.

3. On the toolbar of the right pane, click ➕.

   The system displays the Select Template dialog box.

4. Click **Empty Publication**, and then click **Next**.
5. Complete the fields on each tab as appropriate.
6. Click **OK**.

Related links

Publication properties on page 32

Creating a new version of a publication

About this task

Create a new version of a publication when you want to modify the publication after it has been released. The new version is a copy of the old version.

Important:

If you create a new version of a publication from a released version of the publication, all content in the new version is in a released state. You must create new versions of the objects that you want to edit. Also, if you publish the output immediately after creating a new version of a publication, you'll notice that the Status is Release Candidate. This is because all of the objects are in the Released state. After you create a new version of any of the objects in the publication, the status changes to Draft the next time you publish it.

Procedure

1. On the Publication Manager menu bar, click **Publication** > **Open**.
2. In the Open Publication dialog box, browse to and select the folder where the publication is located.

   The publications in the folder are displayed in the right pane of the dialog box.

3. Select the publication for which you are creating a new version, and then click **Versions** at the bottom-left of the page.

   The Select Version dialog box is displayed.

4. Right-click the version from which to create a new version, and then click **New Version**.

   A new version is displayed in the Select Version dialog box.

5. Click **OK**.
6. Modify the properties of the new publication version if necessary.

Related links

Using Publication Manager to create a new version or branch on page 239

Saving a publication as a new publication

About this task

You can save a publication as a new publication to create a variant of the original publication. You might want to create a variant to change an aspect of the original publication such as a condition. Do not save a publication as a new publication just to make updates or work on the next release of the product. In those cases, you should create a new version of the existing publication.

The publication is saved as a new publication in the repository. Note what is copied to the new publication:

- The reference to the deliverable map is copied; however, the deliverable map is not copied.
- The content of the original baseline is copied into a new baseline.
- The conditions selected to include in the output.
- The publication output formats are the same as the original, and the status changes to **To be Published**.

Procedure

1. In Publication Manager, open the publication to use as the basis for the new publication.
2. On the toolbar, click **Publication** > **Save As**.

   If you have made changes, the system prompts you to save the changes.
3. Click **Yes** to save changes if prompted.
4. In the Select Target Folder dialog box, select the folder in the repository to put the copy of the publication. Then click **Next**.
5. In the Add Publication dialog box, enter the necessary metadata, and then click **OK**.

Related links

Publication properties on page 32
Opening a publication on page 30

Publication properties

These properties are displayed in the New Publication dialog box and in the Properties dialog box for a publication.

General tab

Name	Description
Title	Title for the publication. The title can contain alphanumeric characters, spaces, hyphens, and underscores. Do not use slashes, asterisks, or other special characters. This is a required field. Example: `Administering Communication Manager 8`. The title appears as the filename of the output, additionally, the publication version, language, and output format is appended. For example, Administering Communication Manager 8.0=3=Avaya Book=en-us. The maximum number of characters in an output filename is 116 characters. Out of which, 9 characters are used for the version number, language, and separators. The length of the output format name can vary, with the maximum being 30 for the “Avaya 3–column Quick Reference”. The remaining characters are used for the publication title. If the title is long and if there are no enough remaining characters, the complete publication title is not included in the output filename. You can rename the output filename after you download it, or you can shorten the name that fits within the supported characters.

Table continues…

Name	Description
Publication Type	The type of publication. This is a required field. The options are: • Administering • Article • Article for Administrator • Deploying • Documentation Library • Feature Description • Feature Pack Description • Getting Started • Glossary • Help System • Job Aid • Maintaining • Overview and Specification • Quick Reference • Reference Configuration • Release Notes • Snap-in Reference • Solution Description • Troubleshooting • Upgrading • Using • Videos • What's New
Description	A description of the publication. This field can contain any text and is optional.
Requested languages	For localization only.

Version tab

Name	Description
Version	Version of the publication. This field is auto-populated and cannot be modified.

Table continues…

Name	Description
Changes	A description of changes in this publication. This field can contain any text and is mandatory for new versions and branches. The description must contain the reason for creating this version. For example, For 8.0 updates, Localization updates, and SMGR-12345 updates.
Working language	en-us
Working resolution	Low

Avaya-specific fields tab

Name	Description
Created Date	Date on which you create the publication. This field is required. Do not modify **Created Date**, instead provide or modify the **Revised Date** to specify the publication updated date. This date appears in the following locations: • The cover page of the book in the month year format. For example, November 2020 • Copyright year in the legal page • Footer **Important:** Do not enter the first or last day of a month in the date. The first or last day of the month might display incorrect month on the front cover of the book due to time zone differences.
Release Number	Product release number for which you created this version of the publication. This number appears on the front cover of the book with the text “Release” prepended. However, if you type “Release 8.0”, you still see Release 8.0 in the output because Tridion Docs removes the text “Release” from the field. The text you include after the number continues to display on the front cover of the book.

Table continues…

Name	Description
Revised Date	The date of a new release of the publication. The date in this field takes precedence over the date in **Created Date** and appears on the front cover of the book. The **Created Date** and **Revised Date** fields are used to automatically generate a copyright range in the legal page and in the footer of the output. See “Specifying a copyright range for an output”. You can use the **Revised Date** to specify that the date on the cover must automatically reflect the publish date. See “Setting the date of your outputs to the current date”. **Important:** Do not enter the first or last day of a month in the date. The first or last day of the month might display incorrect month on the front cover of the book due to time zone differences.
Issue number	The issue number of the publication. This number is displayed on the front cover of the book with the text “Issue” prepended. This field is optional. However, if you type “Issue 2.0”, the output displays “Issue 2” in the PDF output because Tridion Docs removes the text “Issue”, decimal, and any number after the decimal. The text you include after the number continues to display on the front cover of the book. For draft outputs you can use issue numbers such as 1.0.5.
Book number	The book number for the publication. This number appears on the cover of the book. This field is optional.

Related links

[Creating a new publication](#) on page 30
[Viewing or changing the properties of a publication](#) on page 37
[Saving a publication as a new publication](#) on page 32
[Specifying a copyright range for an output](#) on page 127
[Setting the date of your outputs to the current date](#) on page 128

Viewing or changing the properties of a publication

About this task

You can change the title, publication type, description, baseline, or add comments to an existing publication.

Procedure

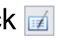
1. On the Publication Manager menu bar, click **Tools** > **Browse Repository**.

   The Browse Repository window is displayed.

2. In the Browse Repository dialog box, browse to and select the folder where the publication is located.

   The publications in the folder are displayed in the right pane of the dialog box.

3. To view the properties of the most current version of the publication:

   a. Right-click the publication, and then click **Properties**. Alternately, you can click  on the toolbar.

   b. **(Optional)** Change or add properties.

   c. Click **OK**.

4. To view the properties of a version other than the most current:

   a. Select the publication for which you are viewing or changing properties, and then click **Versions** at the bottom of the right pane.

      The Select Version dialog box is displayed.

   b. Right-click a version, and then click **Properties**. Alternately, you can click the **Properties** icon in the toolbar.

   c. **(Optional)** Change or add properties.

   d. Click **OK**.

Related links

Publication properties on page 32

Copying objects from one publication to another

About this task

You can copy a part, chapter, or other object in one publication and paste the object in another publication. But if you want to include the same chapter or part in another publication, the preferred method is to just add the chapter or part directly to the other publication.

Procedure

1. In Publication Manager, open the publication from which you want to copy.
2. In the publication tree, right-click the object to copy, and then click **Copy**. This can be an entire part, an entire chapter, or a link to another object.
3. Open the publication to which you want to copy.
4. Check out the map into which you want to paste the copied item.
5. In the publication tree, right-click the desired location in the map.
6. On the menu bar, click **Edit** > **Paste Special**.
7. In the Paste Special dialog box, select **Structure and baseline information** and click **OK**.

Saving a publication

About this task

When you finish modifying a publication, you must save to update the repository with changes.

Use this procedure to save a publication that is currently opened and displayed in the Publication Manager.

All changes you have made to the publication are saved to the repository: changes to all maps, selected version of topics and graphics, metadata updates, and so on.

Procedure

1. On the Publication Manager toolbar, click **Publication** > **Save**.

   If any objects in the publication are checked out, you are prompted to save them and check them in.
2. **(Optional)** If you are prompted to save and check in objects that are checked out, select **Apply to all** to suppress individual prompts to save and check in.

   Any checked out objects are automatically saved and checked in.

Closing a publication

Procedure

1. On the Publication Manager toolbar, click **Publication** > **Close**.

   If objects in the publication are checked out, you are prompted to check them in. If the publication has changed, you are prompted to save it.

2. If prompted to check in an object:
   a. Select an option: **Check in current object**, **Undo checkout**, or **Make available in local storage**.
   b. To apply your selection to all objects that are checked out and suppress additional prompts, select **Apply To All**.
   c. Click **OK**.
3. If prompted to save the publication, click:
   - **Save** to save and close the publication.
   - **Don't Save** to close the publication without saving the changes.
   - **Cancel** to leave the publication open without saving changes.

Capturing the word count for a document

You can use the Tridion Docs workflow report to capture the word count for a document. This is useful if your content is translated and you need to provide an estimate to Localization.

Note:

The word count from the workflow report is based on the publication baseline. The baseline includes all objects referenced in the publication, such as topics you reuse from and content that might be excluded from the output using conditions. So the word count based on the baseline can include more words than what's in the output. This is the appropriate word count to provide to Localization.

Before you begin

A publication must exist for the document.

Procedure

1. Generate a workflow report for the publication.
2. Export the Details section of the report:
   a. Click **Download Statistics Report** in the toolbar.
   b. Click **Save** in the File Download dialog box.
   c. Browse to and select a location to save the report, and then click **Save**.

   Note:

   Do not click **Send and Export** or **Export** in the toolbar. These buttons export the publication, not the report.

   The report is exported as a `.csv` file. This file does not include the Statistics section of the report.

3. Open the statistics report you downloaded.
4. Select the Word Count column and sum the entries to capture the total word count.

Related links

Generating a workflow report on page 217

Capturing the file count in a publication

You can use the Tridion Docs workflow report to find the number of topics, maps, and images in a publication. You might need this information to plan for activities, such as review and conversion.

Note:

The file count from the workflow report is based on the publication baseline. The baseline includes all objects referenced in the publication, such as topics that you reuse from and content that might be excluded from the output using conditions. So the files in the baseline can include more objects than that available in the output.

Procedure

1. Log in to the Tridion Docs web interface.
2. Click the **Repository** tab.
3. Navigate to the folder that contains the publication for which you want to generate a workflow report.

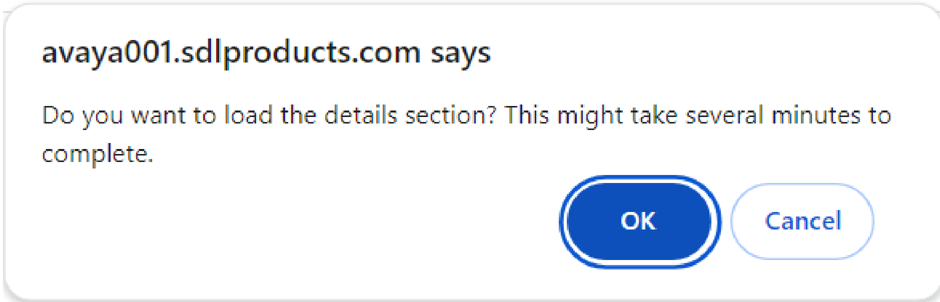
   The page displays the contents of the folder in the right pane.
4. Click the title of the publication for which you want to generate the report.

   When you only select the box next to the title, the page does not display the details of the publication.

   The page displays versions in the lower right pane.
5. Select the check box next to the publication version for which you want to generate the report, and then click **Workflow** in the toolbar of the lower right pane.

   The page displays a Workflow management window.
6. In the Workflow management window, click **use baseline information only**, and click **OK**.

   A new window opens and the reports begins to display. A message displays to confirm if you want to load the details section of the report, as it can take several minutes to display depending on the number of objects in the publication.



7. Click **Cancel**.
8. To export the Details section of the workflow report:
   a. Click **Download Statistics Report** in the toolbar.
   b. Click **Save** in the File Download dialog box.
   c. Browse to and select a location to save the report, and then click **Save**.

   Note:

   Do not click **Send and Export** or **Export** in the toolbar. These buttons export the publication, and not the report.

   The report is exported as a `.csv` file. This file does not include the Statistics section of the report.
9. Open the statistics report you downloaded.

   The row count gives the number of objects in the publication. The objects include the topics, maps, and images.
10. To find the topic count in the publication, do the following:
    a. Open the `.csv` file in Microsoft Excel.
    b. To sort by topics, click **Data** > **Filter**, and in the **Type** column, select **ISHModule**.
    c. Take the count of the topics in the **Title** column.

    Note:

    Ensure that you account the following topics only once:

    - Topics common to all programs: For example, Product names, Application names, Snap-in names, Variables, Languages
    - Topics common to specific project: For example, common steps, common terms, common uicontrol elements, common wintitle elements, documentation titles, legal page.
    - Topics reused from other projects: For example, common steps, common terms, common uicontrol elements, common wintitle elements.

d. To find the topic count in all documents of a product, do the following:

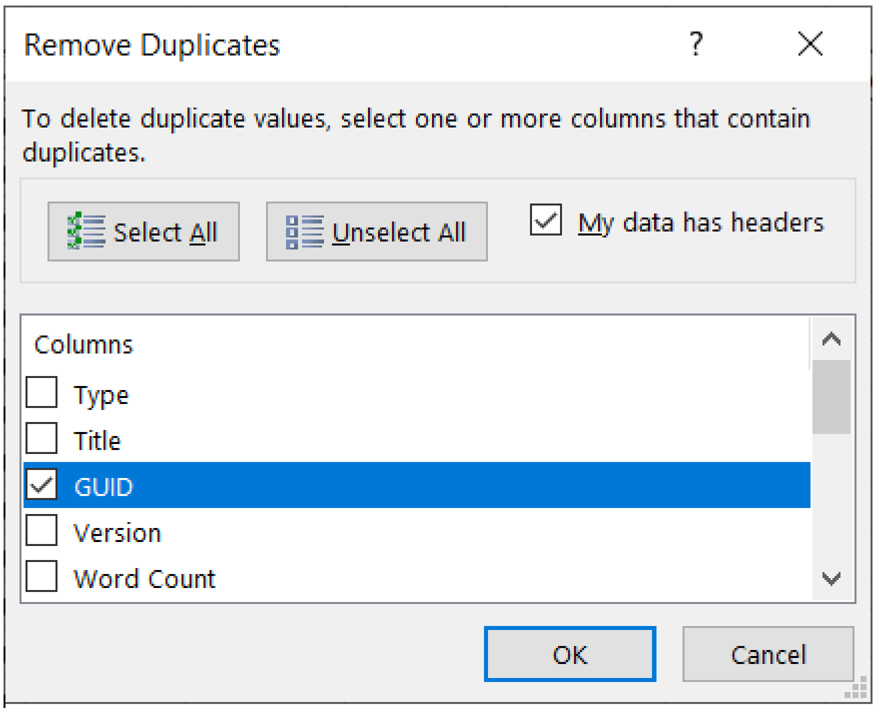
   a. Open the `.csv` file of the first document in Microsoft Excel, example, POS.

   b. Open the `.csv` file of the second document, copy all rows except the header row, and paste the rows in the first Excel sheet below the existing data. Similarly, copy the rows from remaining csv files of documents for the product into the first Excel file.

      You now have all the data from all documents in the product.

   c. Press `Ctrl+A` to select all the data and click **Data**, in the **Data Tools** group, click **Remove Duplicates** icon (.

   d. In the Remove Duplicates dialog box, click **Unselect All**, and select the GUID check box, and click **OK**.



   e. To sort the data by topics, click **Data** > **Filter**, and in the **Type** column, select **ISHModule**.

      The message in the footer displays `<num1> of <num2> records found`. Where, `num1` is the topic count in all publications of the product. For example, in `340 of 420 records found`, `340` is the total topic count.

Chapter 5: Creating and modifying DITA maps

Content components

A component of information is “the largest group of topics that won't ever be split apart as a result of remarketing, repackaging, technological componentization, user tasks, or scenarios” (as defined by IBM).

Our practice is to create a component for each chapter (a chapter map). If you have a complicated deliverable, you can create component maps within a chapter. Then the chapter map will reference the component maps. You can have a mix of component maps and individual topics in a chapter map.

DITA Maps and BookMaps

DITA Maps and BookMaps are special types of DITA topics that define the organization, order, hierarchy, and linking of topics in a deliverable. Maps provide the context for DITA topics.

DITA Maps and BookMaps provide only pointers to topics, the topics are not embedded inside the maps. This allows the same topic to appear in different deliverables.

DITA Maps and BookMaps have specific uses:

- Use the DITA Maps to create component maps. Component maps can be at the chapter level or at lower levels if you have a complicated chapter. Create a map to contain topics at the chapter level.
- Use the BookMap for deliverable maps. DITA Maps is used to produce PDF, HTML, and .chm and other customized outputs. You will nest component DITA Maps in a Bookmap. However, you cannot nest BookMaps in a BookMap.

  You must create only one BookMap for a publication.

  You can also select a template BookMap appropriate for the document that you plan to create. For example, Administering and Deploying.

A DITA Map and BookMap typically contains two parts:

- The top part of the map defines the order and hierarchy of the topics in the deliverable.

- The bottom part contains the relationship table. A relationship table defines the linking between the topics.

Deliverable map

A publication has only one deliverable map. Use only book map as a deliverable map for the publication. The structure (hierarchy) of the references determines the structure of the publication.

You can also select a template BookMap appropriate for the document that you plan to create. For example, Administering and Deploying.

Creating a map

About this task

A video about creating and editing maps in Tridion Docs is available at Basics of creating a document.

Before you begin

Save maps in the `Maps` folder, and set the **Content type** to **Map**.

Procedure

1. On the Publication Manager menu bar, click **Tools** > **Browse Repository**.

   The Browse Repository window is displayed.
2. In the navigation pane, browse to and select the folder where you want the map saved.
3. On the toolbar of the right pane, click ✚.

   The system displays the Select Template dialog box.
4. Click **Bookmap**, **Map** or any bookmap template, for example, Deploying, and then click **Next**.

   The system displays the Add Object dialog box.
5. Complete the fields on each tab as appropriate.
6. Click **OK**.

Related links

Map properties on page 45

Map properties

These properties are displayed in the Add Object dialog box and in the Properties dialog box for a map.

General tab

Name	Description
Title	Title for the map. The title can contain alphanumeric characters, spaces, hyphens, and underscores. Do not use slashes, asterisks, or other special characters. This is a required field. Example: `Managing users`
Content type	**Map** or **Bookmap**. Auto-populated based on your selection when you created the map.
Description	A description of the map. This field can contain any text and is optional.
Enable translation management	For localization only.
Requested languages	For localization only.

Version tab

Name	Description
Version	Version of the map. This field is auto-populated and cannot be modified.
Changes	A description of changes in this map. This field is relevant if the map is a new version of an existing map. This field can contain any text and is mandatory for new versions and branches.
Candidate for baseline	This is a blank field.
Baseline label	This field lists the frozen baselines that use this topic. This field is automatically populated.

Workflow tab

Name	Description
Language	The language of the object. This field is automatically populated

Table continues…

Name	Description
Status	Workflow status. Options are: • Draft • Editorial review • Pre-release validation • Technical review • Released You can move an object to the Released state only when the object is in the Pre-release Validation state.
Author	Owner of the map.
Last modified by	The last person who modified the topic. Auto-populated.
Source language	This field is blank.
Comments	Comments about the workflow. This field can contain any text and is optional.

Avaya-specific fields tab

Name	Description
Product Family	Product category/family that the Product belongs to. This is a required field.
Product	Product that this topic supports. This is a required field.
Component	Product components will be set up by the system administrator on a case by case basis. Talk to the system administrator if you think a product component is appropriate for your product.
Contributor	This field is not currently used.
Doc Lead	The user who has responsibility for this content and can move the object to the Released state in workflow. This a required field.
Localization Coordinator	For localization team only.

Table continues…

Name	Description
Reviewer	You can optionally specify another Tridion Docs user as a reviewer for an object. This is useful when content is in the editorial review phase in workflow and you want the object to appear in the inbox of the selected user. The user that you want to select in the **Reviewer** field must be assigned the role of Reviewer in Tridion Docs. Open a ticket on the Infosolutions project to add the Reviewer role for the user if the name is not available for selection.

Related links

Creating a map on page 44

Important information about copying elements

If you copy elements, such as steps, numbered lines or bulleted lines and paste them within the same topic, you need to change or remove the ID of the element when you paste it. When you copy an element, the ID is copied also. And unless you change the ID, duplicate IDs will exist when you paste the copy.

If you attempt to reuse an element that has a duplicate ID with the same topic, errors might occur. For example, the conref might display text from the incorrect element. Duplicate IDs within the same topic is invalid XML and might produce various types of errors.

Important:

When you copy a topic, the topic is assigned a new ID but the elements will have the same IDs as in the original topic. However, this will not cause any issues because the topic ID is always included in the references. Therefore, all references are unique.

If you are copying an element, pasting it, and not modifying the text, set up a conref rather than copy. If you are copying an element, pasting it, and modifying the text, be sure that you change the ID of the pasted element.

Related links

Copying a topic or map on page 48

Copying a topic or map

About this task

You generally use the Duplicate option to create a copy of a topic or map. You can use this alternate option to copy a map or topic to another folder or to the same folder, but very rarely use. You can copy a topic or map and modify it to create a variant of the existing object.

Do not copy a topic or map:

- If you can use the Duplicate option.
- If the topic or map that you need to create is identical to the existing object. You must reuse the original object.

Procedure

1. On the Publication Manager menu bar, click **Tools** > **Browse Repository**.

   The Browse Repository window is displayed.
2. In the navigation pane, browse to and select the folder where the map or topic is saved.
3. In the right pane, right-click the object, and select **Check Out**.

   The topic or map opens in Oxygen XML Author.
4. On the Oxygen XML Author menu, click **SDLTridionDocs** > **Check in as**.
5. In the Select Target Folder dialog box, browse to and select the folder to which you want to copy the object, and then click **Next**.

   Save maps in the `Maps` folder, and set the **Content type** to **Map**.

   Topics must be created in a folder named `Topics` and has the **Content type** set to **Topic**.
6. In the Add Object dialog box, , and then click **OK**.
   a. Enter a title for the new object, change other properties as appropriate.
   b. To edit the content, select the **Immediately check out the object** check box.

      If you skip this step, the new object opens in read-only view. You can check out using **SDLTridionDocs** > **Check out** .
   c. Click **OK**.
7. If the topic contains a base attribute, remove or modify the value:
   a. Check out the topic.
   b. Place the cursor in the base attribute at the beginning of the topic.
   c. In the Attributes window, remove or change the value in the **base** field.

      You can include only alphanumeric characters, spaces, hyphens, and underscores. Do not use characters, like slashes, asterisks, periods, parenthesis, or other special characters. The maximum length is 100 characters including spaces.
   d. Check in the topic.

Important:

If a publication contains objects with duplicate values in the **base** field, represented by the **Override Output File Name** field in the Avaya-specific fields tab, the publication fails.

Related links

[Important information about copying elements](#) on page 47
[Creating a copy of an existing topic](#) on page 73

Creating a copy of a map

About this task

Make a copy of a map only if you want to model the structure.

Before you begin

Create a `Maps` folder within your content folder, if it does not already exist.

Procedure

1. On the Publication Manager menu bar, click **Tools** > **Browse Repository**.

   The Browse Repository window is displayed.
2. In the navigation pane, browse to the folder, and select the `maps` folder and the map that you want to copy.
3. Do one of the following:
   - On the toolbar of the right pane, click
   - Right-click, and click **Duplicate** .
4. Change the title of the map.
5. Complete the fields on each tab as appropriate.
6. Click **OK**.

Adding objects to a map

Adding a topic or map to a map

About this task

Use this procedure to add topics or component maps to a DITA map.

Procedure

1. Open the publication in Publication Manager.
2. Expand the map to which you want to add the topic or map.

   The map is checked out automatically when you expand it.
3. To add an object before an existing object, right-click the existing object, and then click **Insert before**.
4. To add an object as a child of an existing topic, right-click the parent topic, and then click **Add within**.
5. In the Insert Values dialog box, click **Browse** and browse to the folder where the object is located.

   The objects are displayed in the right pane.
6. Select the object that you want to add, and then click **Insert**.

   Tip:

   Alternatively, you can drag the object and drop a topic where you want to insert in the map. For maps, use the browse method so that the name displays in the publication structure. Do not add bookmaps to other bookmaps.
7. Enter data for other attributes in the Insert Values dialog box if appropriate, and then click **OK**.
8. Check in the map when you finish editing it.

Related links

Suppressing linking to nested topics on page 173
Opening a publication on page 30
Checking in a map on page 64

Adding multiple topics to a map

You can add multiple topics to a map at the same time.

Procedure

1. Open the publication in Publication Manager.
2. Expand the map to where you want to add the topics.
3. Open the Browse Repository window if it's not already open and position it so you can also see the map in Publication Manager.
4. In the Browse Repository window, do one of the following:
   - To select contiguous topics, press `Shift` and select the topics you want to add.
   - To select noncontiguous topics, press `Ctrl` and select the topics you want to add.

5. Drag and drop the selected topics from the Browse Repository window to the map in Publication Manager.
6. In the Template Selection dialog box, click **Topic Ref**, select the **Apply to All** check box, and click **OK**
7. Reorder the topics if necessary.
8. Check in the map when you finish editing it.

Adding a non-DITA file to a map

You can reference a non-DITA files, such as PDF and Excel in a map.

About this task

You must include the PDF or Excel file that you want to reference in a map regardless of whether you want it to appear in the table of content (TOC) or if you just want to insert an xref to it. Insert references to objects like PDF or an Excel file only in a publication that is published as HTML.

Important:

A PDF output with references to Excel or PDF fails.

Before you begin

- Import the file into Tridion Docs.
- A user who views the HTML must have appropriate application installed to view the type of file you want to include. Therefore, include common file types, such as PDF or Excel.

Procedure

1. Open the publication in Publication Manager.
2. Expand the map where you want to add the reference to the non-DITA file:
   - To add an object before an existing object, right-click the existing object, and then click **Insert before**
   - To add an object as a child of an existing topic, right-click the parent topic, and then click **Add within**.
3. Click **Topic Ref**.

   The map is automatically checked out and the Insert Values dialog box displays.
4. In the **Href** field, click **Browse** and browse to the folder where the object is located.

   The objects are displayed in the right pane.
5. Select the object that you want to add, and then click **Insert**.

   Tip:

   Alternatively, you can drag the object and drop the file to where you want it inserted in the map. If you drag and drop the file into the map, make sure that you edit the XML attributes correctly.

6. Set the attributes for the reference to the non-DITA file:
   a. In **Navigation Title**, type the name in the output for this file.

      Provide complete navigation titles, such as Change history and Optimization and scalability. Titles such as Change history_SM_Dep and Optm & Scal are incorrect and cannot be translated.
   b. Click **OK**.
7. If you are including the non-DITA file to add an xref to it and you do not want the file to appear in the TOC:
   a. Right-click the topicref, select **XML Attributes**.
   b. In the **Toc** field, click **no**.
   c. Click **OK**.
8. Check in the map when you finish editing it.
9. Edit the map in Oxygen XML Author to set the locktitle attribute so that the navtitle displays in the TOC or link text rather than the GUID:
   a. Right-click the map in the repository and click **Check Out With** and select Oxygen XML Author.
   b. When the map opens in Oxygen XML Author, place the cursor in the topicref that references the non-DITA file.
   c. In the Attributes window, in the **Locktitle** field click **yes**.
   d. Check in the map.

Related links

[Importing non-DITA files to Tridion Docs] on page 28
[Inserting a cross reference to a non-DITA file] on page 180

Inserting a topichead into a map

About this task

Use this procedure to insert a topichead to a DITA map.

When you add objects to maps or bookmaps, the icons next to some elements have red bar through them. Icons with a red bar indicates that the element is not directly referencing any objects. For example, topichead elements always have a red bar because they contain titles and never reference objects. Conversely, chapters that directly reference a map or topic do not have a red line.

Procedure

1. Open the publication in Publication Manager.
2. Expand the map to which you want to add the topichead.

3. Do one of the following:
   - To add an object before an existing object, right-click the existing object, and then click **Insert before**.
   - To add an object as a child of an existing topic, right-click the parent topic, and then click **Add within**.
4. Select **Topic Head**.

   When you select **Topic Head**, the map is automatically checked out.
5. In the Insert Values dialog box, , type the title that must appear in the output in the **Navigation title** field, and then click **OK**.

   Provide complete navigation titles, such as Change history and Optimization and scalability. Titles such as Change history_SM_Dep and Optm & Scal are incorrect and cannot be translated.
6. Check in the map when you finish editing it.

Bookmaps

Bookmap elements

You need a bookmap to generate PDF, HTML, HTML5 and other outputs. Some of the basic elements of a bookmap have been added to the template, but you will need to populate those elements and add the additional elements that you need to include in the book output. The following table lists and describes the bookmap elements.

Element	Child elements	Description
Booktitle		Parent element for: • MainBook Title • Book Title Alt • Book Library
	MainBook Title	The title appears: • On Avaya Documentation Center, at the top on every page of the document. • In PDF: The cover of the book and, if Book Title Alt is not specified, in the document footer.
	Book Title Alt	If specified, this title appears in the footer in PDF. You can also use Book Title Alt to create a two-line title for the avayaquickref-3column output type.

Table continues…

<table>
<tr><th>Element</th><th>Child elements</th><th>Description</th></tr>
<tr><td></td><td>Book Library</td><td>Title for the book library if you are creating one. Omit this element if you are not creating a documentation library.</td></tr>
<tr><td>Book Meta</td><td>othermeta/bundle name</td><td>A unique ID for the document that you upload on Avaya Documentation Center.

Important:

You provide the book meta, such as release number and issue number, in the publication properties.</td></tr>
<tr><td>Front Matter</td><td></td><td>Parent element for:
• Notices to add a legal page to the book.
• Book Lists, which is required to include a table of contents in the book.</td></tr>
<tr><td></td><td>• Notices
• Book Lists
  - Table of Contents</td><td>The Notices element is used to add a legal page to the book if one is required. Notices is a child of Front Matter.

Book Lists is the required parent of Table of Contents.

The Table of Contents element adds a table of contents to the book. Table of Contents is a child of Book Lists.</td></tr>
<tr><td>Chapter</td><td></td><td>One chapter is included in the bookmap template. You can add as many chapters as you need. You should create a map for each chapter to contain the chapter contents. Creating chapter-level maps is our best practice as it makes it easier to restructure a publication and it can facilitate reuse.</td></tr>
<tr><td>Part</td><td></td><td>The Part element is used to divide a document's chapters into logical groupings. This element makes it possible for you to provide a title and optional introduction under which to group the chapters.</td></tr>
<tr><td>Appendix</td><td></td><td>Used for appendices.</td></tr>
<tr><td rowspan="2">Back Matter</td><td></td><td>Parent element for Book Lists, which is required to include a glossary or index in the book.</td></tr>
<tr><td>Book Lists
• Glossary List
• Index List</td><td>Book Lists is the required parent of Glossary List and Index List.

The Glossary List element adds a glossary to the book. This element requires a Map Ref that references a map of glossary topics or a single Topic Ref that references one glossary topic.

The Index List element adds an index to the book.</td></tr>
</table>

Editing a bookmap

About this task

Use this procedure to add the elements required for the book. Not all steps will apply to all books. Perform the steps that are appropriate for your book. For example, do not add the legal topic in quick reference guides, articles, and video publications.

Before you begin

Create the bookmap. For more information, see Creating a map on page 44.

Procedure

1. In Publication Manager, open the publication that includes the bookmap.
2. Add a title for the book if one does not already exist:
   a. In the publication tree, expand **Booktitle**, and then right-click **MainBookTitle** and select **XML Attributes**.
   b. Type or overwrite the book title in the Insert Values for ‘Main Book Title’ dialog box and then click **OK**.

      For information about adding a trademark to the Main Book Title, see Adding a trademark to the mainbooktitle in a deliverable map on page 56.
3. **(Optional)** To include a book library that displays under the book title on the cover page:
   a. Right-click the **MainBook Title** element and then click **Insert Before** > **Book Library**.
   b. Type or overwrite the book title in the Insert Values for ‘Book Library’ dialog box and then click **OK**.
4. **(Optional)** Add a short title for the book, which displays in the document footer:
   a. In the publication tree, right-click the publication bookmap and select **Check Out With**.
   b. Select **Oxygen XML Author**.
   c. Make sure the editor is set to **Full Tags**.
   d. Locate the mainbooktitle element within the booktitle element.
   e. Place your cursor after the mainbooktitle element, press `Enter` and select the booktitlealt element.
   f. Enter the alternate book title in the booktitlealt element.
   g. Save and close the publication bookmap.
5. In **Front Matter** > **Notices**, add the legal page.

   A few solutions have unique legal content. For most programs, select the Common Standard Legal Page topic. For more information, see Adding the common legal topic to your publication on page 57.

6. Add chapters to the book:
    a. Right-click the **Bookmap** element and then click **Add Within** > **Chapter**.

       Alternatively, right-click the chapter that comes after the chapter you are adding and then click **Insert Before** > **Chapter**.
    b. In the dialog box that is displayed, click **Browse**, browse to and select the DITA map to add to the chapter and then click **Insert**.
    c. Click **OK**.

    Note:

    - To divide the chapters into logical groups, you can use the Part element. For example, for a large, complicated install guide or upgrade guide that contains different deployment or upgrade scenarios, you can use the Part element to create main headings for each scenario and then group the relevant chapters under the headings. See Creating chapter groupings in a bookmap by using the part element on page 60 for more information.
    - Do not reference a bookmap within a bookmap because a publication can have only one bookmap added at the root level.
7. To add an appendix to the book:
    a. Right-click **Back Matter** in the publication tree and then click **Insert Before** > **Appendix**.
    b. Navigate to the DITA map or topic that you want to add to the appendix.

    If required, you can add more than one appendix to the book.
8. To add a glossary to the book:
    a. Expand **Back Matter** > **Book Lists** in the publication tree.
    b. Right-click **Index List** and then click **Insert Before** > **Glossary List**.

       If the book does not have an index, right-click **Book Lists** and then click **Add Within** > **Glossary List**.
    c. Navigate to the DITA map for the Glossary element.
    d. To add glossary topics, right-click the map and then click **Add Within** and navigate to the appropriate topic.
9. Check in the bookmap when you finish working with it.

Adding a trademark to the mainbooktitle in a deliverable map

About this task

You can add a trademark or registered symbol to the main title only from Oxygen XML Author. You cannot add the trademark symbol in a mainbooktitle from Publication Manager.

Procedure

1. Start Publication Manager and open the publication.

   The Browse Repository window is displayed.
2. Right-click the bookmap and select **Check out with** in Oxygen XML Author.
3. In the mainbooktitle element, select the word to which you want to add the trademark, press `Enter`, and click **tm** the list of elements.
4. Select or double-click the tm element, and in the Attributes dialog box, click **reg** or **tm** in the **tmtype** field.

   Ensure that you place the word that carries the trademark in the tm element, as instructed in step 1. Do not place the tm element after the word because that is semantically incorrect.
5. Click **SDLTridionDocs** > **Check in** to check in the map.

Working with legal content

Legal content for product documents

Add the legal topic to the Notices element in the Front Matter section of the book map. Do not add the legal topic in quick reference guides, articles, and video publications.

The legal team must approve all new legal content requests.

Common legal topic

Use the Common Standard Legal Page topic for all programs. The Hosted Services legal topic is obsolete as of November 2023.

Reuse the common legal topic in your publication directly. License types information is no longer included in the legal topic. Therefore, most programs do not require a project-specific legal topic.

In Tridion Docs, you can find the Common Standard Legal Page topic at `General/Common DITA Supporting Content/Legal/Legal page/topics`. Do not make any changes in the common topic.

You can also access Microsoft Word templates for legal pages and developer content at [MS Word templates].

Adding the common legal topic to your publication

About this task

A few solutions have unique legal content. For most programs, you do not need a product-specific legal topic. Instead, add the Common Standard Legal Page topic directly to **Front Matter** > **Notices**.

Do not change any text in the Common Standard Legal Page topic. Ensure that you select the latest version of the topic in your publication.

Procedure

1. In Publication Manager, open the publication where you want to add the legal page.
2. In the bookmap, do the following:
    a. To add the Notices element, right-click **Front Matter** and then click **Add Within** > **Notices**.
    b. If your bookmap already contains the Notices element, right-click **Notices** and then click **XML Attributes**.
3. On the Insert Values for Notices window, click **Browse** under **HRef**.
4. Browse to `General/Common DITA Supporting Content/Legal/Legal page/topics` and select the Common Standard Legal Page topic.
5. Click **OK**.
6. Check in the bookmap.

Related links

Checking for newer versions of objects in the baseline on page 226

Creating a legal topic for developer content

About this task

For developer content, such as API and SDK documents, create a legal topic using the Legal for developer content template.

You require input from your product team to complete the Schedule 1 section. Do not change any other standard text without checking with the Avaya legal team and your product manager.

Procedure

1. On the Publication Manager menu bar, click **Tools** > **Browse Repository**.

    The Browse Repository window is displayed.
2. In the navigation pane, browse to and select the topics folder where you want the topic saved.

    Save the legal topic in the Common folder for the program.
3. On the toolbar of the right pane, click .
4. Select the **Legal for developer content** template and then click **Next**.
5. Complete the fields on each tab as appropriate.
6. Click **OK**.
7. Check out the topic.
8. Update Schedule 1 at the end of the topic:
    - Make the updates to Schedule 1 based on the input from the product team and delete the note.

- Remove Schedule 1 completely, including the note, if instructed to do so by your product team.

9. Delete the note after the title.
10. Check in the topic.

Next steps

Add the legal page to the bookmap for the publication.

Related links

Editing a bookmap on page 55

Inserting a line break in a book title for a PDF output

About this task

You can create a multiline title with specific line breaks in a PDF output.

Note:

If your publication is being translated, you must add a line break at the end of the mainbooktitle after the last word. This has no impact on your outputs but it provides a placeholder line break for localization that they can move if they need it for a translated version of the output.

If your publication is being translated, add a line break at the end of the mainbooktitle after the last word. Adding a new line does not impact your output, but it provides a placeholder line break for localization. The localization team can move if additional space is required for a translated version of the output.

Procedure

1. Right-click the bookmap and select **Check out with** in Oxygen XML Author.
2. Put your cursor in the mainbooktitle element where you want to enter a line break.
   - To add new lines to an existing title, place the cursor before the word that you want to move to the second line.
   - To add new lines to a title, place the cursor at the end of the name, insert the new line, and type the text to appear on the second line.

   Note:

   If you include more words in a line than can naturally fit, the line splits when it reaches the maximum length for a line.
3. Go to the `Text` mode, and add the `<?Pub _newline?>` code before the word from where a new line must start.

   Example 1: Added a line break in the mainbooktitle element after the word “CCaaS”.

   ```
   <booktitle id="GUID-xxx">
   <mainbooktitle id="GUID-xxx">Using Avaya OneCloud CCaaS <?Pub _newline?> Public
   Omnichannel for supervisors</mainbooktitle>
   </booktitle>
   ```

Example 2: Added a line break at the end of the document title to accommodate the languages that need additional space after translation.

```
<booktitle id="GUID-xxx">
<mainbooktitle id="GUID-xxx">Using Avaya OneCloud CCaaS <?Pub _newline?> Public
Omnichannel for supervisors<?Pub _newline?></mainbooktitle>
</booktitle>
```

4. Check in the bookmap.

5. Generate the PDF output and verify the document title.

   A line break gets added after the word where you inserted the line break.

   In the example, a line break is added after “CCaaS” in the document title:

   Using Avaya OneCloud™ CCaaS
   Public Omnichannel for supervisors

Adding a new chapter to a bookmap

About this task

To divide the chapters into logical groups, you can use the Part element. For example, for a large, complicated install guide or upgrade guide that contains different deployment or upgrade scenarios, you can use the Part element to create main headings for each scenario and then group the relevant chapters under the headings. See Creating chapter groupings in a bookmap by using the part element on page 60 for more information.

Do not reference a bookmap within a bookmap because a publication can have only one bookmap added at the root level.

Before you begin

Create a map, called component map, to add as a chapter that in turn can contain maps and topics..

Procedure

1. Open the publication in Publication Manager.
2. Right-click the **Bookmap** element and then click **Add Within** > **Chapter**.
3. In the dialog box that is displayed, click **Browse**, browse to and select the DITA map to add to the chapter and then click **Insert**.
4. Click **OK**.
5. Check in the bookmap when you finish working with it.

Creating chapter groupings in a bookmap by using the part element

To divide a document's chapters into logical groupings, you can use the part element to provide a title and optional introduction to group the chapter under. The part element will typically be used with larger books that contain different types or categories of information. Do not use just to get another level of hierarchy in a standard book. A good example would be a large, complicated install guide or upgrade guide that contains different deployment or upgrade scenarios. In this case, you can use the part element to create main headings for each scenario and then group the relevant chapters under the headings.

About this task

Consider the following rules and restrictions when using part elements in a bookmap.

- If you use the part element, always have more than one part element. Otherwise, there is no reason to use it.
- You can include chapters in a bookmap before a part element, but you cannot include a chapter after a part element in a bookmap. Chapter elements must either be in part elements or before the first part element. This makes sense because of the way that part is intended to be used. Do not use as just another level of hierarchy. Rather, use for major separations in a book.
- Each part element must have a navtitle or a topic at the top level. If you want to provide just a title, apply the navtitle directly to the part element. Or, if you want a topic at the top level of the part to be used as a target for links, you can add the href directly to the part element.
- If you use a topic at the top level of a part, ensure the topic contains only a title without any content. This way, you can link to the part in the output. Including text in a topic at the top level of a part element might give unexpected results. If you choose to include text in a topic at the top level of a part element, and you experience issues, remove the text.

Procedure

1. Check out the bookmap in which you want to insert the part elements.
2. Right-click the element before which you want to add the part element and select **Insert Before** > **Part**.

   Remember that you can have chapters before the first part element but you cannot have chapters after the first part element. Usually, you will be inserting a part element before an Appendix element or Back Matter element.
3. Specify the title or introduction topic for the part:
   - To include just a title and not an introduction topic for the part, right-click the part element, select **XML Attributes**, and then type the title in the **Navigation Title** field of the XML Attributes dialog box.
   - To include an introduction topic, right-click the part element, select **XML Attributes**. In the XML Attributes dialog box, click **Browse**, browse to and select the topic, and then click **OK**.
4. Nest the appropriate chapter elements under the part.
5. Repeat steps 2 through 4 for each part element that you want to include.
6. Check in the bookmap when you finish working with it.

   If an error occurs while you save and check in the bookmap, address the error. Do not just accept it and continue the check in.

Adding an appendix to a bookmap

Before you begin

Create a map for the contents of the appendix, or, if the appendix will include a single topic, create the topic.

Procedure

1. Open the publication in Publication Manager.
2. Right-click **Back Matter** in the publication tree and then click **Insert Before** > **Appendix**.
3. In the Repository, select the map or topic that you want to add, drag and drop to the Appendix.
4. Check in the bookmap when you finish working with it.

Adding a glossary to a bookmap

Before you begin

Create a map for the contents of the glossary, or, if the glossary will include a single topic, create the topic. If you use a glossary map, make sure that you nest all of the topics in a topic or a topichead with the title glossary.

Procedure

1. Open the publication in Publication Manager.
2. Expand **Back Matter** > **Book Lists** in the publication tree.
3. Right-click **Index List** and then click **Insert Before** > **Glossary List**.
4. In the Repository, select the glossary map or topic that you want to add, drag and drop to GlossaryList.
5. Check in the bookmap when you finish working with it.

BookMap guidelines

Use component DITA Maps for chapters

When specifying the chapters in a BookMap, use component DITA Maps that list the topics that are to be part of the chapter.

Nesting of BookMaps

Nesting of BookMaps is not allowed.

Using a bookmap for Eclipse Help

Use this procedure to create or modify a bookmap to support Eclipse Help.

About this task

In addition to specifying a resource ID for the bookmap, the topics must also have resource IDs to support context-sensitive help as required.

Procedure

1. On the Publication Manager menu bar, click **Tools** > **Browse Repository**.

   The Browse Repository window is displayed.
2. Create a new bookmap and add the map to a publication.
3. Select the bookmap, right-click and select **Check out with**, and click **Oxygen XML Author**, in the Select Editor dialog box, click **Editor**.
4. Specify the ID for the help:
   a. Expand the bookmeta element and place the cursor before the end bookmeta element.
   b. Press `Enter`, and select **resourceid** from the list of elements.
   c. In the **Id** field of the resourceid element, type a value that matches the plugin ID.

      You can create the plugin ID or your development team might prefer to assign it. If you create the ID, use the string `com.avaya.docs.`*<project>*. For example, the plugin ID for the Orchestration Designer Developer Guide is `com.avaya.docs.orchdesigner`.
   d. Click **OK**.
5. Check in the map.

Related links

Supporting context-sensitive help for HTML outputs that use context IDs (Eclipse Help, .chm, and Heritage Nortel projects) on page 115

Checking out a map to make updates in Publication Manager

About this task

You can check out a deliverable map or component map in Publication Manager. You must check out a DITA map, to perform the following tasks:

- Add component maps
- Change the order of topics
- Add topics
- Remove topics
- Add or change relationship tables.

- Add or change XML attributes.

Tridion Docs automatically checks out a map when you perform an action that requires the map to be checked out.

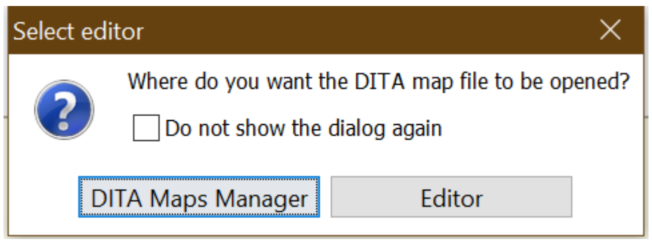
Note:

To perform an action such as adding a trademark to the mainbooktitle, check out the bookmap in Oxygen XML Author from the browse repository. Do not use this procedure.

Procedure

1. In Publication Manager, open the publication that uses the map.
2. In the publication tree, right-click the map and click **Check out with**.

   A red lock icon indicates that the map is checked out by you and can be modified.
3. In Oxygen XML Author, click **Editor** in Select editor dialog box.

   The ditamap opens in Oxygen XML Author.

Related links

Opening a publication on page 30

Checking in a map

About this task

After editing a map in Publication Manager, check in the map to save the changes in the repository.

Procedure

In the publication tree, right-click the map, and then click **Check In**.

Moving objects in a map

Procedure

1. Open the publication in Publication Manager.

2. Check out the map.
3. In the publication tree, select the object to move, and then click the appropriate arrow on the toolbar of the publication tree.

   Note:

   Some arrows may not be available on some objects depending on their position in the document.
4. Repeat the previous step until the structure of your publication is as required.
5. Check in the map when you finish editing it.

Removing objects from a map

About this task

You can remove topics, maps, and images from a map or publication.

Procedure

1. Open the publication in Publication Manager.
2. Right-click the object to remove, and then click **Delete**.

   The topic or the map you deleted is removed from the publication.

   Note:

   The removed objects are available in the repository until you delete the objects permanently from the repository.

Next steps

If the removed topic is also available in the relationship table, you must delete the topic from relationship table. If you fail to delete the topic from the relationship table:

- The output displays a broken link.
- The baseline fails to freeze.

Tip:

Even after you remove the topic from the map, if the topic still appears in the baseline, it indicates that the topic is referenced in one of the maps or in relationship tables of the publication. In the baseline, double-click the topic, the topic gets selected in the **Content** pane, delete the topic.

Related links

Removing relationships on page 178

Adding a trademark to a navtitle in a DITA map

To add a trademark symbol to a DITA map title in a publication, you must check out the map in Oxygen XML Author and insert the symbol. You cannot insert a trademark symbol directly in a navtitle element from the publication.

Note:

Trademark symbol added in a navtitle attribute might not display correctly. You must remove the navtitle attribute and add a navtitle element to the topichead element.

Procedure

1. Start Publication Manager and open the publication.

   The Browse Repository window is displayed.
2. Right-click the map and select **Check out with** in Oxygen XML Author.
3. Locate the topichead element containing the navtitle to which you want to add a trademark.
4. Expand the topichead element and then expand the topicmeta element to view the navtitle element.
5. Keep the cursor in the location where you insert the trademark, press `Enter`, and click **ph** from the menu.
6. Keep the cursor in the ph element, press `Enter`, and click **tm** from the menu.
7. In the Attributes window, select **reg** or **tm** from the **tmtype** field and then click **OK** to accept the changes.
8. Type the text that should contain the trademark inside the tm element.
9. Click **SDLTridionDocs** > **Check in** to check in the map.

Adding author name in the deliverable map

About this task

When you upload a PDF file to Avaya Support site, you set the following document properties:

- Author = Avaya LLC
- Page layout=single page continuous
- Magnification= 100%

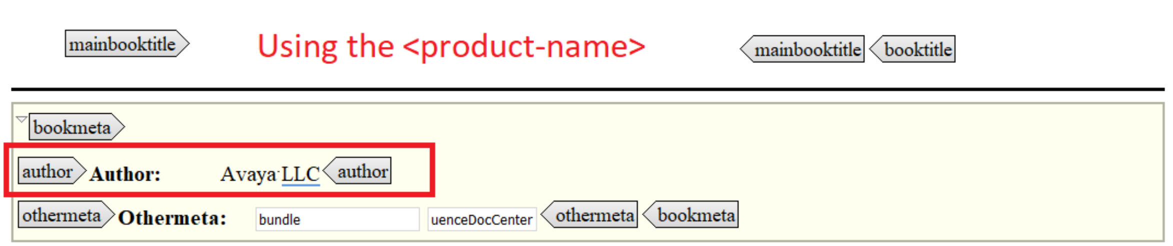
You must add the author name for a publication only once, and every time you publish the PDF, Tridion Docs preserves the author and PDF page property values.

For security purpose, you must add the organization name, Avaya LLC, and not expose the author who created or edited the document.

Procedure

1. Start Publication Manager and open the publication.

   The Browse Repository window is displayed.
2. Right-click the bookmap and select **Check out with** in Oxygen XML Author.
3. In the bookmeta element, add the **author** element and type `Avaya LLC`.

4. Click **SDLTridionDocs** > **Check in** to check in the map.
5. Generate the **Avaya Book** output.

   The PDF output automatically displays the author and page settings in the document properties.

DITA Map guidelines

Number of topics in a DITA Map

You can include as many topics as you need in a DITA Map. In addition to the bookmap, use a DITA Map for each chapter in the document.

Hiding a topic from TOC

If your output includes topics that should not be displayed in the table of contents, set the **Toc** attribute to **no**. For example, use this attribute to ensure that subtopics in an article are not displayed in the table of contents.

Create hierarchy by nesting

You can do the following to create hierarchy:

- Add component maps within a chapter map for large chunks of content.
- Nest topicrefs within other topicrefs in a DITA Map.
- Nest topics under a topichead element.

Nesting under topicref vs. topichead

Start a chapter or module with a topic if you have meaningful introductory content to include. If not, you can use a topichead. The topichead element provides the navigation title under which the topics are displayed.

Number of levels in a DITA Map hierarchy

Keep the structure of a chapter simple. Do not add unnecessary levels of hierarchy. The more you nest, the harder it becomes for users to read and navigate through the content. For more information about heading levels and nesting, see *GIS Customer Documentation Standards*.

HTML and PDF viewers render limited font sizes, highlighting styles, and indentation levels to distinguish headings.

Related links

Using chunking to create aggregated topics on page 69

Customer Documentation Standards: Nesting guidelines

Aggregated topics (chunking)

What is an aggregated topic?

You can use chunking to create an aggregated topic in HTML online help and Documentation Center outputs. With chunking, multiple smaller topics appear as a single aggregated topic. Aggregation is not useful in PDF outputs.

How is an aggregated topic made?

Aggregated topics are created by nesting topics under another topic and setting the chunking, linking, and toc attributes. The topic under which you nest other topics is the parent topic. The nested topics are child topics.

Why not combine the information in a single DITA topic?

The following are reasons for aggregating topics:

- You want a group of topics to appear together in context-sensitive help. For example, there might be a main topic that describes a feature or page, followed by the supporting task topics.
- You have concept topics that should appear as one unit in the output, but you want them to be separate topics due to their size or because you plan to use the smaller concept topics in different contexts.
- You have complex field description topics. The nature of the content requires the use of separate topics, but they need to appear together in the output.
- You are creating articles, which are published on the Avaya Documentation Center. An article focuses on a specific task or activity. For more information about creating articles, see *GIS Documentation Standard for Articles*.

Limitation of the chunk attribute

You can only apply chunking at one level in a topic hierarchy. If you apply chunking to a higher-level topic and to lower-level topics that have additional topic levels under them, Avaya Documentation Center and HTML outputs might fail.

If you require chunking at a lower level in Avaya Documentation Center and HTML outputs, you cannot aggregate the topics at a higher level. Instead, you can use a relationship table to link topics to the higher-level topic.

Using chunking to create aggregated topics

About this task

Chunking is usually applied to the top-level parent topic. DITA Open Toolkit does not support applying chunking to nested child topics when the parent topic already uses chunking.

If you need to apply chunking in lower-level child topics, do not apply it in higher-level topics.

Procedure

1. In the DITA map, identify the parent topic under which subtopics will be nested.
2. Right-click the parent topic and then click **XML Attributes**.
3. Set the following attributes:
    a. Set **Linking** to **Target only**.
    b. Set **Chunk** to **to-content**.
4. Add the child topics under the parent topic.
5. To ensure that the child topics are not displayed in the table of contents, click **XML Attributes** for each child topic and set **Toc** to **no**.

Related links

Setting up chunking for articles

Chapter 6: Creating and modifying topics

Creating a new topic

About this task

Topics must be created in a folder named `Topics` and has the **Content type** set to **Topic**.

See the Basics of creating a document video for steps to create a new topic.

Procedure

1. On the Publication Manager menu bar, click **Tools** > **Browse Repository**.

   The Browse Repository window is displayed.

2. In the navigation pane, browse to and select the topics folder where you want the topic saved.

3. On the toolbar of the right pane, click .

   The system displays the Select Template dialog box.

4. Select the appropriate template for the topic type, and click **Next**.

5. Complete the fields on each tab as appropriate.

   You must complete the **Product Family**, **Product**, and **Doc Lead** fields on the Avaya-specific fields tab appropriate for your project. **Product Family** and **Product** fields are used in searches within Tridion Docs and can be used in the future to categorize our content.

6. Click **OK**.

Next steps

The topic that you created is just a place holder. Check out the topic to add content in the topic.

Related links

Topic authoring checklist on page 325

Topic properties

General tab

Name	Description
Title	Tridion Docs title for the topic. You can include only alphanumeric characters, spaces, hyphens, and underscores. Do not use characters, like slashes, asterisks, periods, parenthesis, or other special characters. The maximum length is 100 characters including spaces. The length restriction is important because Tridion Docs uses the Tridion Docs topic title as part of the topic's temporary filename. This is a required field. Example: `Creating a user`
In Folder	The location of the topic. This field is read-only.
Content type	The topic type. This field automatically populates the topic type of the template that you selected, for example, structure, task, or concept. **Note:** Changing this field has no effect on the topic itself so do not change it. To change the type of topic, you must create a new topic of the correct type and copy the content from the existing topic to the new one.
Description	A description of the topic. This field can contain any text and is optional.
Enable translation management	For localization only.
Requested languages	For localization only. **Important:** For successful translation, ensure that the field is always blank and check box is clear.
Inherited languages	For localization only.

Version tab

Name	Description
Version	Version of the topic. The system automatically populates this field.
Changes	A description of changes in this topic. This field is relevant for the new version of a topic. This field can contain any text and is mandatory for new versions and branches.

Table continues…

Name	Description
Candidate for baseline	This field is blank.
Baseline label	This field lists the frozen baselines that use this topic. This field is automatically populated.

Workflow tab

Name	Description
Language	The language of the object. This field is automatically populated
Status	Workflow status. Options are: • Draft • Editorial review • Pre-release validation • Technical review • Released You can move an object to the Released state only when the object is in the Pre-release Validation state.
Author	The owner of the topic.
Last modified by	The last person who modified the topic. This field is automatically populated.
Source language	This field is blank.
Comments	Comments about the workflow. This field can contain any text and is optional.

Avaya-specific fields tab

Name	Description
Override Output File Name	Required HTML file name if the topic is part of context-sensitive help or use for chunking. This field is auto populated by the base attribute in the topic and is read-only. This field has the same character and restriction limitations as the **Title** field on the General tab: • The base attribute can contain alphanumeric characters, spaces, hyphens, and underscores. Do not use any other characters, like slashes, asterisks, periods, parenthesis, or other special characters. • The maximum length of this field is 100 characters including spaces.

Table continues…

Name	Description
Product Family	The product category or family to which the product belongs. This is a required field.
Product	The product for which you want to create the content. This is a required field.
Component	Product components will be set up by the system administrator on a case by case basis. Talk to the system administrator if you think a product component is appropriate for your product.
Contributor	This field is currently unused.
Doc Lead	The user who has responsibility for this content and can move the object to the Released state in workflow. This a required field.
Localization Coordinator	For localization team only.
Reviewer	You can optionally specify another Tridion Docs user as a reviewer for an object. This is useful when content is in the editorial review phase in workflow and you want the object to appear in the inbox of the selected user. The user that you want to select in the **Reviewer** field must be assigned the role of Reviewer in Tridion Docs. Open a ticket on the Infosolutions project to add the Reviewer role for the user if the name is not available for selection.

Related links

Checking in a topic on page 77
Workflow on page 211

Creating a copy of an existing topic

About this task

Make a copy of an existing topic only if you want to model the content on the existing content. To add the same content, add IDs to the elements such as paragraph, steps, lists items in existing topic and reuse in the new topic.

Procedure

1. On the Publication Manager menu bar, click **Tools** > **Browse Repository**.

   The Browse Repository window is displayed.

2. In the navigation pane, browse to project folder and subfolder, and select the `topics` folder and the topic that you want to copy.
3. Do one of the following:
   - On the toolbar of the right pane, click
   - Right-click, and click **Duplicate** .
4. Change the title of the topic.
5. Complete the fields on each tab as appropriate.

   You are required to complete the Product Family, Product, and Doc Lead fields on the Avaya-specific fields tab. Make sure you complete these fields as appropriate for your project because the Product Family and Product fields are used in searches within the SDL repository and can be used in the future to categorize our content.
6. Click **OK**.

Related links

Copying a topic or map on page 48

Checking out a topic from a publication

About this task

Use the publication to add or check out topics. When you add or update topics from the publication, the correct topic version is selected in your document. If you update the topics from the repository, the changes might not reflect in your publication.

Procedure

1. From the **Start** menu, click **SDL Tridion Docs** > **Publication Manager 14.0**.
2. Open the publication that contains the topic in Publication Manager.
3. Right-click the topic, and select **Check Out**.

   The topic opens in Oxygen XML Author.

Checking out a topic from the Tridion Docs repository

About this task

Important:

Use the publication to add or check out topics. When you add or update topics from the publication, the correct topic version is selected in your document. If you update the topics from the repository, the changes might not reflect in your publication.

Procedure

1. On the Publication Manager menu bar, click **Tools** > **Browse Repository**.

   The Browse Repository window is displayed.
2. In the navigation pane, browse to and select the folder where the topic is saved.
3. Right-click the topic, and select **Check Out**.

   The topic opens in Oxygen XML Author.

Adding or modifying content in a topic

Before you begin

Use the correct topic type for the content that you want to add.

Procedure

1. Open Publication Manager, and check out the topic from Browse Repository or the publication.
2. Do one of the following:
   - Click **Tools** > **Browse Repository**, and navigate to the topic.
   - Open the publication, and navigate to the topic.
3. Right-click and select **Check Out**.

   The topic opens in Oxygen XML Author.
4. Add the content and images to the topic, and tag the content as appropriate.

   For tips on using the XML editor, see *Additional XML Author attributes*.
5. Right-click and select **Check in**.

   Tridion Docs saves the changes that you made to the database, and checks in the topic.

Changing the font display size in Editor

About this task

You can change the size of the text displayed in Oxygen XML Author. The size you select is for the display of the tags and text in Editor only; you cannot change the font size in your outputs.

Procedure

1. In Oxygen XML Author, select **Options** > **Preferences**.
2. On the Preferences dialog, click **Appearance** > **Fonts**.

3. Change the font size.
4. Click **Apply** and **OK**.

   Restart Oxygen XML Author for the changes to take effect. The size of both the tags and the text change.

Adding explanatory text before a step

You can add the stepsection element in the following situations:

- To add a sequence of steps in a procedure. For example, “Perform the next three steps only if you installed expansion pack A.”
- To provide some text before the user action that is not appropriate for the cmd element.

Use the stepsection element carefully and only as intended. Overuse of the element might impact the readability of your procedures.

Procedure

1. Check out the topic in Oxygen XML Author.
2. Place the cursor before the step element where you want to add the explanatory text, press `Enter`, and select **stepsection**.

   The stepsection element is a peer of step, so it goes before the step rather than within it.
3. Add the explanatory text inside the stepsection element.

Opening a topic in Oxygen XML Author in read-only mode

About this task

You can view a topic in read-only mode when the topic is:

- In the Released state
- Checked out by other user
- Located in a folder to which you do not have permissions

Procedure

1. Start Publication Manager.
2. Do one of the following:
   - In Browse Repository, select the topic, right-click, and click **Open**.
   - In Oxygen XML Author, click **SDLTridion Docs** > **Open**, navigate to the topic, right-click and click **Open**.

The topic opens in read-only mode. You can see details, such as tags, conditions, and conrefs.

Checking in a topic

About this task

After you add or update the content in a topic in Oxygen XML Author, check in the topic to save the changes in the repository and close the topic.

Procedure

1. From the Oxygen XML Author menu, click **SDLTridionDocs** > **Check in**.

   The Check in dialog box is displayed.
2. To change the workflow status of the topic:
   a. Select **Change status**.
   b. In the **Status** field, select the appropriate status.
3. Click **OK**.

Related links

Workflow on page 211
Topic properties on page 71

Creating troubleshooting, alarm, event, and error topics

Troubleshooting, alarm, event, and error topics describe a system issue and provide a recommended solution. Two templates are available in Tridion Docs for these types of topics: Troubleshooting or Alarm event error. These templates are based on the troubleshooting topic model in DITA.

These topics include the following:

- Description or information about a problem, alarm, event, or error
- One or more possible causes
- One or more associated resolution or remedy

The troubleshooting topic model is flexible. You can have one or more cause and one or more remedies. The following table describes some possible combinations of cause and remedy.

Scenario	Elements to use in topic
A condition with one cause and one remedy.	Use one troubleSolution element with one cause and one remedy.
A condition with one cause and multiple possible remedies.	Use one troubleSolution element with one cause and multiple remedy elements.
A condition with multiple causes, each with one or more possible remedies.	Use a separate troubleSolution element for each cause and its associated remedies. If a cause has multiple possible remedies, use a remedy element for each remedy.

Related links

Resolution topics on page 21

Identifying migrated topics with duplicate Tridion Docs titles

About this task

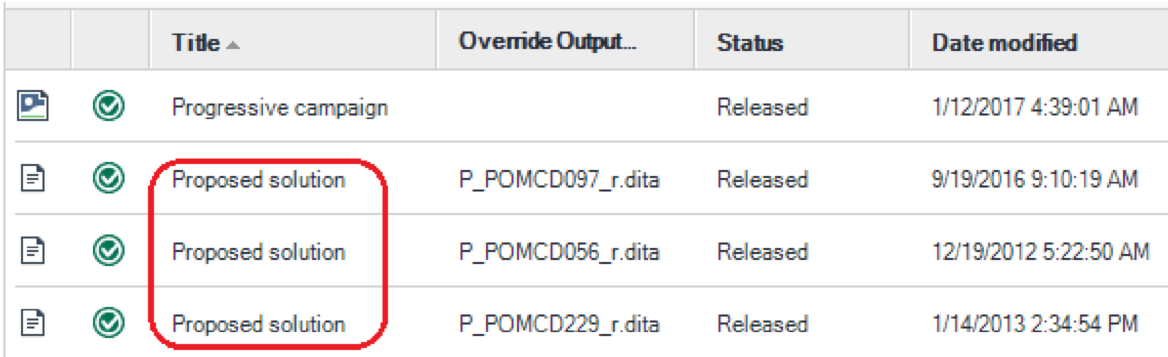
Tridion Docs uses titles instead of file names to manage topics. When content is converted from Astoria to Tridion Docs (erstwhile Trisoft), the DITA topic title is used as the Tridion Docs title. Topics in your publications in Astoria with duplicate DITA titles have duplicate Tridion Docs titles when they got migrated to Trisoft.

The duplicate Tridion Docs titles do not cause an error. However, might make it difficult for you to differentiate the topics. Therefore you can use the **Override Output File Name** field. This field is populated during migration with the filename that was used in Astoria or the name you assigned to the topic to support context-sensitive help in an HTML output.

Procedure

1. Open the publication that contains topics with duplicate titles.
2. Click the Baseline tab, and sort by **Title** column.
3. Locate the duplicate titles in the baseline.

4. Look at the **Override Output File Name** in the second column to differentiate the topics, based on what it was named in Astoria or the filename that was specified to the topic for context-sensitive help.



		Title	Override Output...	Status	Date modified
		Progressive campaign		Released	1/12/2017 4:39:01 AM
		Proposed solution	P_POMCD097_r.dita	Released	9/19/2016 9:10:19 AM
		Proposed solution	P_POMCD056_r.dita	Released	12/19/2012 5:22:50 AM
		Proposed solution	P_POMCD229_r.dita	Released	1/14/2013 2:34:54 PM

5. To easily differentiate the topics, right-click, and select **Properties**, and modify the Tridion Docs name in the **Title** field.

   Modifying the Tridion Docs **Title** field does not impact the title element in the DITA topic.

   Note:

   However, do not change the title if:

   - The **Override Output File Name** field is blank
   - The topic is part of context-sensitive help that is mapped to the help link on a web page

Topic title guidelines

General guidelines

Some general guidelines apply to all topic types:

- Compose titles that are clear and concise.
- Use words that the user would understand in addition to or instead of feature and product names.
- Make sure that the title tells users exactly what information is in the topic.
- Create titles that provide a clear indication of the topic scope.
- Use sentence-case.
- Avoid constructions using the word “for”.
- Use plural unless the information specifically refers to a single object.

Task titles

Begin all task topic titles with an *ing* verb. For example, for a task on adding new users, use a task title similar to “Adding new users”.

Incorrect	Correct
Build a Work Flow	Building workflows
Administer parameters for voicemail	Setting voicemail parameters
Editing the Element Manager	Assigning a certificate to the Element Manager

Description concept titles

Use the name of the thing that the topic describes. For example, title a description concept “Administrator login type”.

For topics with overview content, avoid titles that begin with an *ing* form. If renaming the topic to avoid starting with a gerund creates an awkward title, use the gerund. Also, try to avoid using the words overview or “about in concept titles, unless there is a need to distinguish a concept title from the title of a deliverable or another topic.

Graphical concept titles

Use the name of the thing that the topic depicts graphically. For example, title a graphical concept “Message server internal view”.

Example topic titles

Include “example” in the title to make it clear. For example, “Dial plan configuration example”.

Scenario topic titles

Use the name of the thing that the topic provides a scenario for.

Field description structure titles

Begin all field description structure topics with the name of the page or dialog box followed by “field description”. For example, title a field description structure “Call Profile field descriptions”.

Report output titles

Use the name of the report followed by something like “report results” or “report output”.

Accessibility standards

All Deskphone user guide content we create must comply with Section 508 for people with disabilities. Following these standards ensures compliance and avoid a lot of added work later.

The following standards are not specific to DITA content but are required for all source formats:

- You must include an alt tag with ANY image and figure elements to make the intent of the image accessible for users using screen readers or text-only readers. Ensure that the text you include in the alt tag provides a complete description and does not restate the name of the image.
- You must include the name attribute with any objects elements to make the intent of the object more accessible for users using screen readers or text-only readers.
- You must include heading rows in all tables and simple tables.

- Avoid creating complex table layouts that include horizontal and vertical cell spans when possible.

Indexing and keywords guidelines and tips

A good index can really help users find the content they’re looking for. Follow these guidelines to increase the quality of your indexes.

If there are terms that are relevant to the content that you don’t want to include in the index, you can add keywords in the prolog. This is useful for identifying things like terms not used in the product that a user might search for (for example, a user might search for an industry-standard term instead of the feature name Avaya has assigned to something). Keywords are searchable in our HTML outputs. Providing industry-standard terms and other additional relevant terms as keywords in the prolog will improve the findability of our HTML content and help the user locate the right topic. The keyword element is available under keywords in the prolog at the same level as indexterm.

General guidelines

- Every topic that has content must contain an index entry. Topics with just titles and without content in it that are created for linking purpose don't necessarily require index entries.
- Do not just index the topic title. Ensure that you index the subjects covered in the topic.
- Include only text in index entries; do not tag the entries.
- The most important consideration for indexing is to ensure that you consider how a user might look for information. There might be terms or words not included in the topic text that should be included as index terms. For example, there might be an Avaya feature name that is also commonly known by an industry standard term.
- Insert index entries that refer to the entire topic in the prolog element (<prolog><metadata><keywords><indexterm>). Index entries entered in the prolog link to the page in which the topic title displays. It is always best to include index terms in the prolog of a topic whenever possible.
- If you have a very long topic and want to add additional index entries, insert the index entry immediately following the start tag of the block element. But this should be very rare.

  Note:

  Do not insert index terms between the <title> element and the first paragraph in a <section> as it causes a little extra space to appear in the output. Instead, put the index terms in the first paragraph of the section.
- Consider reversing the primary and secondary entries. For example, create “users” as a primary entry and “adding” as a secondary entry. Then, create “adding” as a primary entry and “users” as a secondary entry.
- Do not create more than two levels of index terms.
- When you have pointed to a particular word or phrase in the text, avoid moving an index tag within text that has not changed since the last time it was translated. A moved index term

generates a fuzzy match because the segmentation of the sentence has changed from that stored in the translation memory.

- You do not have to include punctuation to separate index entries, as they are automatically inserted where appropriate.
- Be careful not to include extra spaces at the beginning or end of indexterm elements. Extra spaces in indexterm can cause your build to fail.
- Do not leave empty index terms in any topics.
- Use keywords as appropriate to enhance the findability of the content. Because keywords are only searchable in the HTML output, make sure that you include the important terms as index entries. Use the keyword element to include other terms that a user might search for that you don't include in the index.

Secondary index entries

A secondary index entry is one that appears like this in an index:

```
Primary term
    Secondary term
```

The DITA markup used to express this relationship is this:

```
<indexterm>Primary term<indexterm>Secondary term</indexterm></indexterm>
```

Note:

The markup for the 'Secondary term' is entirely contained within the markup for the 'Primary term.' In other words, the indexterm containing the 'Secondary term' is a child element of the indexterm containing the 'Primary term.'

Tips

- If you see a red underline in an index entry, indicating a spelling error, do not add any blank spaces to the beginning or end of the indexterm. If the spelling in the entry is correct, ignore the red line. Adding spaces to the beginning or end of the indexterm can cause output build issues.

Important information about copying elements

If you copy elements, such as steps, numbered lines or bulleted lines and paste them within the same topic, you need to change or remove the ID of the element when you paste it. When you copy an element, the ID is copied also. And unless you change the ID, duplicate IDs will exist when you paste the copy.

If you attempt to reuse an element that has a duplicate ID with the same topic, errors might occur. For example, the conref might display text from the incorrect element. Duplicate IDs within the same topic is invalid XML and might produce various types of errors.

Important:

When you copy a topic, the topic is assigned a new ID but the elements will have the same IDs as in the original topic. However, this will not cause any issues because the topic ID is always included in the references. Therefore, all references are unique.

If you are copying an element, pasting it, and not modifying the text, set up a conref rather than copy. If you are copying an element, pasting it, and modifying the text, be sure that you change the ID of the pasted element.

Related links

Copying a topic or map on page 48

Marking a task step or substep as optional

About this task

You can mark steps and substeps in task topics as optional using the importance attribute.

Procedure

1. In the publication, check out the topic in Oxygen XML Author.
2. Double-click or select the step or substep that you want to mark as optional.
3. In the Attributes window, click **optional** in the **importance** field.

   The word “Optional” appears in bold and parenthesis at the start of the step in the output.

   Note:

   Do not apply the **required** value from the **importance** field to any steps. All steps are assumed to be required unless they’re marked optional. Also, no formatting is used when you apply **required** to a step, so the selection has no effect.
4. Click **OK**.
5. Check in the topic.

Inserting XML comments into topics

You can insert XML comments into your topics to add reminders or notes to yourself or your coauthors. XML comments do not appear in outputs and are not translated.

Procedure

1. Check out the topic in Oxygen XML Author, position your cursor where you want to insert the XML comment.

2. Place the cursor where you want to insert the XML comment, press `Enter`, and insert the comment element.
3. Enter the text into the comment element.

Modifying element attributes

About this task

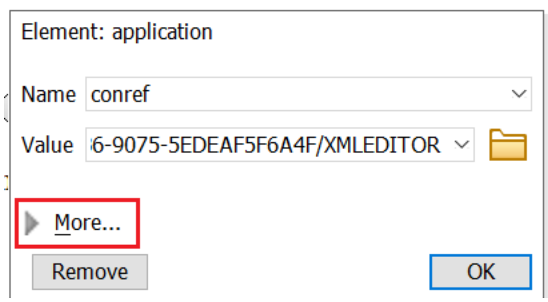
You might need to modify attributes of an element to add ID for element reuse or set conditions, translations, reuse, and so on.

Procedure

1. In Oxygen XML Author, check out the topic and double-click or select the element.

   When you double-click the element, the Attributes window opens.
2. In the Attributes window, add or modify the attributes.

   In the pop-up Attributes window, click **More** to expand the view to see more attributes.

Related links

[Additional Oxygen XML Author configuration]

Replacing tags in the topic

About this task

You can replace one or all occurrences of a tag with a new tag in a topic.

Note:

- We use element, tag, and markup interchangeably in the guidelines.
- After the change, the new tag still retains the ID if it has any. If you are reusing this element in other topics, you must change the tag to the new tag in the target topics too to ensure that the content is displayed in the output.

Procedure

1. Check out the topic in Oxygen XML Author.
2. To replace a single occurrence of a tag:
   a. Select the tag or put your cursor in the text.
   b. From the menu, click **Document** > **Markup** > **Rename <element-name>**.

      For example, if you want to change the uicontrol tag to userinput, click **Rename uicontrol** and select a new tag **userinput** from the list.
   c. From the list, select a new tag and press `Enter`.

      Oxygen XML Author replaces the selected tag with the new tag.
3. To replace all occurrences of a tag in a topic:
   a. Select the tag that you want to replace.
   b. Select **Rename Element** from the menu **Document** > **Markup** or right-click and select **Refactoring**.
   c. In **New name**, select a new tag from the list.
   d. Click **Rename all elements with the same name**, and click **OK**

      Oxygen XML Author replaces all occurrences of the tag in the topic with the new tag.

      Important:

      If the tag that you want to replace contains an ID, the same ID is retained in the new tag.

Inline markup

Elements that can be intermixed with text are called inline elements; text of this sort is said to contain inline markup.

Utility

inline markup, such as uicontrol or wintitle, identifies low-level types of information. Tagging information in this way provides production software cues that it needs to apply special formatting, and it identifies information type for users of the raw files such as translators or technical writers. While this information is quite useful, providing too much such information, especially in contexts where identifying the low-level information types does is not useful.

When not to use inline markup

In some contexts it does not make sense to tag everything that you can with inline markup. Use the semantics of the context to determine whether to apply tagging. The following table provides some examples:

Case	Wrong	Right
1	<userinput><option>132</option></userinput>	<userinput>132</userinput>
2	<userinput><cmdname>cd</cmdname> <filepath>/usr/bin</filepath></userinput>	<userinput>cd /usr/bin</userinput>
3	<title>How to use the <cmdname>grep</ cmdname> command</title>	<title>How to use the grep command</title>

Case 1: The semantics of userinput override the semantics of option. The fact that 132 is an option is irrelevant to the purpose of the instruction; namely, that the user is to type 132 into some field.

Case 2: The semantics of userinput override the semantics of cmdname and filepath. The fact that cd is the name of a command and that /usr/bin is a filepath doesn't matter because all we want to do is to tell the user to type cd /usr/bin into some field.

Case 3: A purpose of a title is to help readers find content. Involved semantic tagging of title content does nothing to help readers find content faster. inline tags that make sense within title include sup for superscript, sub for subscript, or inline elements that have content provided through conref.

White-space

Placing space characters in the correct place can help you avoid formatting errors in the output.

Case	Wrong	Right
1	See<cite> Using Avaya's Wonderful Products, 555–555–555 </cite>for more information	See <cite>Using Avaya's Wonderful Products, 555–555–555</cite> for more information
2	Click<uicontrol>OK</uicontrol>to continue.	Click <uicontrol>OK</uicontrol> to continue.
3	<indexterm> Some index entry <indexterm>some sub-entry </indexterm> </ indexterm>	<indexterm>Some index entry<indexterm>some sub-entry</ indexterm></indexterm>

Case 1: The space characters should go outside of the cite open tag (<cite>) and the cite close tag (</cite>).

Case 2: Space characters are missing before the uicontrol start tag and after the uicontrol close tag. The output would look like this: ClickOKto continue.

Case 3: This example has several problems. It was fixed by 1) removing the space after the first indexterm start tag. 2) removing the space immediately before the second indexterm start tag, 3) removing the spaces before each indexterm close tag.

Tagging code exhibits

When you include code in a DITA topic, the way you tag the content depends on the context in which the code is being included.

Commands or text entries in task steps

When you are authoring a task and you are explicitly telling the user what to enter in a step, tag the text/command they enter in userinput and tag any variables in the command with varname. Do not tag the command name or parameter names. In this context, it is important for the variables to be clear as such but the semantics of the other lower-level elements aren't key to the purpose of the content.

If you need to provide a where statement to define variables that are part of a command:

- When there is one variable, include the complete "where" statement in the cmd and tag the variable with varname.
- When there is more than one variable, include the text "where" at the end of the cmd. Then provide the definitions of the variable in a ul in an info tag. Tag each variable name with varname.

Command reference topics

When you're authoring a command reference topic, where the purpose of the topic is to define the command and its syntax, then you do use the more detailed semantic elements, like cmdname, parmname, varname because, in this particular context, the more detailed semantics are important to the purpose of the content.

General code samples

When you're presenting a code exhibit in any other context, tag the code with the most semantically appropriate element, like msgblock, codeph, systemoutput, etc. But do not tag the lower-level elements, such as the command names and parameters, because calling out those lower-level elements isn't key to the purpose in this context.

Tagging system-outputted text

There are different types of information that might be output from Avaya products:

- System messages (often have a message number or ID associated with them)
- Information from the system in response to a command or system query

There are different DITA tags to use for each type of information a system displays.

System messages

Use the following DITA elements for content related to system messages:

- For the text of system messages, use the msgph element.
- If you're listing a multiline system message or a group of system messages, you can use the msgblock element.
- If you include the message identifier, tag the message number with the msgnum element.

If you are unsure of whether the system output is a recognized system message or general system output, contact your product team.

System output in response to commands, actions, or queries

Use the <systemoutput> element for content related to outputs from the system such as responses to commands, actions, or queries.

Copying text into topics from external sources

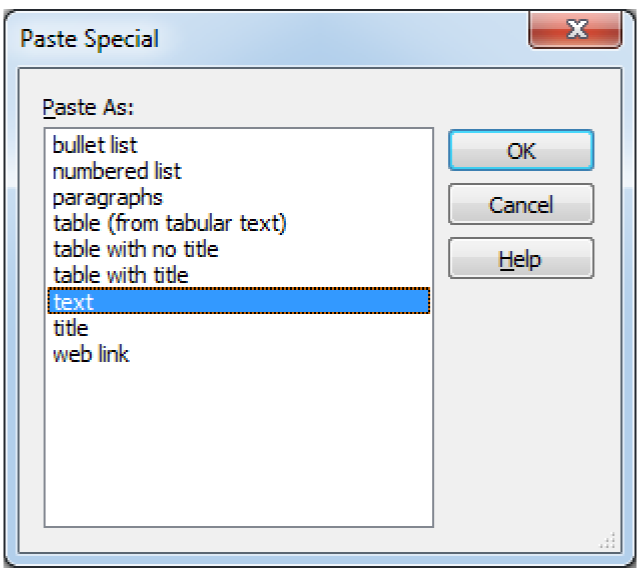
Copying multiple lines of text into a topic

You can copy and paste text into DITA topics from external sources, like Word files or PDFs. This procedure contains the steps for copying and pasting multiple lines of text, including text with code symbols.

Procedure

1. Copy the text from the source.
2. Open the topic and position the cursor where you want to insert the text.
3. Select **Edit** > **Paste Special**.

   You can also right-click on the position where want to paste the text and select **Paste Special** from the menu that displays.
4. When the Paste Special dialog box displays, select **Text** and click **OK**.



Related links

Copying text into a codeblock element on page 89
Copying rows and columns from an Excel spreadsheet or Word table on page 89

Copying text into a codeblock element

There are instances when you need to copy a block of code into a codeblock element. There are sometimes brackets in the code that prevent you from simply copying the text directly into the codeblock element. The following workaround solves the issue.

Tip:

If the line breaks in the code sample aren't preserved when you paste into a topic, try pasting the code sample into Notepad and then copy and paste from Notepad into Editor.

Procedure

1. In the original source, replace the first bracket (<) with another symbol.
2. Copy the code sample into a codeblock element in a DITA topic.
3. Replacing the symbol with the start bracket (<).

Related links

Copying multiple lines of text into a topic on page 88

Copying rows and columns from an Excel spreadsheet or Word table

You can copy and paste text into a table in a DITA topics from an Excel spreadsheet or Word table. Russ Pierce contributed this method, which is a much faster way of copying a large amount of content.

Before you begin

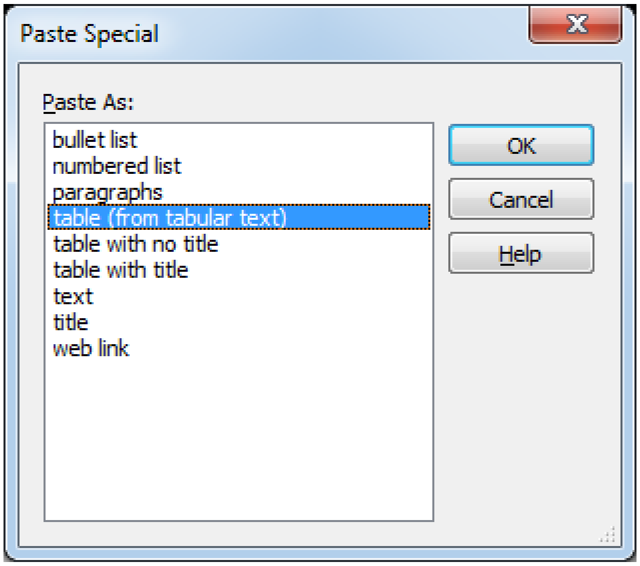
Create a table in a DITA topic that has the same number of columns as what you're copying.

Procedure

1. Select the columns/rows you want to copy and select `Ctrl+C`.
2. Open the topic and position the cursor in the first empty cell in the row where you want to insert the rows.
3. Select **Edit** > **Paste Special**.

   You can also right-click on the position where want to paste the text and select **Paste Special** from the menu that displays.

4. When the Paste Special dialog box displays, select **table (from tabular text)** and click **OK**.



Related links

Copying multiple lines of text into a topic on page 88

Scaling code samples in codeblock

About this task

When you use the codeblock element, the number of characters that appear on each line depends on where you're using the codeblock element. For example, in a reference topic, a codeblock can have 83 characters on a line. In an info tag in a step, there are 73 characters. If you've got a codeblock element with more characters on a line and the line breaks are incorrect, you can scale the codeblock element to decrease the size of the text and fit more characters in a line.

Important:

The way the element appears in the editor is not the same as it will appear in your output. Therefore, you must generate the output to check the size of the code sample and make sure that the text is still readable. Do not reduce the scale to a point where the text cannot easily be read.

Procedure

1. Put the code sample in a codeblock element.
2. Double-click or select the codeblock element.
3. In the Attributes dialog box, select a value from the **scale** menu that represents the percentage you want to codeblock to appear.

For example, if you select 90, the codeblock text will be scaled down to 90% of its normal size. The number of characters that fit on a line in a codeblock element depends on where the codeblock element is used, therefore, the scaling needs to be changed as appropriate.

4. Click **OK**.

Tagging filepath elements that contain variables

When DITA content is translated, the filepath element is not translated because information like paths, filenames, directory names should remain in English. However, variables within a filepath element should be translated. Therefore, for the content to be translated properly, we need to tag the variables separately outside of the filepath, but the whole path should be contained with an element. This procedure provides the steps for tagging a filepath with variables so that the filepath is not translated but any variables are. This process is more complicated than putting the whole path in one filepath and including the varname tag within filepath, but it ensures that the translation is correct.

Procedure

1. Position the cursor where you want to insert the filepath, press `Enter`, and select **ph**.
2. Put the cursor in the ph element, press `Enter`, and select **filepath**.
3. Put the cursor in the filepath element and enter the part of the filepath that appears before any variables.
4. Put the cursor after the filepath with the ph element, press `Enter`, and select **varname**.
5. Put the cursor in the varname element and enter the variable.
6. If the filepath continues after the variable, put the cursor after the varname element within the ph, press `Enter`, and select **filepath**.
7. Put the cursor in the filepath element and enter the part of the filepath that appears after any variables.
8. If the filepath contains multiple variables, repeat the steps to insert additional varname or filepath elements within the ph to add the entire path.

Example

Performing a completeness check on a topic

Procedure

1. In Oxygen XML Author, check out the topic.

2. Click or select **Document** > **Validate**.

   The status and error messages are displayed in the lower pane.

   ```
   The content of element type "step" is incomplete,
   it must match "((note|caution|danger|esd|important|note-
   avaya|security|tip|voltage|warning)*,cmd,(choices|choicetable|info|
   stepxmp|substeps|tutorialinfo)*,stepresult?)".
   ```

3. Correct any errors found and check in the topic.

Inserting links to footnotes in a topic

When you want to add a footnote, you typically just insert the <fn> element and enter the footnote text. When you insert a footnote, in the output, the footnote marker with the number appears in the text and the footnote appears at the bottom of the page. However, in an HTML output, you can also link to the footnote from another element in the same topic by inserting a cross-references to the footnote element.

Note:

Links to footnotes are only supported in HTML outputs. Use footnotes sparingly, only when they are really needed.

About this task

To use the same footnote in multiple procedures, conref the footnote element into the other procedure rather than inserting a cross-reference. That way, the users see the footnote at the bottom of the page they’re reading rather than having to jump to another page.

As per the DITA processing standards for footnotes:

- In PDF outputs, the footnote marker does not link to the footnote at the bottom.
- In HTML outputs, the footnote marker links to the footnote text.

Procedure

1. In the publication, check out the topic in Oxygen XML Author.
2. Put your cursor where you want to insert the footnote[1], press `Enter`, and select **fn**.
3. Insert the footnote text within the fn element.

   If you do not need to insert links from other locations in the topic, the adding footnote action is complete and you can check in the topic.

4. To insert a link from an element in the same topic to an existing footnote element in that topic, you must first add an ID to the footnote element and then insert the xref:

   a. Double-click or select the fn element and add an ID for the footnote in the **id** field.

1

b. Check in the topic.

   You must do this for the ID on the footnote to be available for selection when you insert the xref.

c. Check out the topic.

d. Place your cursor in the location where you want to add the cross reference and press `Enter` and insert the **xref (cross reference)** element.

e. In the Cross reference (xref) dialog box, browse to and select the topic that contains the footnote to reference.

f. Select the footnote element to cross reference, and then click **Insert and close**.

   You do not have to enter the number of the footnote for the link text. The correct footnote number is automatically inserted in the output during production.

g. Double-click or select the xref element.

h. In the Attributes window, type `fn` in the **type** field and then click **OK**.

5. Check in the topic, publish the output, and verify that the footnotes are appearing as expected.

Identifying elements not to translate

In DITA, you can specify an element that is not to be translated.

Note:

The product and application elements are not translated by default.

Before you begin

Consult your Localization Project Manager or Information Architect before setting the translate attribute on any content.

Procedure

1. In the publication, check out the topic in Oxygen XML Author.
2. Double click or select the element that you do not want to translate.
3. In the Attributes window, set the **translate** attribute to **no**.
4. Click **OK**.

Printing the tag view of a topic in Editor

About this task

Printing the tag view of topics is useful if you want to do a tag edit on your topics offline.

Procedure

1. Open Oxygen XML Author and check out the file that you want to print.
2. From the menu, click **Options** > **Preferences** .
3. In the Preferences dialog box, select **Editor** > **Print** .
4. Select **File** > **Print** and select the appropriate settings to print the topic.

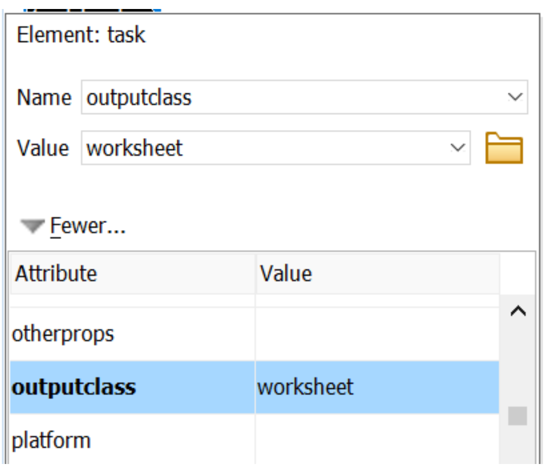
Forcing worksheets and checklists to start on a new page

You can force worksheets and checklists to start on a new page in the PDF output. This allows users to print those pages without getting unrelated content. Apply this functionality only to worksheets and checklists.

Procedure

1. From the publication, check out the topic that contains worksheet or checklist.
2. Double click or select the topic's root element.

   For example, task element in a task template.
3. In the Attributes window, in **outputclass**, type `worksheet`.

4. Click **OK**.
5. Check in the topic and produce the output to validate that the topic starts on a new page.

Editing tips

Here are some general tips to keep in mind when using Editor:

- You can create a common topic for your project and add all of the conrefs you need to use from the common topics, like products. dita. Then you can just copy and paste the conrefs from your common topic into your topics and speed up the time it takes to insert these common conrefs.
- When you're working in the codeph element, you cannot press `Enter` to view the available elements. You need to select **Insert** > **Markup** and select the elements you want to insert from the Insert Markup list.
- When the syntax of a command string is important (for example, you're creating a command reference topic), be sure to tag each part of the command string appropriately (cmdname, parmname, varname).

Change tracking

When you enable change tracking in a topic and then produce a draft output, the changes in that topic are shown in draft PDFs as follows:

- Change bars in the left margin
- Green highlighting for added text
- Red highlighting and strikethrough for deleted text

Markup changes, such as changing an element or applying an attribute, do not appear in the outputs, although those changes are tracked in the topics.

Enabling and disabling change tracking in a topic

About this task

You cannot enable or disable change tracking globally. You have to do it in topic by topic.

Procedure

1. Check out the topic open in Oxygen XML Author.
2. To enable track changes, do one of the following:
   - Click **Edit** > **Review** > **Track Changes**.
   - From the toolbar, click .
   - Right-click and select **Review** > **Track Changes**.
3. As you make changes to the topic text, the changes are highlighted.
4. To turn off tracking changes, from the toolbar, click .

Turning off change tracking does not remove the change markings for any changes you made to the topic while change tracking was enabled. You must accept or reject the changes to clear the change marking.

Related links

Accepting or rejecting changes in topics on page 97

Accepting or rejecting changes in topics

You can accept or reject changes in topics any time in Oxygen XML Author. For example, you might clear changes when you are ready to produce an output for a final delivery or if you want to clear any changes after a draft delivery and start tracking new changes.

About this task

Important:

You must resolve any changes in topics before you deliver content to Localization or produce a final output.

Before you begin

Change tracking is enabled and changes made to the content.

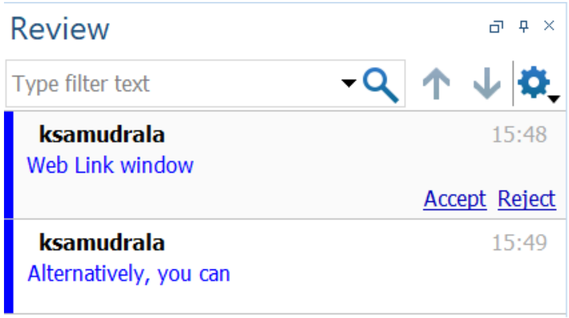
Procedure

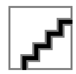
1. Check out the topic that has changes you want to resolve.
2. Do one of the following options:
   - To accept all of the changes in the topic, from the toolbar or **Edit** > **Review**, click **Accept all changes**.
   - To reject all of the changes in the topic, from the toolbar or **Edit** > **Review**, click **Reject all changes**.
   - To move through the changes and accept or reject them individually, click **Accept Changes and Move to Next** or **Reject Changes and Move to Next** for each change.

   If you want to change whether additional changes you make are tracked, you can enable or disable change tracking.

   Alternatively, you can perform the following steps to accept or reject changes.
3. To open the Review window, do one of the following:
   - Click **Edit** > **Review** > **Manage reviews**.
   - Right-click and select **Review** > **Manage reviews**.
   - Click **Window** > **Review**.

4. In the Review window, click (down arrow), for each change, click **Accept** or **Reject**.





5. Check in the topic.

Related links

Enabling and disabling change tracking in a topic on page 96

Chapter 7: Working with web interface

Creating a folder from web interface

About this task

You can create a folder from Tridion Docs web interface or the repository.

Before you begin

Ensure that you have write permission to the parent folder.

Submit an issue to the Infosolutions project.

Procedure

1. Right-click the folder under which you want to create a folder, and click the **New Folder** icon.
2. In the Create new folder dialog box, enter a name and the type of content that the folder can contain.

   To create the folder for a deliverable, for example deploying, set the content type as **None**. Within the deliverable folder, you can create subfolders for:

   - topics and set the content type as **Topic**
   - images, and set the content type as **Image**
   - maps, and set the content type as **Map**
   - publications, and set the content type as **Publication**
3. In **Grant read access**, click one of the user group.
4. Click **OK**.

Changing the folder properties from web interface

About this task

You can change the folder properties from Browse repository.

Before you begin

Ensure that you have write permission to the parent folder.

Procedure

1. Select the folder for which you want to change the properties.
2. Click Properties, and change properties, such as name, author, change description, and reviewer.
3. Click **OK**.

Deleting the folder from web interface

About this task

You can delete a folder from Browse repository.

Before you begin

Ensure that you have write permission to the parent folder.

Procedure

1. Select the folder that you want to delete.
2. On the top-right, click the **Delete** icon.
3. Click **OK** to confirm delete.

Chapter 8: Making metadata changes in bulk

Metadata changes in bulk

At a time, you can change the metadata value of multiple objects from the Properties dialog box.

- Requested languages
- Change description
- Status
- Author
- Product family
- Product
- Coordinator
- Doc Lead
- Localization coordinator
- Reviewer

To change properties in bulk, objects must be of the same type. For example, you can change the name of the author for multiple maps.

Important:

Tridion Docs overwrites the existing values with new values.

Changing metadata in bulk

About this task

You can change properties of topics, maps, or images in bulk from a browse repository or the baseline of the publication.

Note:

You can also use the procedure to release only some topics, maps, and images. To release all objects in the publication, use the workflow on the web interface.

Before you begin

You require a doc lead role to change the metadata in bulk.

For doc lead role, get an approval for the doc lead role from your lead or manager, and open a DITA ticket and request for doc lead role.

Procedure

1. Start Publication Manager, and navigate to the project folder.
2. From Browse Repository or the Baseline tab of the publication, select objects of same type whose values you want to change.

   For example, you can select multiple topics.
3. Right-click and select **Properties**.
4. On the Properties of Multiple Objects dialog box, change the field values as appropriate in General, Version, Workflow, and Avaya-specific fields tabs.

   Important:

   Tridion Docs overwrites the existing values with new values.
5. Click **Yes** to confirm the action.

   The system displays a message `Update Completed with <n> errors`, and lists the objects that could not be modified. You must click **Close**.

   Correct the error and modify the object properties again.

Chapter 9: Working with tables

Creating a simple table

About this task

Use simpletable rather than table for tables that do not require more complex features like spanning of cells or centering content.

Procedure

1. In Oxygen XML Author, check out the topic.
2. Press `Enter` and select **table (wizard)** from the element list.
3. In the Insert Table dialog box:
   a. Click **Simple**.

      The CALS option creates a complex table where you can span cells or align cells.
   b. Ensure that you select **Generate table header**.

      Header rows are required in tables for Section 508 compliance for people with disabilities.
   c. Specify the number of **Rows** and **Columns** to be included in the table.
   d. Click **OK**.

   You can add or remove the rows and columns later if you need to.
4. To add additional rows to the table:
   a. Place the cursor where you want to insert the row, right-click and select **Insert Rows**.
   b. In the Insert Rows dialog box, select the number of rows you want to add.
   c. Click **Above** or **Below** and click **OK**.
   d. **(Optional)** Alternatively, you can press enter and select **row** from the context menu.
5. To add a new column to the table:
   a. Place the cursor in a cell where you want to add another column, right-click and select **Insert Columns**.
   b. In the Insert Columns dialog box, select the number of columns you want to add.
   c. Click **Before** or **After** and click **OK**.

6. To modify the width of each column:
    a. Double-click or select the table.
    b. In the Attributes dialog box, set the **relcolwidth** attribute by specifying the percentage for each column followed by an asterisk (*) and a space.

       For example, in a two-column table, to specify the column widths of 30% and 70% for the first and second columns respectively, enter `30* 70*` in the **relcolwidth** field.

       Important:

       Do not use fixed width for tables that use the full page. Using fixed width can cause the table to run off the page. Ensure that you use relative widths using percentage.
    c. Click **OK**.

   You can also modify a column's width of simple table or complex table by positioning the cursor over the column separator until the cursor changes, and then dragging the cursor to adjust the width of the column. You cannot use this method to modify the column widths of part tables.
7. If you have any empty table rows, do the following so that the rows will be the same height as rows with content:
    a. In the editor, go to **Tools** > **Preferences.**.
    b. On the Preferences dialog box, click **Save**.
    c. Under Write Non-ASCII Characters As, select **Numeric Character References**.
    d. Click **OK**.
    e. Put your cursor in a cell in the empty row and select **Insert** > **Symbol**.
    f. Select the **Character Entities** tab and select **nbsp**.
    g. Click **OK**.

Creating a complex table

About this task

Complex tables use the table element. Create a complex table only when you need to use features like span and center align a column or a cell. Use simpletable for tables that don't require use of complex features.

Procedure

1. In Oxygen XML Author, check out the topic.
2. Press Enter and select **table (wizard)** from the element list.

3. In the Insert Table dialog box:
    a. Ensure that you click **CALS**.

       The Simple option creates a simple table.
    b. Ensure that you select **Generate table header**.
    c. Specify the number of **Rows** and **Columns** to be included in the table.
    d. Click **OK**.

   You can add or remove the rows and columns later if you need to.
4. If you skip the step **Generate table header** while inserting the table, select the row, right-click and click **Header** in the **Row** tab.

   Header rows are required in tables for Section 508 compliance for users with disabilities.
5. To modify the width of a column:
    a. In the table/tgroup element, expand colspecs, and select the colspec element of the appropriate row.
    b. Change the **colwidth** attribute in the form percentage followed by asterisk.

   For example, for a two-column table where you want the first column to have a proportional width of 30% and the second column to have a width of 70% of the table width, enter a **colwidth** of `30*` for the first column and then modify the attributes of the second column to set the **colwidth** to `70*`.

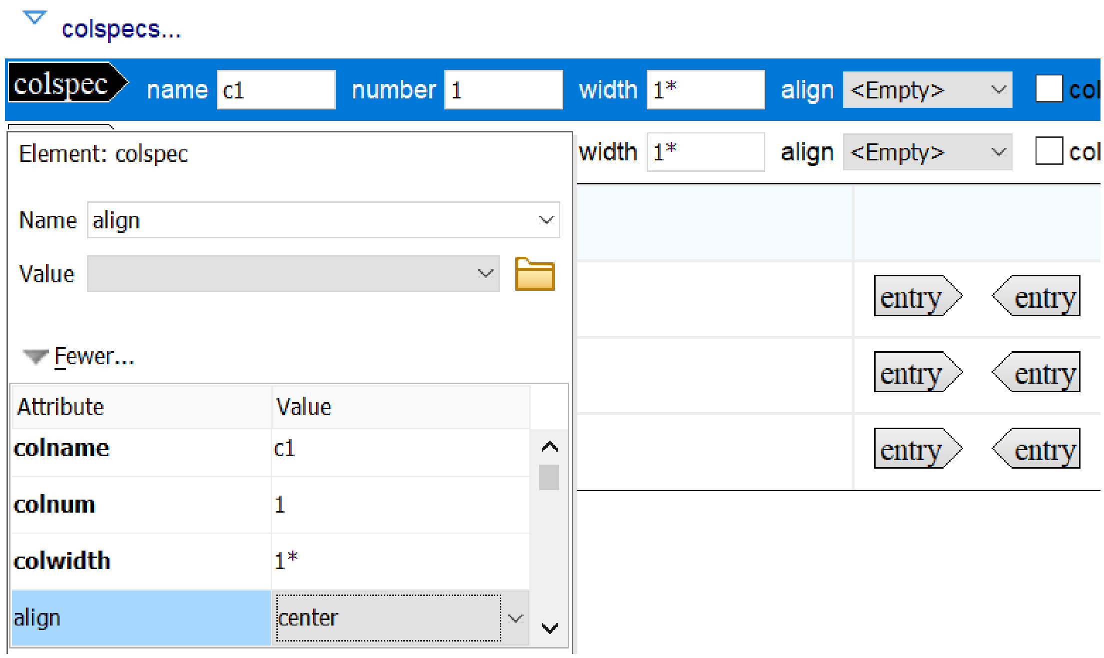
   You can also modify a column's width of simple table or complex table by positioning the cursor over the column separator until the cursor changes, and then dragging the cursor to adjust the width of the column. You cannot use this method to modify the column widths of part tables.

   Important:

   Do not use fixed width for tables that use the full page. Using fixed width can cause the table to run off the page. Ensure that you use relative widths using percentage.
6. To add additional rows to the table:
    a. Place the cursor where you want to insert the row, right-click and select **Insert Rows**.
    b. In the Insert Rows dialog box, select the number of rows you want to add.
    c. Click **Above** or **Below** and click **OK**.
    d. **(Optional)** Alternatively, you can press enter and select **row** from the context menu.
7. To merge any cells, select the cells you want to merge, right-click and select **Join**.
8. To center a column or a cell:
    a. Do the following:
        - To center a column, double-click or select the colspec element from table/tgroup.
        - To center a cell, double-click or select the cell.

The editor displays the Attributes window.

b. In the Attributes window, select **center** in the **align** field.



c. Click **OK**.

9. If you have any empty table rows, do the following so that the rows will be the same height as rows with content:

   a. In the editor, go to **Tools** > **Preferences.**.

   b. On the Preferences dialog box, click **Save**.

   c. Under Write Non-ASCII Characters As, select **Numeric Character References**.

   d. Click **OK**.

   e. Put your cursor in a cell in the empty row and select **Insert** > **Symbol**.

   f. Select the **Character Entities** tab and select **nbsp**.

   g. Click **OK**.

Modifying a simple table or a part table

Use the same procedure to modify simple tables or part tables contained in structure topics.

Procedure

1. To add additional rows to the table:

   a. Place the cursor where you want to insert the row, right-click and select **Insert Rows**.

b. In the Insert Rows dialog box, select the number of rows you want to add.
c. Click **Above** or **Below** and click **OK**.
d. **(Optional)** Alternatively, you can press enter and select **row** from the context menu.

2. To add a new column to the table:
   a. Place the cursor in a cell where you want to add another column, right-click and select **Insert Columns**.
   b. In the Insert Columns dialog box, select the number of columns you want to add.
   c. Click **Before** or **After** and click **OK**.
3. To modify the width of each column:
   a. Double-click or select the table.
   b. In the Attributes dialog box, set the **relcolwidth** attribute by specifying the percentage for each column followed by an asterisk (*) and a space.

      For example, in a two-column table, to specify the column widths of 30% and 70% for the first and second columns respectively, enter `30* 70*` in the **relcolwidth** field.

      Important:

      Do not use fixed width for tables that use the full page. Using fixed width can cause the table to run off the page. Ensure that you use relative widths using percentage.
   c. Click **OK**.

   You can also modify a column's width of simple table or complex table by positioning the cursor over the column separator until the cursor changes, and then dragging the cursor to adjust the width of the column. You cannot use this method to modify the column widths of part tables.
4. If you have any empty table rows, do the following so that the rows will be the same height as rows with content:
   a. In the editor, go to **Tools** > **Preferences.**.
   b. On the Preferences dialog box, click **Save**.
   c. Under Write Non-ASCII Characters As, select **Numeric Character References**.
   d. Click **OK**.
   e. Put your cursor in a cell in the empty row and select **Insert** > **Symbol**.
   f. Select the **Character Entities** tab and select **nbsp**.
   g. Click **OK**.

Modifying an existing complex table

About this task

Procedure

1. To add a new row to the table:
    a. Put the cursor in any column of the row where you want to add a new row.
    b. Press `Enter` and select **row**.
    c. Insert the text in the cells of the new row.
2. To modify the width of a column:
    a. In the table/tgroup element, expand colspecs, and select the colspec element of the appropriate row.
    b. Change the **colwidth** attribute in the form percentage followed by asterisk.

    For example, for a two-column table where you want the first column to have a proportional width of 30% and the second column to have a width of 70% of the table width, enter a **colwidth** of `30*` for the first column and then modify the attributes of the second column to set the **colwidth** to `70*`.

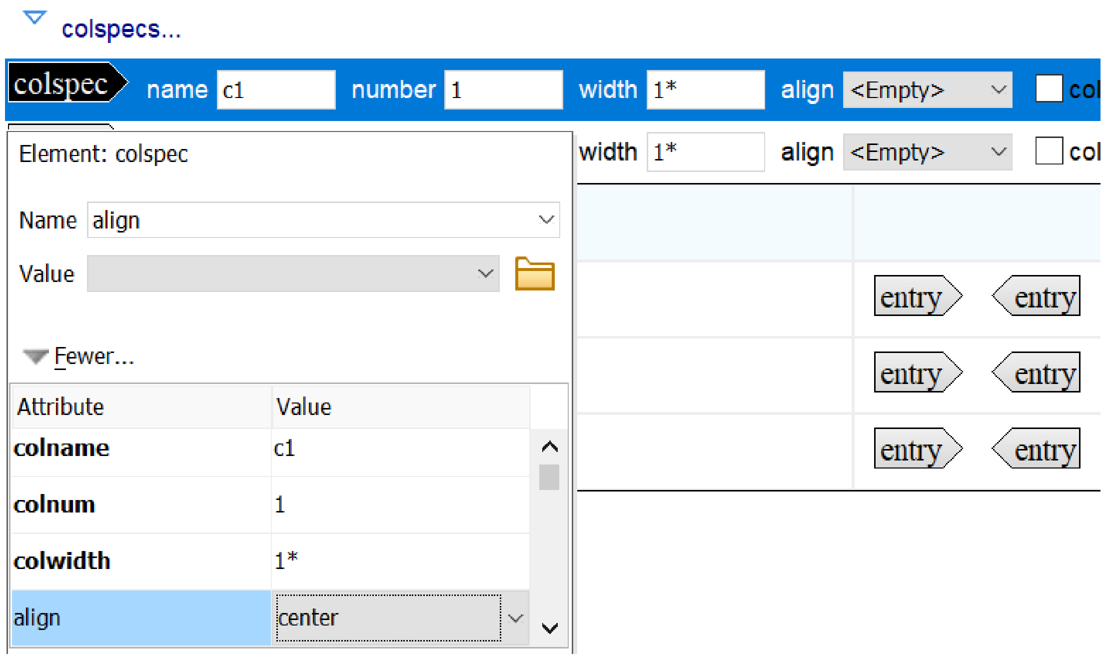
    You can also modify a column's width of simple table or complex table by positioning the cursor over the column separator until the cursor changes, and then dragging the cursor to adjust the width of the column. You cannot use this method to modify the column widths of part tables.

    Important:

    Do not use fixed width for tables that use the full page. Using fixed width can cause the table to run off the page. Ensure that you use relative widths using percentage.
3. To merge any cells, select the cells you want to merge, right-click and select **Join**.
4. To center a column or a cell:
    a. Do the following:
        - To center a column, double-click or select the colspec element from table/tgroup.
        - To center a cell, double-click or select the cell.

        The editor displays the Attributes window.

b. In the Attributes window, select **center** in the **align** field.



c. Click **OK**.

5. If you have any empty table rows, do the following so that the rows will be the same height as rows with content:

   a. In the editor, go to **Tools** > **Preferences.**.

   b. On the Preferences dialog box, click **Save**.

   c. Under Write Non-ASCII Characters As, select **Numeric Character References**.

   d. Click **OK**.

   e. Put your cursor in a cell in the empty row and select **Insert** > **Symbol**.

   f. Select the **Character Entities** tab and select **nbsp**.

   g. Click **OK**.

Setting the orientation of a table to landscape

For tables with larger number of columns, you can set the table to appear in landscape orientation in your PDF output. This option is supported for the Avaya Book, Avaya Jobaid, and Validator PDF outputs.

About this task

- When you apply this option, the actual page in the PDF still appears in portrait orientation; the table is rotated on the page to appear in landscape orientation.

- The landscape option is only supported for tables using the <table> element. It cannot be applied to <simpletable> or <parttable>).
- When you apply this option, a page break is inserted right before and right after the <table> element in the output.
- If you include a <title> or <desc> option in the <table> element, the title and description appear in landscape orientation as well.

Procedure

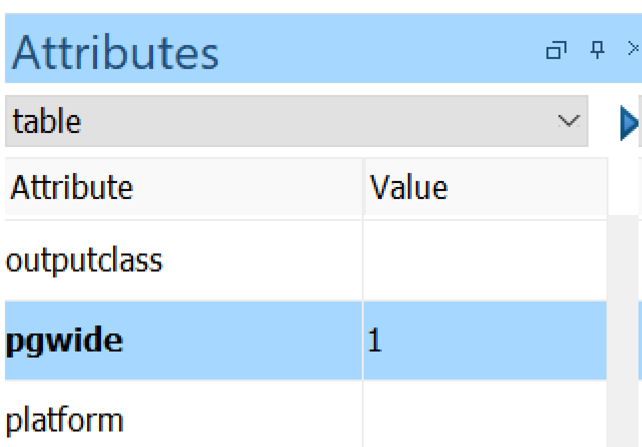
1. Check out the topic containing the table that you want to display in landscape orientation.
2. Double-click or select the <table> element.
3. In the Attributes window, select **land** from the **orient** field.
4. Click **OK**.
5. Check in the topic.

Extending a table element to the left margin

You can extend a larger table to start at the left margin and align with the topic heading.

Procedure

1. In the publication, check out the topic in Oxygen XML Author.
2. Double click or select the table element that you want to modify.
3. In the Attributes window, set the **pgwide** attribute to `1`.



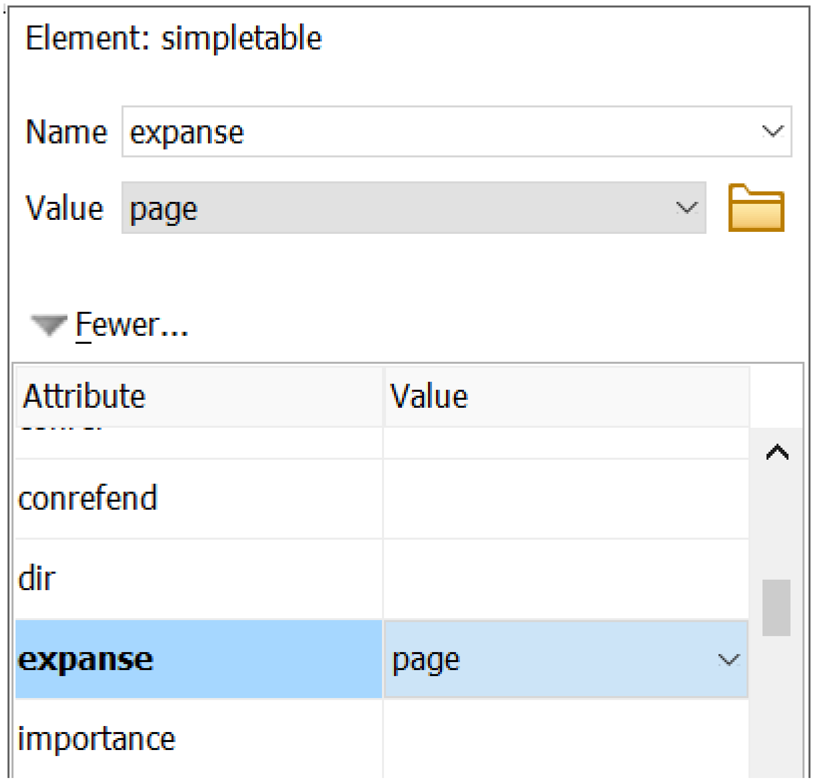
4. Click **OK**.
5. Check in the topic.

Extending a simpletable and parttable to the left margin

You can extend a simpletable or parttable to align with the left margin and the topic heading.

Procedure

1. In the publication, check out the topic in Oxygen XML Author.
2. Double-click or select the table element that you want to modify.
3. In the Attributes window, set the **expanse** attribute to `page`.



4. Click **OK**.
5. Check in the topic.

Splitting the row in a table

About this task

When you have more content in a row near the page boundary, the entire row moves to the next page. To avoid additional white space on the page, you can split the row. When you split the row, content that can fit into the page remains on the current page, and moves the additional content to the next page.

Procedure

1. Check out the topic containing the table where you want to split the row.
2. Double-click or select the table or part table element.
3. In the Attributes window, in the **outputclass** field, type `rowsplit`, and click **OK**.
4. Check in the topic.
5. Publish the Avaya PDF output and verify the output.

Suppressing color banding in tables

The tables in PDF outputs use color banding, where the rows alternate between white and light gray. The banding appears for all tables with four or more rows. You must leave the banding on because it is part of our common formatting. But for some tables, such as those with vertical spanning, the banding can look odd. So you have an option to suppress the banding on individual tables.

Procedure

1. Open the topic that contains the table you want to suppress banding for.
2. Double-click or select the simple or complex table element.
3. In the Attributes window, type `no-shading` in the **outputclass** field.
4. Click **OK**.

Chapter 10: Context-sensitive help

Supporting context-sensitive help for HTML outputs without context IDs

If you are developing content for context-sensitive help that does not require context IDs, you can specify the filename or base attribute to be used in the HTML output.

The processor uses the topic title to create the html file during the output generation. For example, the processor creates `New_Server_field_descriptions.html` file from the `New Server field descriptions` topic that you share with the development team to map to the product help.

To avoid the underscores in the html file, you can add a base attribute in the topic. During output generation, the processor by default uses the base attribute in the topic and overrides the filename. For example, if you set “NewServerFieldDesc” as base attribute, the processor creates `NewServerFieldDesc.html` file from the `New Server field descriptions` topic.

About this task

Some projects map the project help to the topics published on Avaya Documentation Center.

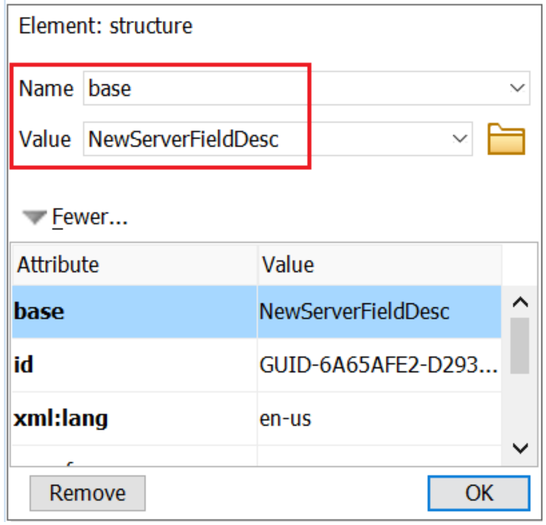
Before you begin

- Ensure you create a separate publication for the online help deliverable.
- Use a bookmap as a deliverable map in the publication.
- If you are reusing an existing Administering or Using bookmap for online help, use appropriate conditions to hide or add content exclusively in product integrated help.

Procedure

1. Open the publication in Publication Manager.
2. Check out the topic in Oxygen XML Author.
3. Double-click or select the root element, for example, the structure element in a structure topic.
4. In the Attributes window, enter the filename to be used in the HTML output, without the extension, in the **base** field.

   For example, if the topic must have the filename `NewServerFieldDesc.html` in the output, type `NewServerFieldDesc` in the **base** field.



Important:

Use only alphanumeric characters, dashes, and underscores in the base attribute—do not use spaces, periods, or special characters. Do NOT include the file extension in the base field. The extension is automatically applied during output generation. Migrated content includes the `.dita` extension but that is stripped out during output generation. Do not remove the extension from the base attribute from migrated content.

5. Check in the topic.

   The **Override Output File Name** in the topic properties reflects the base attribute value but is not editable. To modify the html file name to be used, check out the topic and modify the base attribute.

6. Share the html file name that is identified for mapping on the product help with the developer.

   For example, `NewServerFieldDesc.html`.

   Note:

   For projects that map the product help to the htmls published on Avaya Documentation Center, share the entire path, such as https://documentation.avaya.com/bundle/UsingDeviceManagementTool_r31/page/NewServerFieldDesc.html.

7. After the developer submits the help to the build, verify that the link works and the content shows up correctly.

Result

When you generate the HTML output, the file name of the topic matches with the base attribute you specified.

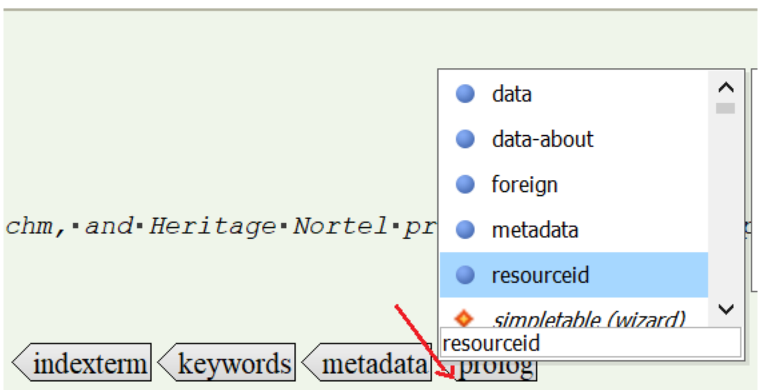
Supporting context-sensitive help for HTML outputs that use context IDs (Eclipse Help, .chm, and Heritage Nortel projects)

Projects that produce Eclipse Help and.chm help and content converted from Heritage Nortel projects use the resource ID element in DITA to specify the required context IDs in topics. If your project does not require context IDs, see the topic Supporting context-sensitive help on page 113 for the other method of supporting context-sensitive help.

Procedure

1. Check out the topic in Oxygen XML Author.
2. Position the cursor before the end **prolog** element and press `Enter`.

   If your topic does not already have a prolog element, add one before the taskbody element.
3. Select **resourceid** from the list that displays.

4. Enter the ID for the topic in the **resourceid**.

   For .chm help, enter the id in the format `string:context #`, where:

   string is the name of the topic, such as a concatenated version of the topic title, and *context #* is the context number from development. For example, `AddUser:342123`.
5. Check in the topic.

   When you produce an HTML output, a mapping file will be automatically produced that includes the topic you added the resourceid to. For .chm, the information is built into the output.

Related links

Using a bookmap for Eclipse Help on page 62

Context-sensitive help support in content migrated from Astoria

In GIS, the team used multiple methods to support context-sensitive help. You can use one of the supported methods only if you must migrate from Astoria to Trisoft, the old name of Tridion Docs.

If you are creating a new GIS project that requires context-sensitive help, see Supporting context-sensitive help for HTML outputs without context IDs on page 113.

Projects that used the Astoria filename as the base for context-sensitive help

Many GIS projects used the Astoria filename as the base for context-sensitive help. Tridion Docs preserves the Astoria filename in the base attribute on the root element in the topic so that the HTML output filenames remain the same. This attribute is represented by the Override Output File Name, a read-only field. For new topics in context-sensitive help, you must use the base attribute to specify the filename to be used in the context-sensitive help. For information on using the base attribute to add a help ID, see the topic Supporting context-sensitive help for HTML outputs without context IDs on page 113.

Heritage Nortel projects that use mapping for context-sensitive help

Writers who supported Heritage Nortel projects, applied the help ID for the topic on the topic title element. In Tridion Docs (erstwhile Trisoft), the way the help ID is applied is changed because Tridion Docs does not support IDs on topic titles. In Tridion Docs, if you must add an ID to a topic to support context-sensitive help, you add a resourceid to the topic prolog. See the topic Supporting context-sensitive help for HTML outputs that use context IDs (Eclipse Help, .chm, and Heritage Nortel projects) on page 115. This change is implemented in topics migrated from Astoria.

Projects that used the copy-to attribute on topicrefs to support context-sensitive help

Some GIS projects applied the copy-to attribute to topicrefs in DITA Maps to support context-sensitive help. The copy-to attribute has been preserved in the migration to Trisoft, so the HTML filenames in the output continues to use the contents of the copy-to attribute. The copy-to attribute does not appear in Publication Manager. Instead, you must check out the map in Oxygen XML Author to modify the copy-to attribute. See the topic Supporting context-sensitive help for HTML outputs without context IDs on page 113 for information on using the base attribute to supply a help ID. To change your project to use the base attribute instead, submit an issue to the Infosolutions project.

Note:

The copy-to attribute method is deprecated. Therefore, use the base attribute.

Chapter 11: Working with output

Supported output formats

Use a BookMap, except for Eclipse help, to produce the outputs. You can produce more than one output type simultaneously from a BookMap.

Avaya supports the following output formats from our DITA content in Tridion Docs:

- - Avaya DocPortal: HTML-based output generated to publish the content on Avaya Documentation Center Production.

    Important:

    Except for some legacy products, use this output format to publish documents on Avaya Documentation Center.

  - zoomindocs.Avaya-staging: HTML-based output generated to publish the content on Avaya Documentation Center Stage.
- Avaya book: The standard PDF book layout.
- Avaya Jobaid (PDF): Job aids must be short, without all the surround you see in a typical book output, like a cover page, table of contents, and index. To produce a job-aid output, do not include a table of contents or index and legal page.
- Quick reference PDF outputs:
  - Avaya Quickref 3–Column: The preferred quick reference format. The format is flexible because we can create more than a single double-sided page. Space is used efficiently because the content begins right after the title in the first column.
  - Avaya Quickref: An older 2–column layout used for legacy double-sided, folded, single page outputs. The right column on the second side is designed as the cover.
- Validator PDF: This output identifies specific tagging instances that do not adhere to Avaya standards and highlights them in the output so that they can be corrected. For information on the tagging this output highlights, see “Validator PDF output formatting”.
- Localization Use PDF: This output is for the Localization team’s use if they want to produce a PDF with different settings, such as producing a version compare draft.
- Avaya HTML: HTML-based frameset output for online help that is integrated with the product.
- Avaya HTML5: A frameless HTML output optimized for viewing on small devices:
  - This output is supported on browsers, such as Firefox and Chrome. However, the output is not supported on Internet Explorer.

- The output contains structural breadcrumbs at the top of each topic that shows the path to the topic in the publication structure. If a topic appears more than once in a publication, you must apply a copy-to attribute to identify a unique output filename for each duplicate instance of the topic. if you do not do this, the breadcrumbs display multiple paths for each topic.

- Avaya CHM: Microsoft compiled help (`.chm`): The `.chm` format is an old format that we avoid using whenever possible. We support `.chm` only for the legacy products. New projects must not use `.chm` help.
- Avaya Eclipse: This output has specific requirements for deployment and must not be used without consulting Information Architect.
- Avaya DOCX: An MS Word (`.docx`) output. The Word document is used to send the content for technical reviews.

Related links

Selecting the output format for a publication on page 122
Deleting and adding a TOC and index to a PDF output on page 144
Validator PDF output formatting on page 131

DITA Open Toolkit

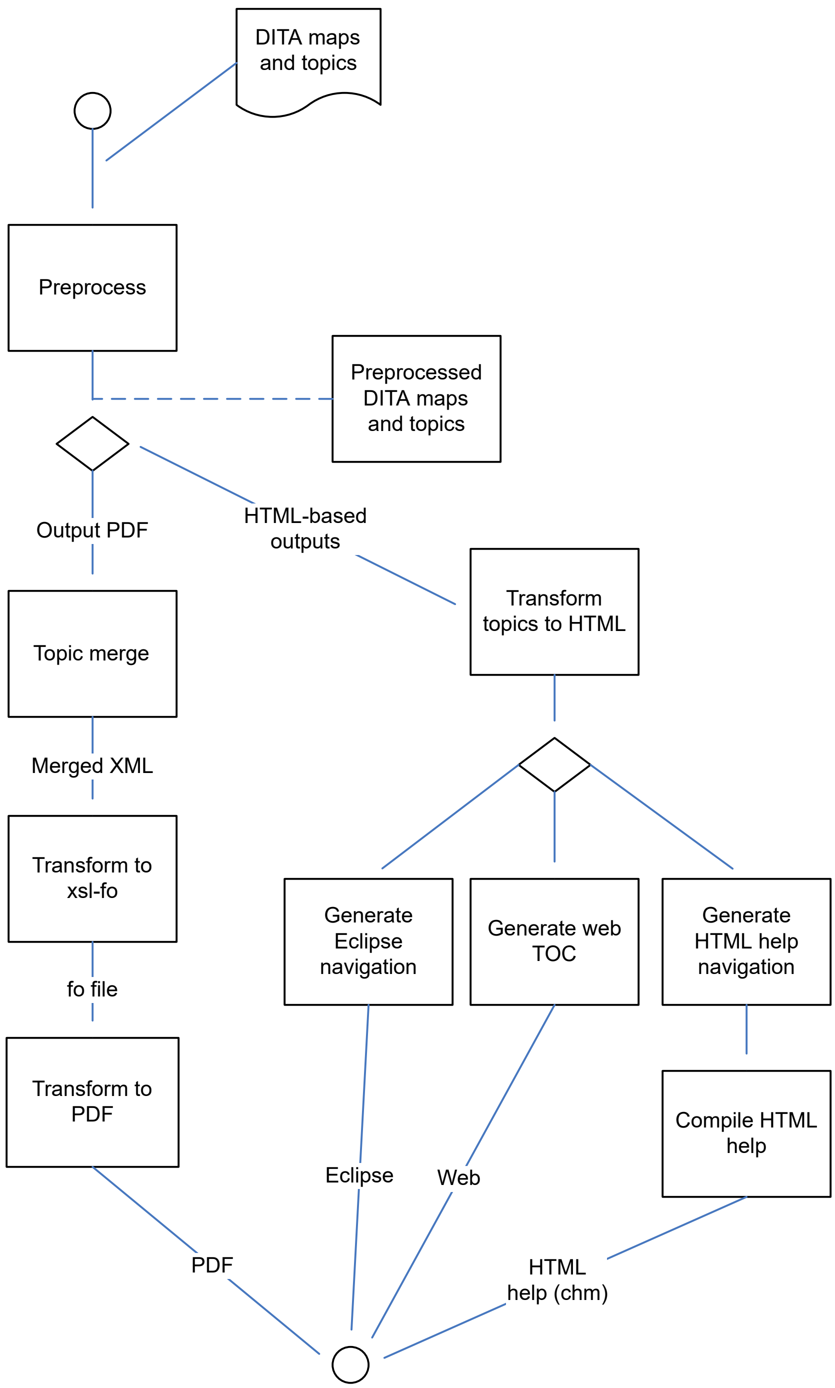
The DITA Open Toolkit (DITA OT) is an open source implementation of the OASIS DITA Technical Committee's specification for Darwin Information Typing Architecture (DITA) DTDs and schemas. The toolkit uses an open source solution of ANT, XSLT, and Java to implement transformation functions from DITA content (maps and topics) into the output formats that we support. This description of the DITA OT processing has been taken from the DITA Open Toolkit Document site.

DITA OT processing pipeline

The DITA Open Toolkit implements a multi-stage, map-driven architecture to process DITA content. Each step in the process examines some or all of the content; some steps result in temporary files used by later steps, while others result in updated copies of the DITA content. Most of the processing takes place in a temporary working directory (the source files themselves are never modified).

Transformations in the toolkit are designed like a pipeline. Most of the pipeline is common between all output formats, and is known as the “preprocess” stage. In general, any DITA process begins with this common set of preprocessing routines. Once the preprocessing is completed, the pipeline diverges based on the desired output format. Some processing is still common to multiple output formats; for example, Eclipse Help and HTML Help both use the same routines to generate XHTML topics, after which the two pipelines branch to create a different set of navigation files.

The following image illustrates how the pipeline works for some common output types.


DITA maps and topics
Preprocess
Preprocessed DITA maps and topics
Output PDF
HTML-based outputs
Topic merge
Transform topics to HTML
Merged XML
Transform to xsl-fo
Generate Eclipse navigation
Generate web TOC
Generate HTML help navigation
fo file
Transform to PDF
Compile HTML help
Eclipse
Web
PDF
HTML help (chm)

Output tab options

Output tab

Name	Description
New	Adds a new output format that you select from the Select Output Format dialog box.
Publish	Publishes the output for the selected format and the language.
Unpublish	SDL does not support the Unpublish option for the Avaya environment.
Cancel	Cancels the publishing job for the selected output.
Download	Downloads the output to the default directory.
Release	Moves the output from **Release Candidate** to **Release**. The Release status indicates that the content is released for distribution to Localization team or customer. You can move an output to Release when: • All publishing errors in the publication are resolved. Click **View Report** to view the errors. • All objects (topics, maps, images, resources) in your publication are released
View Report	Lists any errors such as conref, xref resolution errors.
Properties	Displays the output properties where you can set the language and draft output format properties.
Delete	Deletes the output format for the selected language.

Publishing Status tab

You can add more relevant columns. To do that, on the column header, right-click and select **Add/Remove columns**.

Name	Description
Output format	The supported output format in which you want to generate the output.
Language	The language that you selected for the output format.

Table continues…

Name	Description
Status	The publishing status, The statuses are: • To be Published You must Publish to generate the output. • Pending • Publishing Before publishing, the status momentarily displays Pending before this job gets to the publishing queue. • Draft • Release Candidate • Released
Published by	The user who last generated the output.
Started at	Time when the last output started generating.
Finished at	Time when the last output finished generating.

Output status

The output for a publication can have one of several different statuses. The following table describes the various statuses that are possible. Tridion Docs assigns one of the following statuses.

Status	Description
To be Published	The output format was defined, but the output was not generated yet.
Pending	Output generation was initiated. The server that processes these jobs is busy processing other jobs. The job is processed when possible.
Publishing	The output is being generated.
Release Candidate	The baseline is frozen, and the output generated without any errors. All objects were present and released, no invalid links, hyperlinks, or conrefs were found, and the output format can be released.

Table continues…

<table>
<tr><th>Status</th><th>Description</th></tr>
<tr><td>Draft</td><td>Some objects in the publication are not yet released, and/or the output generated with errors. Issues can include:
Objects included in the publication are not present at all.
Images are not present in the requested resolution.
The publishing report lists all issues that were found during generation of the output.</td></tr>
<tr><td>Out-of-date</td><td>The content of the publication or output format has changed since the output was last generated. Since the current content of the output is not current, the output should be regenerated.</td></tr>
</table>

Selecting the output format for a publication

About this task

You must select the output format for a publication before you can generate an output. The status of the output format is To Be Published until the output is generated for the first time.

Important:

When you publish the AvayaDocPortal output, the documents are uploaded on Avaya Documentation Center automatically.

Before you begin

Open the publication in Publication Manager.

Procedure

1. Click the **Output** tab.
2. Click **New** on the toolbar.
3. On the Select Output Format dialog box, select the output format for the publication, and then click **Next**.

   Use output formats that start with Avaya such as “Avaya Book”, AvayaDocPortal, and “Avaya HTML”, except Validator PDF.
4. In the Add Publication Output dialog, click **en-us** in **Language combination**.
5. **(Optional)** To publish outputs for languages other than English, in the Fallback languages section, select **en-us** in **Topics and maps**, **images**, and **Resources** fields.
6. **(Optional)** To publish an output with draft markings, select the **Use draft output format** check box.

If you select draft output format, Tridion Docs includes any draft-comments, change tracking. With change tracking, in the PDF format, you can see added, modified, and deleted text highlighted in different colors, and change bars in the left margin.

Important:

This step does not apply for the AvayaDocPortal output.

7. **(Optional)** To hide line numbers, watermark, and draft comments, select the following check boxes:
    - **Hide draft watermark**
    - **Hide line numbers**
    - **Hide draft comments**

    Important:

    This step does not apply for the AvayaDocPortal output.
8. **(Optional)** To compare the changes that you made from an earlier version of the publication, in **Differences with version**, select a version.

    Important:

    This step does not apply for the AvayaDocPortal output.
9. Click **OK**.

Related links

Generating output on page 125
Supported output formats on page 117
Output properties on page 123

Output properties

Publishing Options tab

Name	Description
Output format	Format that you selected in the Add Publication Output dialog box. This field is auto-populated and cannot be modified.
Language combination	Language of the book. For English books, select **en-us**.

Fallback languages

Name	Description
Topics and maps	For AvayaDocPortal output, select **en-us**. For all other output types, leave this field blank.
Images	For AvayaDocPortal output, select **en-us**. For all other output types, leave this field blank.
Resources	For AvayaDocPortal output, select **en-us**. For all other output types, leave this field blank.

Draft options

Name	Description
Use draft output format	Adds the following draft markings to the outputs: • PDFs (Avaya Book, Avaya Jobaid, Avaya Quickref 3-Column, Avaya Quickref): draft watermark, line numbers, <draft-comment> element, proprietary statement, and change tracking. • Avaya HTML: <draft-comment> element and change tracking. • Avaya HTML5: <draft-comment> element. The draft output format is not supported for the Avaya CHM output.
Hide draft watermark	Hides the draft watermark on draft PDF outputs. Line numbers and draft comments are shown unless specifically hidden.
Hide line numbers	Hides line numbers on draft PDF outputs. A draft watermark and draft comments are shown unless specifically hidden. Tables do not show line numbering.
Hide draft comments	Hides draft comments (in draft-comment tags) in draft PDF outputs. A draft watermark and line numbers are shown unless specifically hidden.
Differences with version	Produces an output that compares the current publication version with a previous version that you select from the list. You must also select the **Use draft output format** box to produce a draft with the version compare.

Publishing Status tab

Name	Description
Status	A status of `To Be Published` is displayed until you generate the output. You must then publish the output, which is a separate task.
Published by	The user who last generated the output.
Started at	Time when the last output started generating.
Finished at	Time when the last output finished generating.

Related links

Selecting the output format for a publication on page 122

Generating output

About this task

When you generate an output, Tridion Docs assigns one of the following statuses to the output:

- Draft—Some objects in the publication are not yet released, and/or the output generated with errors such as broken hyperlinks or missing objects.
- Release Candidate—The baseline is frozen, and the output generated without errors.

See the Basics of creating a document video for steps to generate an output.

Before you begin

- Open the publication in Publication Manager.
- Select the output format for the publication.

  For more information, see Selecting the output format for a publication.

Procedure

1. Click the **Output** tab.
2. Select the output format you want to publish.
3. Click **Publish** on the toolbar.

   The publish process begins. The time to complete publishing depends on the size of your publication.
4. Download the output, and verify the content.

   For the AvayaDocPortal output, the document is automatically uploaded to Avaya Documentation Center. You do not need to download the zip file from Tridion Docs

Related links

Selecting the output format for a publication on page 122

Programs available on Avaya Documentation Center

Currently, the content of the following products is being published on Avaya Documentation Center:

- Appliance Virtualization Platform
- Application Enablement Services
- Avaya Aura®
- AVP Utilities
- Avaya Breeze Platform
- Avaya Call Management System
- Avaya Control Manager
- Avaya Aura® Presence Services
- Avaya Devices Adapter
- Avaya Aura Device Services
- Avaya Enterprise Cloud
- Avaya Experience Platform
- Avaya Experience Platform Connect
- Avaya Solutions Platform
- Avaya Workplace Attendant
- Avaya Workplace Client
- Avaya Meetings Server
- Avaya Media Server
- Avaya Multimedia Messaging
- Avaya Session Border Controller
- Avaya Vantage
- Avaya Aura Web Gateway
- Branch Gateway
- Communication Manager
- Device Enrollment Devices
- IP Office Web Client
- IP Office Manager
- IP Office Web Manager
- J100 Series Phones
- Oceana Solution
- Avaya Workspaces

- Avaya Analytics
- Session Manager
- System Manager
- Utility Services

Specifying a copyright range for an output

About this task

The copyright we include in our outputs should be a range, where the first year is the date the output was first produced and the second year is the current publish date. Use this task if you have not already set up your existing publications to show a copyright range. The copyright appears in the legal page and in the footer of outputs.

Copyright ranges can be different across books within a project. For example, you might have a new book created for a 2016 release, which would have a copyright of 2016. And you might have another book that's been published since 2012, which should have a copyright range of 2012–2016.

Procedure

1. Open the properties of the publication.
2. Select the **Avaya-specific fields** tab.
3. Set the **Created Date** field to the date of the product release for which the output was first published.

   If you set this date when you first published your output and have used the **Revised Date** for subsequent releases, this date should already be set properly

   Important:

   If you have been updating the **Created Date** for every release instead of using the **Revised Date** field, change the **Created Date** to the proper date. If you do not know when the date of the first release the output was published for, check with your GIS Program Manager or check the Avaya support site to try to find the date. If you cannot determine the date of first publish, leave the **Created Date** as the current publish date and be sure to start using the **Revised Date** field in future releases
4. For existing outputs, if the **Revised Date** is not already populated, set it to the current publish date.
   - You do not have to set the **Revised Date** if it's the first release of an output.
   - If the **Created Date** and **Revised Date** are the same year, the copyright date in the output will only show one year
   - If you set the **Revised Date** to a date more than five years ago (so that the output always uses the current date), note that the system has been configured to recognize this, and will use the current year as the second year in the copyright range.

5. Click **OK**.

Related links

[Setting the date of your outputs to the current date] on page 128
[Publication properties] on page 32

Setting the date of your outputs to the current date

About this task

When you set the **Created Date** and **Revised Date** fields of a publication, you can choose **Today** as an option. When you do that, the date remains the same unless you change it manually. So if you produce an output a month later, it will still have the previous month in the output. If you want the date on the outputs to always track to the current date, use the steps in this procedure.

Before you begin

You must have a setting in the **Created Date** field because it's always required.

Procedure

1. Open the publication, right-click the publication object, and select **Properties**.
2. On the Properties dialog, set the **Revised Date** to a date at least 5 years in the past.

   This functionality is only available on the **Revised Date** field. And it has to be implemented using a date because the date fields require a date selection.

   a. Click the ellipsis next to the **Revised Date** field.
   b. Click the month and date at the top of the date selection dialog.

      The display will change to show the current year at the top and the months under the year.
   c. Click the left arrow at the top of the dialog to scroll to previous years.
   d. Click a month to select something at least five years in the past.
   e. Click a date to complete the selection.
   f. Click **OK** on the Properties dialog.

Related links

[Specifying a copyright range for an output] on page 127
[Publication properties] on page 32

Producing a draft output to compare two publication versions

About this task

You can produce a PDF output to compare the version of a publication that is open with any other version of the same publication. Version compare includes all of the differences between the two publication versions. This compare is different from the regular draft output, which uses the active Oxygen XML Author change tracking in the topics in the current version.

Note:

You can produce a version compare draft for PDF outputs only.

The formatting of changes are same as the draft output:

- Change bars in the left margin
- Green highlighting for new text
- Red highlighting and strikethrough for deleted text

Procedure

1. Start Publication Manager.
2. From the repository, open the version of the publication that you want to use as the basis for the comparison and click the **Output** tab.
3. Select the PDF output format you want to create the comparison of and click **Properties**.
4. On the Properties dialog box:
    a. Select the **Use draft output** check box.
    b. Select the **Differences with version** check box.
    c. Select the version with which you want to compare.

       Ensure that you compare with a different version and do not leave it at the current version, or you will have a publishing issue.
    d. To suppress the watermark, line numbers, or draft comments, select the appropriate check boxes.

    Important:

    To disable the **Differences with version** option, remove the output format and add it back, or disable in the web interface due to a known Publication Manager issue. The information on disabling the check box through the web interface is provided at the end of this procedure.
5. Click **OK**.
6. Publish the output.

7. To disable the **Differences with version** option, do one of the following:
    - a. In the Output tab, delete the output format.
      b. Add a new output format.

      Note:

      Deleting the output format and then adding it back is faster and simpler.
    - a. On the Tridion Docs web interface, select the publication.
      b. Click the **Repository** tab, and navigate to the publication folder.
      c. On the right pane, select the publication, and click the publication title.
      d. In the lower pane, select the **Version** check box on the far left, then scroll to the right and select the check box that corresponds to the **Output Format** and the **Language Combination**.
      e. On the lower-right pane, click **Properties**.

      You cannot modify values on the Properties page, and Tridion Docs displays **Compare with version** as unchecked. Ignore and continue with the next step.
      f. On the Properties dialog, click **Modify**.

Producing a Validator PDF output

Before you begin

Open the publication in Publication Manager.

About this task

The Validator PDF output highlights specific tagging issues so that you can locate and correct them. See “Validator output formatting” for a list of the elements the output highlights.

Note:

It’s strongly recommended that you produce a Validator output for your outputs during content development. It’s especially important that you produce a Validator output before making any deliveries to Localization and before releasing your topics. Leave yourself enough time to make any necessary corrections.

Procedure

1. Select the **Output** tab.
2. Click **Add**.
3. In the Select Output Format dialog box, select **Validator PDF** and click **Next**.
4. When the Add Publication Output dialog box displays, select **en-us** as the **Language combination**.

5. If you want the validator output to include highlighting for the inline elements that aren't reused, select **Hide line numbers** under Draft option.

   The validator output only checks for reuse of the following elements: <product>, <application>, <uicontrol>, <wintitle>, and <version>. Reuse of the <product> and <application> elements is required. Reuse of the <uicontrol>, <wintitle>, and <version> elements is required for localized content and strongly encouraged for other content.
6. Click **OK**.
7. Click **Publish**.

Related links

Validator PDF output formatting on page 131

Validator PDF output formatting

The Validator PDF output format highlights specific tagging instances that fall into the following categories Desktop Client:

- Tags that we should not use
- Tagging hierarchies that are not a best practice
- Elements that are not reused that should be reused, especially for content that's localized.

The following table lists the elements that are highlighted in the Validator PDF output and describes the formatting that's applied.

Element/context	Formatting	Sample
Elements and contexts that should not be used		
<b>: We should never use the bold tag in our content.	"b: <*text*>" appears in red and in a larger size.	b: More
<I>: We should never use the italics tag in our content.	"i: <*text*>" appears in red and in a larger size.	i: root.
List in a paragraph. List elements should always go after the end of the paragraph.	The list appears in red, and the text "List inside of p" appears in red before the list.	Displays your extension number and presence status. From this drop down, you can: List inside of p • Set your presence status or enter a custom presence status message • Log into and out of the server

Table continues…

Element/context	Formatting	Sample
Admonishment (note, warning, etc.) in a paragraph. Admonishment elements should always go after the end of the paragraph.	The admonishment appears in red, and the text “Admonishment inside of p” appears in red before the list.	Admonishment inside of p Note: Videos are not available for all products.
Ordered list in a step.	The list appears in red, and the text “Ordered list inside of steps” appears in red before the list.	Ordered list inside of steps a. Right-click, select **Delete** and then the element you want to delete. b. Click the minus arrow from the icon bar and select the element you want to delete.
Table in a paragraph.	The list appears in red, and the text “Ordered list inside of steps” appears in red before the list.	Avaya Media Server supports the following locales: Table inside of p b: Locale / b: Language / b: Country de_de / German / Germany en_ca / English / Canada en_gb / English / United Kingdom
Empty <p>, <abstract>, <title>, <shortdesc> elements	The element appears in red with the text “Empty *<element name>*”.	Empty paragraph
Elements that should not be reused		
<ph> element that is conref’d. Do not reuse the <ph> element.	The element appears in red with the text “Conref not allowed on ph: *<reused content>*”.	Conref not allowed on ph: Agent
Elements that should be reused		
<product> element that’s not conref'd. Reuse of product names is required.	Highlighted in bright green.	Communication Manager
<application> element that’s not conref'd. Reuse of application names is required.	Highlighted in bright green.	Desktop Client

Table continues…

Element/context	Formatting	Sample
<uicontrol> element that's not conref'd. Our best practice is to reuse <uicontrol> elements. For new projects and localized content, this is required	Highlighted in blue. Reusing <uicontrol> and <wintitle> elements is required for new projects and existing projects that are localized. It's strongly encouraged for all other projects but not mandatory at this time. Highlighting the <uicontrol> elements that are not conref'd can also help locate <uicontrol> elements that have been used improperly to apply bold formatting.	5. Click **OK**.
<wintitle> element that's not conref'd. Our best practice is to reuse <wintitle> elements. For new projects and localized content, this is required.	Highlighted in light purple.	Services
<version> element that's not conref'd. Our best practice is to reuse <version> elements. For new projects and localized content, this is required	Yellow highlighting	6.1 or 6.2
Change tracking		
Change tracking is enabled in a topic.	The text "Change tracking is active in the next topic" appears in red before the topic. Change tracking is fine while you're developing the content, but it's very important that it be turned off before you deliver content to Localization or you deliver and release the final content.	Change tracking is active in the next topic.

Table continues…

Element/context	Formatting	Sample
There is change tracking markup in a topic.	The text “Change markup is present in the next topic” appears in red before the topic. It’s very important that you resolve and change tracking before you deliver content to Localization or you deliver and release the final content.	Change markup is present in the next topic.

Related links

Producing a Validator PDF output on page 130

Breadcrumbs in HTML outputs

How breadcrumbs work

The HTML output formats support breadcrumbs at the top of each topic that provide the path to the topic in the publication structure.

- Breadcrumbs are optional and are disabled by default. See the topic Adding breadcrumbs to an HTML output for information on how to control whether breadcrumbs appear or not.
- Each breadcrumb links to its respective topic. If the path to the topic includes topicheads, those will not be links because a topichead can’t be a link target.
- If a topic appears more than once in a publication, you must populate the “copy-to” attribute of the additional instances of the topic to specify a unique output filename. You set the copy-to attribute on the topicrefs of the additional topic instances. If you do not set the copy-to attribute, the breadcrumbs for the topic will include multiple paths for every instance.

Enabling breadcrumbs in HTML outputs

About this task

HTML output formats, Avaya HTML5 and Avaya HTML, support breadcrumbs. The breadcrumbs are optional and you can control whether they appear in your outputs.

Procedure

1. Start Publication Manager and open the publication.

   The Browse Repository window is displayed.
2. Right-click the bookmap and select **Check out with** in Oxygen XML Author.

3. Expand the **bookmeta** element.
4. Position the cursor before the ending **bookmeta** tag, press `Enter`, and select **othermeta**.

   If **bookmeta** includes a **bookid**, **bookrights**, or **data** element, position the cursor before them.

   The Attributes dialog box displays.
5. In the **content** field, type `yes`.
6. In the **name** field, type `breadcrumbs`.
7. Click **OK**.
8. Click **SDLTridionDocs** > **Check in** to check in the map.
9. To disable breadcrumbs, check out the bookmap, remove the **othermeta** attribute for breadcrumbs, and then check in the bookmap.

Specifying a unique output filename for multiple topic instances to support breadcrumbs

This topic provides information on using the copy-to attribute to specify a unique filename when you include a topic more than once in a publication.

About this task

You must specify a unique output filename when you use a topic more than once in a publication that uses the HTML5 output format. The HTML5 output format support breadcrumbs at the top of each topic. If you use a topic more than once in a publication and you do not use the copy-to attribute to specify a unique output filename, the breadcrumbs for each instance of the topic will include multiple paths.

Apply the copy-to attribute only on the additional instances of the topic. However, you can use the copy-to attribute for every instance of the topic.

Note:

The copy-to attribute might fail the Avaya DocPortal output generation, therefore, use it only when required.

Procedure

1. Start Publication Manager.
2. Open the publication and locate the map that contains the additional instance of the topic.
3. Right-click the map, click **Check out with**, and select Oxygen XML Author.
4. Double-click or select the topicref to which you want to specify the copy-to attribute.
5. In the Attributes window, select the **copy-to** field and enter the filename to which you want to assign this instance of the topic.
6. Click **OK**.
7. Check in the DITA Map.

8. Repeat these steps for any additional instances of the topic.

Downloading output

About this task

You can download output that has a status of Draft, Release Candidate, or Released. For output that includes multiple files, for example, online help, the output compressed in a zip file.

Before you begin

Generate the output.

Procedure

1. Click the **Output** tab.
2. Select the output to download.

   You can select multiple outputs to download by pressing `Ctrl` and selecting the additional outputs.
3. Click **Download** on the toolbar.
4. In the Object Download dialog box, click **Save**.
5. In the **Save As** dialog box, browse to the folder on your computer where you want to save the output, and then click **Save**.

   The title appears as the filename of the output, additionally, the publication version, language, and output format is appended. For example, Administering Communication Manager 8.0=3=Avaya Book=en-us. The maximum number of characters in an output filename is 116 characters. Out of which, 9 characters are used for the version number, language, and separators. The length of the output format name can vary, with the maximum being 30 for the “Avaya 3–column Quick Reference”. The remaining characters are used for the publication title. If the title is long and if there are no enough remaining characters, the complete publication title is not included in the output filename. You can rename the output filename after you download it, or you can shorten the name that fits within the supported characters.

Checking the publishing logs for errors

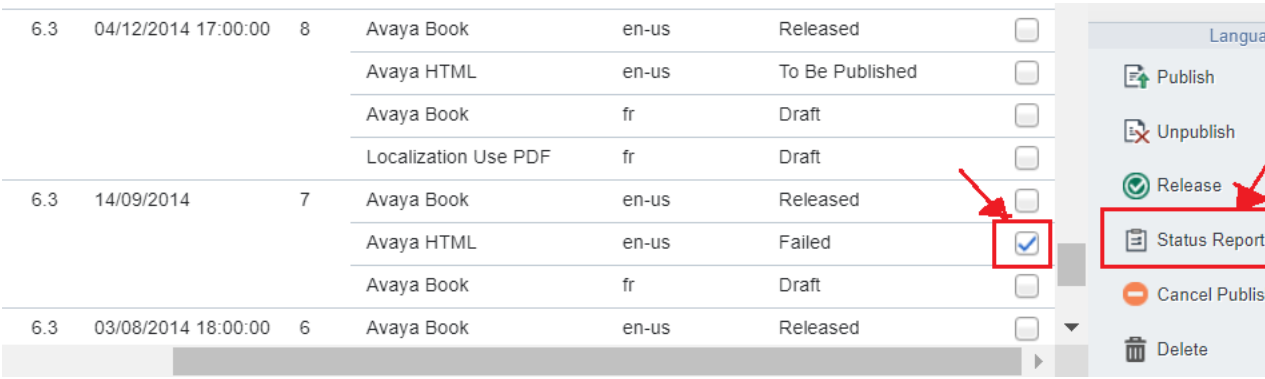
When you produce an output it’s important that you always check the logs for errors. The fact that the output published doesn’t mean that it published without errors such as missing content or broken links.

About this task

Procedure

1. When you receive the email that your publishing request completed successfully with an attached zip file, open the `ditaot.log` file.
2. For PDFs, scroll to the end of the file where it says “BUILD SUCCESSFUL” and ensure that the number of Errors is 0.
3. For HTML outputs, or if there are errors indicated at the bottom of the log, search the log for “[ERROR]”.

   Searching specifically for “[ERROR]” will find all of the DITA Open Toolkit errors.
4. **(Optional)** If you do not receive the notification on the publishing status, view the logs from web interface:
   a. On the Tridion Docs web interface, navigate to the publication for which the publishing failed, and select the select it.
   b. In the right-bottom pane, select the version, output format, and language by two check boxes.
   c. On the extreme bottom-right pane, click **Status Report**.

   d. In the Event Details dialog, search for the term, “error”.
   e. Read through the details to identify the cause of the output failure.

Related links

Viewing publishing logs on the Tridion Docs web interface on page 138
Viewing publishing logs from Publication Manager on page 140

Viewing the publishing queue

About this task

If a publishing job seems to take longer than expected to complete, you can check the publishing queue to see if other requests are in the queue before your request.

Procedure

1. Log in to the Tridion Docs web interface.
2. Click the Publishing tab.
3. In the left pane, click **All Users**.

   Publishing jobs are listed by category:

   - Publishing (currently in progress)
   - Pending (in queue)
   - Release Candidate (successfully published)
   - Draft (successfully published)
   - Cancelled
   - Failed
4. If the output been published more than two days ago, click **Last 4 days** or **Last 10 days** from **Select time period**.

Related links

Logging on to the Tridion Docs web interface on page 26

Viewing publishing logs on the Tridion Docs web interface

About this task

If a publication fails to publish, view the publishing logs in the Web interface to look for the errors that caused the failure.

Procedure

1. Log in to the Tridion Docs web interface.
2. Click the Publishing tab.
3. In the left pane, click **Current User** to view only the publishing jobs that you submitted, or click **All Users** to view publishing jobs that other users submitted.

   The refresh might take a couple of minutes.

   Publishing jobs are listed by category:

   - Publishing (currently in progress)
   - Pending (in queue)
   - Release Candidate (successfully published)
   - Draft (successfully published)
   - Cancelled

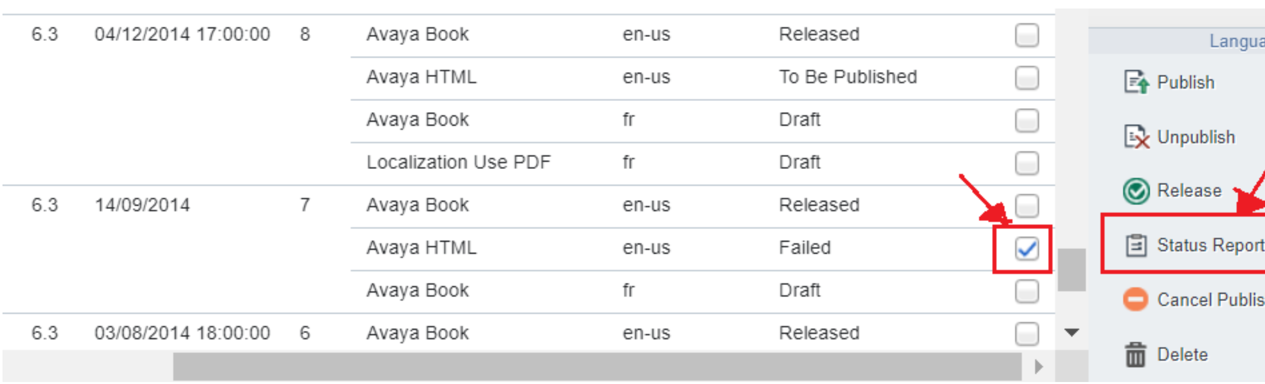
- Failed

4. If the output been published more than two days ago, click **Last 4 days** or **Last 10 days** from **Select time period**.
5. Scroll to the job for which you want to view publishing logs, and then click the title of the publication.

   A log for the publishing job is displayed in a new window.
6. Look through the events for the first one that shows the status as Failed and then double-click the event to view the details.

   Tip:

   `DITA-OT logging` contains helpful information.
7. In the Event Details dialog box:
   a. Search for the term, “error”.
   b. Read through the details to identify the cause of the output failure.
8. **(Optional)** If you do not receive the notification on the publishing status, view the logs from web interface:
   a. On the Tridion Docs web interface, navigate to the publication for which the publishing failed, and select the select it.
   b. In the right-bottom pane, select the version, output format, and language by two check boxes.
   c. On the extreme bottom-right pane, click **Status Report**.



   d. In the Event Details dialog, search for the term, “error”.
   e. Read through the details to identify the cause of the output failure.

Related links

[Logging on to the Tridion Docs web interface](#) on page 26
[Viewing publishing logs from Publication Manager](#) on page 140
[Checking the publishing logs for errors](#) on page 136
[Solution](#) on page 305

Viewing publishing logs from Publication Manager

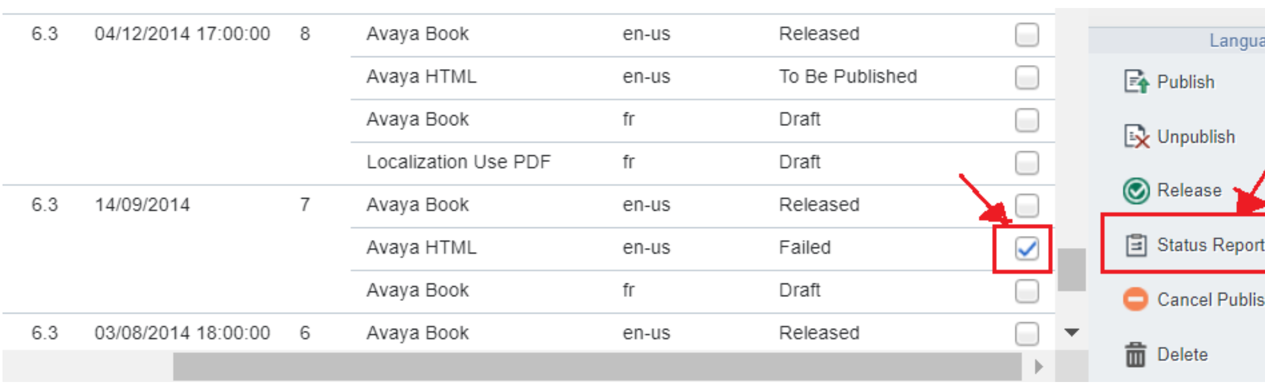
About this task

If a publication fails to publish, view the publishing logs to look for the errors that caused the failure.

You can view the logs from Publication Manager and web interface.

Procedure

1. Open the Publication Manager and click the **Output** tab.
2. Select the output for which you want to check the publishing error log, right-click and click **Save DITA Open Toolkit log as**.
3. Save the log to your computer, and do the following:
    a. Search for the term, “error”.
    b. Read through the details to identify the cause of the output failure.
4. **(Optional)** If you do not receive the notification on the publishing status, view the logs from web interface:
    a. On the Tridion Docs web interface, navigate to the publication for which the publishing failed, and select the select it.
    b. In the right-bottom pane, select the version, output format, and language by two check boxes.
    c. On the extreme bottom-right pane, click **Status Report**.



    d. In the Event Details dialog, search for the term, “error”.
    e. Read through the details to identify the cause of the output failure.

Related links

[Viewing publishing logs on the Tridion Docs web interface](#) on page 138
[Checking the publishing logs for errors](#) on page 136

Downloading outputs from the Tridion Docs web interface

About this task

Typically, after you publish the output, you download the output from Tridion Docs Publication Manager.

However, when you do not need to make changes to the content, you can download outputs from the Tridion Docs web interface.

Procedure

1. Log on to the Tridion Docs web interface.
2. On the left pane, click **Content Manager** and go to the Publishing tab.
3. Locate the output that you want to download and select the check box to the left of the publication.
4. Scroll up to the top of the page, click **Download**, and follow the prompts to open or save the output.

   Tridion Docs displays the PDF outputs in a separate window, you can view the content.
5. Repeat steps 3 and 4 for any other outputs that you want to download.
6. To download a specific version of a publication:
   a. In the Repository tab, browse to the publication.
   b. From the bottom-right pane, select a version of the publication and the output format.
   c. Click **Download** in the bottom-right menu.

Checking accessibility and generating a report

About this task

To comply with Section 508, check if images and objects in a document are accessible and usable by screen readers. Generate a report if required.

Before you begin

1. Provide a meaningful and short text in the alt tag for each image used in the topic.
2. Publish the **Avaya PDF** output in Tridion Docs.

Procedure

1. Download and open the PDF in the Acrobat application.

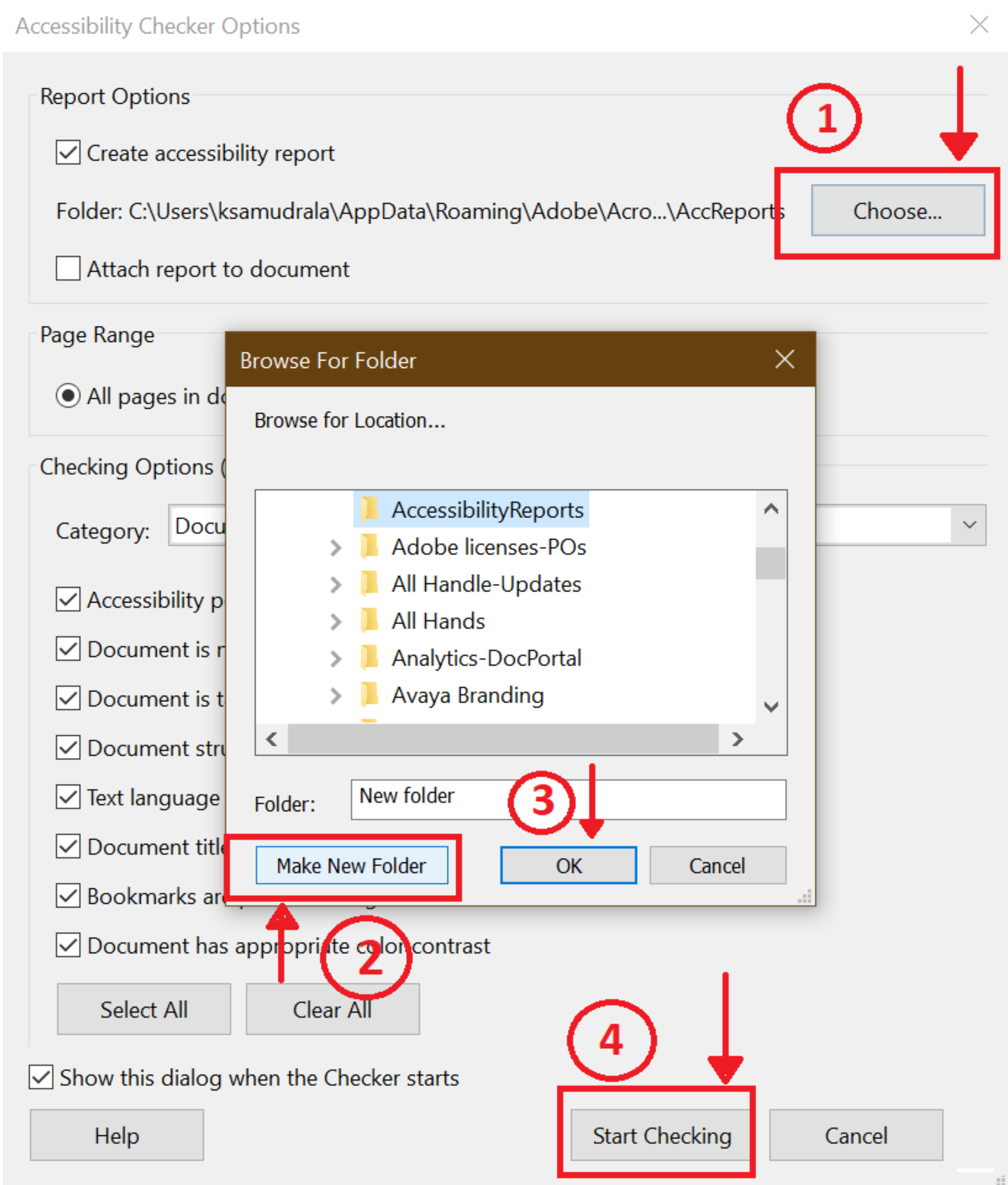
2. From the menu or the toolbar, click **Tools** > **Accessibility**.

3. From the menu, select **Accessibility Check**.

   Acrobat displays the Accessibility Checker Options dialog box.

4. In **Report Options** section, click **Create accessibility report** check box, and click **Choose**, browse to a location where you want to save the report.



5. To create a new folder to save the report, click **Make New Folder**, else, click **OK**.
6. Click **Start Checking**.

   The checker tool lists the sections and pass/fail status and the rule description.
7. Fix any issues in the report, such as adding alt text in images and regenerate the report if required.

8. Share the accessibility report as required.

Related links

[Making images and objects accessible] on page 255
[Accessibility of images] on page 255

Deleting and adding a TOC and index to a PDF output

You can produce a PDF book output without a table of contents or an index. Or if you've got a publication that doesn't currently include a TOC or index, you can add one back. If you are producing a job aid output, you should not include a TOC or index.

Procedure

1. To suppress the table of contents:
   a. Open the publication in Publication Manager and expand the **Front Matter** element.
   b. Right-click the **Book Lists** element and select **Delete**.
2. To suppress the index:
   a. Open the publication in Publication Manager and expand the **Back Matter** element.
   b. Expand the **Book Lists** element and determine whether **Index List** is the only element under **Book Lists**.
   c. If the **Index List** is the only element under **Book Lists**, right-click the **Book Lists** element and select **Delete**.
   d. If there are other elements under **Book Lists**, right-click the **Index List** element and select **Delete**.
3. Save the publication and produce the PDF.
4. If you want to add the table of contents back at some point:
   a. Open a publication in Publication Manager that contains a Table of Contents element.
   b. Expand the Front Matter element, right-click the **Book Lists** element, and select **Copy** from the menu that displays.
   c. Open the publication to which you want to add the TOC in Publication Manager, right-click the **Front Matter** element, and select **Paste**.

      The publication displays Book Lists and Table of Contents elements within Front Matter.
5. To add the index back at some point:
   a. Open a publication in Publication Manager that contains an Index List element.
   b. Expand the Back Matter element, right-click the **Book Lists** element, and select **Copy** from the menu that displays.

If the bookmap you're copying from also includes a Glossary List, expand Book Lists and copy the Index List element instead.

c. Open the publication to which you want to add the index in Publication Manager.

d. If the bookmap doesn't already have a Back Matter element, right-click the bookmap element and select **Add Within** > **Backmatter**.

e. Right-click **Back Matter** and select **Paste**.

Note:

The **Book Lists** element must be the last element (or only element) under **Back Matter**.

The publication displays Book Lists and Index List elements within Back Matter.

Related links

Supported output formats on page 117

Changing the HTML output extension to .htm

About this task

By default, HTML outputs have an .html extension, but you can change the extension to .htm by adding some metadata to the DITA Map file used to generate the output.

Procedure

1. Start Publication Manager and open the publication.

   The Browse Repository window is displayed.

2. Right-click the bookmap and select **Check out with** in Oxygen XML Author.
3. Put your cursor at the start of the ending Bookmeta tag, press `Enter`, and select **othermeta** from the list that displays.
4. In the Attributes dialog box, enter `.htm` in the **content** field and enter `htmlExtension`in the **name** field.

   The topic Sample DITA Map set to produce .htm output files provides an example of how the attributes should be set to produce an output with an .htm extension.

5. Check in the bookmap, save the publication, and produce the HTML output.

Support for non-Avaya branded outputs

We provide limited support for producing non-Avaya branded outputs (sometimes called OEM outputs). You can make the following changes to remove or change the Avaya branding:

- Replace the Avaya logo
- Remove or change the feedback link in the footer
- Replace the copyright holder in the footer of HTML outputs
- Change the color scheme in HTML outputs

Important:

GIS team members should not remove or replace Avaya branding without the direction of your GIS Program Manager.

Adding a custom logo in outputs

About this task

You can substitute the Avaya logo with a custom logo in outputs.

If you already have set up a substitute logo by using othermeta, the same setup works, and you do not need to change it.

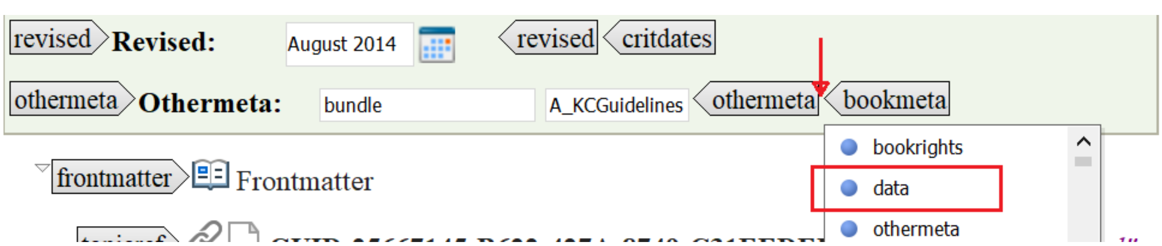
Before you begin

Upload the image to the appropriate project folder in Tridion Docs. Ensure that the file name is unique, preferably the project-specific name.

Procedure

1. Start Publication Manager and open the publication.

   The Browse Repository window is displayed.
2. Right-click the bookmap and select **Check out with** in Oxygen XML Author.
3. Place the cursor before the end **bookmeta** tag, press `Enter` and click **data**.

4. Press `Enter` and insert the **image (wizard)**.
5. On the Insert image dialog box, navigate to the image that you want to use for the logo, and click **Insert**.

6. In the Attributes dialog box of the image, type one of the following in the **outputclass** field.
   - For PDF outputs, `logo-pdf`.
   - For HTML outputs, `logo-html`.

   If you use the same bookmap to produce both PDF and HTML outputs, you can include two **data** elements in **bookmeta**, one with **outputclass** set to `icon-pdf` and one with **outputclass** set to `icon-html`.
7. Click **OK**.
8. Click **SDLTridionDocs** > **Check in** to check in the map.
9. Publish the output and verify that the correct logo is displayed.

Removing the comments link in the footer

You can remove the comment link from the footer of outputs. This procedure is only intended for outputs for OEM—branded outputs.

Important:

Do not remove the feedback link in Avaya-branded outputs.

Procedure

1. Right-click the bookmap and select **Check out with** in Oxygen XML Author.
2. Expand the **bookmeta** element.
3. Position the cursor before the ending **bookmeta** tag, press `Enter`, and select **othermeta**.

   If **bookmeta** includes a **bookid**, **bookrights**, or **data** element, position the cursor before them.

   The Attributes dialog box displays.
4. In the **content** field, type `no`.
5. In the **name** field, type `feedback`.
6. Click **OK**.
7. Click **SDLTridionDocs** > **Check in** to check in the map.

Changing the email address in the comments link in the footer

You can remove the change the email address used in the comment link from the footer of outputs. This procedure is only intended for outputs for OEM—branded outputs.

Important:

Do not change the email address in the comments link in Avaya-branded outputs.

Procedure

1. Start Publication Manager and open the publication.

   The Browse Repository window is displayed.
2. Right-click the bookmap and select **Check out with** in Oxygen XML Author.
3. Expand the **bookmeta** element.
4. Position the cursor before the ending **bookmeta** tag, press `Enter`, and select **othermeta**.

   If **bookmeta** includes a **bookid**, **bookrights**, or **data** element, position the cursor before them.

   The Attributes dialog box displays.
5. In the **content** field, type the email address you want to appear in the comments link in the footer of outputs.
6. In the **name** field, type `feedback-email`.
7. Click **OK**.
8. Click **SDLTridionDocs** > **Check in** to check in the map.

Customizing the copyright holder

About this task

The copyright holder is the company name that appears in the following places:

- After the copyright date in the legal page
- After the copyright date in quick reference outputs
- In the footer of HTML outputs

This topic provides the steps for changing the copyright holder in all of the locations in our outputs.

Procedure

1. Start Publication Manager and open the publication.

   The Browse Repository window is displayed.
2. Right-click the bookmap and select **Check out with** in Oxygen XML Author.
3. Put the cursor at the start of the ending **bookmeta** element, press `Enter`, and select **bookrights**.

   If **bookmeta** includes a data element, position the cursor before it instead of the ending **bookmeta** element.
4. With the cursor at the end of the **bookrights** element, press `Enter`, and select **organization**.
5. Put the cursor in the **organization** element and type the name of the copyright holder, such as “Company ABC, inc.”.

6. Click **SDLTridionDocs** > **Check in** to check in the map.

Changing the color scheme for a frameset HTML output

This procedure provides the steps for changing the colors used for the bar above the main title, the title of the active tab in the navigation, and the topic titles. This procedure is only for the frameset (traditional) HTML output. If you're producing an HTML5 output, see “Changing the color scheme for an HTML5 output”.

Procedure

1. Start Publication Manager and open the publication.

   The Browse Repository window is displayed.
2. Right-click the bookmap and select **Check out with** in Oxygen XML Author.
3. Position the cursor before the ending **bookmeta** tag, press `Enter`, and select **othermeta**.

   If **bookmeta** includes a **bookid**, **bookrights**, or **data** element, position the cursor before them.

   The Attributes dialog box displays.
4. In the Attributes dialog box, enter the name or hex code of the color you want to use in the **content** field and enter `theme-color` in the **name** field.

   If you choose to use the hex code for the color, make sure you include the hash (#) before the number, such as `#ff4d6c`. If you want to find the hex code of a color, you can use a color picking site, such as the HTML Color Picker on the w3schools site.
5. Click **OK**.
6. Click **SDLTridionDocs** > **Check in** to check in the map.
7. Produce the output and validate that the correct color scheme appears.

Related links

Changing the color scheme for an HTML5 output on page 149

Changing the color scheme for an HTML5 output

This procedure provides the steps for changing the colors used for the bar at the top and bottom of the output. The HTML5 color bar is a gradient, so there are two colors you must specify. This procedure is only for the HTML5 output. If you're producing an HTML frameset output, see “Changing the color scheme for a frameset HTML output”.

Procedure

1. Start Publication Manager and open the publication.

   The Browse Repository window is displayed.
2. Right-click the bookmap and select **Check out with** in Oxygen XML Author.
3. Position the cursor before the ending **bookmeta** tag, press `Enter`, and select **othermeta**.

If **bookmeta** includes a **bookid**, **bookrights**, or **data** element, position the cursor before them.

The Attributes dialog box displays.

4. Enter the name or hex code of the color you want to use at the top of the color bar in the **content** field and enter `gradient-light` in the **name** field.

   If you choose to use the hex code for the color, make sure you include the hash (#) before the number, such as `#ff4d6c`. If you want to find the hex code of a color, you can use a color picking site, such as the HTML Color Picker on the w3schools site.
5. Click **OK**.
6. Position the cursor before the ending **bookmeta** tag, press `Enter`, and select **othermeta**.

   If **bookmeta** includes a **bookid**, **bookrights**, or **data** element, position the cursor before them.

   The Attributes dialog box displays.
7. In the Attributes dialog box, enter the name or hex code of the color you want to use at the bottom of the color bar in the **content** field and enter `gradient-dark` in the **name field**.
8. Click **OK**.
9. Click **SDLTridionDocs** > **Check in** to check in the map.
10. Produce the output and validate that the correct color scheme appears.

Related links

Changing the color scheme for a frameset HTML output on page 149

Producing the Eclipse help outputs

About this task

Eclipse help is an HTML-based help output. This output type must be used only with Eclipse-based applications or if you've discussed using it with Information Architect.

Draft output is not supported for Eclipse outputs.

The context IDs, when present, are always contained in the `contexts.xml` file. The start file can be found in `toc.xml`, the file mentioned in the toc start tag's topic attribute.

Before you begin

Resolve any errors and make final changes in the topics before you produce a final output for delivery. In specific, if the content is localized to ensure that content marked for deletion is not included in translation.

Procedure

1. Click the **Output** tab.

2. Click **Add**, select the **Avaya Eclipse Help**, and click **OK**.
3. When the publishing completes, download the output.

   The output is automatically placed into a folder with a name that matches the Eclipse Plugin ID entered in the resourceid. This means that you can download the `.zip` from Tridion Docs and extract it directly to the Eclipse plugin directory, and the help comes up integrated the next time Eclipse starts.

Chapter 12: Publishing documents on the Avaya Documentation Center

Guidelines to publish content on Avaya Documentation Center

To publish the content seamlessly on Avaya Documentation Center, you must add required metadata.

Also, follow best practices to enhance the content search and filter on Avaya Documentation Center.

DITA filename titles

- **Avoid special characters::** The **Title** field of the DITA file in Tridion Docs must contain only alphanumeric characters, dashes, and underscores.

  Important:

  Do not include any special characters, such as trademarks , registered marks, and special characters, such as +-!(){}[]^"~:\&||#$@€/><,.‘;=%£&¬|`'“.

- **Avoid long topic title::** Ensure that the topic title is not too long, truncate the names of the existing topics where required and keep it to 50 characters maximum. Examples of long titles:

  ```
  When I start the Avaya Communicator client Microsoft Outlook
  displays a security notification mess
  ```

  ```
  Avaya
  Equinox_for_iOS_is_matching_local_contact_details_for_incoming_call_
  instead_of_aggregate_con
  ```

  Important:

  Change the name from **Topic** > **Properties**. You do not need to create a new version.

- **Unique Override Output Filenames::** In a publication, ensure that the Override Output Filename in the Baseline tab is unique. Checkout the topic, and remove or change the value if you find duplicate override filenames within the publication. See Duplicate override filenames on page 305.

Metadata

You need to set the following metadata in the document that you want to publish on Avaya Documentation Center

Metadata	Element where the value is set	Description
Publication type	Publication properties	To enable content search by document type.
Release number	Publication properties	To enable content search by release number.
Product family and product names	Topics properties Map properties	To enable content search by product family and product name.
Bundle name	Bookmap/bookmeta/othermeta	To identify different releases of a publication on Avaya Documentation Center.
Homepage	Map/topicmeta	To make a preferred topic as the home or landing page. By default, legal page is set as the homepage.
Cross-reference to topic external to the publication	xref/@scope	To link a topic to another topic that is external to the current publication.
Related link	related-links/link	To link to content or a video topic

Avaya Documentation Center publishing checklist

The checklist provides a high-level process of preparing the content and publishing output on Avaya Documentation Center.

Use the check list as reference. You do not have to mark each item when you complete the task.

<table>
<tr><th>No.</th><th>Task</th><th>Notes</th><th>✔</th></tr>
<tr><td>1</td><td>Open the publication, and update the content for the release.</td><td></td><td></td></tr>
<tr><td>2</td><td>Ensure that DITA topic file names contain alphabets, numbers, underscores, and hyphens only.

Important:

Avoid registered marks, trademarks, and special characters, such as +-!(){}[]^"~:\&|| #$@€/><,.‘;=%£&¬|`'“

DITA topic file names with special characters might not show up on Avaya Documentation Center.</td><td></td><td></td></tr>
</table>

Table continues…

No.	Task	Notes	✔
3	In the Publication properties, set the correct publication type. For example, Administering and Using.		
4	Ensure that the following are available on Avaya Documentation Center, and open an INFOSOLUTIONS Jira ticket to request if not already available: • For new program, the product name • The product release number for the document that you want to publish		
5	In the Publication properties, ensure that you add the correct release number. **Note:** If you do not add a release number, your document might not show up when the user applies filter for this product release.		

Table continues…

No.	Task	Notes	✔
6	In the bookmap element, add the bundle name. **Note:** If you publish the output without a bundle name, the link to the document on Avaya Documentation Center contains GUID, the bookmap ID. For example, https://documentation.avaya.com/bundle/GUID-A58BC730-486D-4FEF-B67D-9F920127FBF2/page/AboutHostedServices.html If you add the bundle name and republish the output, a second entry gets created for the same document on Avaya Documentation Center, and this time with the bundle name. https://documentation.avaya.com/bundle/UsingAvayaSubscription/page/AboutHostedServices.html Contact IA to get the document with GUID in the URL removed from Avaya Documentation Center.	Preparing content for publishing on the Avaya Documentation Center on page 156	
7	Set the homepage in the ditamap that contains the topic you want to set as home page.	Preparing content for publishing on the Avaya Documentation Center on page 156	
8	(Optional) Set the scope attribute to peer in xref to link to a topic that is external to the publication.	Inserting a link to an external topic on Avaya Documentation Center on page 182	
9	In the **Output** tab of the publication, add the **Avaya Doc portal** output, if not already available. To publish the output on the development server, select the **zoomindocs.avaya-staging** output type.		
10	Ensure that the content in the publication shows up correctly on Avaya Documentation Center.		

Preparing content for publishing on the Avaya Documentation Center

About this task

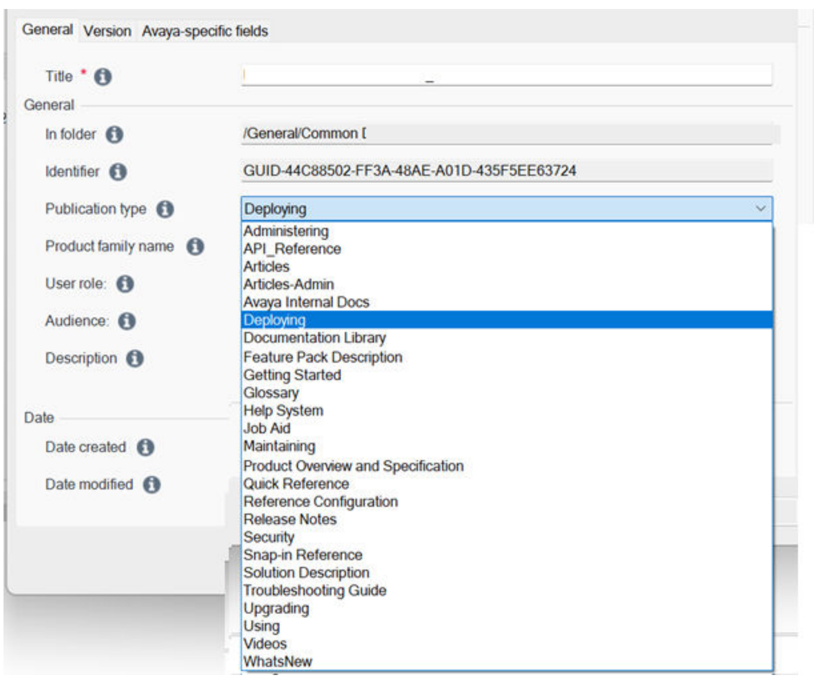
To publish content on the Avaya Documentation Center, you must add the required metadata to the bookmap and add the new AvayaDocPortal output format.

Before you begin

- Know the metadata values, such as bundle name, product family, and product name that you must provide in the bookmap of the document.
- In the **Title** field of the topic properties, include only alphanumeric characters, dashes, and underscores. Avoid special characters.
- Ensure that the topic that you reference using scope=peer is added to the Resources section of the publication.

Procedure

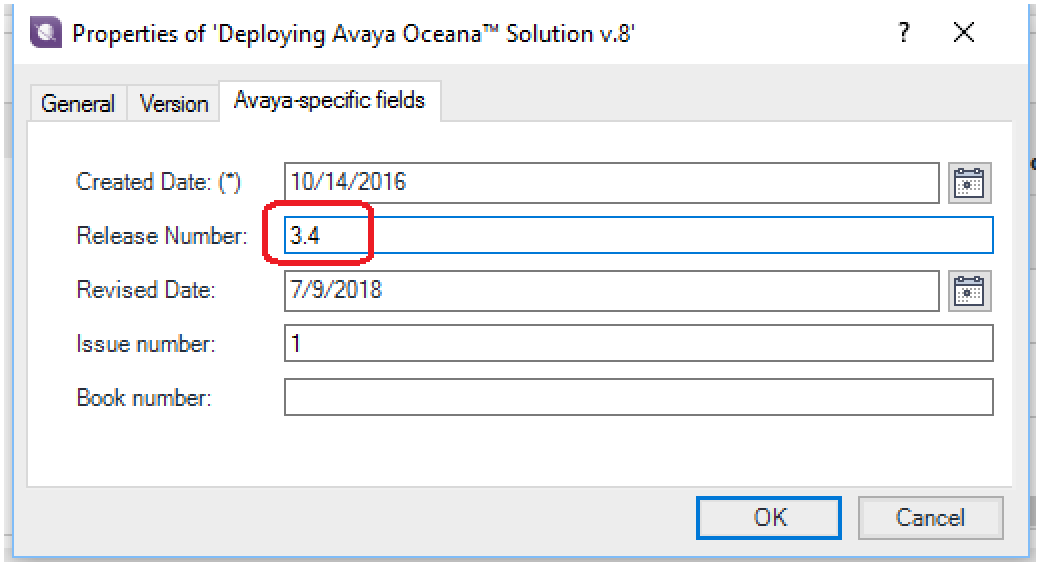
1. In the Tridion Docs repository, select the publication, and check if the **Publication Type** has the correct document type set in the properties.

   If you do not add the correct publication type, user cannot filter the information by the document type on Avaya Documentation Center.
2. In the publication properties, set **Release Number** correctly.

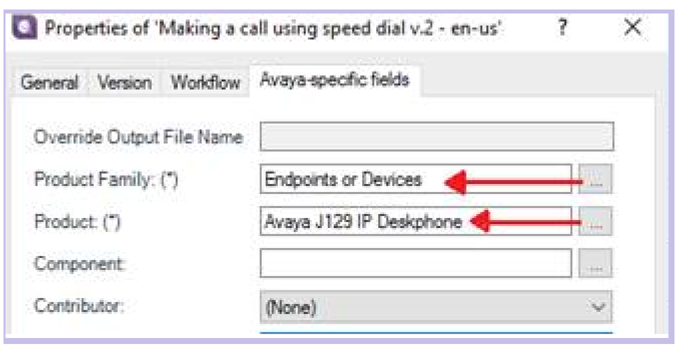
Important:

If you do not add the correct release number, user cannot filter the information by release number on the Avaya Documentation Center.



3. To ensure that the correct product family and product name are set in the bookmap of your publication:

    a. Right-click the bookmap, click **Properties** > **Avaya-specific fields**, and change the value if the product family and product are set to Common DITA supporting content or any other incorrect project name.

    b. If you do not see your project name, check with your lead and open an INFOSOLUTIONS Jira ticket to get the name added to the list.

    c. To change the values in bulk, from Browse Repository or the **Baseline** tab of the publication, select all topics or maps:

        a. Right-click **Properties** > **Avaya-specific fields**, and change the product family and product names.

        b. Click **OK**.

4. To set the bundle name:

    a. Check out the bookmap by using the **Check out with** option to open in Oxygen XML Author.

        The bookmap opens in Oxygen XML Author.

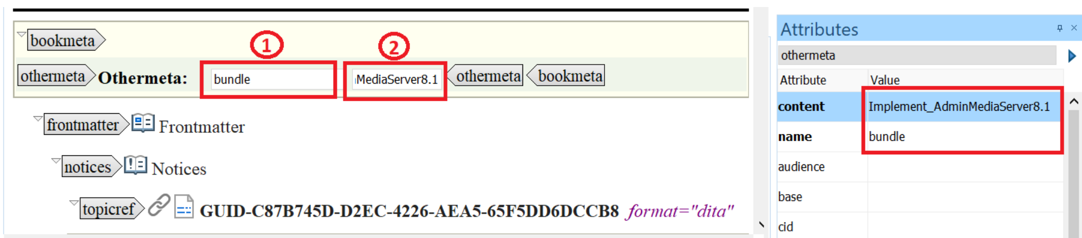
    b. From the toolbar or the **DITA** > **Tags display mode** menu, click **Full Tags**.

    c. Place your cursor within the bookmeta element, add a new othermeta element, if not already available.

    d. Set the following bundle parameters:

        - name=bundle
        - content=<bundle-name>.

        Where <bundle-name> is a unique name that identifies document type, product name, and release number.



Important:

Use a unique release number to prevent overwriting documents of the older release on Avaya Documentation Center. For example

- For Release 8.1 document, UsingSolutionDeploymentManagerClient_r81
- For Release 8.2 document, UsingSolutionDeploymentManagerClient_r82

    e. Check in the bookmap.

5. To set the homepage in the publication:

    a. Identify the topic that you want to set as home page.

        If you do not set the homepage for a publication, the publication displays the first topic on Avaya Documentation Center, which is the legal page.

        The best practice is to set the overview or purpose topic as the home page.

    b. In Oxygen XML Author, check out the map that contains the topic you want to set as home page.

    c. Place the cursor in the topicref element.

d. In the Attributes window, set outputclass = `homepage`.

6. To publish the output on the Avaya Documentation Center, do the following:

   a. Add the **AvayaDocPortal** output type.

   b. In the output properties, set the Language combination.

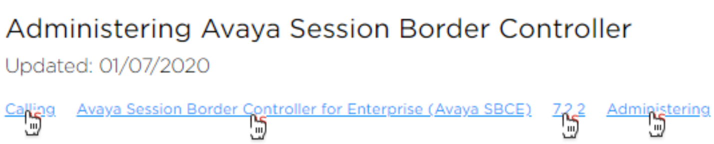
   c. To publish output for languages other than English, set the fallback languages for Topics and maps, images, and Resources to `en-us`.

   d. Publish the output.

   Important:

   For **AvayaDocPortal** output, the document is automatically uploaded to the Avaya Documentation Center. You do not have to do anything with the zip file produced in Tridion Docs.

7. Go to https://documentation.avaya.com, log in using your global handle and password, and verify if the document is published correctly, and topics show up.



Related links

Replacing the document or publishing for new release on the Avaya Documentation Center on page 160
Inserting a link to an external topic on Avaya Documentation Center on page 182

Replacing the document or publishing for new release on the Avaya Documentation Center

About this task

The bundle name that you add to the bookmap of a publication must be unique to avoid any accidental overwriting of the content on the Avaya Documentation Center. However, if you have to make changes to the existing publication, use the existing bundle name.

Procedure

1. To publish content for the new release on the Avaya Documentation Center:
    a. Create a new version of the bookmap.
    b. Update the bundle name in the newer version of the bookmap.

    For example, if the bundle name of the existing publication is UsingSolutionDeploymentManagerClient_r70, and you created a new version of the bookmap, v.5 to update the content, update the bundle name to UsingSolutionDeploymentManagerClient_r80 in the bookmap v.5.
2. To replace the content that is already published on the Avaya Documentation Center:
    a. **(Optional)** Create a new version of the bookmap only if the bookmap is released.
    b. Keep the existing bundle name in the bookmap.

    For example, if the bundle name of the existing publication version 4 is UsingSolutionDeploymentManagerClient_r70, and you created a new version v.5 of the bookmap to update the content, keep the bundle name UsingSolutionDeploymentManagerClient_r70 in the bookmap v.5.

Related links

Selecting the output format for a publication on page 122

Avaya Documentation Center postpublishing checklist

The checklist provides the high-level process to verify the content uploaded on Avaya Documentation Center.

Note:

This is a mandatory checklist, and you must mark each item when you complete the task.

No.	Task	Action	✔
1	Ensure that the following metadata is displayed correctly: • Product family • Product name • Release number • Document type	Set the properties in: • Publication: Release number and Document type • Bookmap: Product family and product name.	
2	From **Library** or the product landing page, open the document, and ensure that it does not display `Content not found` message.	Add the legal page in the bookmap of the publication if not already added. If you still see the error message, open an INFOSOLUTIONS Jira.	
3	Ensure that the bundle name defines the product name, documentation type, and release number of the document, instead of the default GUID.	Add the bundle name in the bookmap.	
4	From **Library** or the product landing page, open the document, and ensure that the default home page is set to a meaningful topic. For example, an overview topic. If you do not set the homepage, the page displays the legal page as homepage for the document.	Add the homepage in the topicref element in the ditamap where the preferred topic is available.	
5	From **Library** or the product landing page, ensure that the document does not contain a duplicate entry for the same release. The page displays the duplicate entry if you republish the same document on Avaya Documentation Center with an updated bundle name.	Identify the duplicate entry, open an INFOSOLUTIONS Jira and request to delete the duplicate entry.	
6	Ensure that you fix any empty navigation links at the chapter level.	In the chapter map, add topics within the topichead instead of adding them directly.	

Table continues…

<table>
<tr><th>No.</th><th>Task</th><th>Action</th><th>✔</th></tr>
<tr><td>7</td><td>Ensure that when you open the topic, the page does not display <code>Content not found</code>.

DITA topic file names with special characters does not show up on Avaya Documentation Center.</td><td>Ensure that the title field in DITA topic properties contains alphabets, numbers, underscores, and hyphens only.

Important:

Avoid registered marks, trademarks, and special characters, such as +!(){}[]^"~:\&||#$@€/><,.‘;=%£&¬|`'“</td><td></td></tr>
<tr><td>8</td><td>Work with Information Architect, and make the documents for the new product release available to customers and partners on the GA deadline.</td><td>Important:

If you do not perform the step, customers and partners cannot view the documents for this product release.</td><td></td></tr>
</table>

Related links

Preparing content for publishing on the Avaya Documentation Center on page 156

Adding videos in a document

Videos in documents

As part of GIS Cloud Strategy, we deliver video content in documentation that is delivered to Avaya Documentation Center. The videos include the product videos created by Avaya learning team and Avaya mentor videos hosted on You Tube.

Avaya Documentation Center supports the following:

- Direct access to videos through the Video publication
- Jump to the relevant video from a topic
- Search and filter videos

Preparing for adding videos in a document

About this task

Some high-level tasks that the GIS Lead/Writer needs to perform before adding videos in a document.

Procedure

1. Arrive at the video topic list, video duration, video type and audience/persona.

   Note:

   Arrive at the video topics, list the user/audience persona and arrive at the top 10 or 20 topics these persona will be performing on your product. In your documents, map these topics to your content.

2. Map the video topic with the content in your document. Identify the documents (Using, Quick Reference, Deploying, Administering, Overview and Specification) vis-a-vis videos that you will add in the document.

   Here is a sample spreadsheet for mapping videos to your content.

   Table 1: Sample spreadsheet

Document Title	Overview & Specifications	Administering	Using	Troubleshooting
Understanding J179 IP Phone	✔	✔	✔	-
Setting up users	-	✔	✔	-
Adding an account	-	✔	✔	-
Reindexing the site	-	-	-	✔

3. Work with the Avaya Learning team on story-boarding these topics.
4. Review and approve videos.
5. Involve the Localization team if your program is being localized.

Implementing videos in a document

About this task

Implementing videos in documents involves two major tasks.

Procedure

1. Create a video publication and add all video topics for the project.
2. Provide references to the video topics in documents, such as Using and Administering.

Creating a video publication

About this task

Create a separate publication where you can add all video topics.

Procedure

1. Create a new publication using the new Video Publication template.

   Ensure that the Publication type is set to **Videos**.

2. Create a new bookmap using the new Videos map template.

   Note:

   Do not add the legal topic or any normal topic such as, concept, task, and reference in the Videos bookmap.

3. Create chapter maps to organize your video topics.
4. Create a reference type topic and check out the topic.
5. Press `Enter`, select the object element, and add the following attributes from the Attributes window:

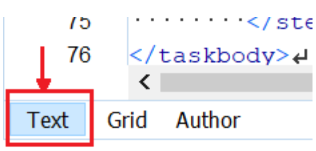
   - **data**: <url of the video>

     Example: https://cdn.avaya-learning.com/CDN_EU/CCaaS/21380W/sav/index.html?id=52984896d532adecb88a0333dc1c037a

     To reference videos from YouTube, for example, the caUGylLdw08 video, enter `https://www.youtube.com/embed/caUGylLdw08`. Note that the path must contain `/embed/`.

   - **outputclass**: iframe

6. In Oxygen XML Author, go to the **Text** view at the lower-left corner, and add the full view parameter <param name="allowfullscreen" value="true" /> inside the object element.

   For example:

```
<object data="https://cdn.avaya-learning.com/CDN_EU/xxxxxx" outputclass="iframe">
<param name="allowfullscreen" value="true" />
</object>
```

7. Repeat Steps 4 through 6 for each video.

   Note:

   Add one video in a topic.

8. Add maps into the video publication and add the video topics into appropriate maps logically organizing the topics.
9. Publish the **AvayaDocPortal** output to upload the videos publication on Avaya Documentation Center.

Linking video topics in documents

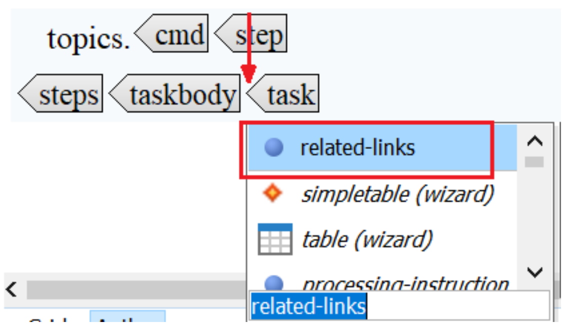
About this task

You can reference the video topics in documents, such as Using, Overview and Specification, Deploying, and Administering.

Procedure

1. Open the publication, such as Using <product> and check out the topic where you want to reference the video topic.
2. At the end of the topic, place the cursor between body and root elements, press `Enter` and add the **related-links** element.

   For example, between the end of taskbody and task elements.

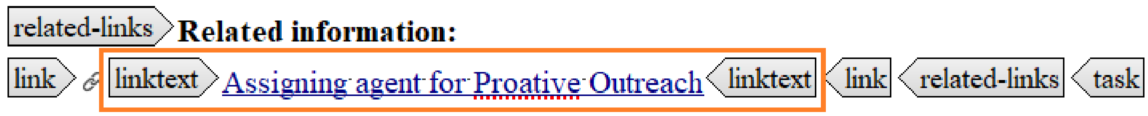
   

3. Inside related-links, press `Enter` and do the following:
   a. Select **link (web link)**.
   b. In the **URL** field of the Web Link dialog box, type `<link to the video topic on doc center>`.

      Example, https://documentation.avaya.com/bundle/ExperiencePlatformApplicationCenterAdministrationVideos/page/Assigning_agents_for_Proactive_Outreach.html
   c. Click **OK**.

      The Avaya Documentation Center output displays the complete URL as the link text.

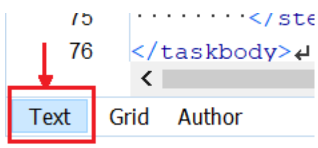
4. To change the link text, place your cursor in the link element, press `Enter` and click **linktext**, and enter the video title.



5. In the Attribute window of the link element, set the following attributes:
   - **href**: `<link to the video topic on doc center>`, if not already provided in the Web Link dialog box.
   - **scope**: `external`
   - **type**: `video`

     Type `video` if you do not see the option in the **type** field.

   In the **Text** view of the editor, you will see <link href="https://documentation.avaya.com/bundle/page/<video topic.html>" format="html" scope="external" type="video">Video title</>



6. Check in the topic.

   Note:

   You can link more than one video topic in a topic. Add a new link element for each video topic that you want to link.
7. Repeat Step 2 through 5 for all topics where you want to reference video topics.
8. Publish the AvayaDocPortal output to upload the content on Avaya Documentation Center.
9. Verify that the links to video topics appear and are active.

Publishing video content on Documentation Center

Procedure

1. Publish both the video publication and the documents where you have linked the videos on Avaya Documentation Center, for example, Using, Getting Started, Overview and Specification, Deploying, and Administering.
2. To verify your video content, using the **zoomindocs.avaya-staging** output format, publish the content on the development server https://avaya-dev.zoominsoftware.io/.

   You may then publish the content on Avaya Documentation Center production.

3. Using appropriate credentials for development and production Avaya Documentation Center sites, log in and verify the published videos and links to videos.

Verifying video content on Documentation Center

Procedure

1. Open Avaya Documentation Center, log in if required, and navigate to the document that has videos.
2. Run the videos.
3. Verify that the **Full view** option is available.
4. Ensure that the **download** option is disabled.

Maintaining video content on Documentation Center

Procedure

1. Periodically, check if the video topics are available and ensure that they are not removed from the publications.
2. In the documents, check if the video links under the **Related videos** section are active.
3. Periodically, check if Avaya learning team has:
   - Added any new videos for the program.
   - Removed any existing videos for the program.
   - Updated links to videos for the program.
4. Get approval from your Doc lead or Product Owner before you add a video publication.
5. Review the guidelines or consult your Doc lead if you are creating a new video publication or adding a new video to an existing publication for the first time.

Removing videos from Documentation Center

About this task

If the content of the video is obsolete, not relevant anymore, or not required in a document, you need to do one or both as appropriate:

- Remove the link to the video from the content.
- Remove the video topic completely from the document.

Procedure

1. From Tridion Docs, open the publication that contains references to videos, such as Using and Administering, and do the following:
   a. Check out the topic where you referenced the video topic.
   b. Remove the link element or the entire <related-links> element.
   c. Republish the document on Avaya Documentation Center.

   d. On Avaya Documentation Center, in the referenced topic, verify that the reference to the video has been removed in the **Related Videos** section.

2. From Tridion Docs, open the Videos publication, and do the following:
   a. Remove the video topic.
   b. Republish the document on Avaya Documentation Center.
   c. On Avaya Documentation Center, verify that the video has been removed from the document.

Considerations for linking Videos in documents

- You can combine the following types of linking for a topic in a publication:
  - Link to one or more video topics using the <related-links>/link element in the source topic.
  - Link to one or more content topics using relationship table in the ditamap.
- Do not use relationship tables in ditamap to link video topics. If you do so, the video topics will appear within **Related links** instead of **Related videos**, which is incorrect.

Best practices

Avoiding accidental overwriting of output on Avaya Documentation Center

- Uploaded documents for the major release, for example, 4.0, on Avaya Documentation Center.
- Started work on a Feature Pack or Service Pack for that product.

Potential issue

If you accidentally publish the Avaya Documentation Center output of the working copy, the content gets updated on Avaya Documentation Center.

Avaya Documentation Center overwrites the output because the publication for Feature Pack\Service Pack and the major release share the same bundle name.

Best practice 1

This applies when you are updating the content for Service Pack of the current release where you need to replace the document on the Avaya Documentation Center.

1. Delete the Avaya Documentation Center output formats from the current working copy of the publication in Tridion Docs.
2. Add the AvayaDocPortal output format only when you plan to upload the content on the Avaya Documentation Center.

Best practice 2

This applies when you create or update content for a new release, and upload as a new document on the Avaya Documentation Center.

1. In the new version of the publication that you created for a new product release, set the new release number for which you are creating the content.

   For example, 4.0.

2. Update the bundle name in the new version of the bookmap.

   For example, change the bundle name from DeployingOceanaSolution_r3.9 to DeployingOceanaSolution_r40.

   With the new bundle name and the release number, even if you accidentally publish the AvayaDocPortal output, Avaya Documentation Center creates a new entry of the document, and does not overwrite the existing document.

Related links

Preparing content for publishing on the Avaya Documentation Center on page 156

Chapter 13: Linking and references

Types of linking in DITA

There are two basic types of linking in DITA:

- Links in topics (inline links): Cross-references
- Links in maps: Hierarchical links and relationship table links

Links in maps

Related links are links that do not appear in the topic source. These links are automatically generated from DITA Maps.

There are two types of related links:

- Hierarchical
- Relationship table

Because related links are automatically generated from the DITA Map, they allow the topics to be used in different contexts. Related links are less disruptive to flow than inline links. But it's still important to make sure that you use them appropriately so that you don't overwhelmed users with too many links.

A couple of examples of good related links

- A topic might include instructions for a command that has a lot of parameters and variables. A relationship should be created in the relationship table between the task and command reference topic.
- A task topic might need related links to other task topics. For example, a task about performing a system backup might need to link to a task topic about restoring the system database from a backup.

Cross-reference links in topic

You can use cross-references to link to information to another topic, an external webpage, or file.

Where possible, manage links between topics in relationship tables. The use of cross-references can cause issues, especially with reused content.

- If you own common content that is reused, avoid using cross-references to topics wherever you can. When you use xrefs to topics and someone reuses your content, if they aren't reusing the topic that's the target of the xref, they'll end up with a broken link in their output. It also causes potential problems related to localization, which are explained below.

- If you reuse a topic that contains an embedded xref and the target topic is not included in your deliverable, your output will contain a broken link. If you're reusing topics that include xrefs to topics, request that the content owner move the xref to a relationship table link instead.
- When you reuse content that contains embedded xrefs, that creates a dependency on the topics that are the target of the xrefs. If the content is localized, all content that is referenced is included in the package sent for translation. So if you're reusing content that includes xrefs to other topics, those other topics are included in the package for localization, even if you are only reusing an element in that topic that does not include the xref. This increases translation costs.
- If you create relationships between topics, you do not need to include a text reference to that topic.

You can use cross-references in the following situations, but consider the implications for reuse and ensure that you also include the target topics in the publication:

- High-level tasks or checklists.
- Complicated task topics that document multiple pages or dialog boxes in an application.
- New in this release or Change history topics.
- Reference to external targets, such as websites.
- The user might lose the context of the link unless the link is included in the appropriate text element.

Related links

Inserting a cross reference to another topic on page 179

Hierarchical links and relationship table links

Hierarchical links

When you nest topics within a ditamap, Tridion Docs automatically generates hierarchical links in the output. The links are created from the parent to the nested child topic and vice versa.

Hierarchical links do not show in the topic source like the relationship table links. You can view the links only in the output.

You do not require the hierarchical links to be visible in the output for the following reasons:

- The nested child topics immediately follow the parent topic.
- The parent topic displays links to all the nested topics that might distract the reader.

You can hide the hierarchical links generated from nesting topics by updating the XML attributes of the topics in the map.

Ensure that the hierarchy that you create between topics adds value. For example, an overview topic should be a peer of the other topics in a component rather than a parent. You can use a topic head to organize topics and avoid the hierarchy.

Related links

Suppressing linking to nested topics on page 173

Linking attributes

Use the Linking attribute to control the behavior of relationship table links or parent/child topics in the topic hierarchy (top part of a map). These settings only apply to the topics in the specific context. For example, if a topic appears twice in a relationship table, setting the linking attribute in one relationship does not affect the linking behavior of the topic in another relationship.

Child topics inherits the Linking attribute from the parent. If you produce an output and don't see the linking you expect, it could be because the Linking attribute is set on the parent topic.

Attribute	Description
(None)	This is the default behavior: • In the topic hierarchy, parent topics contain links to nested child topics in the output, and the child topics have a link to the parent topic. • In relationship tables, links go both ways.
None	There is no linking—the topic cannot be linked to and it cannot link to other topics.
Normal	This is the same as the default behavior. A topic can be linked to and can link to other topics. Use this only to override the linking value of a parent topic.
Target only	A topic can only be linked to and cannot link to other topics. This is used often to suppress links from parent to nested child topics and to define one-way relationships in relationship tables.
Source only	A topic cannot be linked to but can link to other topics. We typically use Target only on the parent topic, but you can use this attribute if there are multiple child topics and some require different behavior than others. If you use Source only in the topic hierarchy, you must set the Linking attribute on the child topics to Normal or Target only.

Suppressing linking to nested topics

Procedure

1. Open the publication and navigate to the topic with nested topics that you want to suppress the links to.
2. Right-click the topic and select **XML Attributes**.
3. In the Insert Values for ‘Topic Ref’ dialog box, select **None** or **Target only** from the **Linking** menu.
4. Click **OK**.

Related links

Linking attributes on page 172
Hierarchical links on page 171

Topic sequences in HTML outputs

In a DITA Map, you can create topic sequence type of linking when there’s an order to topics that you want to show in the related links. The sequence type of linking is used in HTML outputs and shows as next and previous links at the bottom of the topics.

Note:

In PDF outputs, the related links does not show sequencing.

Important:

Create sequences only when a definite order in which the topics should be read or performed in a specific order. Creating sequences of your entire publication is not appropriate because there’s not a real sequence to many topics, like topics in your overview or a group of administration tasks that can be performed at any time in any order. If there are related topics you’d like to point the user to, you should use regular relationship table links.

To set up sequencing, you can use the topicgroup element in a reltable row in the DITA Map. When setting up a sequence, consider the following:

- If the topic order in the hierarchy matches the order that you listed within the map, you can just wrap the topics in the hierarchy with the topicgroup element instead of using the reltable. This won’t be very common.
- If the sequence is different than the topic order, you can set up the topicgroup in the reltable, copy the topics into the topicgroup, and use the toc attribute to hide the duplicate topics in the TOC.
- If you use the same map in a publication from where you produce a PDF, you can use the HTML condition to hide the sequence topicgroup in the PDF if you do not want the related links to appear in the PDF.
- If you use the same publication to produce the PDF and HTML outputs and you want to use the HTML condition to hide the topicgroup in the PDF, you must consider creating a separate publication for the HTML. Alternatively, you need to change the conditions back and forth to produce the outputs and that introduces risk, and not recommended.

- You can technically set up a topicgroup in the topic hierarchy of a DITA Map. If you do that, ensure that you apply the HTML condition to the topicgroup to exclude it from the PDF output. Otherwise, the topics will appear in the PDF twice.

Use the topic sequencing only in situations where it adds value and there's an actual sequence to the topics.

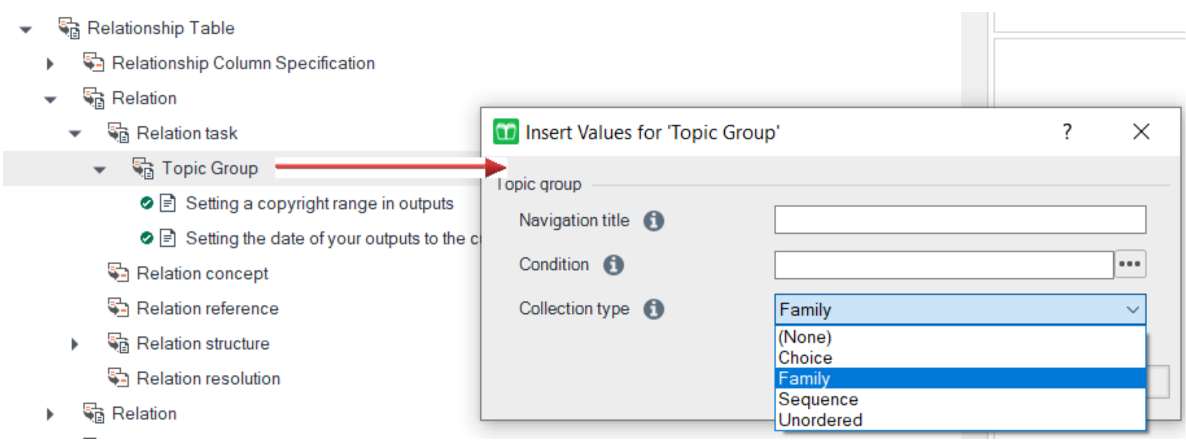
Defining topic sequence linking for an HTML output

Use this procedure to define a topic sequence in a DITA Map that will display as next and previous topic links at the bottom of the topics in an HTML output.

Procedure

1. Open the publication and navigate to a reltable in the map where you want to define the sequence.
2. Add a new relationship table row.
3. Right-click one of the elements in the row and select **Add Within** > **Topic Group**.

   All of the topics you want to include in the sequence might not be the same topic type. In this case, just choose the topic type that most of the topics belong to.
4. When the Insert Values for Topic Group dialog box, displays:
   a. Select **Sequence** as the **Collection type**.
   b. If the map is also being included in the PDF and you don't want the related links to appear in the output, set the **Condition** to **HTML**.
   c. Click **OK**.



5. Copy the topics that make up the sequence into the topicgroup

If you didn't set up a topicgroup separately from the topic hierarchy, as noted in step 2, skip the following step.

6. For each topic in the topicgroup, set the **toc** attribute to **no**.

Relationship tables

Relationship tables overview

Each DITA Map or BookMap can contain an optional relationship table, which identifies the links between the topics in the map.

Each row of a relationship table represents a relationship. For example, if you include a task topic and a reference topic in a row of a relationship table, those topics will have links to each other when you generate an output. If you have multiple topics that relate to another topic, yet those topics do not relate to each other, you must create individual rows in the relationship table for each relationship.

Create rows in a relationship table to link within each component. For cross-component linking, you can create the relationships in the parent map that includes those components.

Links can go out of control, therefore, create relationships between topics that have a strong relationship, rather than just linking to topics with tangential relationships. For example, linking all tasks in a component to every task does not make sense because the user can see those tasks in the table of contents and will understand that they are all related to the same general topic. If topics have a strong relationship to each other, you can add the relationship in the relationship table.

Relationship table guidelines

Add topicrefs to the correct column

When adding topicrefs to a row in a reltable, make sure that you add the topicref to the appropriate column based on the topic type. For example, all topicrefs to concept topics should be added to the Concept row. Structure topic references should be added to the Structure column.

Including multiple topics of the same type in a row

You can include multiple topics of the same type in a row of a relationship table and create links between those topics. To do this, enclose the topicrefs in a topicgroup element and set the **collection-type** attribute to **family** for that topicgroup.

Avoid xrefs to topics

Every link you need to create to topics should be defined in a relationship table rather than as an xref in a topic, if possible. There are issues with using xrefs to create links to topic, especially with reused content:

- If you own common content that is reused, avoid using cross-references to topics wherever you can. When you use xrefs to topics and someone reuses your content, if they aren't reusing the topic that's the target of the xref, they'll end up with a broken link in their output. It also causes potential problems related to localization, which are explained below.
- If you reuse a topic that contains an embedded xref and the target topic is not included in your deliverable, your output will contain a broken link. If you're reusing topics that include xrefs to topics, request that the content owner move the xref to a relationship table link instead.
- When you reuse content that contains embedded xrefs, that creates a dependency on the topics that are the target of the xrefs. If the content is localized, all content that is referenced

is included in the package sent for translation. So if you’re reusing content that includes xrefs to other topics, those other topics are included in the package for localization, even if you are only reusing an element in that topic that does not include the xref. This increases translation costs.

- If you create relationships between topics, you do not need to include a text reference to that topic.

There are some limited cases where it's better to embed the xref directly in the topic content. For example, in an installation checklist or when the context of the link would be completely lost by not embedding it in the text.

It’s not an issue to include xrefs to external targets, such as Web sites.

All topics included in the relationship table must be included in the map hierarchy

A known current limitation is that links to topics external to the map cannot be resolved. So, if you have a reference in a relationship table that is not part of the output you’re producing, the link won’t be resolved. So you must include any topics that you want to link to in the hierarchy of the map. If you do not want the topic to be included in the PDF output, set the **print** attribute to **no**. If you do not want the topic included in the table of contents of the HTML output, set the **toc** attribute to **no**.

Text references in content to topics participating in relationship tables

Don’t include text references to a topic that you’re linking to via a relationship table unless necessary. Benefits of using reltables include the flexibility of where you use the topic and minimizing distractions for the reader. When you add a reference in the topic text, you create a dependency, even if the dependency is not a physical one. And it’s queue to the reader that they should stop reading this topic and go to the one that’s being referenced. If you do feel that a text reference is important, tag the text reference with the <q> element.

Include information about relationship table links in topics

It’s a really good practice to include an XML comment at the top of topics to indicate any topics they have relationship table links to. This is especially important for topics that are reused so that writers reusing that topic can see the topics the writer is linking to in a relationship table and can set up the same relationships in their maps.

One relationship link type that does not work

Relationship table links do not work from topics that are the first or only topic in a chapter or appendix.

Adding relationships

Relationship tables define the relationships between topics. Each row or the Relation element in the relationship table represents a relationship. The links appear in the output at the bottom of each topic as related links.

About this task

You can add relationships between topics using a relationship table in the map. If you are using the same relationship table in a DITA map and a bookmap, you can reuse the relationship table rather than create it in both places or copy it from one to the other.

You can create relation between two or more topics of any type. However, you must group topics that you want to relate using the topic group element. A topic group under a Relation element must contain topics of same topic type.

Note:

Relationship table links do not work from topics that are the first or only topic in a chapter or appendix.

Before you begin

Create a DITA map or bookmap.

Procedure

1. Open the publication in Publication Manager.
2. Check out the map where you want to create or modify the relationship.
3. To add a relationship to the relationship table:
   a. Expand an empty row in the Relationship Table element, or, if the table does not contain empty rows, right-click the **Relationship Table** element, and then click **Add Within** > **Relationship Row**.

      A Relation element indicates a row or a relation. A relation element or a row contains a relation element for each topic type, such as Relation task, Relation concept, and Relation reference.

      Note:

      Add topic of type that match with the Relation element. For example, add all task topics under the Relation task element and set the link attribute to each topic.

   b. Right-click the Relation element that matches the topic type of the topic that you want to add, and then click **Add Within** > **Topic Ref**.

      For example, to add a task topic to the relationship table, right-click the **Relation task** element, and then click **Add Within** > **Topic Ref**.

   c. Click **Browse**, and then browse to and select the topic to add to the relationship.
   d. In the **Linking** field, set an attribute to the topic.
      - Target only: To link the topic from other topics in the relationship but prevent the topic from linking to other topics in the relationship.

        With Target only, other topics in the relationship does not appear in the current topic as related topics.

      - Source only: To link other topics in the relationship to this topic but prevent the topic from appearing in other topics.

   e. Click **OK**.
   f. Repeat steps b through e to specify the topics that are related to the first topic.

4. To create a relationship between more than one topic of the same type, add a topic group within the Relation element for that topic type, for example, Relation task:
    a. Right-click the Relation element where you want to add the topic group and select **Add Within** > **Topic Group**.

       Ensure that you add the topic group to the appropriate Relation element. For example, if you are creating a relationship between two tasks, add the Topic Group to Relation task.
    b. In the **Collection type** field of the Insert Values of ‘Topic Group’ dialog box, select **Family**, and then click **OK**.
    c. Right-click the **Topic Group** element, and then click **Add Within** > **Topic Ref**.
    d. Click **Browse**, and then browse to and select the topic to add to the Topic Group.
    e. Set any other attributes required for the topic relationship, and then click **OK**.
    f. Repeat steps c through e to specify other topics in the topic group.
5. Repeat steps 3 and 4 as necessary to add relationships to the relationship table.
6. Check in the map.

   Note:

   It’s a really good practice to include an XML comment at the top of topics to indicate any topics they have relationship table links to. This is especially important for topics that are reused so that writers reusing that topic can see the topics the writer is linking to in a relationship table and can set up the same relationships in their maps.
7. **(Optional)** If you want to reference topics that you created links to using a reltable, you can include text references to those topic and wrap the topic title with the <q> element.

Related links

Linking attributes on page 172

Removing relationships

About this task

Use this procedure to remove a relationship and all topic references that it contains (Relation element), a specific topic reference in a relationship, or a topic group in a relationship.

When you remove a topic from the map in a publication, you must remove all relationships that is set to the topic.

Procedure

1. Open the publication in Publication Manager.
2. Check out the map from which to remove a relationship.
3. Expand the relationship table.
4. Right-click the element to remove, Relation, Topic Group, or Topic Ref, and then click **Delete**.

Cross-references (inline links)

Inserting a cross reference to another topic

About this task

Create links between topics in relationship tables rather than cross referencing using the xref element. You use xrefs for specific purpose, such as checklists.

When you insert an xref to a topic that has multiple versions, the link automatically goes to the version of the target topic that you're using in your publication. So you don't have to worry about selecting the wrong version to link to.

Procedure

1. Check out the topic in which you want to insert the cross reference.
2. Place your cursor in the location where you want to add the cross reference and press `Enter` and insert the **xref (cross reference)** element.

   Alternatively, from the toolbar, click the link icon () and select **Cross Reference**.

   The Cross reference (xref) dialog box is displayed.
3. Click the Tridion Docs icon (), browse and select the topic that you want to reference.
4. Click **Insert and close**.

Related links

Cross-reference links in topic on page 170

Inserting cross references to elements within a topic

About this task

Important:

Linking to elements within the same topic creates circular references. If number of circular references in a publication reaches a threshold number, Publication Manager crashes while opening the publication. Therefore, avoid linking to elements within the same topic.

Instead, add the element in a common topic and reference in the topic any number of times.

Do not link to title elements within other elements. Link to the parent element instead. For example, to link to a table within a topic, add the ID to the table element rather than to the title element.

Important:

Link text for cross references to specific elements is not updated automatically if you change the title of the cross-referenced element. For example, if you cross reference a figure with a title of “Front view of server” and use that title for the link text of the cross reference, the link text is not automatically updated if you change the figure title to “Front view of S8800.” If you change the title of an element that is cross referenced, you must manually update the link text of the cross references.

Procedure

1. Assign an ID to the element that you want to link to if it does not already have an ID.

   Do not use numbers for IDs, and never use a single number. Use a descriptive ID instead.
2. Save and check in the topic that has the element ID.
3. Check out the topic in which you want to insert the cross reference.
4. Place your cursor in the location where you want to add the cross reference and press `Enter` and insert the **xref (cross reference)** element.

   Alternatively, from the toolbar, click the link icon () and select **Cross Reference**.

   The Cross reference (xref) dialog box is displayed.
5. Click the Tridion Docs icon (), browse and select the topic that you want to reference.
6. From the window, select the element that you want to reference.
7. Click **Insert and close**.

Related links

Adding an ID to elements on page 193

Inserting a cross reference to a non-DITA file

About this task

You can insert a cross-reference to a PDF or Excel spreadsheet. A user who views the HTML must have appropriate application installed to view the type of file you want to include. Therefore, include common file types, such as PDF or Excel.

Before you begin

Before you can link to a non-DITA file, like an Excel spreadsheet or PDF, you must do the following:

- Import the file into Tridion Docs.
- Include the file in the appropriate DITA map.

Procedure

1. Check out the topic in which you want to insert the cross reference.
2. Place your cursor in the location where you want to add the cross reference and press `Enter` and insert the **xref (cross reference)** element.

   Alternatively, from the toolbar, click the link icon () and select **Cross Reference**.

   The Cross reference (xref) dialog box is displayed.
3. In the Cross reference (xref) dialog box, browse and select the file that you want to reference.
4. Click **Insert**.

5. For Excel spreadsheet or Word file, set the format attribute on the xref:
    a. Double-click or select the xref element.
    b. In the Attributes window, enter `xslx`, `xsl`, `doc`, or `docx` in the **format** field.

       You do not need to set the format for PDFs. RWS supports PDF, Excel, and Word file formats.
    c. Click **OK**.

Related links

Importing non-DITA files to Tridion Docs on page 28
Adding a non-DITA file to a map on page 51

You can reference a non-DITA files, such as PDF and Excel in a map.

Inserting a link to a web site

Procedure

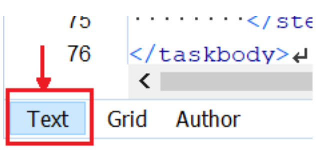
1. Check out the topic in which you want to insert the cross reference.
2. Place your cursor in the location where you want to add the link and press `Enter` and insert the **xref (web link)** element.

   Alternatively, from the toolbar, click the link icon () and select **Web Link**.

   The Web Link dialog box is displayed.
3. In the Web Link dialog box, type the full URL address in the **URL** field, for example, `https://documentation.avaya.com`.

   Important:

   Avoid any empty spaces in the address to keep the address valid. Ensure you include `%20` for any spaces in the address.
4. **(Optional)** To add the link text, at the bottom of the editor, click the **Text** tab:

   Change:

```
<xref href="https://documentation.avaya.com" format="html" scope="external"/>
```

   To:

```
<xref href="https://documentation.avaya.com" format="html" scope="external">Avaya
Documentation Center</xref>
```

   By default, the link text is the URL that you type in the **URL** field.
5. Click **OK**.

The scope attribute is automatically set to external when you use the xref (web link) element.

Important:

If the **scope** is not set to **external**, Tridion Docs processes the link as internal, and converts the address to all caps.

Inserting an email link in a topic

Procedure

1. In Oxygen XML Author, check out the topic.
2. Place your cursor in the location where you want to add the link and press `Enter` and insert the **xref (web link)** element.

   Alternatively, from the toolbar, click the link icon (🔗) and select **Web Link**.

   The Web Link dialog box is displayed.
3. In the Web Link dialog box, enter the email Id in the format `mailto:<email address>`.

   For example, `mailto:jmiller@avaya.com`
4. To add the link text, at the bottom of the editor, click the **Text** mode:

   Change:

   ```
   <xref href="mailto:jmiller@avaya.com" format="html" scope="external"/>
   ```

   To:

   ```
   <xref href="mailto:jmiller@avaya.com" format="html"
   scope="external">jmiller@avaya.com</xref>
   ```
5. Click **Insert and close**.

Inserting a link to an external topic on Avaya Documentation Center

About this task

If you are developing content to publish on Avaya Documentation Center, you can link to a topic that is part of another HTML output already published on Avaya Documentation Center.

The link must be active on Avaya Documentation Center though the target topic is unavailable in the same publication. You can apply the scope=peer attribute on the xref element so that when you produce the HTML output, the system inserts the link without trying to locate the target. If you publish a PDF, the link will be inactive and the link text in the xref element will be formatted as a text reference.

Important:

Do not set the scope attribute to peer on xref elements unless you are publishing to Avaya Documentation Center. If you need to use scope=peer, contact Information Architect.

Before you begin

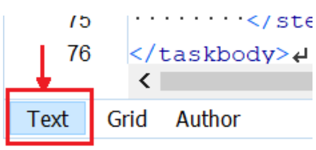
The target topic must be available in at least one of the publication on Avaya Documentation Center.

Procedure

1. Check out the topic in Oxygen XML Author.
2. Place your cursor in the location where you want to add the cross reference and press `Enter` and insert the **xref (cross reference)** element.

   Alternatively, from the toolbar, click the link icon () and select **Cross Reference**.

   The Cross reference (xref) dialog box is displayed.
3. Click the Tridion Docs icon (), browse and select the topic that you want to reference.
4. Click **Insert and close**.
5. Double-click the xref element, in the Attributes window, set the **scope** attribute to **peer**.
6. Click **OK**.
7. To add the link text, at the bottom of the editor, click the **Text** tab, and add the following link text:

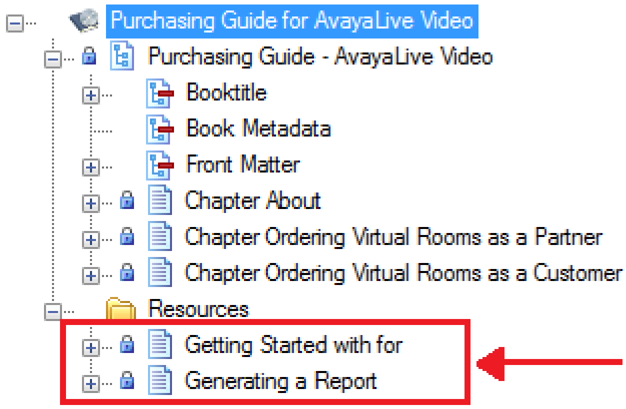
   


   ```
   <xref href="<GUID or link to the topic>" format="html" scope="external"><Add link
   text here></xref>
   ```
8. Add topics that you have referenced with scope=peer to the **Resources** folder located at the bottom of the publication.
   a. Open the publication in Publication Manager if not already open, and go to the Contents tab.
   b. In the desktop repository, locate the topic that you referenced using scope=peer and drag it to the Resources at the bottom of the publication.

      Important:

      Do not include topics under Resources that are not set with scope=peer.

Example


Purchasing Guide for AvayaLive Video
Purchasing Guide - AvayaLive Video
Booktitle
Book Metadata
Front Matter
Chapter About
Chapter Ordering Virtual Rooms as a Partner
Chapter Ordering Virtual Rooms as a Customer
Resources
Getting Started with for
Generating a Report

Chapter 14: Reusing content and viewing reuse information

Reuse in DITA

With DITA, reuse is not limited to single-sourcing multiple types of output from the same source topics. Reuse allows you to create a chunk of content in one topic and reuse that content in multiple topics, DITA maps, or patterns, even across several projects. A reusable chunk of content can be a component with multiple topics, a single topic, or a content element within a topic.

Implemented properly and consistently, this strategy provides the following benefits:

- Simplifies and reduces the time required for maintenance of content with automatic updates when the source content is modified.
- Eliminates the possibility of contradictory information in documentation caused by inconsistently applied updates.
- Enhances usability and user comprehension with more standardized wording.
- Reduces localization costs with fewer unique words to translate.
- Allows for a more balanced division of responsibility between writers on a project.

You can also incorporate content from other documentation sets, if those other projects are in DITA. For example, the Avaya one-X® Portal implementation requires configuration of Communication Manager and Modular Messaging. If documentation for those two products was in DITA, *Implementing Avaya one-X® Portal* could reuse the appropriate topics, instead of sending users out to find the content in the other documentation sets.

Note:

If you implement reuse in a way that is not mentioned in these guidelines and examples, share this information with the rest of the team. We all benefit from increased reuse.

Reuse types

Component reuse

A component is a group of topics and a related DITA map that are intended to be reused as a complete set. For example, you can create a DITA map with a series of topics that describe how to troubleshoot issues in the Administration application. You can use this DITA map in the Administration application deliverable and in the central troubleshooting deliverable.

Topic reuse

You can reuse a single topic between deliverables. For example, an overview topic that describes a feature can be used in the What's New deliverable, the feature-specific deliverable, and the user guide.

Content element reuse

A content element is the chunk of content contained inside a DITA element. Examples of content elements include a bulleted list, a step in a procedure, an application name, a product name, and a field or menu option name from a user interface.

Common topics

A common topic is a DITA topic that can store content that we expect to reuse in other publications of same product or another product. Depending on the content, you may reuse the entire topic, a paragraph, tip, or other content element in the topic.

Common topics with reusable elements are not included in a deliverable or ditamap. These common topics are used as containers to hold product-specific or other common text elements that we meant to reuse in other topics.

Location of common topics

Common topics are usually stored in folders named `Common` in the repository. `Common` folders exist at multiple levels, according to the expected type of reuse for the content.

Cross-project common topics

Cross-project topics are intended for use in all projects or a large number of projects. Cross-project common topics include the following content:

- Reusable elements for the names of Avaya products, applications, or snap-ins, such as `Applications`, `Product names`, or `Snap-in names`. These files are stored in Tridion Docs under `Common DITA Supporting Content/Products Applications and Languages/topics`.
- Legal page elements, such as `Notices`. The file is stored in Tridion Docs under `Common DITA Supporting Content/Legal/Legal page/topics`.
- Common document titles: each project should maintain a list of their document titles under `Common DITA Supporting Content/Project document titles`.
- Glossary topics: The editors maintain common glossary topics in Tridion Docs under `Avaya Standards Processes and Glossary Terms` from where all writers can reuse. When you're building a glossary, you must check if the terms you need are already available. If not, you can provide the content to the editors and request them to create glossary topics.

Project-level common topics

Project-level common topics are intended for use in the deliverables for a single project. These common topics must include project-specific terms, names, and phrases that may change and need be referenced into multiple topics or components. The project team maintains these topics in a `Common` subfolder of the project folder in the repository.

Project-level common topics can include one or more of the following types of content:

- Product or application features
- List of project deliverables
- Frequently used admonishments or other content elements
- Standard troubleshooting topics

Deliverable-level common topics

Deliverable-level common topics are intended for use in a single deliverable. These common topics can include steps, admonishments, or descriptions that may change and need be referenced into multiple topics or components. The deliverable or component owner can maintain these topics in the deliverable folder or in the `Common` subfolder of the project folder in the repository.

Deliverable-level common topics can include one or more of the following types of content:

- Frequently used descriptions or admonishments
- Frequently used steps in a task, such as opening a settings dialog box.
- Names of application elements, such as dialog boxes, windows, and pages.
- Reusable information for alarm topics

Reuse and localization

Even if your deliverables are not currently translated into other languages, you must create your topics to make them translation-ready for future.

Based on customer requests or business needs, translation request might come even after the release of a product.

Element reuse

You can reuse inline elements, such as uicontrol, wintitle, and cite. This helps the Localization team and writers to manage the common elements well.

- Create separate common topics for the uicontrol and wintitle elements that you reuse. Depending on the complexity of your product and the number of interfaces, you can decide to have separate common topics based on the types of users (for example, administration versus users) or separate interfaces.
- The Localization team requests that you create separate common topics for inline elements that are part of the interface versus those that aren't. For example, a filename that they double-click during installation must be tagged with uicontrol but it is not an element in the interface. Therefore, the filename must be added in a separate common topic from the actual interface elements. You can contact your Localization team member to request a list of the strings from the interface.
- You must reuse inline elements only where it is semantically appropriate. For example, if a term is used as both a uicontrol and a generic word, reuse only the uicontrol element when it is specifically referencing the interface element and not when it is a generic reference.

- Each project must have a common topic for titles in cite elements.

Do not reuse the following inline elements.

- emphasis
- indexterm
- pre
- q
- simple-equation
- sstitle
- title
- tm

Use of xrefs to topics

When content contains embedded xrefs, it creates a dependency on the topics that are the target of xrefs. If the content is localized, all content that is referenced is included in the package sent for translation. Therefore, if you are reusing content with xrefs to other topics, those other topics are included in the package for localization, even if only an element in that topic is being reused that does not include the xref. This increases the translation costs.

Reuse icons with alt text

If your content contains a lot of icons, create a common topic with icons and the alt text in the image element. With this, the Localization team can translate the common topic that includes the alt text only once, and do not require to retranslate separate instances of the alt text.

Guidelines for reusing content

When you plan and implement content reuse, consider the following guidelines.

Reuse content at the highest level possible

Always reuse the content at the highest level possible. For example, if a step contains a command and a note and you want to reuse both, reuse the step rather than reusing each individual element.

Always reuse product and application names

Reuse product names, application names, and snap-in names. If you do not see a name in the common topic, submit an issue to the Infosolutions project.

Do not use product or application names for generic references

You should only reuse the common product and application names when referring to the specific product or application. Do not reuse a product or application name when you're making a generic reference. For example, if you're talking about the Conferencing product, reuse the name. But if you're just making a generic reference to the concept of conferencing, type the text and do not reuse the product name. Inappropriate use of the common product and application names is incorrect from a DITA perspective and it also has an impact on localization.

Reusing inline elements

You can reuse inline elements, such as uicontrol, wintitle, and cite.

Do not reuse the following inline elements:

- emphasis
- indexterm
- pre
- q
- simple-equation
- sstitle
- title
- tm

Avoid reuse of part of a sentence

To reuse a complete sentence in a paragraph, you can wrap the sentence in the ph element and reuse it. However, you should only reuse at the full sentence level. Do not reuse a few words in a sentence. This can create unexpected results in the English and issues in localized content.

Avoid conditions in the content that is set for reuse

When you add ID to element for reuse later, and if you need to set conditions to the element, do the following:

1. Checkout the topic and add an ID to the element that you want to reuse.
2. Reference the element in the target topic where you want to reuse.
3. Add the condition to the element that you reused.

Important:

If you add ID to the element in the source topic, add condition in the source topic itself, and later reuse in the target topic, Tridion Docs displays errors during the baseline freeze and publication release fails.

Store reusable elements in container topics

Create separate common topics to reuse text in uicontrol and wintitle elements. Each project must also have a common topic for document titles in cite element. If you reuse other inline elements, you can use a single common topic, unless you have several inline elements to reuse and you want to create separate common topics.

Avoid content duplication across projects

For solution documents and products with several models, such as J100 phones, you might have to create common content for common features in the product suite. During the content planning and creation phase, check if the content is already present in other product documents.

Keeping multiple copies of similar content in the content source might increase the maintenance and translation efforts.

Here are some tips to look for common content during the content research phase:

Tip:

- Search for the content you plan to create already exists on [Avaya Documentation Center] or [Avaya Support Site].
- Consult your documentation lead for your product or cross products and confirm if similar content is already created for the product.

If you find similar content, reuse the content from the source file in Tridion Docs rather than creating a new topic.

Avoid using xrefs to topic within topics that are reused

Where possible, manage links between topics in relationship tables. The use of cross-references can cause issues, especially with reused content.

- If you own common content that is reused, avoid using cross-references to topics wherever you can. When you use xrefs to topics and someone reuses your content, if they aren't reusing the topic that's the target of the xref, they'll end up with a broken link in their output. It also causes potential problems related to localization, which are explained below.
- If you reuse a topic that contains an embedded xref and the target topic is not included in your deliverable, your output will contain a broken link. If you're reusing topics that include xrefs to topics, request that the content owner move the xref to a relationship table link instead.
- When you reuse content that contains embedded xrefs, that creates a dependency on the topics that are the target of the xrefs. If the content is localized, all content that is referenced is included in the package sent for translation. So if you're reusing content that includes xrefs to other topics, those other topics are included in the package for localization, even if you are only reusing an element in that topic that does not include the xref. This increases translation costs.
- If you create relationships between topics, you do not need to include a text reference to that topic.

Avoid duplicate IDs in a topic

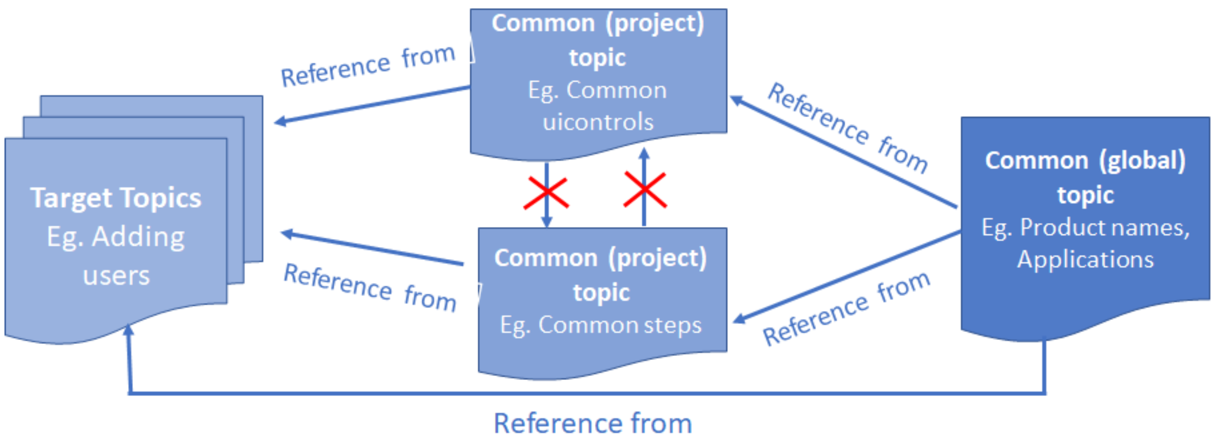
When you copy an element, Tridion Docs copies the associated ID thus creating duplicate ID error in a topic.

To avoid duplicate IDs, copy only the text or copy the element with ID and delete the ID.

Content reference direction

To prevent circular references that cause delays in opening publication and Publication Manager crash:

- Always make references to common topics instead of the peer topics used in the project.
- Ensure that the direction of references must be in the direction depicted in the image.



For example, add frequently used content, such as steps, uicontrols, and wintitles in a common topic and reuse the content in Adding users, Editing users, and Deleting users. Do not reuse content from the Adding users topic in the Editing users topic.

Reuse icons with alt text

If your content contains a lot of icons, create a common topic with icons and the alt text in the image element. With this, the Localization team can translate the common topic that includes the alt text only once, and do not require to retranslate separate instances of the alt text.

Planning your content reuse

About this task

Successful reuse of content in DITA requires good planning and frequent communication between the owners and writers who reuse the content. Reuse planning and communication do not end when you begin content development. Some good candidates for reuse will not be obvious until after you start to create topics.

Use these steps to identify and implement content reuse during various stages of planning and content development:

Procedure

1. Identify the content that is a candidate for reuse between deliverables or in the same deliverable.

   Reusable content can be a group of topics, a single topic, or a content element within a topic.

2. Identify the appropriate source topics for the reusable content.

   The reuse source determines where the reusable content is maintained and which author is responsible for creating and updating the content. Source topics can be stored in a common folder or with the content for a specific deliverable.

Ensure that the source topic title where you add reusable elements reads something like common uicontrol_SM.

3. Implement the reuse in your topics.

   The implementation steps depend upon the type of reuse and the location of the source topics.

4. Document how you reused content in a deliverable or across deliverables. Update the content plan and design document, if necessary, to include detailed information about how the reused content elements in each deliverable.

Identification of reusable content

One of the first steps in the planning phase of your deliverable and of the documentation set requires that you identify content elements for reuse.

Use the following factors as a guideline to identify content as a good candidate for reuse:

- Two or more topics require the same content.
- Two or more deliverables require the same content.
- The content is typically subject to frequent changes during a release cycle or between releases.
- Standardization of the text or phrase is vital for business or usability reasons.

Identification of source topics

After you identify content that you want to reuse, you must next identify the source topic where the content will be created and maintained. The source topic determines who owns the content and where the topics with the reusable content is stored.

Typically, the writer who is responsible for the deliverable that includes the source topic is also responsible for creating and updating all reusable content in that deliverable. If the source topic is in the `Common` folder for your project, then the project team should assign an owner for the content.

When you identify the source topic for reusable content, consider the answers to the following questions:

- What type of content is being reused? Will you reuse the entire topic or only one or more content elements in the topic?
- If the content is a whole topic, is it a single topic or multiple topics with a component DITA map?
- What type of topic will include the reused content? Will the content always be in a task topic or will it be in multiple topic types?
- If the content will be in multiple topic types, is there a natural base topic type? For example, the base topic type for user interface elements can be the structure topic for fields and buttons or a common topic that lists the names of dialog boxes and windows.
- What deliverables will include the reused content? Will it be reused across multiple deliverables or in one deliverable?

- If the content is reused across multiple deliverables, is there a natural home for the content? For example, overview topics are typically maintained with the product overview deliverable, and administration tasks are typically included with the administration application deliverable.

Adding an ID to elements

About this task

You can add an ID to an element, such as p, step, cmd, ul , table, and graphic, to reuse in another topic. Tridion Docs automatically assigns IDs to some elements such as section. For elements that have an ID assigned by Tridion Docs, you do not need to manually add an ID to reuse the element.

Important:

Always create IDs to content set for reuse in a common topic. The content from the common topic can be reused across projects.

Before you begin

- You require write permissions to a topic to add IDs within the topic.
- If you do not own the topic, contact the topic owner who could add IDs to the content that you want to reuse.

Procedure

1. Check out the topic from which you want to reuse elements.
2. Double-click or select the element.

   The Attributes window opens.
3. In the **id** field of the Attributes window, type a string, for example, `AddUserInfo`.

   Provide an ID that is descriptive and relevant to the content in the element. Do not use the wand icon next to the **Id** field.

   Note:

   In tables, you can reuse the following:

   - elements in a cell
   - entire cell
   - rows in the table

   Click **OK**.
4. Check in the topic.

Related links

Inserting cross references to elements within a topic on page 179
Reusing an element on page 194

Reusing an element

About this task

You can reuse an element (text, table, or graphic) from another topic. For example, you might want to reuse a p, step, cmd, or ul element.

Before you begin

Add an ID to the element that you want to reuse if not already added.

Procedure

1. Check out the topic in which you want to insert the reused element.
2. Place the cursor where you want to insert the reused element.

   Do not insert the element that you want to reuse. However, you must insert any required parent elements. For example, to reuse a list item, you must insert a list element. To insert a cite element, your cursor must be in a p tag.
3. In Oxygen XML Author, click **SDL Tridion Docs** > **Conref** > **Insert conref**.
4. In the Reuse Content dialog box, browse to and select the topic from which you want to reuse content.

   The Reuse Content dialog box displays the list of elements, IDs, content set for reuse, and preview of the content.
5. Select the reusable content and click **Insert and close**.
6. To reuse a table row:
   a. Place the cursor in the location where you want the reused row, before or after a row element.

      Do not add a row and place the cursor in that row.
   b. Complete Step 3 through Step 8 to select the row to reuse.
7. To reuse a table cell, you must enter the topic and element ID for the element that you want to reuse:
   a. Get the ID of the element that you want to reuse and the topic the element is present.

      You can open the topic, select or double-click the root element to open the attributes, and copy the entry from the **id** field to get the topic ID. To get the element ID, select or double-click the element and copy the entry from the **id** field.
   b. Place the cursor in the empty cell element where you want to insert the conref.
   c. In the Attributes window, select the **conref** field and enter the ID of the topic and element in the following form: `topic id#topic id/element id`

      For example, `GUID-2057F68D-0BA1-4E58-B13A-26A4BE2B51F6#GUID-2057F68D-0BA1-4E58-B13A-26A4BE2B51F6/MONITORSPECS` where `GUID-2057F68D-0BA1-4E58-B13A-26A4BE2B51F6` is the topic ID and `MONITORSPECS` is the element ID.

d. Click **OK**.

The reused text appears in the topic.

8. Check in the topic.

Related links

Adding an ID to elements on page 193

Creating a common topic for document titles

About this task

Every project must have a common topic that contains a list of all of the publication titles for your project. Writers for that project or other projects can reuse the titles in the topic. The topics are stored in the same folder to which everyone has access.

Important:

If you have to change or add new titles for a release and you have to create a new version of the topic, you must include the product release for which the doc titles apply in the **Changes** field. This will help writers who reuse your topic know which version to use.

Procedure

1. In the Tridion Docs repository, go to the folder `Common DITA Supporting Content/Project document titles/topics`.
2. On the toolbar of the right pane, click .

   The system displays the Select Template dialog box.
3. Select the **Document titles** template and click **Next**.
4. Complete the fields on each tab as appropriate.

   Important:

   Ensure that the Tridion Docs title includes the product name, so that writers are aware of the project for which they need the document titles to be reused. For example, “CM Document Titles”.
5. Click **OK**.
6. Check out the topic.
7. Put each document title in a cite element in a list item.

   If the title includes a product name, reuse the product name in the cite element. If your document has a document number, you can put the cite element and document number in a ph element. You can then reuse the ph element in other topics so that you get both the document title and number.

8. Add an element ID to each cite element, as well as any other elements that you might want to reuse.

   For example, if you wrapped a cite element and a document number in a ph element, apply an id to the ph element.

9. If you include any text in the topic, such as descriptions or instructions that are not part of the titles and will not be used in any output, set the **translate** attribute to **no** in the attributes for that element

10. Check in the topic.

Reuse of inline elements and document titles

Reuse of product and application names

- Reuse product names, application names, and snap-in names. If you do not see a name in the common topic, submit an issue to the Infosolutions project.
- Refer to the Product Naming Rules (CID 150002) for the official product names. Contact your GIS Program Manager or Program Owner for changes to the naming rules.
- Some product teams allow articles to precede the product name and some do not. Consult your GIS Program Manager or Program Owner and the Product Naming Rules document for the correct usage for your product.
- Add the following names in the common topics:
  - Avaya products
  - Applications within Avaya products. This includes mobile application names.
  - Snap-in names
  - Interfaces with their own names. This does not refer to generic names like the “web application”, but for named interfaces, such as “Messaging Web Application” for Avaya Aura® Messaging or “Web Manager” for IP Office.

  Important:

  If your product is localized, before you request IA to add an application name or interface name to the common Applications topic, contact your Localization Project Manager to determine if the name must be localized. Include this information in your request.
- If a product name has been changed, however, if your product still uses the earlier version of the product, select earlier version of the topic with the older name in your publication.
- You should only reuse the common product and application names when referring to the specific product or application. Do not reuse a product or application name when you’re making a generic reference. For example, if you’re talking about the Conferencing product, reuse the name. But if you’re just making a generic reference to the concept of conferencing, type the text and do not reuse the product name. Inappropriate use of the common product

and application names is incorrect from a DITA perspective and it also has an impact on localization.

Inline element reuse

- Create separate common topics for the uicontrol and wintitle elements that you reuse. Depending on the complexity of your product and the number of interfaces, you can decide to have separate common topics based on the types of users (for example, administration versus users) or separate interfaces.
- The Localization team requests that you create separate common topics for inline elements that are part of the interface versus those that aren't. For example, a filename that they double-click during installation must be tagged with uicontrol but it is not an element in the interface. Therefore, the filename must be added in a separate common topic from the actual interface elements. You can contact your Localization team member to request a list of the strings from the interface.
- You must reuse inline elements only where it is semantically appropriate. For example, if a term is used as both a uicontrol and a generic word, reuse only the uicontrol element when it is specifically referencing the interface element and not when it is a generic reference.
- Each project must have a common topic for titles in cite elements.

Do not reuse the following inline elements:

- emphasis
- indexterm
- pre
- q
- simple-equation
- sstitle
- title
- tm

Document title reuse

- All products must have a topic including the document titles for that product. The common topics are located in Tridion Docs under `Common DITA Supporting Content/Project document titles`. If you do not see a common topic for a product from where you need to reuse the names, contact the writer for that project. If you don not know the topic owner, consult your Doc Lead or Documentation Manager or create a ticket in the Infosolutions project.
- When you reuse titles from a common topic, the version that you use is important. Always review the **Changes** field to know the version and ensure that it suits the product release that is appropriate for your product. For example, when writers start work on a new release, they might need to create a new version of the document titles topic to make changes for the new release on which they are working, and they must mention the release number of the product in the **Changes** field. In this case, you would not use the latest version of the topic because it's for an unreleased version of the product. If you have any questions about the version of a document titles topic, contact the writer for that project.

Locating the source of a conref

About this task

You can find the topic where the content is set for reuse, or the source of a reused element. You can view the source topic even if you do not own or that is in released state.

Procedure

1. Check out the topic that reuses the content in Oxygen XML Author.
2. Place the cursor in the conref for which you want to locate the source.
3. In Oxygen XML Author, click **SDL Tridion Docs** > **Conref** > **Open source object**.

   The source topic opens in a read-only mode.
4. To locate the source topic in Tridion Docs, click **SDLTridion Docs** > **Properties**.

Viewing where an object is used from the web interface

About this task

You can view maps or topics in which an object is used or referenced. With this functionality, you can see which documents and products reuse a topic on which you are working. Use the Tridion Docs web interface to perform this procedure. You can also view “where used” information from the publication baseline in Publication Manager or from Oxygen XML Author.

Procedure

1. Log on to the Tridion Docs web interface.
2. Click the Repository tab.
3. Browse to and select the folder where the object is located.

   The objects in the folder are displayed in the right pane.
4. Select the a topic or a map for which you want to find the references made from other objects.
5. On the toolbar, click **Reports**.
6. In the report window, click **Referenced by**, and then click **Show Report**.

   The page displays a list of the topics and maps that use the object.
7. **(Optional)** To download a `.csv` file of the report, click **Download Report** in the toolbar.

   The Download Report option generates a report listing all topics and maps that uses or references the selected topic, map or image.

Related links

[Viewing where an object in the baseline is used](#) on page 230

Viewing where a topic is used from Oxygen XML Author on page 199

Viewing where a topic is used from Publication Manager

About this task

You can view maps or topics in which a topic is used from Publication Manager. With this functionality, you can see which documents and products reuse a topic on which you are working. You can also view “where used” information from the Oxygen XML Author or Tridion Docs web interface.

Procedure

1. Start Publication Manager, and open the publication.
2. Select the topic for which you want to find the topics and maps that reference this topic.
3. Click **VIEW** > **Where used**.
4. On the Where Used dialog box, click **Look in current publication** or **Look in entire repository**.

   The Where Used dialog box lists the maps and topics that reference this topic or map within the publication or the entire repository based on your selection.
5. **(Optional)** Right-click and click **Check out** or **Open**.

Viewing where a topic is used from Oxygen XML Author

About this task

Use this procedure to view maps or topics in which a topic is used. With this functionality, you can see which books and products reuse a topic on which you are working. You can also view “where used” information from the publication baseline in Publication Manager or Tridion Docs web interface.

Procedure

1. Log in to the Tridion Docs web interface.
2. Check out the topic for which you want to view where it is used.
3. On the Oxygen XML Author menu, click **SDLTridionDocs** > **Where used**.

   The Where Used dialog box lists the maps and topics that reference this topic or map.
4. **(Optional)** Check out or open the topic, or close the Where Used dialog box.

Related links

Viewing where an object is used from the web interface on page 198

Viewing where an object in the baseline is used on page 230

Viewing where an element is used

About this task

You can find where an element that is set for reuse is being used in the repository. You might need this information to assess the impact if you need to change the content in the reused element, delete the element itself.

For example, you can identify all topics in the repository that reuse a specific product element from the file `Common DITA Supporting Content\Product and application names\topics\Product names`.

Procedure

1. Get the ID of the topic that contains the element:
   a. Right-click the topic, select **Properties**.
   b. Copy the GUID from the **Identifier** field.
   c. Close the Properties dialog box.
2. Get the ID of the element:
   a. Check out or open the topic, usually, common topic, that contains the element.
   b. Double-click or select the element that is set for reuse.
   c. In the Attributes window, copy the entire string in the **id** field.
3. In the Tridion Docs repository, click the **Search** tab.
4. In the **Find what** field, type `conref=`*`<topic GUID>`*`#`*`<topic GUID>`*`/`*`<element ID>`*.

   For example, `conref="GUID-D2F34A51-7BBE-4B11-8A33-93E782075B1C#GUID-D2F34A51-7BBE-4B11-8A33-93E782075B1C/SELECTREQUIREDKEYBOARDTYPE` where `GUID-D2F34A51-7BBE-4B11-8A33-93E782075B1C` is the topic ID and `SELECTREQUIREDKEYBOARDTYPE` is the element ID.
5. To restrict the search, use the fields in Advanced options.

   For example, to find instances of the element in content for a particular product, use the **Product** field to choose your product.
6. Click **Search**.

   It might take several minutes for the system to display the search results because the search is done in the entire repository.

Chapter 15: Working with conditions

Conditional content

Conditional content makes it possible to show and hide different content for different deliverables. For example, a topic might be used in both the Installation Guide and Administration Guide. You might want to show one paragraph in the Administration Guide, and hide it in the Installation Guide. To accomplish this, you could apply the Administration condition to the paragraph. When you produce the Installation Guide, you could hide content that has the Administration condition applied.

You can conditionalize inline elements, such as uicontrol, wintitle, and cite. But do not tag a word or group of words with <ph> to apply a condition because it can cause major issues.

Tridion Docs uses the Condition Builder feature to manage conditions. All conditions that are available in the system are displayed in Condition Builder. Conditions are organized into three categories:

- Product— includes conditions for different product names.
- Platform—includes conditions for different operating systems, hardware platforms, and a few other items.
- Other properties—includes conditions for release numbers, deliverable type, for example, Installation, Administration, Print, and HTML, and a few other items.
- Audience— includes conditions for different users, such as end user, admin.

In Condition Builder, you can view all available conditions, select conditions that you will use in your content, and build a custom list of just the relevant conditions. You will use the custom list to select the conditions to apply to specific elements. You can add or remove conditions from your custom list at any time. Removing conditions from your list does not remove conditions from the content.

If you need new conditions added to the system, contact a Tridion Docs administrator/information architect.

Before publishing a deliverable that includes conditional content, select conditions that you want to show and conditions that you want to hide.

If you need to show different conditions for variations of a publication, for example, PDF and online help, create different publications for the two deliverables. Do not use the same publication and change the conditions that show because that creates a lot of risk that the conditions will be set improperly for an output.

Tags with a condition applied include an `ishcondition` attribute in the tag. For example, a section tag that has a condition of Administration applied looks like this: `section ishcondition=”otherprops=Administration”`

Condition states in Tridion Docs

Beginning from Tridion Docs 14.0, behavior of Publication Manager with conditions has been improved, especially when conditions are absent or not defined in the **Conditions** tab.

You might see the following three states for the conditional context:

1. No conditional context is defined or has an empty field value. The message `This publication has no context set, so upon publishing all conditional content will be included.` is displayed in the **Conditions** tab and the conditional filtering is disabled.

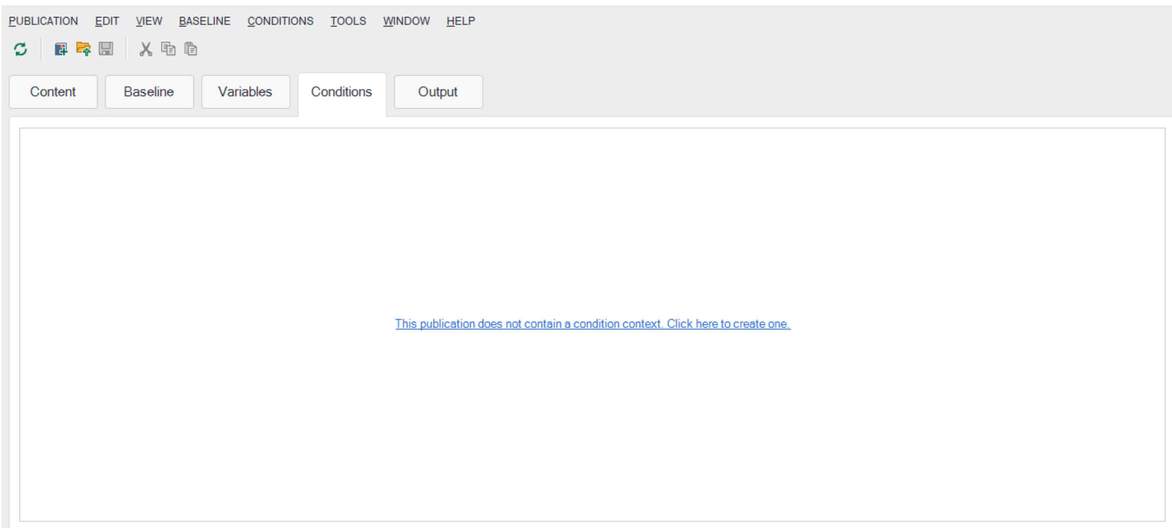


Figure 1: Conditions tab with no condition context

As a result, all conditioned content within this publication is displayed in green in the preview and the content is displayed on publishing the output.

In the example, the condition `audience=admin` is not defined in the Conditions tab, however, the content in the step with audience=admin is still displayed.

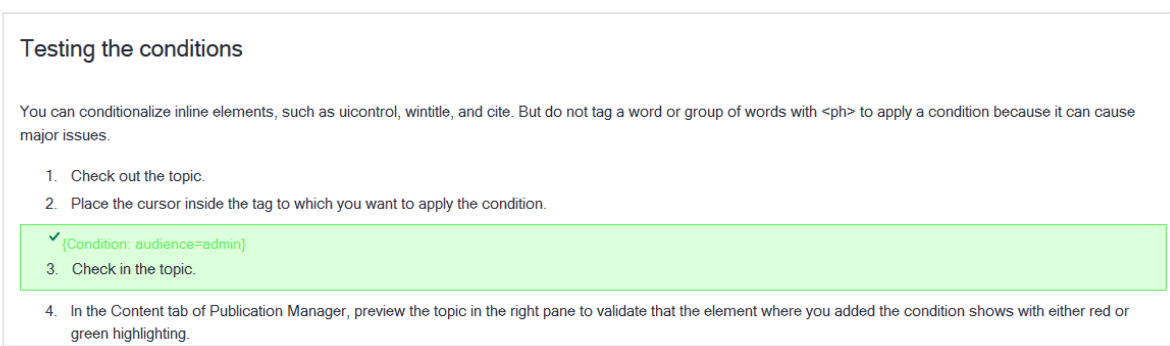


Figure 2: Conditioned content in the preview with no condition context

2. Conditional context is available, however, no condition or no condition value is defined. The conditional filtering excludes (hides) all conditioned content in the publication while publishing.

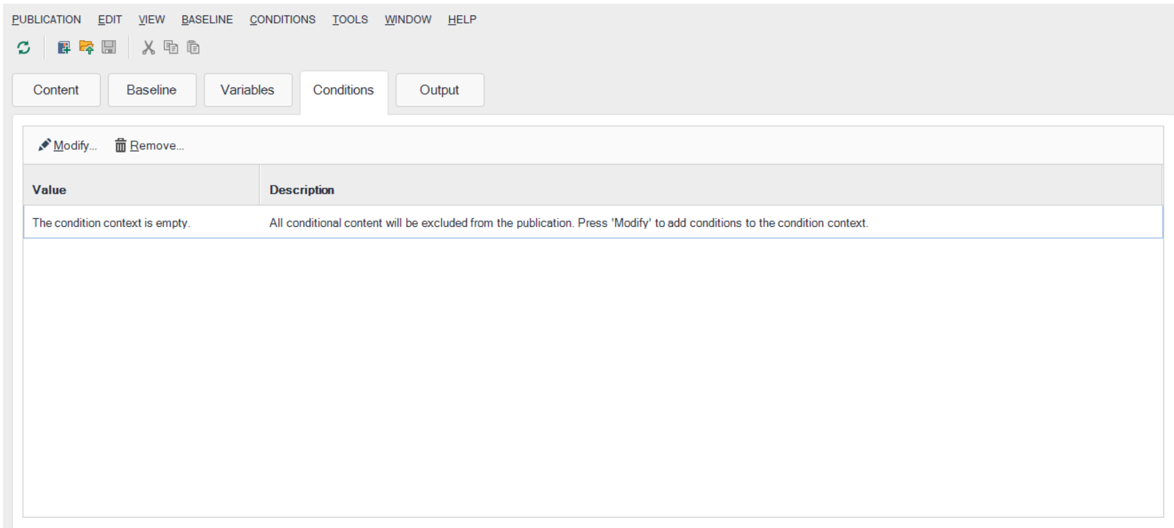


Figure 3: Conditions tab with empty condition context

All conditioned content is displayed in red in the preview.

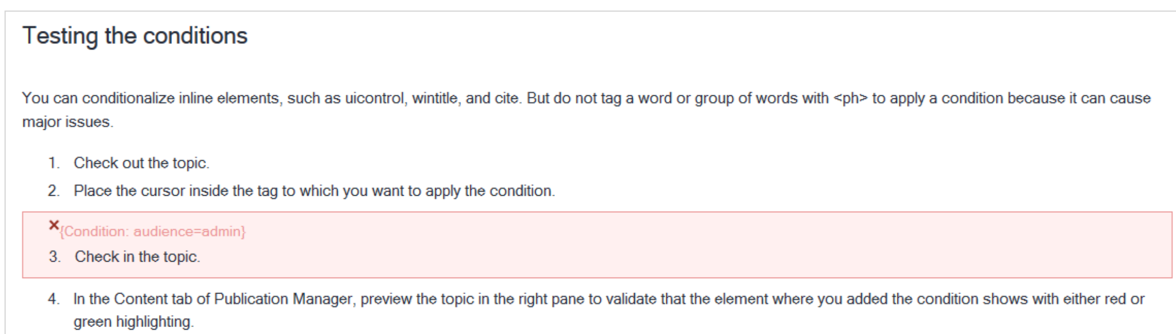


Figure 4: Conditioned content in the preview with empty condition context

3. Condition and condition values are defined, and content is included or excluded as defined by the conditions. The content is displayed in green or red accordingly in the preview.

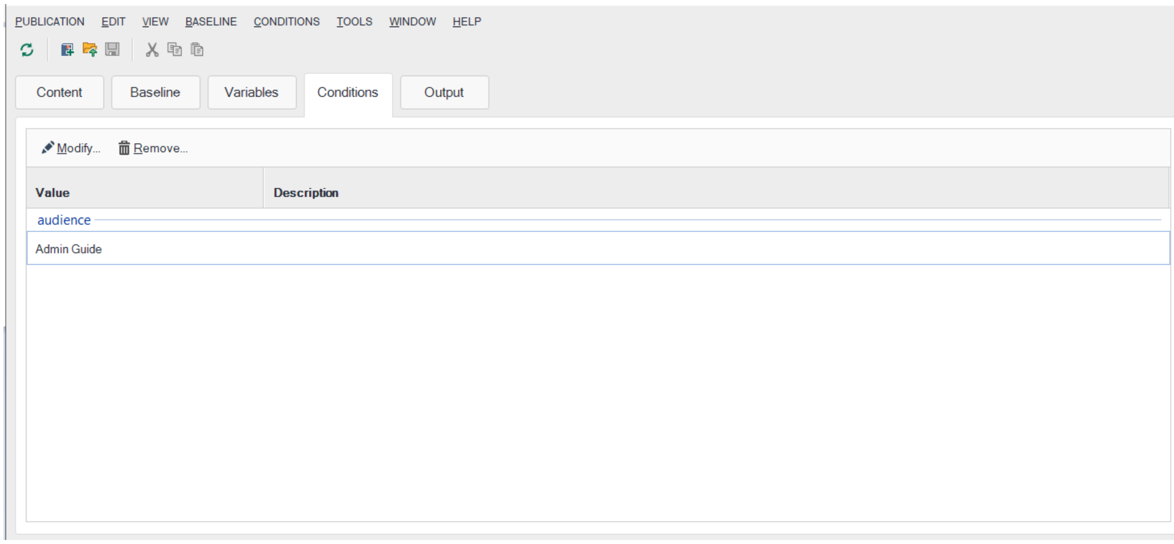


Figure 5: Conditions tab with a conditional context value

The content is displayed in green or red accordingly in the preview.

In the example, the condition `audience=admin` is defined in the Conditions tab. Therefore, the content in the step with `audience=admin` is displayed.

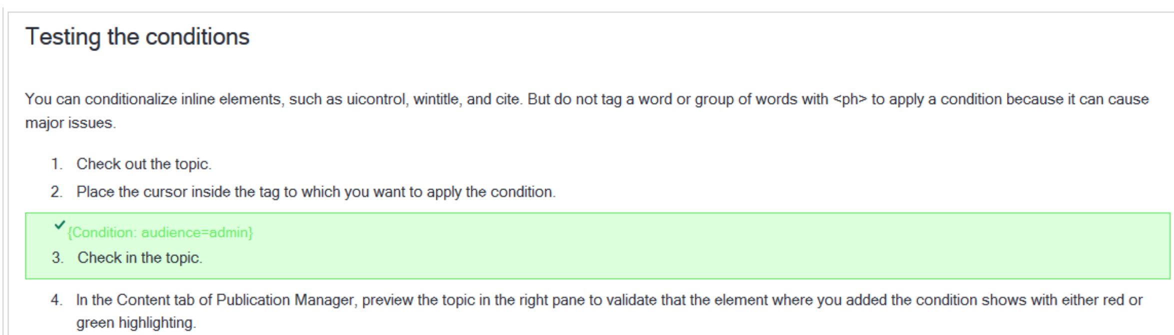


Figure 6: Conditioned content in the preview when condition and condition values are defined

Applying conditions to elements in topics

About this task

You can conditionalize inline elements, such as uicontrol, wintitle, and cite. But do not tag a word or group of words with <ph> to apply a condition because it can cause major issues.

Procedure

1. Check out the topic.

2. Place the cursor inside the tag to which you want to apply the condition.
3. In Oxygen XML Author, click **SDL Tridion Docs** > **Conditional text** > **Set condition**.

   The page displays the Condition Builder dialog box.
4. If no conditions are listed on the Conditions tab of Condition Builder, or if the condition that you need to apply is not listed:
   a. Click the Tree tab.
   b. In the left pane, expand **All Condition Names**, and then select the category of conditions that you need to apply, such as otherprops and Product.

      The conditions in the selected category are displayed in the right pane of the Tree tab.
   c. Select the required condition, and then click **Add**.
5. On the Condition tab, select the condition that you want to apply, and then click **OK**.

   To apply more than one condition, press and hold down **Ctrl** while selecting all conditions to apply, click **Or**, and then click **OK**.
6. Check in the topic.
7. In the **Content** tab of Publication Manager, preview the topic in the right pane to validate that the element where you added the condition shows with either red or green highlighting.

Next steps

- In the **Conditions** tab of the publication, select the appropriate condition.
- Publish the output and verify if the conditionalized text is visible or hidden based on what you set in the **Conditions** tab.

Related links

Applying conditions to table columns on page 206
Applying conditions to table rows on page 206
Selecting conditions in a publication on page 210

Removing conditions from elements in topics

Procedure

1. Start Publication Manager and open a publication or browse repository.
2. Check out the topic.
3. Place the cursor inside the tag from where you want to remove the condition.
4. In Oxygen XML Author, click **SDL Tridion Docs** > **Conditional text** > **Remove condition**.

Applying conditions to table rows

Procedure

1. Check out the topic in Oxygen XML Author.
2. Click **View** > **Tables** > **Table Markup**.

3. Depending on the table type, place the cursor inside the row, strow, or partrow element to which you want to apply the condition.

   Do not apply condition to table rows in a section of a table that has spanning. When you span rows, the number of rows is calculated. When you apply conditions and do not include that condition in your output, the number of rows for spanning is taken incorrectly. In the output, the table is displayed correctly.
4. In Oxygen XML Author, click **SDL Tridion Docs** > **Conditional text** > **Set condition**.

   The page displays the Condition Builder dialog box.
5. To apply conditions to other rows in a table, repeat from Step 3.
6. Check in the topic.
7. In the **Content** tab of Publication Manager, preview the topic in the right pane to validate that the element where you added the condition shows with either red or green highlighting.

Next steps

- In the **Conditions** tab of the publication, select the appropriate condition.
- Publish the output and verify if the conditionalized text is visible or hidden based on what you set in the **Conditions** tab.

Applying conditions to table columns

Important:

Conditionalizing table elements adds complexity to the table. Depending on the size and complexity of your publication, you might encounter a publishing issue where the PDF you produce will not open. If you have this issue, see “Error opening PDF: “There was an error opening this document. The file is damaged and could not be repaired.”

Procedure

1. Check out the topic in Oxygen XML Author.
2. In the first table row, place the cursor in the entry element (entry, stentry, partentry) that corresponds to the column you want to apply the condition to.

For example, to apply a condition to the second column in the table, put your cursor in the second entry element in the row.

3. In Oxygen XML Author, click **SDL Tridion Docs** > **Conditional text** > **Set condition**.

   The page displays the Condition Builder dialog box.

4. Repeat steps 3 through 6 for every row in the table.

   Tip:

   Once you apply the condition to the first entry element, you can put your cursor in the second entry element and press `Ctrl+Y` to repeat the action.

   It's very important that you apply the condition to the same entry in every row or else the entire column will not be conditionalized.

5. Check in the topic.

6. In the **Content** tab of Publication Manager, preview the topic in the right pane to validate that the element where you added the condition shows with either red or green highlighting.

Next steps

- In the **Conditions** tab of the publication, select the appropriate condition.
- Publish the output and verify if the conditionalized text is visible or hidden based on what you set in the **Conditions** tab.

Related links

Error opening PDF: "There was an error opening this document. The file is damaged and could not be repaired" on page 304

Conditionalizing a topic or map

Procedure

1. Open the publication in Publication Manager.

2. Check out the map.

3. Right-click the topic or map reference to which to apply a condition, and then click **XML Attributes**.

4. In the **Condition** field, click the Browse button [...].

   Condition Builder is displayed.

5. If no conditions are listed on the Conditions tab of Condition Builder, or if the condition that you need to apply is not listed:

   a. Click the Tree tab.

   b. In the left pane, expand **All Condition Names**, and then select the category of conditions that you need to apply, such as otherprops and Product.

      The conditions in the selected category are displayed in the right pane of the Tree tab.

   c. Select the required condition, and then click **Add**.

6. On the Condition tab, select the condition that you want to apply, and then click **OK**.

   To apply more than one condition, press and hold down **Ctrl** while selecting all conditions to apply, click **Or**, and then click **OK**.

Removing condition from topics in a map

Procedure

1. Open the publication in Publication Manager.
2. Check out the map.
3. Right-click the topic or map reference to which to apply a condition, and then click **XML Attributes**.
4. Clear the **Condition** field, and then click **OK**.

Removing conditions from your list in Condition Builder

About this task

Use this procedure to remove a condition from your list of conditions in Condition Builder. You will probably want to remove conditions that are not used in the deliverables that you are currently working on. This procedure removes conditions only from the list. It does not remove conditions from content to which they are applied. You can add conditions back to the list at any time.

Procedure

1. Check out a topic.
2. In Oxygen XML Author, click **SDL Tridion Docs** > **Conditional text** > **Set condition**.

   The page displays the Condition Builder dialog box.

3. On the Conditions tab of Condition Builder, select the condition to remove, and then click **Delete**.
4. Click **OK** when prompted to confirm the deletion.
5. Click **Close**.

Viewing all conditions used in a publication

Procedure

1. Open the publication in Publication Manager.
2. Click the Conditions tab.

   The conditions that are currently selected to show in the publication are listed in the top pane.
3. Click **Modify** on the top left.

   The Select Conditions dialog box displays all conditions that are used in the publication topics.

Viewing where conditions are used

About this task

Use this procedure to view where a specific condition is used in a publication.

Procedure

1. Open the publication in Publication Manager.
2. Click the Conditions tab.

   The conditions that are currently selected to show in the publication are listed in the top pane.
3. Select a condition, and then click Where Used at the very bottom of the bottom, left pane.

   If you don’t see the Where Used tab at the bottom of the pane, go to **View** > **Where Used** and it should appear again.

   All topics in the publication that use the condition are listed.

Previewing conditions in a topic or map

About this task

You can view which content in a topic or map is conditionalized and which conditionalized content is hidden or shown based on the current condition settings for the publication. In the preview, red content is conditionalized and hidden, and green content is conditionalized and shown.

Procedure

1. Open the publication in Publication Manager.

2. In the Content pane, click the map or topic to preview.

   A preview of the topic or map is displayed in the bottom-right pane.

Selecting conditions in a publication

About this task

If a publication contains conditional content, use this procedure to select the conditions to show in the output. The conditions that you select apply to all output formats for the version of the publication. However, different versions of a publication can have different conditions selected. When you select a condition, all elements that are tagged with that condition are included in the output.

If you need to show different conditions for variations of a publication, for example, PDF and online help, create different publications for the two deliverables. Do not use the same publication and change the conditions that show because that creates a lot of risk that the conditions will be set improperly for an output.

Procedure

1. Open the publication in Publication Manager.
2. Click the **Conditions** tab.
3. Click **Modify** on the top left.
4. In the Select Conditions dialog box, select **Display Conditions Used in Publication** from the menu in the upper-right corner of the dialog box to only show the condition that have been applied to the content in the publication.
5. Select the conditions that you want to show in the output.
6. **(Optional)** Before saving your selections, verify the conditions that are included or excluded from the publication.
   a. To verify the conditions that are included, select **Display Selected Conditions** from the drop down menu in the top right corner.
   b. To verify the conditions that are excluded, select **Display Unused Conditions** from the drop down menu in the top right corner.

   Tip:

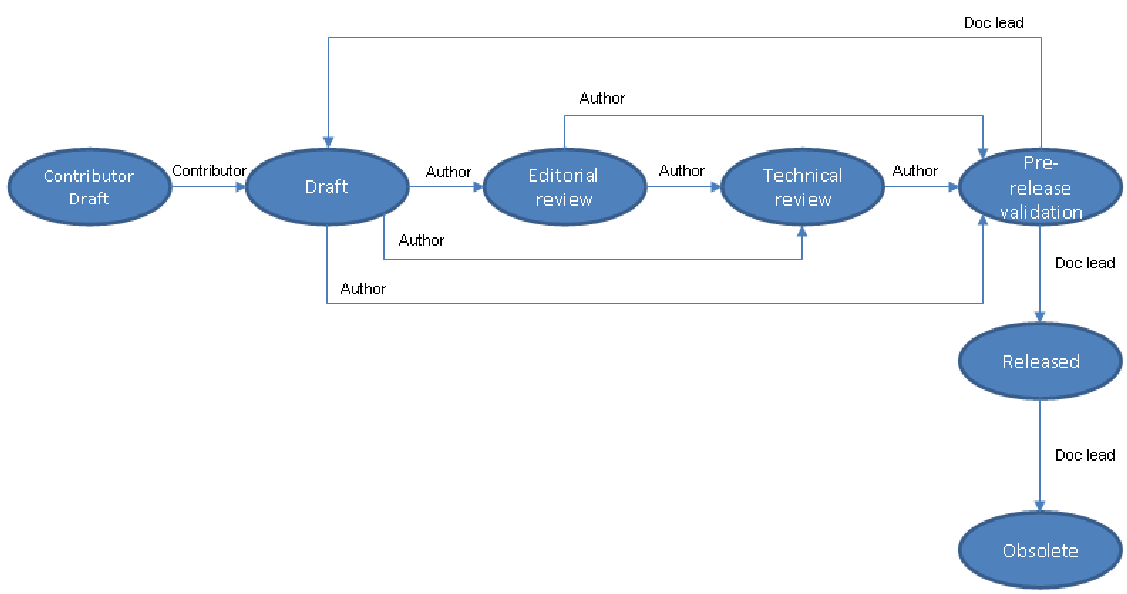
   To view all conditions available in the repository, select Display All Conditions from the drop down menu in the top right corner of the Select Conditions dialog box.

Chapter 16: Workflow

With the workflow feature in Tridion Docs, you can manage the content development process. Every object in Tridion Docs such as topic, map, and image must move through specific workflow states. Because each object has a workflow, you can manage the content development process at the topic level rather than as a book or help system. When a topic, map, or graphic is complete, reviewed, and approved, you can change the workflow state for that object to Released. Releasing chunks of content is relevant in an Agile methodology. You must also release objects before translation.

Workflow states

The following chart shows the sequence of workflow states and the role responsible for each change in state.



The following table describes each state in the workflow.

Sequence in flow	Workflow state	Description
1	Contribute	Only for a non-GIS resource to contribute content by using Content editor, such as RWS Collective Spaces. Avaya does not use RWS Collective Spaces currently.
2	Draft	Initial default state of all new objects. Objects are in draft state during the development phase.
3	Editorial Review	Content that is in review. Reviews can include reviews by the GIS editors, informal peer reviews, a CE review, or a DITA content review. You can use the **Reviewer** field in object properties to indicate the internal resource performing the review.
4	Technical Review	Content that is going through a technical review.
5	Pre-Release Validation	Content in which all required quality checks and reviews are validated.
6	Released	Content that is complete. When content is in the Released state, it cannot be modified. **Important:** User with Doc Lead role can change content from Pre-Release Validation state to Release state.
7	Obsolete	Content that is no longer used in new deliverable. You cannot delete the object because it is used in frozen baselines.

Note:

You can change the workflow status on multiple objects simultaneously by using the following:

- Workflow from web interface
- Browse repository
- Publication Manager baseline

Move content object through each relevant state so that we can view the progress of the content development in Tridion Docs. Some workflow states, such as Pre-release Validation state are mandate, therefore, you cannot skip this step. Objects must have the Pre-release Validation state before you can release them.

Roles

As an author, you manage most of the workflow states for your content, but only the Doc Lead role can make the final transition, from Pre-Release Validation to Released. The Doc Lead role is intended for someone who is responsible and accountable for validating that the content has gone through all necessary quality checks, testing, reviews. The author or another team member can take this role.

Related links

[Checking in a topic](#) on page 77

[Topic properties](#) on page 71

Changing the workflow status when checking in a topic

About this task

Use this procedure to change the workflow state of a topic when you check in the topic to the repository.

All topics, maps, and images must have a status of Pre-release Validation before they can be released. Other states, including Technical Review or Editorial review, are recommended when they are applicable but can be skipped.

Procedure

1. From the Oxygen XML Author menu, click **SDLTridionDocs** > **Check in**.

   The Check in dialog box is displayed.
2. To change the workflow status of the topic:
   a. Select **Change status**.
   b. In the **Status** field, select the appropriate status.
3. Click **OK**.

Related links

[Workflow](#) on page 211

Changing the workflow status of an object from the Desktop Repository

Before you begin

Open the Browse Repository window.

All topics, maps, and images must have a status of Pre-release Validation before they can be released. Other states, including Technical Review or Editorial review, are recommended when they are applicable but can be skipped.

Procedure

1. Right-click the object of which to change the status, and then click **Properties**. Alternately, you can click on the toolbar.
2. In the Properties dialog box, click the **Workflow** tab.
3. In the **Status** field, select the new workflow status for the object.

Related links

Workflow on page 211

Delivering content to localization

This topic provides the basic process for submitting content to the GIS Localization team for translation. For 80% and 100% drops, you must release the objects and freeze the publication baselines.

Important:

You must accept or reject change tracking in all topics before submitting content for localization.

About this task

This procedure does not provide the complete process for working with Localization. These are only the steps required in Tridion Docs to prepare for delivery of the content to Localization. If you have questions about the Localization process for content, contact the Localization Project Manager (LPM) for your project.

Procedure

1. When you are ready to submit your content for the 80% drop to Localization:
    a. Produce a Validator PDF output to ensure that there are no errors and to check for issues such as elements tagged with <b> or <i>, uicontrol and wintitle elements not reused that must be corrected before translation.
    b. Produce your output and make sure that there are no errors.
    c. Release all topics, maps, and images in the publication.
    d. Freeze the publication baseline.

    You must freeze the baseline for the 80% drop to ensure that the testers validating the translated content see the translated content and not the English version of updated topics in the output.
2. For a new project, inform the Localization coordinator to get the user group added to the ServiceUser.
3. When you need to make changes, create a new version of the publication and then create a new version of any topics, maps, and images that you must modify.

4. When you're ready to submit your content for the 100% drop to Localization:
   a. Produce the output and ensure that there are no errors.
   b. Release all topics, maps, and images in the publication.
   c. Freeze the publication baseline.

   You must freeze the baseline for the 100% drop to ensure that the testers validating the translated content see the translated content and not the English version of updated topics in the output.
5. If you need to make changes after the 100% drop before the product release, create a new version of the publication and then create a new version of any topics, maps, and images that you must modify.

   Note:

   When you have finalized the content for a product release and have delivered it, you must release the version of the publication.

Related links

Checklist for preparing content for Localization on page 332

Releasing a publication

You must release the publication version after you make your final delivery for product releases, including maintenance releases. You can release publications at additional intervals if you choose. For example, if you have a lengthy Controlled Introduction or a similar situation where you want to ensure that the version of the content you delivered is preserved. Localization drops and final delivery are the only required times when you must release a publication.

About this task

When you release the output for a publication, the status of the publication changes to Released.

Tridion Docs automatically changes the output status to Release Candidate when all referenced content for a publication is in released state and no errors or serious warnings occur during the output generation. When the output is in the Release Candidate status, you can release the output. This process archives a record of everything in that publication.

When an output format for a publication version is in Released state, you cannot make changes to the contents or output of that publication. However, you can add additional output formats that use the same contents. To update a released publication, you must create a new version of the publication.

Before you begin

- Freeze the baseline
- Generate the output
- Check that the output is correct, conditions in specific

Procedure

1. Click the **Output** tab.
2. Select an output format with the Release Candidate status.
3. Click **Release**.

Related links

Checklist for releasing a publication on page 329

Preparing topics for an editorial review

Procedure

1. Create an Jira in the Infosolutions project to request that the editor has permissions to your project.

   Provide the path to the project the editors will be reviewing and the editor's name.
2. Modify the properties for each topic to be reviewed:
   a. In the publication or repository, right-click the topic and select **Properties**.
   b. On the Avaya-specific fields tab, select the editors name in the **Reviewer** field.
   c. On the Workflow tab, change the **Status** to **Editorial review**.

      If the editor is already specified as the Reviewer and you just need to change the workflow on a group of topics. You can use your existing publication or, if you just need to change the workflow on a subset of topics, you can create a publication that contains a map with only the topics you want to change the workflow for.
   d. Click **OK**.

Next steps

Once the editorial review is complete and you have implemented the comments from the editors, change the workflow status of the content appropriately.

Setting up a peer review

Procedure

1. Create an Jira in the Infosolutions project to request that the writer(s) performing the review have permissions for your project and are assigned the Reviewer role.

   Provide the path to the project your peer will be reviewing and the reviewers' name.
2. Modify the properties for each topic marked for review:
   a. In the publication or repository, right-click the topic and select **Properties**.

b. On the Avaya-specific fields tab, select the writer's name in the **Reviewer** field.
c. On the Workflow tab, change the **Status** to **Editorial review**.
d. Click **OK**.

Next steps

Once the editorial review is complete and you have implemented the comments from the reviewer, change the workflow status of the content appropriately.

Generating a workflow report

About this task

A workflow report has two sections. The first section contains statistical information, including the number of each type of object and the percentage of objects in each workflow state. The second section displays the details of all of the objects in the publication.

- Statistics: Provides contains statistical information that includes:
  - The number of objects of each type.
  - The percentage of objects in each workflow state.
- Details: Displays the details of all objects in the publication.

Procedure

1. Log in to the Tridion Docs web interface.
2. Click the **Repository** tab.
3. Navigate to the folder that contains the publication for which you want to generate a workflow report.

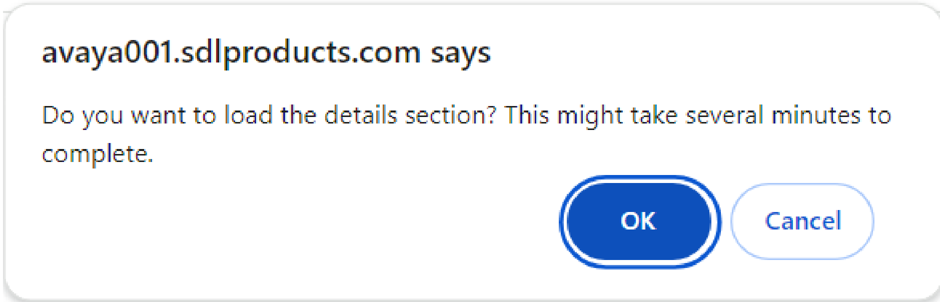
   The page displays the contents of the folder in the right pane.
4. Click the title of the publication for which you want to generate the report.

   When you only select the box next to the title, the page does not display the details of the publication.

   The page displays versions in the lower right pane.
5. Select the check box next to the publication version for which you want to generate the report, and then click **Workflow** in the toolbar of the lower right pane.

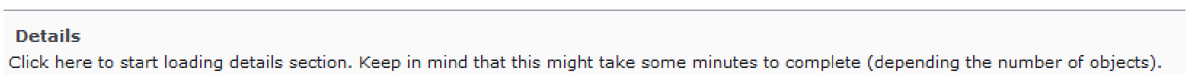
   The page displays a Workflow management window.
6. In the Workflow management window, click **use baseline information only**, and click **OK**.

   A new window opens and the reports begins to display. A message displays to confirm if you want to load the details section of the report, as it can take several minutes to display depending on the number of objects in the publication.



7. Select one of the following:
   - To change the status of a category of objects using the top part of the report, click **Cancel** to only display the statistics.
   - To select individual objects to change the status, click **OK** to display the details section.

   If you select **OK** to display the details section, it takes a few minutes to display the details. Do not make any changes to the top part of the report until the details finish displaying. If you do, it might cause delay or displays an error.
8. **(Optional)** If you choose only to display the statistics section of the report and then decide to see the details, scroll down and click the line `Click here to start loading details section`.



9. To capture the statistical information at the top of the report, take a screen capture.
10. To export the Details section of the report:
    a. Click **Download Statistics Report** in the toolbar.
    b. Click **Save** in the File Download dialog box.
    c. Browse to and select a location to save the report, and then click **Save**.

    Note:

    Send and Export or **Export** options buttons on the toolbar export only the publication and not the report.

    The report is exported as a `.csv` file. This file does not include the Statistics section of the report.

Changing the workflow status of objects from the web interface

About this task

All topics, maps, and images must have a status of Pre-release Validation before they can be released. Other states, including Technical Review or Editorial review, are recommended when they are applicable but can be skipped.

You can use this procedure to move the objects from draft to Pre-release Validation and Pre-release Validation to Release states.

Procedure

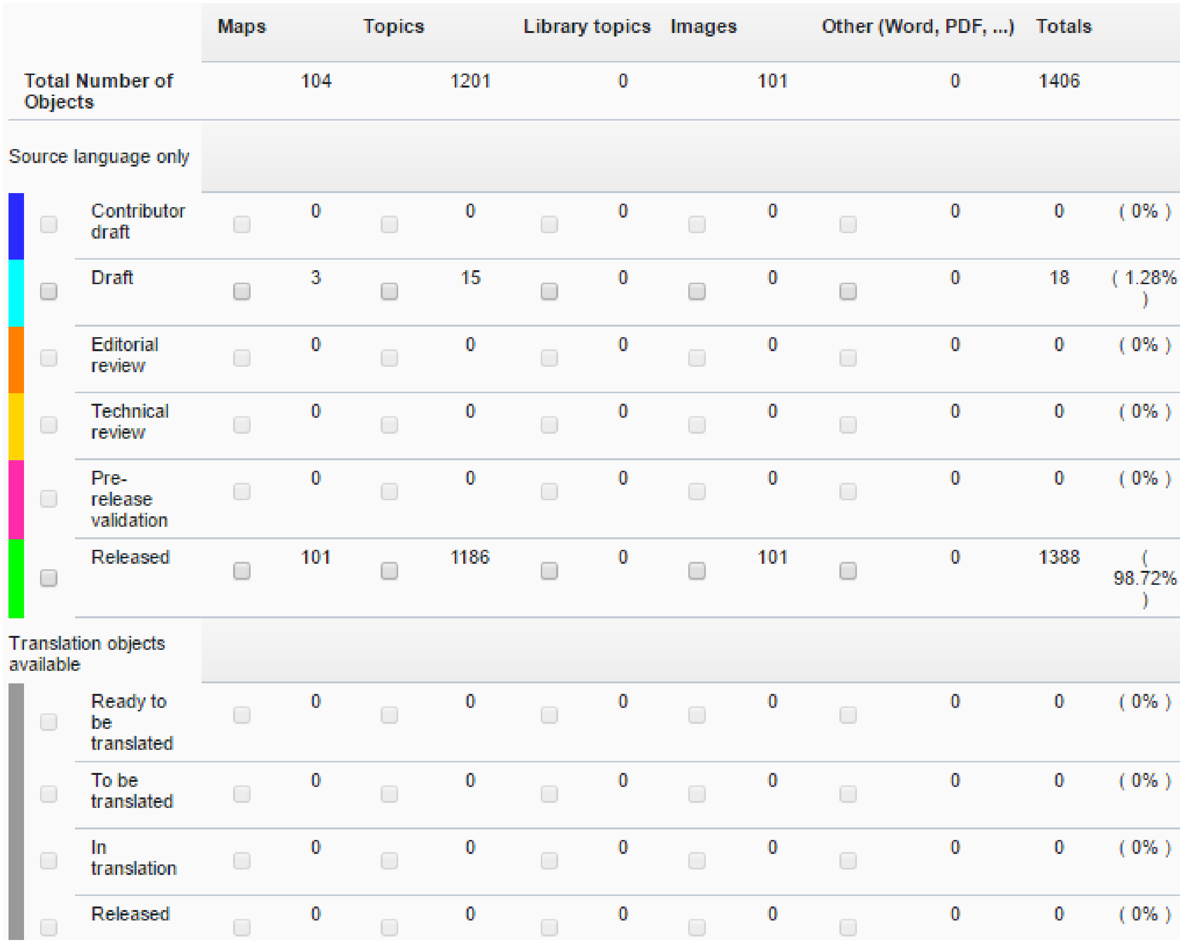
1. Log in to the Tridion Docs web interface.
2. When the system prompts to load the details, click **Cancel**.

   If you choose to load the details, it might take several minutes to complete.
3. Generate a workflow report for the publication that contains the objects.

   Wait for the details section of the workflow report to fully load before making changes. You can use the scroll bars to view the Details section. If the Details are not displayed as expected, refresh the browser window.
4. To change the status of specific objects:
   a. In the report, scroll to the second section that shows all objects in the publication.
   b. Select the check box of the object for which you want to change the workflow status.

      You can select multiple objects that you will change to the same workflow status.
5. To change all topics, maps, images, or all objects to the same workflow status, select the check box to the left of the type of object that you want to change the workflow status, for example, Draft Pre-release Validation.

   You can select more than one type, such as all Topics in Draft status and Editorial review status. Or you can select all Draft Topics and Maps. You can also choose to move objects in all types from one status to another by selecting the check box to the left of the status.



	Maps	Topics	Library topics	Images	Other (Word, PDF, ...)	Totals	
Total Number of Objects	104	1201	0	101	0	1406	
Source language only							
Contributor draft	0	0	0	0	0	0	(0%)
Draft	3	15	0	0	0	18	(1.28%)
Editorial review	0	0	0	0	0	0	(0%)
Technical review	0	0	0	0	0	0	(0%)
Pre-release validation	0	0	0	0	0	0	(0%)
Released	101	1186	0	101	0	1388	(98.72%)
Translation objects available							
Ready to be translated	0	0	0	0	0	0	(0%)
To be translated	0	0	0	0	0	0	(0%)
In translation	0	0	0	0	0	0	(0%)
Released	0	0	0	0	0	0	(0%)

6. Scroll to the toolbar at the top of the report.
7. In the **Select workflow action** field, select the action that you want to do, and then click **Send**.

   You cannot move to the Released state from any state other than Pre-Release Validation. If objects are in another state and you want to release them, you must first move them to Pre-Release Validation, then generate the workflow report again, and move the objects from Pre-Release Validation to Released.

   If status change requests are invalid, the system indicates that it could not transition all of the request objects. For example, if you try to move directly from Draft to Released, the request is not processed because you cannot move from Draft straight to Released.

   The updated report does not automatically update to reflect the new workflow status. To confirm the changes, regenerate the report.
8. Repeat the process to move the objects from Pre-release validation to Release.

Related links

[Generating a workflow report](#) on page 217
[Workflow](#) on page 211

Viewing workflow status of objects from the publication baseline

Procedure

1. In Publication Manager, open a publication.
2. Click the **Baseline** tab.
3. Click the **Status** column heading to sort by workflow status.

   This view makes it possible for you to see the workflow state of all objects in the publication.

Inbox

Inboxes help you manage the workflow of content that you own or have a role in. At each step of the workflow, objects appear in the inbox of the user who is responsible for the next step in the workflow process.

You have an inbox for each role that you are assigned, so some users will have multiple inboxes. The *Author* and *Doc Lead Project* inboxes show all of the objects to which you are assigned the respective role. Inboxes for other roles, including Contributor, Editorial review, Technical review, and Doc lead, show the objects for which you are assigned the respective role and that have been placed in a workflow state that requires your action. For example, if you are assigned a role of Doc Lead for a publication, objects in the Pre-Release Validation state appear in your inbox. After reviewing the objects, you can change their state to Released, and they are removed from your Doc Lead inbox.

Viewing your inboxes

Procedure

1. Log in to the Tridion Docs web interface.
2. Click the **Inbox** tab.
3. In the left pane, click the role for which you want to view the inbox.

Releasing a publication

You must release the publication version after you make your final delivery for product releases, including maintenance releases. You can release publications at additional intervals if you choose.

For example, if you have a lengthy Controlled Introduction or a similar situation where you want to ensure that the version of the content you delivered is preserved. Localization drops and final delivery are the only required times when you must release a publication.

About this task

When you release the output for a publication, the status of the publication changes to Released.

Tridion Docs automatically changes the output status to Release Candidate when all referenced content for a publication is in released state and no errors or serious warnings occur during the output generation. When the output is in the Release Candidate status, you can release the output. This process archives a record of everything in that publication.

When an output format for a publication version is in Released state, you cannot make changes to the contents or output of that publication. However, you can add additional output formats that use the same contents. To update a released publication, you must create a new version of the publication.

Before you begin

- Freeze the baseline
- Generate the output
- Check that the output is correct, conditions in specific

Procedure

1. Click the **Output** tab.
2. Select an output format with the Release Candidate status.
3. Click **Release**.

Related links

Checklist for releasing a publication on page 329

Chapter 17: Working with publication baselines

Baselines

The baseline of a publication is a table that identifies all objects in a version of a publication. Tridion Docs identifies objects by GUID and version. Use a baseline to correspond to a deliverable for a specific product version. For example, Using_Avaya_J16_ SIP_IP_Phone-v12-GUID-123ABC-2022/04/23 07:13:01 is a baseline and Using_Avaya_J16_ SIP_IP_Phone-v13-GUID-123ABC-2022/10/18 05:14:05 is a new baseline.

You can use the baseline to identify the versions of the objects that are included in a publication. However, the baseline does not contain the languages, output formats, or the conditions you specified when publishing. By omitting this information, you can change condition settings and output formats to produce different, custom output from the same, frozen publication baseline.

Object versions in a baseline

When creating a publication, you must select the version to use for each topic, map, and library that the publication references.

When you add a topic or map to a publication, the latest version is selected by default, select an earlier version of the object if necessary.

If you create a new version of an object from:

- the repository, the new version does not automatically gets selected in the publications where the object is being used.
- Publication Manager, the new version is automatically selected in the baseline.

Versions do not have to match within the publication. For example, you can use version 3, which may be the latest version of an object, and use version 1, which may be an older version of another object.

Important:

Use the Autocomplete option on the **Baseline** tab cautiously.

Here are some considerations to use autocomplete:

- Use Autocomplete when you create a latest version of the publication for the new release of the product.
- Sort by the **Newer version** column, and select new versions of topics only if the changes in the latest version applies to the release of the product. This applies when

you are publishing outputs of older versions and projects that reuse content from other publications and projects.

Baseline freezing

After you publish a deliverable, and all content, that includes topics, maps, and images in the publication is released, you can freeze the content as the publication baseline. After you freeze the baseline, you cannot change the content. The baseline becomes an archive of your publication. If the baseline is frozen, you can find the version of each object that was used for the publication.

When you freeze a baseline, each object version that is used in the publication is labeled using the baseline name (Baseline label property). You cannot delete the object versions contained within a frozen baseline.

Baseline cleanup

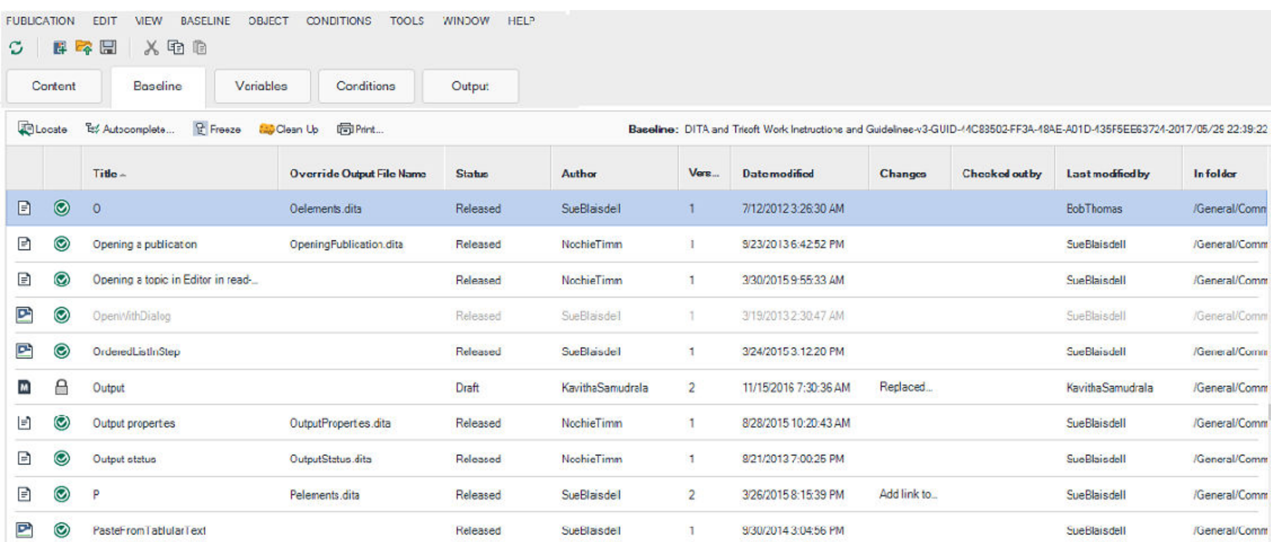
You can use Clean Up to remove all objects from the baseline that are not used in the publication anymore.

Related links

Versions and branches on page 231

Information provided in a publication baseline

The baseline provides important information about the content in your publication. The following screen capture shows the first few columns of a sample baseline. Solid rows indicate that the object is currently being used in the publication. Greyed out objects are currently not being used in the publication, but were used at some point in the past.



Icons in the baseline

The icons displayed in the first two columns in the baseline indicates the object type and status.

Icon	Description
Object type	The type of object. The options are: • : Indicates that the object is a topic. • : Indicates that the object is a map. • : Indicates that the object is an image.
Status	• : Closed lock indicates that the object is in draft state. • : A green check mark indicates that the object is currently released. • : Open lock indicates that the object is checked out.

Columns in the baseline

The baseline includes the following columns. You can sort the columns by clicking the column title.

Column	Description
Title	The Tridion Docs title of the object.
Override Output File Name	The base attribute of the topic. To modify the Override Output File Name, you must check out the topic and modify the base attribute.
Status	The workflow status of the object. The values are: • Draft • Prerelease Validation • Release
Author	The writer specified in the Author field on the Workflow tab in the object properties.
Version	The version of the object used in the publication.
Date modified	The last date this object was updated.
Checked out by	The user who checked out the topic. If the object is checked in, the column is blank.
Last modified by	The user who last updated the object.
In Folder	The full path to where this object is stored in the repository.
Product	The product name assigned on the Avaya-specific fields tab in the object properties.
Doc lead	The user assigned as the Doc Lead on the Avaya-specific fields tab in the object properties.
Type	Indicates if the object is a topic, map, or an image.
Newer Version	Indicates if there’s a newer version of the object in the repository. If there is a newer version, you can go to the Contents tab and choose the newer version if you want to use it in the publication.

Table continues…

Column	Description
Used	Indicates if the object is currently used in the baseline. Content that appears with a blue background is currently being used in the publication. Objects that appear with a white background are not currently used in the baseline but were at some point in the past.
Added by	The user who added the object to the system.
Added on	The date when the object was added to system.

Manually selecting the object versions used in a publication

About this task

Use this procedure to manually select the version of an object that is used in a publication. By default, the publication includes the latest version of the object that is available when you add the object to the publication. The following procedure makes it possible for you to manually select a different version. You might use this procedure if a newer version of an object becomes available than the version that was available when you added the object to your publication.

Procedure

1. Open the publication in Publication Manager.

   View the Baseline tab to see if newer versions are available for objects used in the publication. The **New Version** column displays `Yes` if a newer version of the object exists or `No` if the latest version is used in the publication.

   To see where a specific object is located in the publication, select the object, and then click **Locate** in the tool bar. Or right-click the object, and then click **Locate in Publication**. The content pane is displayed, and the object is selected in the publication tree.
2. In the publication tree, select the object for which you want to assign or change the version.

   All versions of the object are displayed in the right pane. The Changes column should indicate the changes made in any newer versions.
3. In the right pane, select the version that you want used in this publication baseline.

Checking for newer versions of objects in the baseline

You can use the baseline tab to check for objects that contain a newer version. Objects in the baseline can include topics, maps, or images. Use this procedure to identify whether you need to use the latest versions of the objects for your publication. This is especially important if you are reusing the common content.

Procedure

1. Open the publication in Publication Manager.
2. Click the **Baseline** tab.
3. Click **Newer Version** column heading to sort the baseline report.

   All objects for which a newer version is available are grouped together. The **New Version** column displays `Yes` if a newer version of the object exists or `No` if the latest version is already used in the publication.
4. To locate a specific object in the publication, select the object, and then click **Locate** in the tool bar or right-click, and select **Locate in Repository**.

   The system displays the content pane, and selects the object in the publication tree.
5. In the upper-right pane, view the **Changes** column to determine whether the newer version applies to your specific release.

   The **Changes** column provides a description of the change or product release number for which the changes apply.

Next steps

If a newer version applies to your release, go to Changing the version of an object used in a publication.

Related links

Changing the version of an object used in a publication on page 239

Freezing the baseline

You must freeze a publication baseline before you can release the publication.

About this task

After the baseline is frozen, you cannot change the content. You can, however, change the condition settings and output formats to produce different, custom output from the same frozen publication baseline.

Note:

To identify errors ahead of baseline freeze, freeze the baseline before you release all objects in the publication. That way, if there are errors that require you to modify the content, you have the opportunity to make the changes in the draft version before you release the topics and maps.

Before you begin

- Review the “Checklist for releasing a publication” checklist.

- Generate the output and check for any errors in the log file.
- Check the baseline for any topics that are reused from other project folder. See the **In Folder** column to identify the location.

  If you do not have write access to the reused topics, request the topic owner to resolve the errors.
- Ensure that all objects in the publication are in the Release state.

  This does not apply if you are performing a preliminary baseline freeze to look for any errors before releasing all objects.

Procedure

1. Open the publication in Publication Manager.
2. Click the **Baseline** tab.
3. Click **Freeze**.

   The Freeze Baseline report pane displays `Frozen`.

   If a baseline cannot be frozen, a Freeze Baseline Report is displayed at the bottom pane that contains location and cause of the baseline freeze error.

   If the freeze operation fails, fix all errors and retry the freeze.

Related links

Checklist for releasing a publication on page 329

Freeze Baseline report

The following error messages might be displayed in the Freeze Baseline Report.

Error message	Description	Action
`Object is not released`	The object is not released in the working language.	Review and release the objects.
`Object no longer available`	The object or the version of the object does not exist anymore.	Select another version of the object or delete the object from the publication.
`There is no value assigned to this variable`	The variable has no value and cannot be resolved.	Provide a value for the variable in the resource file associated with the publication.

Table continues…

Error message	Description	Action
`Link could not be resolved`	Some links cannot be resolved.	Set the scope attribute to external for all links to files or locations that are not part of the actual publication, for example, PDF files, additional images, or URLs. For xrefs that are not related to external links, locate the topic that includes the broken links and correct them. This will require you to create a new version of the object if you already released it. Checking your publication logs will reduce the risk of this issue. **Note:** This error can also be caused when topics in your baseline are referencing topics not used in your publication. For example, if you're reusing part of a topic and that topic includes an xref in a section you're not reusing.

Related links

Baseline freeze fails even though publishing log shows no errors on page 294

Cleaning up the baseline

About this task

While developing the content, you might delete topics, maps, and images that do not apply for the release or the product. The objects that are removed are displayed in gray in the publication. You can clear the baseline to remove all the gray objects that are not being used in the current version of the publication.

Procedure

1. Open the publication in Publication Manager.
2. Click the **Baseline** tab.
3. Click **Clean Up**.

   Tridion Docs removes from the baseline all objects that are displayed in gray, and keeps objects that are used in the current version of the publication.

If you still see topics in gray, it implies that the topics have been removed from the map, but are still being referenced in the relationship table. You must delete the topic from the relationship table.

Viewing where an object in the baseline is used

About this task

Use this procedure to view maps or topics in which a specific object in a baseline is used. With this functionality, you can see if a topic on which you are working is reused in books for other products. You can also view where used information from the Tridion Docs web interface or Oxygen XML Author.

Procedure

1. Open the publication in Publication Manager.
2. Click the **Baseline** tab.
3. Select the object for which you want to view where used.
4. In the menu bar, click **VIEW** > **Where used**.

   The **Where Used** pane that is below the Baseline pane, displays topics and maps that use this object.

Related links

Viewing where an object is used from the web interface on page 198
Viewing where a topic is used from Oxygen XML Author on page 199

Chapter 18: Working with versions and branches

Versions and branches

Each object in Tridion Docs has one only instance (one file). To change a released object or make different changes for different versions of a publication, create a new branch or new version of the object.

When you create a new version of a publication, create a new version or branch only of topics or maps that you need to modify. You do not need to create a new version of all topics and maps in the new publication. Versions of topics that were released in a previous publication version and do not require modification can be used in the new publication version.

Objects in a publication can have different version numbers and do not need to correspond in any way to the software version of the product they support.

Tridion Docs does not support propagation of changes across multiple versions or branches of an object. This means if the same change applies to multiple versions or branches of an object, you must make the change manually in each branch and version to which it applies.

For changes that apply to the latest released version of an object, you create a new version. For changes that apply to an earlier released version of an object, you create a branch off of the earlier version.

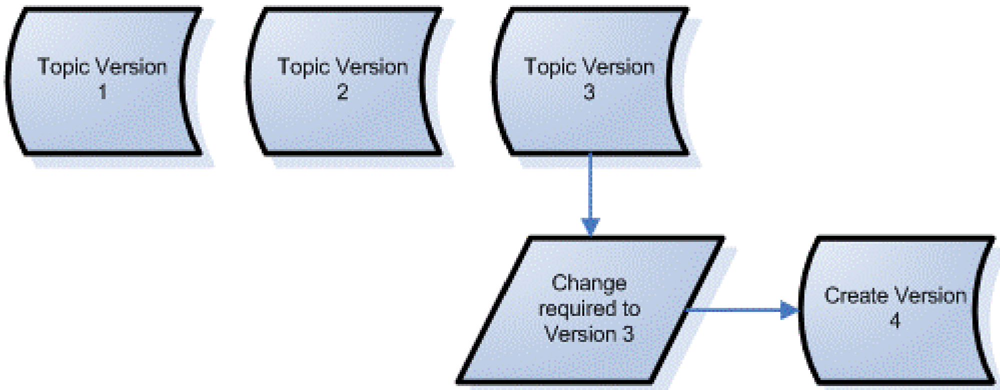
A video about release management and creating versions and branches is available at Working with branches and versions.

Related links

Baselines on page 223

Whether to create a new version or branch

Scenario 1: Changes required in the latest version of an object



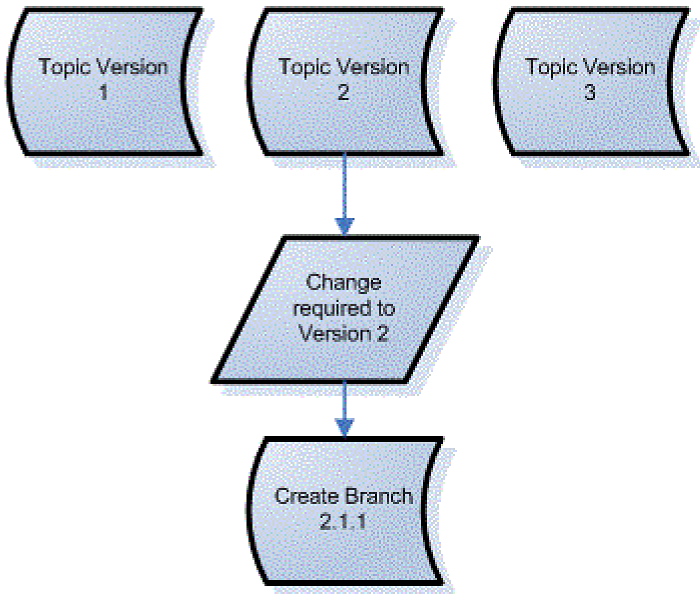
In this scenario, changes are required in version 3 of a topic for a reissue of a publication. Version 3 is the latest version of the topic, and it is in the Released state. When you need to update the latest version of a released object, create a new version.

Note:

You technically can create a branch from the latest version for maintenance updates. But when it's time to create the next version, you have to remember to do create it from the previous full version and not from the branch (you can't create a version 3 from branch 2.1.1). And any changes that you made to the branch will not be included in the new version and will have to be added manually. So this is not recommended.

You can create a new version of an object that is in Draft state. You might want to do this if you are still working on one release but starting work on the next release. But, for any changes that apply to both versions, you will have to make those changes manually in both versions. To minimize maintenance, we recommend waiting until the first version is as stable as possible before you create the new version.

Scenario 2: Changes required in an earlier version of an object

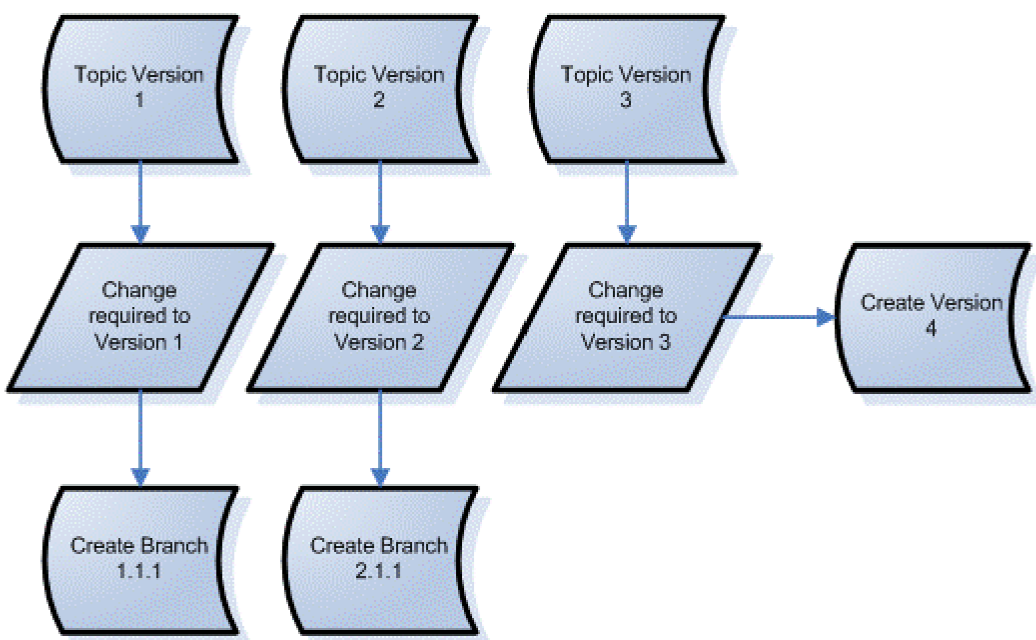


In this scenario, changes are required in version 2 of a topic, which is in a Released state. Because version 2 is not the latest version of the topic, you must create a new branch off of version 2.

Related links

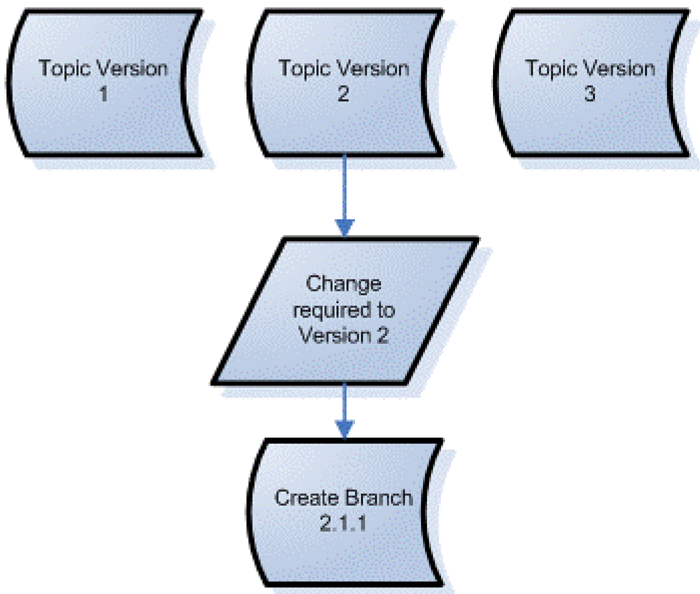
[Branching best practice](#) on page 236

Scenario 3: Changes required in all released versions of an object



In this scenario, changes are required in all versions of a topic. All versions are in Released state. For the latest version (version 3), you create a new version (version 4). For each of the two earlier versions, version 1 and version 2, you create a new branch, branch 1.1.1 and 2.1.1. Even if the changes required are the same, you must manually make the change in each branch and version.

Scenario 4: Changes required in earlier released version of an object and in the current draft version



In this scenario, changes are required in version 2 of a topic, which is in a Released state. A newer version exists, version 3, and is in a Draft state. Because version 2 is not the latest version of the topic, you must create a new branch off of version 2. If the changes that you are making to version 2 also apply to version 3, you can update version 3 since it is in a Draft state.

Related links

Branching best practice on page 236

When to create a new version of objects in a publication

When you have to update a publication, it can be hard to know which objects you need to update. For example:

- To update a topic, do you have to create a new version of the map? No, you only need to create a new version of the topic. The maps control the objects that are included in the map, their sequence, and their attributes. But the map does not control the version of the topic that is used in the map. That means, you can use the same version of a map in two different publications or different versions of the same publication, and select different versions of the topic in a map.

- To change the XML Attributes of a topic, do you need to create a new version of the topic? No, but you do need to create a new version of the map because you're modifying the topicref and not the contents of the topic.

To determine which object needs a new version, you need to understand what each object controls:

- Map: Controls the topics and maps that are referenced and the order/structure.
- Publication: Controls the version of the objects that are being used.
- Topic: Controls the content.

The table lists cases where you need to create new versions of objects.

Important:

To make changes to a publication that is released, you must create a new version of the publication.

What you need to change	What you version if it's Released
Update the contents of a topic	Create a new version of the topic. You do not need to create a new version of the chapter map or bookmap.
Update the XML Attributes of a topic	Create a new version of the map but not the topic. You are not changing the contents of the topic, but modifying the attributes of the topicref element in the map. **Note:** If you try to access the XML Attributes of a topic in a map that is released, the system prompts you to create a new version of the map, so you will know for which object you need to create a version.
Modify the structure of a chapter (such as, adding or removing a topic)	Create a new version of the chapter but not of the bookmap.
Add a new chapter	Create a new version of the bookmap but you do not need to create a new version of the map you're adding or deleting.
Update the XML Attributes of a map	Create a new version of the bookmap or map that includes the topicref. Similar to the topic, you are not changing the contents of the map in this case. You are only modifying the attributes of the topicref element in the bookmap or higher-level map. **Note:** If you try to access the XML Attributes of a map and the bookmap or higher-level map is released, the system prompts you to create a new version of the bookmap or higher-level map, so you will know which one you need to version.

Table continues…

What you need to change	What you version if it’s Released
Change the version of a topic or map being used in a publication	Create a new version of the publication if the publication is released.
Changing the publication properties	Create a new version of the publication if the publication is released.

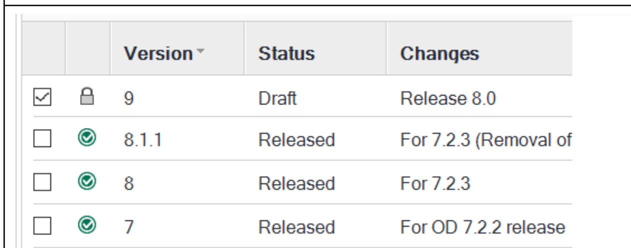
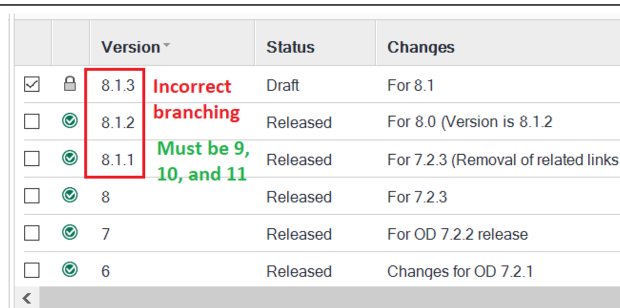
Branching best practice

Create branches of objects to update content for older product releases.

You must follow the correct branching practices of objects in Tridion Docs when working on various product releases. This applies to all objects, such as publications, bookmaps, maps, and topics.

- Create only versions from the latest version
- Create a branch to modify the content from the older topic, map, or publication version for older product releases and you have already started work on the new release.

<table>
<tr><th>Correct</th><th>Incorrect</th></tr>
<tr><td>Create a new v9 from v8 for product release 8.0

Create a new v10 from v9 for product release 8.1</td><td>Branch created from the latest available topic, map, or publication v8</td></tr>
<tr><td>
</td><td>
</td></tr>
</table>

Localization projects

For localization projects, you might have more than one version for the publication and map/topics within it for each product release. For example:

1. V12 for Product Release 8.1 [Draft and work in progress]
2. V 11 for Product Release 8.0 GA
3. V 10 for Product Release 8.0 [Object released for localization 100% drop]
4. V 9 for Product Release 7.2.3 updates
5. V 8 for Product Release 7.2.3 [Object is released and content frozen]

Why should you avoid branches

- Branches are not visible in the repository and the publication baseline
- Branches are easy to miss out
- The next main version does not reflect the changes made in the branch.

  In the example, version 9 does not reflect the changes from version 8.1.1, 8.1.2, and 8.1.3. You must add changes made in the branch again in version 9, which the writer might easily miss out thus making the content incomplete in the latest versions.
- You can view the branch only from the **Version** field in the repository and the **Version selection** pane in Publication Manager

When should you create a branch

Create a branch from the older version of the publication, map, or a topic:

- When you already have a draft version for the current product release
- When you need to update the content for the older product releases

Note:

In all other scenarios, create versions only.

Tips for managing concurrent versions

If you must maintain multiple concurrent versions, use the following tips to manage your content:

- Create new versions of only those maps and topics that require updates. You do not have to create new versions of all topics and maps to update a publication.
- When you must update multiple versions of the same topic, open all versions at the same time and make the change in all versions simultaneously. The topic “Selecting the version of a publication or topic to modify” includes the steps for selecting a specific version of a topic to check out.
- Use the publication baseline to manage the versions of topics and maps used in each publication. As you create new versions of topics and maps, you must select those new versions immediately in the appropriate publication to avoid having to go back later and try to sort out which version of topics and maps belong in which version of the publication.
- You can create a new version from a draft version of content. You do not need to release content to create a new version. However, to adhere to the process, you release content when it’s complete and delivered for a release. But creating a new version from a draft version is appropriate when you must have more than one working version of the content.
- The maps control the objects that are included in the map, their sequence, and their attributes. But the map does not control the version of the topic that is used in the map. That means, you can use the same version of a map in two different publications or different versions of the same publication, and select different versions of the topic in a map.

Viewing the version of all objects in a publication

About this task

The publication baseline displays the version of all objects included in a publication.

Procedure

1. Open the publication in Publication Manager.
2. Click the **Baseline** tab.

   Tip:

   The **New Version** column displays `Yes` if a newer version of the object exists or `No` if the latest version is used in the publication.

Checking for newer versions of objects in the baseline

You can use the baseline tab to check for objects that contain a newer version. Objects in the baseline can include topics, maps, or images. Use this procedure to identify whether you need to use the latest versions of the objects for your publication. This is especially important if you are reusing the common content.

Procedure

1. Open the publication in Publication Manager.
2. Click the **Baseline** tab.
3. Click **Newer Version** column heading to sort the baseline report.

   All objects for which a newer version is available are grouped together. The **New Version** column displays `Yes` if a newer version of the object exists or `No` if the latest version is already used in the publication.
4. To locate a specific object in the publication, select the object, and then click **Locate** in the tool bar or right-click, and select **Locate in Repository**.

   The system displays the content pane, and selects the object in the publication tree.
5. In the upper-right pane, view the **Changes** column to determine whether the newer version applies to your specific release.

   The **Changes** column provides a description of the change or product release number for which the changes apply.

Next steps

If a newer version applies to your release, go to Changing the version of an object used in a publication.

Related links

[Changing the version of an object used in a publication](#) on page 239

Changing the version of an object used in a publication

About this task

Use this procedure to manually change the version of an object that is used in a publication. By default, the latest version of objects is used but you can choose to use an older version. This is useful for maintenance releases and when you're reusing from a project but can't use the latest version of the content.

Note:

You cannot use different versions of the same topic in the same publication.

Procedure

1. Open the publication in Publication Manager.

   View the Baseline tab to see if newer versions are available for objects used in the publication. The **New Version** column displays `Yes` if a newer version of the object exists or `No` if the latest version is used in the publication.

2. In the publication tree, select the object for which you want to assign or change the version.

   All versions of the object are displayed in the right pane. The Changes column should indicate the changes made in any newer versions.

3. In the right pane, select the version that you want used in this publication baseline.

Related links

[Checking for newer versions of objects in the baseline](#) on page 226

Creating new versions or branches

Using Publication Manager to create a new version or branch

About this task

Use this procedure to create a new version or branch for a map or topic. When you use Publication Manager to create a new version or branch for a map or topic, the new version or branch replaces the version that is currently in the publication. When you use Publication Manager to create a new version or branch for a publication, the new version is opened, and the previous version is closed.

Important:

- If you are creating a new version or branch for a publication, you must open the publication version to use as the initial baseline for the new version or branch. For example, to create a branch 2.1.1, open version 2 of the publication. Or to create version 3 of a publication, open version 2.
- If the publication is released, you have to create a new version of the publication before you can create new versions of any maps or topics from the publication in Publication Manager.

Procedure

1. Open the publication in Publication Manager. To open a version other than the latest:
   a. Click **Versions** in the bottom, right corner of the Open Publication dialog box.
   b. In the Select Version dialog box, select the version that you want to open, and then click **OK**.
   c. In the Open Publication dialog box, click **Open**.
2. In the publication tree, browse to and select the object for which to create the new version or branch, and then click **Versions** at the bottom, right corner of the window.

   The Select Version dialog box displays all versions and branches of the object.
3. Right-click the version for which to create a new version or branch, and then click **New Version** or **New Branch**.

   If the new version or branch is for a map or topic, the Create version of object dialog box or Create branch of object dialog box is displayed.
4. Complete or modify the fields on each tab of the dialog box, and then click **OK**.

   The fields in the dialog box are the same fields that must be completed when you create a new map or topic. The **Changes** field on the Version tab is mandatory for new versions and branches.

Related links

Map properties on page 45
Topic properties on page 71

Using the desktop repository to create a new version or branch

About this task

Use this procedure to create a new version or branch for a publication, map, topic, or image.

Procedure

1. On the Publication Manager menu bar, click **Tools** > **Browse Repository**.

   The Browse Repository window is displayed.
2. In the navigation pane, browse to and select the folder where the object is saved.

3. In the right pane, select the object, and then click **Versions** at the left-bottom corner of the window.

   The Select Version dialog box displays all versions and branches of the object.

4. Select the version for which you want to create a new version or branch, and then click one of the following in the tool bar:

   -  to create a new version
   -  to create a new branch

5. Complete or modify the fields on each tab of the dialog box, and then click **OK**.

   The fields in the dialog box are the same fields that must be completed when you create a new map or topic. The **Changes** field on the Version tab is mandatory for new versions and branches.

6. To close the Select Version dialog box, click **OK**.

Related links

Map properties on page 45
Topic properties on page 71

Using the publication baseline to create a new version or branch

About this task

Use this procedure to create a new version or branch for a map or topic.

Before you begin

Determine if the version in the baseline is the latest version or an earlier version to help you determine if you need to create a new version or a new branch. The **Newer Version** column of the baseline can help you.

- If this field displays `No` for the object, the version in the baseline is the latest. You should create a new version if you need to update and it's released or you need to start working on the next release before the current release is done.
- If this field displays `Yes` for the object, a newer version exists, and you need to create a new branch.

The desktop repository and Content pane of Publication Manager might be more helpful because they display a list of all versions available for the object. Publication Manager also displays which version is currently used in the publication.

Procedure

1. Open the publication in Publication Manager.
2. Click the Baseline tab.
3. Right-click the version for which to create a new version or branch, and then click **New Version** or **New Branch**.

If the baseline is frozen, the **New Version** and **New Branch** options are not available. You'll need to create a new version or branch of the publication before you can make any updates to the content.

The Create version of object dialog box or Create branch of object dialog box is displayed.

4. Complete or modify the fields on each tab of the dialog box, and then click **OK**.

   The fields in the dialog box are the same fields that must be completed when you create a new map or topic. The **Changes** field on the Version tab is mandatory for new versions and branches.

Related links

[Map properties](#) on page 45
[Topic properties](#) on page 71

Using the publication baseline to create new versions of multiple released topics

About this task

You can create new versions of multiple topics that are in released state in a publication. Use this procedure only for released topics.

Procedure

1. Open the publication in Publication Manager.
2. Select topics for which you want to create new versions, right-click and select **Check Out**.
3. In the Check Out dialog box, click **Create a new version** (the default), select the **Apply To All** check box, and click **OK**.

   Tridion Docs displays the Create version of object dialog box for the first topic.
4. Click the **Version** tab, and type a description in the **Changes** field, then click **OK**.

   Tip:

   If the same description applies, copy and paste the description in the **Changes** field for each topic.

   Tridion Docs opens the topic in XML Editor and displays the Create version of object dialog for the next topic. The Editor window takes precedence when the topic opens, so you might need to minimize the window to see the Create version of object dialog.
5. Repeat step 4 for each topic you selected.
6. When all new topic versions are created and open in Editor, you can edit the topics.

   When you create new versions from the Baseline tab, Tridion Docs automatically selects new versions for this publication.

Selecting the version of a publication or topic to modify

About this task

You can modify an earlier version of a publication or topic. If an earlier version is released, the system prompts you to create a new branch if you attempt to check out a released object.

Procedure

1. On the Publication Manager menu bar, click **Tools** > **Browse Repository**.

   The Browse Repository window is displayed.
2. In the navigation pane, browse to and select the folder where the object is saved.
3. In the right pane, select the object, and then click **Versions** in the left-bottom corner of the window.

   The Select Version dialog box displays all versions of the object.
4. Right-click the version that you want to open, and then click **Check Out**.

Selecting the version of a map to modify

About this task

To modify maps within the publication tree of Publication Manager, you must open a publication that uses the map version that you need to modify.

However, you can add or update XML attributes of a map, such as bundle name, by opening from Oxygen XML Author. To select a version of the map, you can use the **Versions** option available at the lower-left corner.

If a map is released, and you want to check out, the system prompts you to create a new version or a branch. Always, create a new version for the latest version of the map. You must create a branch only when you are checking out an older version of the map.

Procedure

1. Open a publication that uses the map version that you need to modify.
2. In the publication tree, modify the map.
3. When you are finished with the modifications, right-click the map in the publication tree, and then click **Check In**.

Deleting an unused version or branch of a topic, map, or image

If you accidentally create a new version or branch in Tridion Docs and the new version is not being used in any publications, you can delete it.

Do not delete any versions that are being used. If you do delete a version that's being used, when you open the publication using that version, you'll see the version listed with a caution icon next to it. You'll must select the previous version.

Procedure

1. Log in to Tridion Docs web interface.
2. In Repository, locate the folder, and on the top-right pane, click the file.
3. When the topic details display in the bottom pane, select the left check box for the version that you want to delete and then select the check box at the far right for the language.

   You must select the check box at the far right for the language even if the object is English-only.
4. Click **Delete** from the menu on the far right side to delete the selected language.

   Important:

   Ensure that you select **Delete** on the right side. You might need to expand your browser window or use the horizontal scroll bar to view the **Delete** option.
5. Click **Yes** to confirm the deletion, and click **Close**.

   If you try to delete the version without deleting the language first, the system displays an error message that the object could not be deleted.
6. Select the left check box for the version again and then click **Delete** from the options that run across the top of the topic details to delete the version.
7. Click **Yes** to confirm deletion, and then click **Close**.

Deleting an unused version of a publication

If you accidentally create a new version or branch of a publication in Tridion Docs, you can delete it.

About this task

You cannot delete a publication version if you freeze the baseline and release the publication.

Procedure

1. Start the Publication Manager.

2. Locate the publication in the Repository and click **Versions** in the bottom-left corner of the page.
3. When the Select Version dialog box displays, highlight the version that you want to delete and click .
4. When prompted to confirm, click **Yes**.
5. Click **OK** to close the Select Version dialog box.

Comparing versions and revisions

Comparing topic versions from Publication Manager

In Publication Manager, you can compare two versions of the same topic to see the differences. You can also compare versions of a topic from the desktop repository and web interface.

Note:

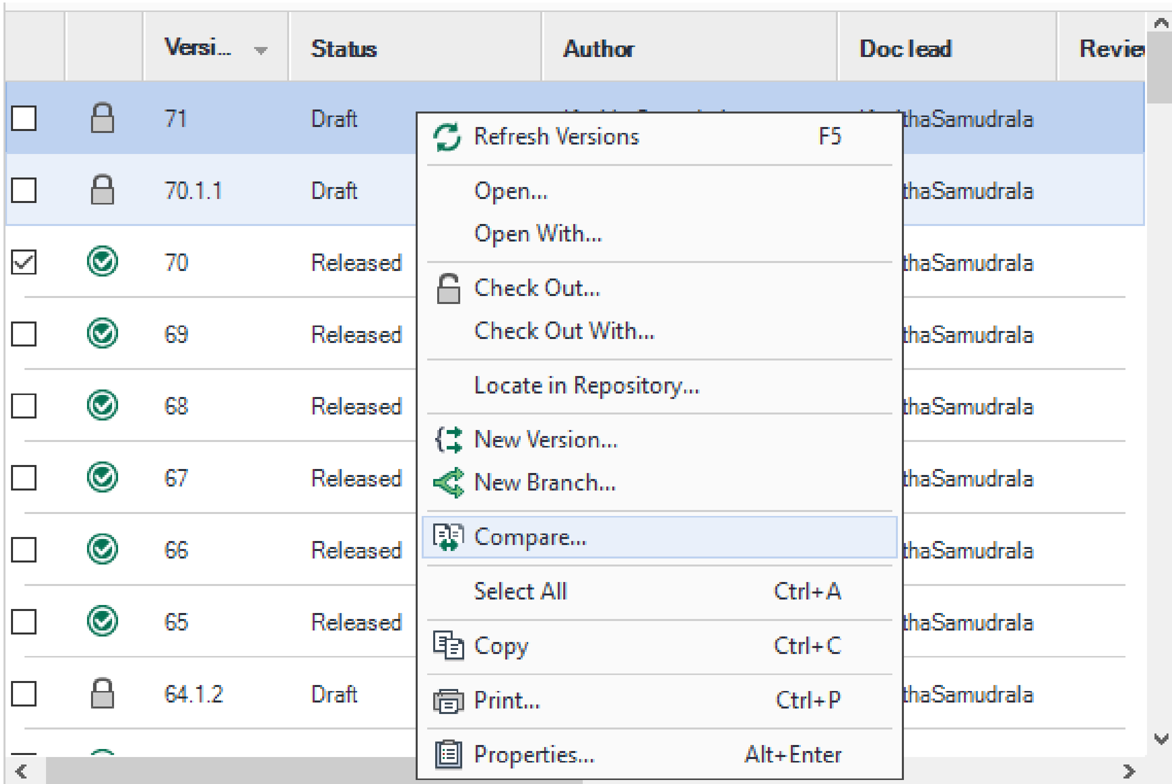
Comparing the versions is different than comparing the revisions.

Procedure

1. Start the Publication Manager.
2. Open a publication that contains the topic.
3. Select the topic for which you want to compare the versions.

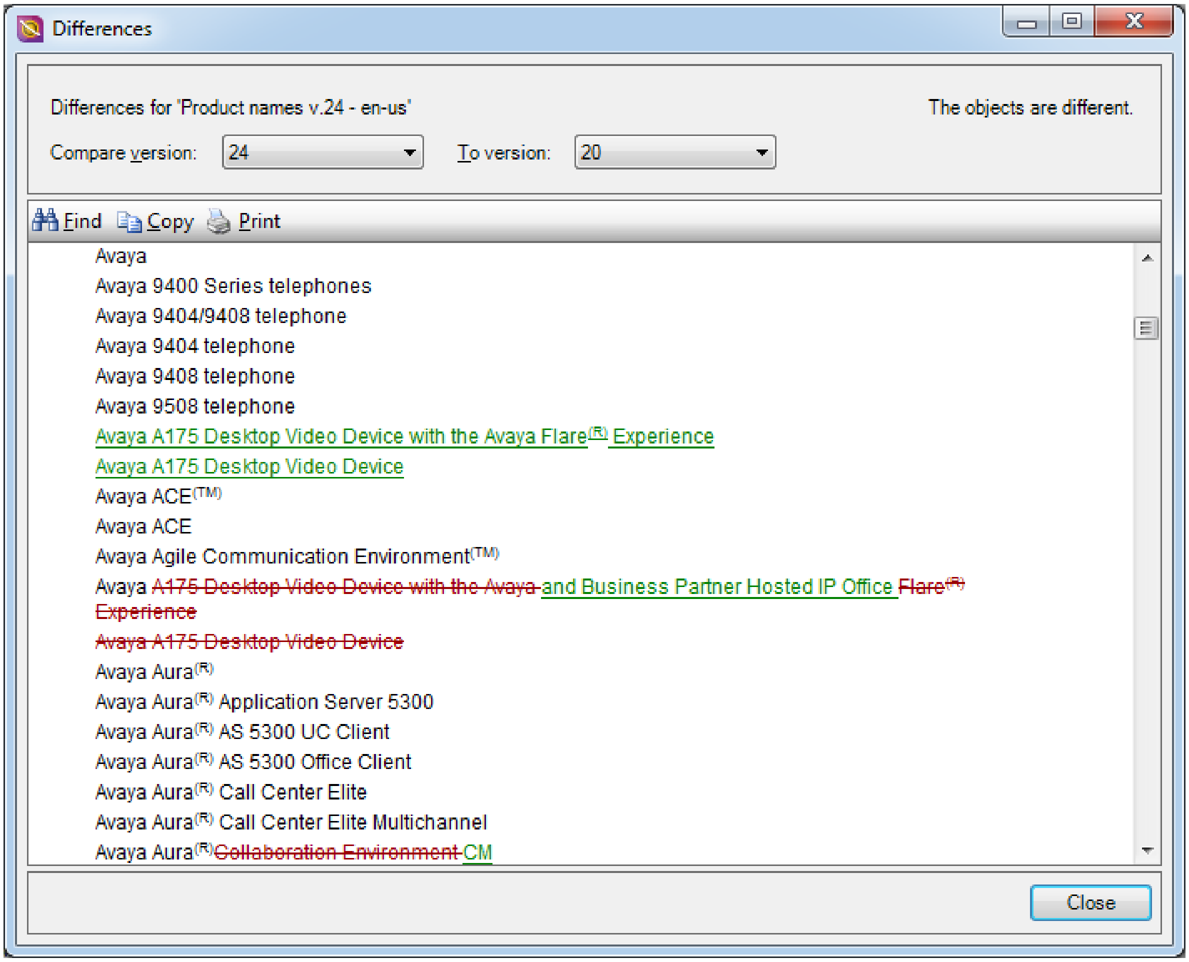
   The version selection pane on the right side displays the versions for the selected topic.

4. Right-click the version that you want to compare and click **Compare**.



5. In the Differences dialog box, in the **Compare version** field select the version to use as the basis for the comparison.
6. In the **To version** field, select the version with which you want to compare.
7. Click **OK**.

   The Differences dialog box displays the differences between the two topics. Content that appears in green and underlined is content that has been added in the version specified in the **Compare version** field. Content that has been removed is crossed out, and appears in red.



Related links

[Comparing topic revisions in the Tridion Docs web interface](#) on page 249
[Comparing topic versions from the desktop repository](#) on page 247

Comparing topic versions from the desktop repository

In the desktop repository, you can compare two different versions of the same topic to see the differences. You can compare the versions of the topic from an open publication in Publication Manager.

Note:

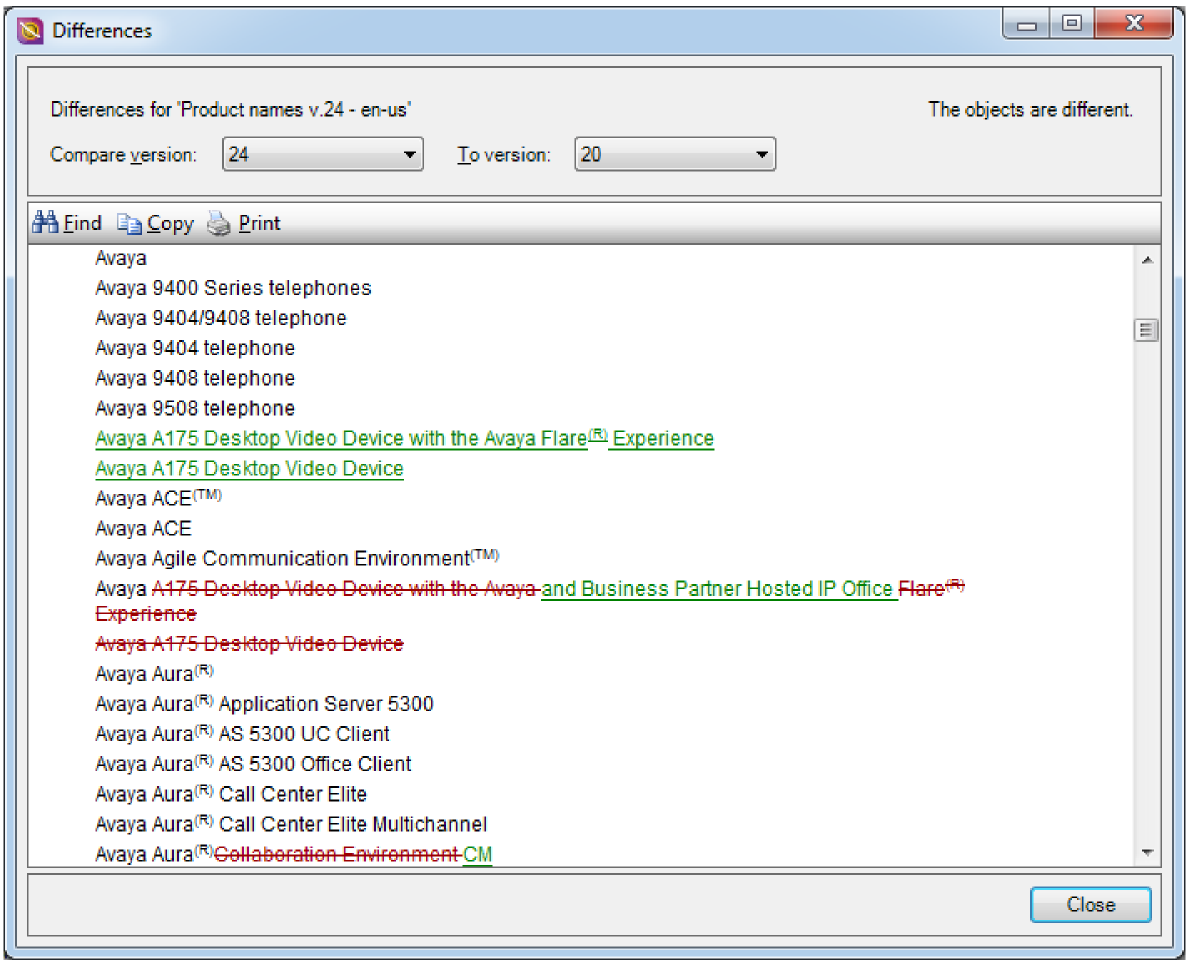
Comparing the versions is different than comparing the revisions.

Procedure

1. Start Publication Manager, and click **Tools** > **Browse Repository**.
2. Locate the topic for which you want to compare the versions, in the lower-left corner, click **Versions**.

3. In the Select Version dialog box, click **Compare**.
4. In the Differences dialog box, in the **Compare version** field select the version to use as the basis for the comparison.
5. In the **To version** field, select the version with which you want to compare.
6. Click **OK**.

   The Differences dialog box displays the differences between the two topics. Content that appears in green and underlined is content that has been added in the version specified in the **Compare version** field. Content that has been removed is crossed out, and appears in red.

Related links

[Comparing topic revisions in the Tridion Docs web interface](#) on page 249

[Comparing topic versions from Publication Manager](#) on page 245

Comparing topic revisions in the Tridion Docs web interface

You can compare the revisions (checkins) without a topic version in the Tridion Docs web interface.

Note:

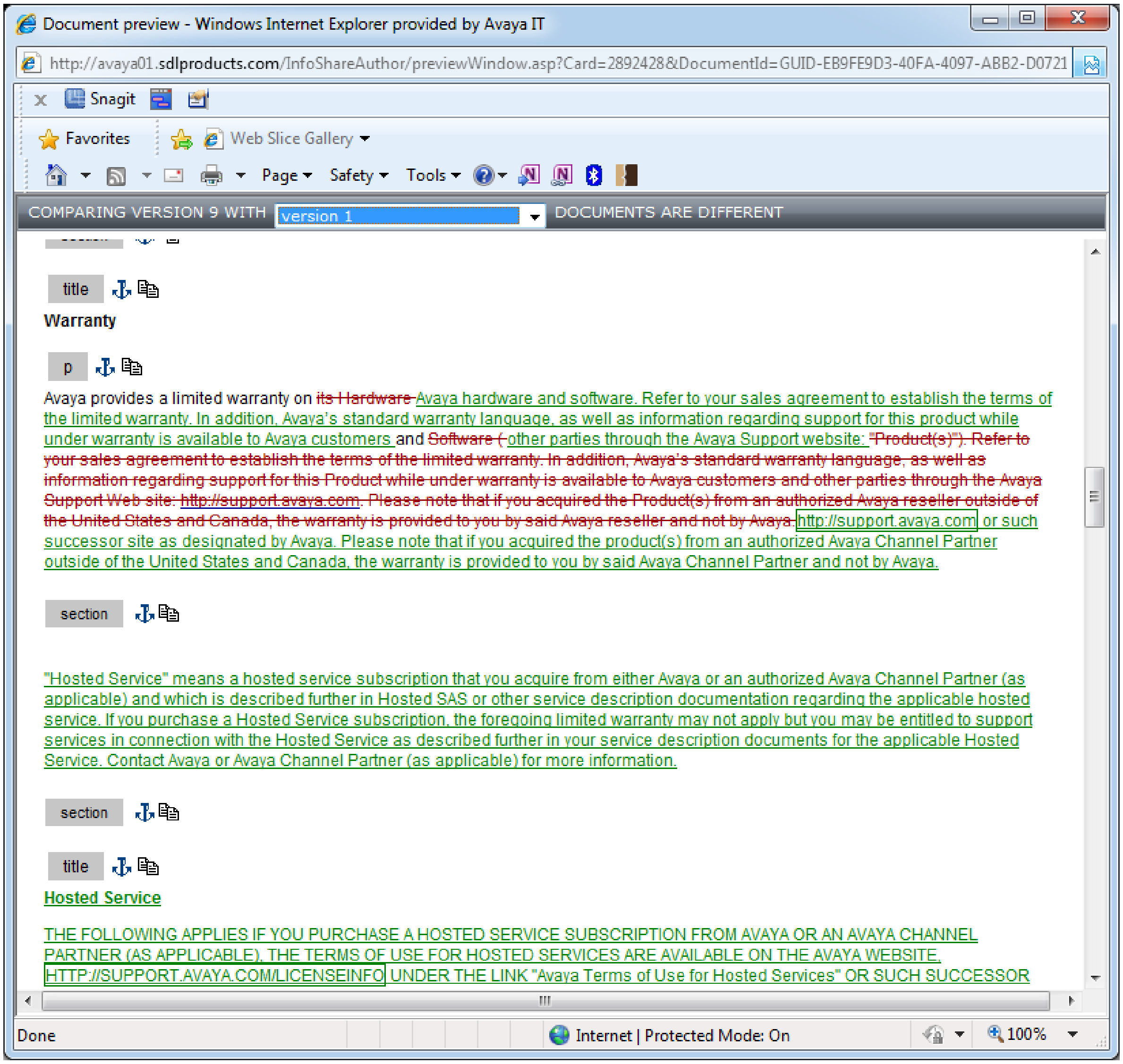
Comparing topic revisions is different than comparing topic versions. You can also compare topic versions in Tridion Docs.

Procedure

1. Go to the Repository tab in the Tridion Docs web interface and locate the topic for which you want to compare revisions.
2. Select the check box to the left of the topic for which you want to compare revisions.

   The details of the topic are listed below the topic list.
3. Select the check boxes on the left and right of the row of the version of the topic.
4. Click **Show History** on the extreme right.
5. In the History dialog box, click **Show/Hide Revisions** to see all the revisions of the topic version.
6. Select the check box to the left of the revision of the topic that you want to use as the basis for the comparison and click **Preview**.
7. When the preview displays, select a revision from the **Comparing Revision *version #* with** menu

   The display changes to show the differences between the two versions. Content that appears in green and underlined is content that has been added in the version specified in the **Compare version** field. Content that has been removed is crossed out, and appears in red.



Related links

Comparing topic versions from Publication Manager on page 245
Comparing topic versions from the desktop repository on page 247

Comparing publication versions in the Tridion Docs web interface

You can generate a PDF that displays the differences between two versions of a publication. You can only compare between versions of publications; the compare is not available for revisions within versions.

About this task

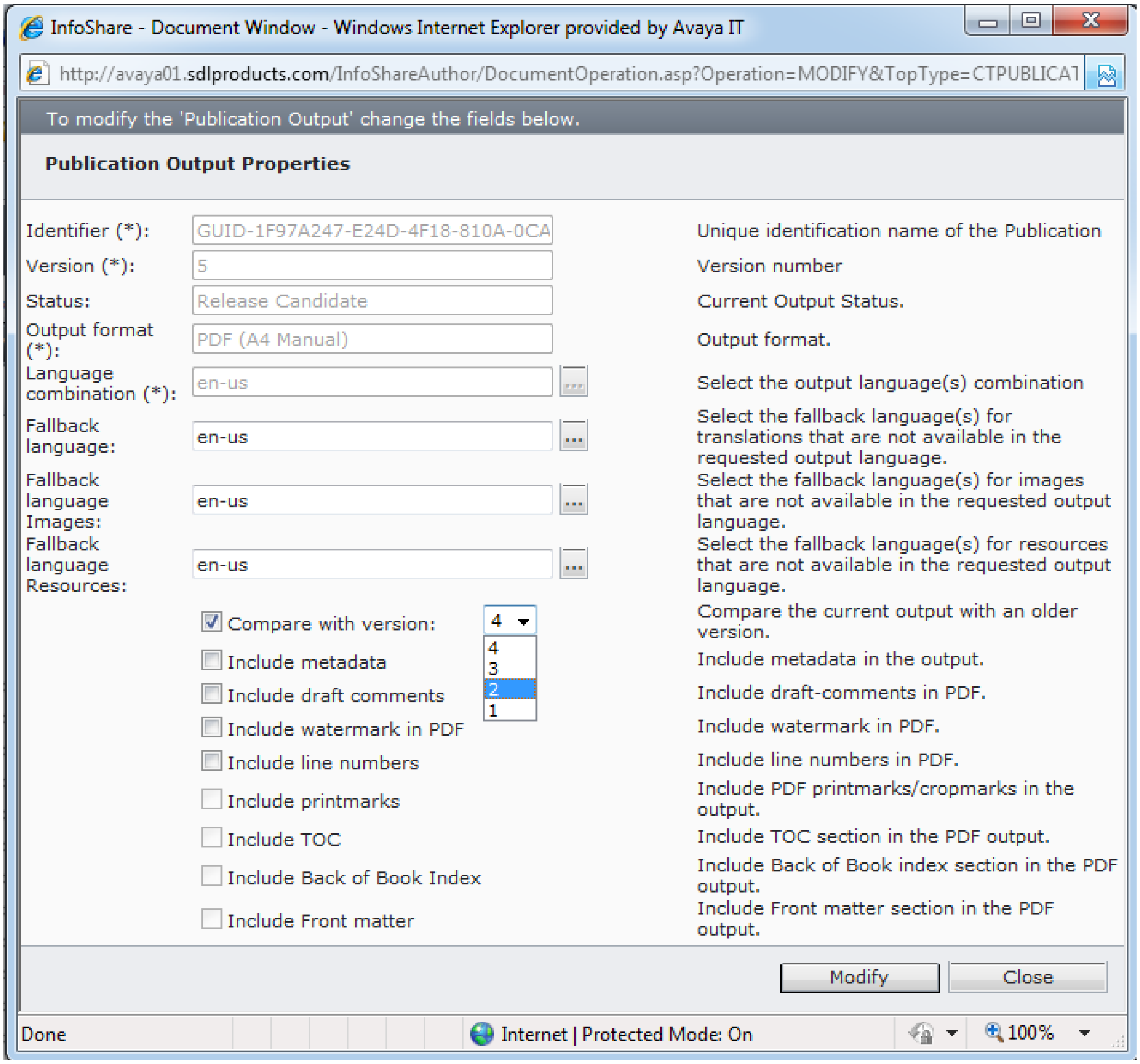
The publication version comparison only works with the Avaya Book output format.

Procedure

1. Add the Avaya Book output format if you have not already added to the publication in Publication Manager.
2. Go to the Repository tab in the Tridion Docs web interface and locate the publication you want to compare versions for.
3. Select the check box to the left of the publication for which you want to compare versions.

   The details of the publication are listed at the bottom of the page.
4. Select the check boxes on the left for the version of the publication that you want to use as the basis for the comparison.
5. Select the check box on the right side of the page next to the **Avaya Book** output format.
6. Click **Properties** on the right side of the page.

7. In the Publication Output Properties dialog, ensure that **Compare with version** is checked and select the version for which you want to compare.



8. Click **Modify**.
9. Publish the Avaya Book output format.
10. When the publishing request completes, download the output.

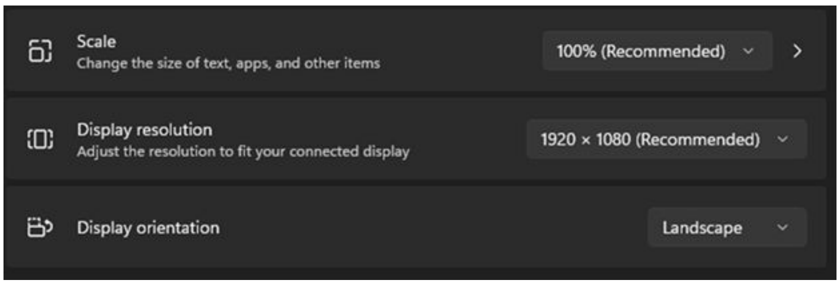
    Content that is added to the version that you selected as the basis appears in green and underlined; content that is removed appears in red and is struck through.

Chapter 19: Managing graphics

Image guidelines

Conventions

- Use 1920x1080 screen resolution without any upscale when taking screenshot.



- Ensure the image is not more than 6 inches width and 10 inches length. If you do not include a title for the figure, you can keep the length up to 10.25 inches.

  Note:

  If the image is larger than the text box, it is automatically scaled during production to fit if the **placement** attribute is set to **break** on the graphic.

- Resize images using the source tool. However, you can use attributes on the image element to scale an image in the output.
- Ensure that the font size is 14, see step 4 in Embedding text in an object on page 371 for more information.

  The Localization team might need to reduce font size to fit longer translated strings into image objects.

File naming conventions for images

Use the file naming conventions that you use for your XML/DITA files. The file name need to be meaningful, in camel-case with no spaces. For example, use “VustatsDisplayExample”. Avoid using file names that imply a logical or hierarchical order. For example, do not name your files as Fig2-2 or Chap3Image. The location of your image might change and this naming convention will not make sense if the image is reused in other deliverable or media.

Supported images formats

You can include the following image formats in DITA topics:

- png

- gif
- svg

Important:

HTML and HTML5 outputs do not support eps (Encapsulated PostScript) images. Therefore, you cannot view these images in the HTML files opened in browsers. You must convert eps images to the png format by using applications, such as Inkscape and Adobe Illustrator.

Scalable vector graphics (SVG) is an XML-based image format with the following benefits:

- SVG is a vector-based format rather than bitmap-based, such as png and gif. Vector-based graphics, line drawings and text in specific, do not lose image quality when scaled.
- SVG has higher resolution than the image formats we currently use.
- Because SVG is XML-based, the text in SVG can be translated to different languages.

Use the Inkscape software that is freely distributed to create and edit an SVG image. For instructions to create SVG using Inkscape, see Creating SVG images using Inkscape on page 364.

Text in drawings

Do not embed text in png or gif drawings unless the drawing does not make sense without callouts. You can embed text in SVG images that can be translated to various languages.

When uploading images in Tridion Docs, only select the **Enable translation management** check box for SVG images with embedded text. Do not select this check box for other image types that are not localized.

DITA elements for images

You can use one of the two ways to tag an image within a DITA topic:

- Image element if you do not need to add supporting information, such as a title or legend for call-outs (simpletable element) with your image.
- Image element inside a fig element to:
  - Include a title or description (desc element) with your image.
  - Provide a legend for your call-outs in simpletable element.

Accessibility

Ensure that you include an alt element inside the image element to make the image accessible for users using screen readers or text-only readers.

Placement attribute

When you insert an image into a topic, use the placement attribute to determine if the image breaks to a separate page in the output when appropriate or always stays with the text around it:

- Set the **placement** attribute to **break** when the image must be independent of the text around it and break to a new page in the output when appropriate. Use **break** in almost all cases.
- Set the **placement** attribute to **inline** when the image must stay with the text around it. This value can cause awkward page breaks in outputs and must only be used when an image is nested within text. Do not use the Inline attribute.

When the **placement** attribute is set to **break**, images that are large for the page are automatically scaled to fit in the text box.

Test image in the output

Generate the output and verify how the image is displayed. The way the image displays in Editor is not always a true representation of how it appears in an output.

Related links

[Scaling images in topics](#) on page 265

Accessibility of images

Add the alternate text for images to make the image compliant with Section 508 of the Rehabilitation Act, which was enacted to make electronic and information technology accessible to people with disabilities. When you add the alternate text, screen readers or text-only readers can read the text in a tagged PDF. In DITA, we use the alt element to add additional description to images or objects like embedded tutorials. If we do not provide the necessary alt text, you cannot produce a tagged PDF on request, which might impact on making certain sales, especially Government sales.

Note:

Alt text is required only for images in the following:

- End user content: User Guides, Quick Reference Guides, endpoint Installation and Maintenance guides
- Overview content: Solution Descriptions, Overview and Specifications

Avoid using images that require long descriptions in the alt tag.

To limit the description in the alt tag, use callouts in a table below an image or provide a description that introduces the image. See the information on using alt text in the Accessibility section of the *Avaya GIS Customer Documentation Standards* (CID 156561).

Avoid puncutation marks in the description text.

Related links

[Making images and objects accessible](#) on page 255

Making images and objects accessible

About this task

For screen readers or text-only readers to read the text to support content access to users with disabilities, you can add description to images and objects.

Procedure

1. Check out the topic in Oxygen XML Author.
2. To add a description to an image:
    a. Double-click or select the element.
    b. In the Attributes window, click **alt** and type a description for the image.

       The reader using a screen reader must understand the drawing by your description. Descriptions might be quite long. If the alt text is a sentence fragment, do not add any punctuation at the end. For example, if the text is “Folder icon”, do not add a period at the end.
3. To add a description to an object element:
    a. Double-click or select the element.
    b. In the Attributes window, click **name** and type a description for the object.

       Ensure that the description you provide is sufficient to help the reader using a screen reader understand the purpose of the object.

Related links

Checking accessibility and generating a report on page 141
Accessibility of images on page 255
Accessibility of images on page 255

Line drawings

Unless you are creating a flow diagram or a very simple block diagram, it is recommended that you use a graphic artist.

The existing projects have many hardware drawings that writers created. It might take time to get the drawings redone by a graphics artist, if it is determined that the cost is worth the benefit. This will have to be decided on a project basis.

Create line drawings in SVG format so that they appear in a higher resolution in outputs and the text can be translated.

Screenshot considerations and guidelines

Use guidelines while documenting installation and configuration tasks and other tasks that describe how to use features within a product.

Include screenshots when screenshots:

- Help reassure the user that where they are in the UI is the right place to be

- Help call attention to a specific area of a complex UI
- Support an example that is hard to visualize otherwise, for example, setting up a configuration that is not quite straight forward

Where they add value, documentation maintenance and localization might be time-consuming and costly. However, just as you would with words, omit the obvious and whatever does not add value.

Strive for an additive approach (add screenshots when the words seem inadequate) over a subtractive approach (do not include screenshots if they seem superfluous). In other words, be more open to screenshots in the future, but understand that they have to work in the document, not just be there because they can.

Considerations

Before you include screenshots in documentation, consider the following points:

- Task-oriented content requires fewer screenshots than a descriptive approach. Avaya DITA/XML information model dictates a task-oriented approach that reduces the need for screenshots.
- Usability studies show that users can confuse screenshots with the real application. Users must scroll screenshots to get to the next piece of information. Screenshots slow down the user access to information.
- Content that describes in detail in text is more accessible to users with disabilities than content with text plus pictures. If a screenshot does not provide additional technical information, then the content becomes complex for disabled users.
- Every screenshot requires accessibility text. You must update this text each time the screenshot is updated. There is a risk of the accessibility text being out-of-step with the screenshot, or with the application. These factors add to the maintenance load for the writer, and can confuse the disabled user. The alternate text must also be localized, which adds time and cost.
- Screenshots, in general, add to the translation burden and cost. The localization team has to capture all screenshots in each language. Also, translators have to translate the accessibility text associated with each screenshot into each language.
- Assess the requirements for all publication methods and how the intended audience will use the content. Some Avaya products have a requirement to group documentation covering broad topics into “libraries” of information and PDF files which cover may areas of the product, such as administration and end user tasks. These deliverables bring together and reuse DITA/XML topics that may also appear as online help. PDF files are not always used in conjunction with the application.

Guidelines

Use the following guidelines for including screenshots in documentation:

- Do not use screenshots as a matter of course. Remember that the user usually has the application open, so that a screenshot does not provide any additional information and may cause confusion.
- Include a screenshot only when a procedure or step is complex and a screenshot will alleviate the need for numerous, convoluted steps. (In most cases, if a task is that complicated, you must suggest changes to the user interface which would make the task easier for the user.)

- Do not substitute screenshots for writing the text for the steps the user needs to perform and must only be used to provide clarification or validation. Do not use a screenshot to avoid including the appropriate text that tells the users what to do.

  Note:

  Where there are no screenshots, the procedure must clearly include the screens to select (show path) and the fields to click (or tab to) and mention the purpose of the screen, dialog box or field depending on where you are in the steps.
- Include a screenshot in the first concept topic of a component map to verify that the content describes the same interface that the user is viewing online (this is not mandatory if it is already clear). For example, use it to set context and to describe general navigation within an interface. The trade off is that when the user interface changes, you must recapture the screenshot and rewrite the text that increases the localization cost.
- Do not use screenshots for aesthetic purposes or because it looks better to start all procedures with screenshots. For example, do not use screenshots to break up long passages, or to show that every step in a task has been completed correctly.
- Ensure that a screenshot supports the text, rather than verifies or repeats what the text says.
- You do not get the higher resolution or ability to translate text in SVG graphics. But if you plan to include any text callouts with your screen capture, use SVG because the text callouts can be translated.

  To avoid text callouts, you can use PNG image, add numbers to identify specific portions in the image, and add the text description in a simple table that follows the image.

Tool recommendations

You may use

- Snipping Tool to capture screenshot.
- Gimp or Inkscape to create and edit images and add text.

Icons

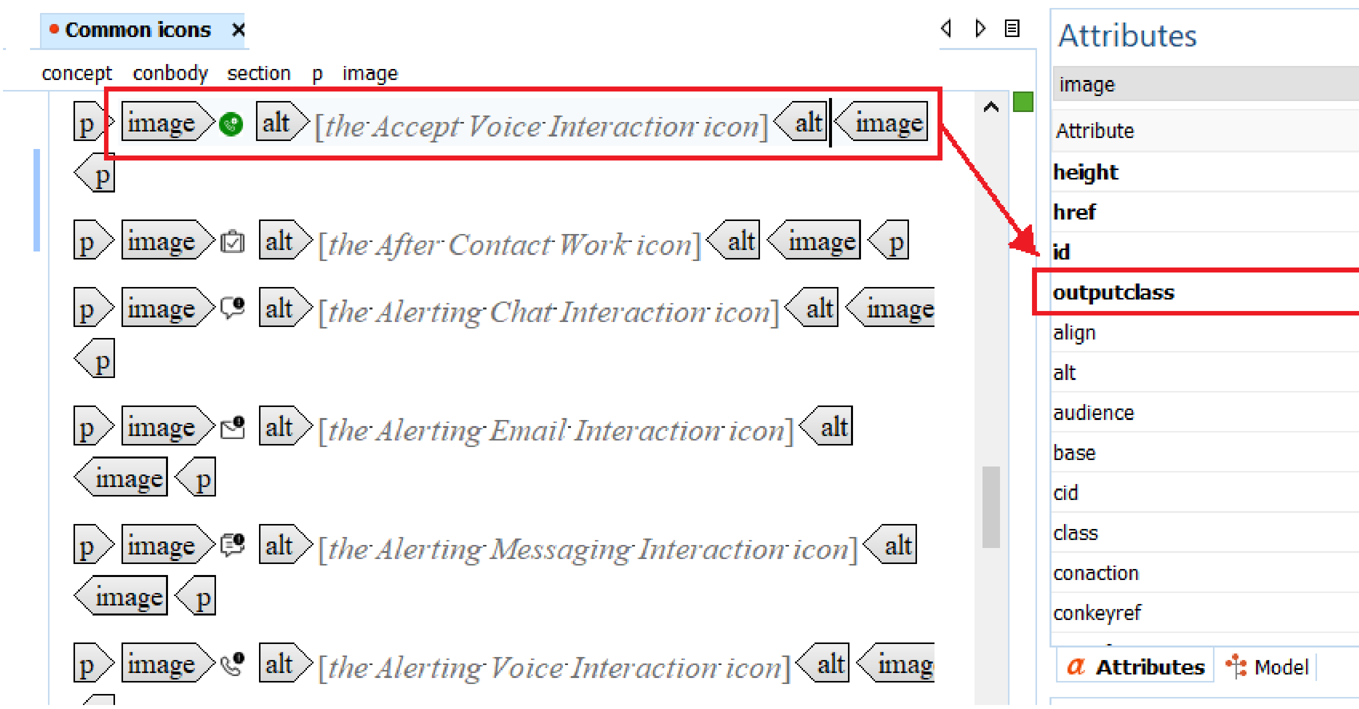
You can use icons in DITA topics. However, you must follow these requirements:

- An image element must include an alt tag with a description of the icon that can be read by a screen reader for persons with vision impairment.
- If your content contains a lot of icons, create a common topic with icons and the alt text in the image element. With this, the Localization team can translate the common topic that includes the alt text only once, and do not require to retranslate separate instances of the alt text.
- The height attribute on the image element must be set to 11pt to maintain the size of all icons same, and to maintain the line spacing.

Important:

If the icon is complicated that it cannot be read at 11 pt, you must not include it in steps and paragraphs. Instead, provide it in a reference table with other graphics and use the icon label in steps and paragraphs.

- If an icon size on Avaya Documentation Center is larger even after the height is set to 11, set the **outputclass** attribute of the image to **icon** in Oxygen XML Author.



Photographs

In most cases, you must involve a graphic artist to convert your photograph into a graphic. If you must use a photograph, ensure that you test visibility in all your outputs, and remember that photographs rarely look good in print. Export the photograph as a JPEG file.

Importing images

About this task

Image files must be in the `svg`, `gif`, or `png` format. Use the jpg format only if you are unable to get the file in `svg`, `gif`, or `png` format.

Save the images in a folder with content type set to Image. Usually, this folder is named `images` for consistency. However, you can give a different name based on your project. You can import multiple images at a time from the same source folder.

See the [Importing and adding an image to a topic]() video for steps to add images to a topic.

Before you begin

Create the `images` folder within your content folder, if it does not already exist.

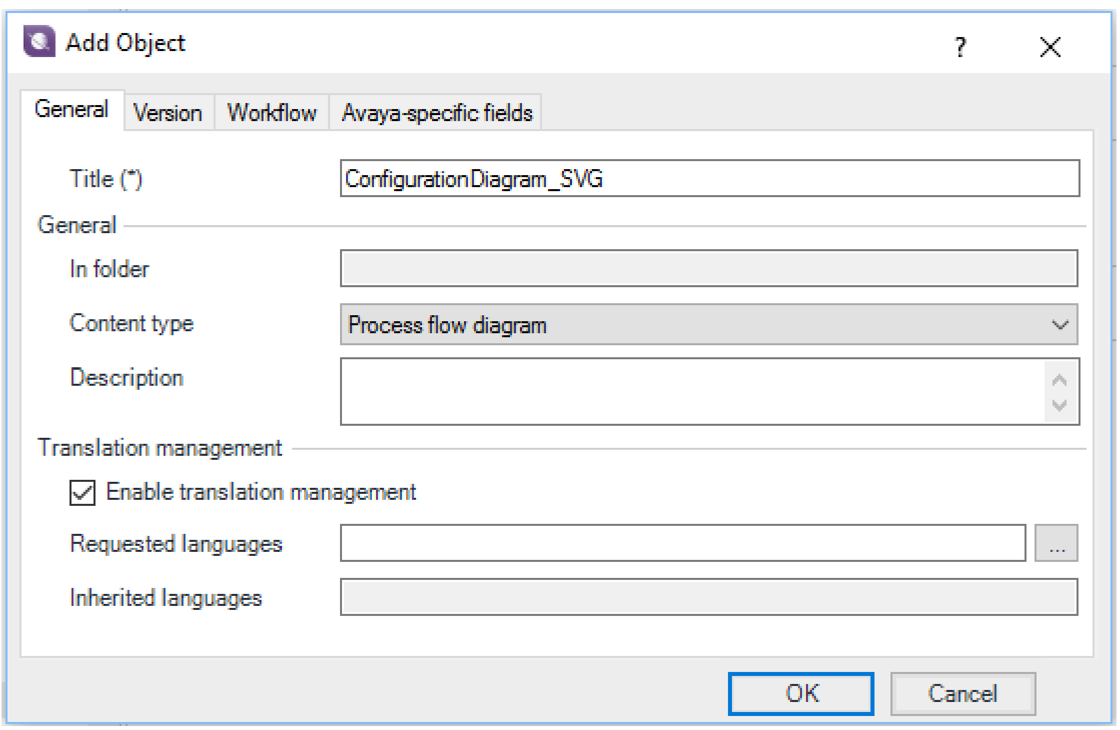
Procedure

1. On the Publication Manager menu bar, click **Tools** > **Browse Repository**.
2. In the navigation pane, browse and select the folder to which you want to upload the image.
3. On the right pane, click the import ( ) icon.
4. On the Import File dialog box, browse and select one or more files to import, and then click **Open**.

   The system imports the files and displays the Add Object dialog box.
5. In the **Title** field, add a name to identify the image.

   Add SVG in the title to distinguish an SVG image from other formats.

   For example, ConfigurationDiagram_SVG.
6. For SVG images, on the Add Object dialog box, click **Enable translation management**.

   Do not select any languages; the Localization team must do that.

7. Complete the fields on each tab as appropriate.
8. Click **OK**.

Related links

Image properties on page 261
Creating a new folder from Browse Repository on page 24

Image properties

These properties are displayed in the Add Object dialog box and Properties dialog box for an image.

General tab

Name	Description
Title	Title for the image. The title can contain alphanumeric characters, spaces, hyphens, and underscores. Do not use slashes, asterisks, or other special characters. This is a required field. Example: `Managing users`
In Folder	Path to the file.
Identifier	Unique identifier of this file. This field displays only for the existing images.
Content type	The type of image. The options are: • **Block diagram** • **Icon** • **Network Topology diagram** • **Other illustration** • **Process Flow diagram** • **Screenshot**
Description	A description of the image. This field can contain any text and is optional.
Date created	The date when the image was imported to Tridion Docs.
Date modified	The date when the image was modified in Tridion Docs.

Table continues…

Name	Description
Enable translation management	The option to set the image for translation. **Important:** • For SVG, select the check box • For other type of images, leave the field at the default
Requested languages	For localization use only.
Inherited languages	The field is auto populated.

Version tab

Name	Description
Version	The version of the image. The field is auto populated.
Changes	A brief description of changes made in this version of the image. This field is relevant if the image is a new version of an existing image.
Candidate for baseline	
Baseline label	This field lists the frozen baselines that use this topic. This field is automatically populated.

Workflow tab

Name	Description
Language	The language of the object. This field is automatically populated
Status	Workflow status. Options are: • Draft • Editorial review • Pre-release validation • Technical review • Released
Author	The owner of the image.
Last modified by	The last person who modified the image. The field is automatically populated.
Resolution	Image resolution. The values are low and high. PNG, GIF, and JPG images are of low resolution.
Source language	This field is blank.
Comments	Comments about the workflow. Use this field to create a history of changes you make. For example, SMGR-1234 updates and R10.2 updates.

Avaya-specific fields tab

Name	Description
Product Family	The product category or family to which the product belongs. This is a required field.
Product	The product that this image supports. This is a required field.
Contributor	This field is not currently used.
Doc Lead	This is a required field.
Localization Coordinator	For localization use only.
Reviewer	You can optionally specify another Tridion Docs user as a reviewer for an object. This is useful when content is in the editorial review phase in workflow and you want the object to appear in the inbox of the selected user. The user that you want to select in the **Reviewer** field must be assigned the role of Reviewer in Tridion Docs. Open a ticket on the Infosolutions project to add the Reviewer role for the user if the name is not available for selection.

Related links

Importing images on page 259

Inserting an image in a topic

About this task

If you are referencing an image that has multiple versions, you can select the version of the image that you want to use in the publication. If a topic referencing an image is used in different versions of a publication, you can select different versions of the image to use in the different versions of the publication, even if the version of the topic is the same. But if you are referencing the same image multiple times in the same publication, you cannot use different versions of it.

Before you begin

Import the image into the Tridion Docs repository. See Importing images on page 259.

Procedure

1. Check out the topic in which you want to insert the image.
2. **(Optional)** To add a title for the image:
    a. Place the cursor where you want to insert the image in the topic and insert a figure (fig) element.

   b. Insert a title element within the fig element, and type a title for the image.

3. Place the cursor where you want to insert the image in the topic and insert an image element.
4. In the Insert image window, browse and select the image.
5. Preview the image to see if you selected the correct image.
6. To add a title to the image, type a text in the **Figure title** field.

   The editor wraps the image element within the figure element.
7. For larger images, such as block diagrams set the **placement** attribute to **break**.

   The placement attribute determines whether the image can break to a new page when appropriate or stay with the text around it. If you leave the placement attribute at the default of inline, it can cause some strange page breaks in your PDF output and it will prevent the image from being automatically scaled to fit in the width of the text box. For images that are too long, use the height attribute to constrain the height.
8. In the Attributes dialog box, set one of the following attributes to control the size of the image in the output:
   - **width**: If the image is too wide, set the width in inches. Enter the number followed by “in” to indicate inches.

     When you set the width, the height is proportionally scaled.
   - **height**: If the image is too long, set the height in inches. Enter the number followed by “in” to indicate inches.

     When you set the height, the width is proportionally scaled. The maximum height you can use is 8.75in. If you are using an image and not the fig element, or you are using fig but not including a title, you can set slightly higher than 8.75in.
   - **scale**: To scale the image to a specific percentage. Do not enter the percentage character; it is assumed.
9. If you need to use the image for an end user output, within the image element, add an alt element, and type a description of the image to make the image accessible for users using screen readers or text-only readers.

   Do not use the **Alternative text** (alt) attribute in the Image element.
10. Click **Insert**.

    If an image has multiple versions, and you want to select an older version, you cannot do that when you insert the image. But after you insert the image, you can locate where the image is being referenced on the Content tab in Publication Manager and select the version.

    The image with selected attributes gets added in the topic.

Scaling images in topics

About this task

You can apply attributes to an image element to scale the size of an image up or down in your output. The attributes do not impact the image itself; but the size displayed in the output. This means that if you use a image in more than one topic, you can control the size in each topic in which the image is used.

Procedure

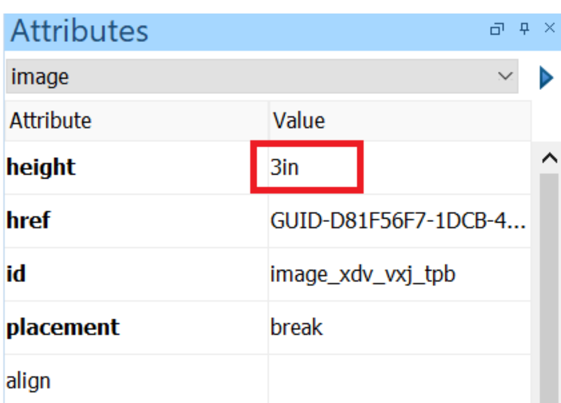
1. Check out the topic in Oxygen XML Author.
2. Double-click or select the image element.
3. In the Attributes dialog box, set one of the following attributes to control the size of the image in the output:
    - **width**: If the image is too wide, set the width in inches. Enter the number followed by “in” to indicate inches.

      When you set the width, the height is proportionally scaled.
    - **height**: If the image is too long, set the height in inches. Enter the number followed by “in” to indicate inches.

      When you set the height, the width is proportionally scaled. The maximum height you can use is 8.75in. If you are using an image and not the fig element, or you are using fig but not including a title, you can set slightly higher than 8.75in.
    - **scale**: To scale the image to a specific percentage. Do not enter the percentage character; it is assumed.

Example

In the following example of an image, the height is limited to 3 inches.



Related links

Image guidelines on page 253

Setting the orientation of a figure to landscape

If a figure in a topic requires more width to display properly, you can set the figure to appear in landscape orientation in your PDF output. This option is available for the Avaya Book, Avaya Jobaid, and Validator PDF outputs.

About this task

- When you apply this option, the actual page in the PDF still appears in portrait orientation; the figure is rotated on the page to appear in landscape orientation.
- Landscape is supported only for the <fig> element. You cannot apply it to an <image> element.
- When you apply this option, a page break is inserted right before and right after the <fig> element in the output.
- If you include a <title> or <desc> in the <fig> element, the title and description appear in landscape orientation.

Before you begin

Ensure that the image is inside a <fig> element.

Procedure

1. Start the Publication Manager.
2. Check out the topic that contains image that you want to display in landscape orientation.
3. Double-click or select the <fig> element containing the image.
4. In the Attributes window, type `land` in the **outputclass** field.
5. Click **OK**.
6. Check in the topic.

Extending an image to the left margin

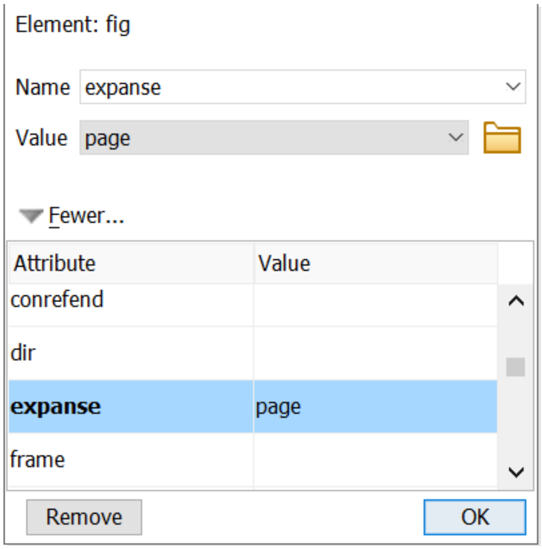
For a larger image, you can extend it to start at the left margin and align with the topic heading.

Before you begin

Ensure that the image element is added inside the parent fig element.

Procedure

1. In the publication, check out the topic in Oxygen XML Author.
2. Double click or select the figure element, the parent of image element that you want to modify.
3. In the Attributes window, set the **expance** attribute to `page`.



You can set this property only on the fig element and not cannot extend the margin for an image element.

4. Click **OK**.

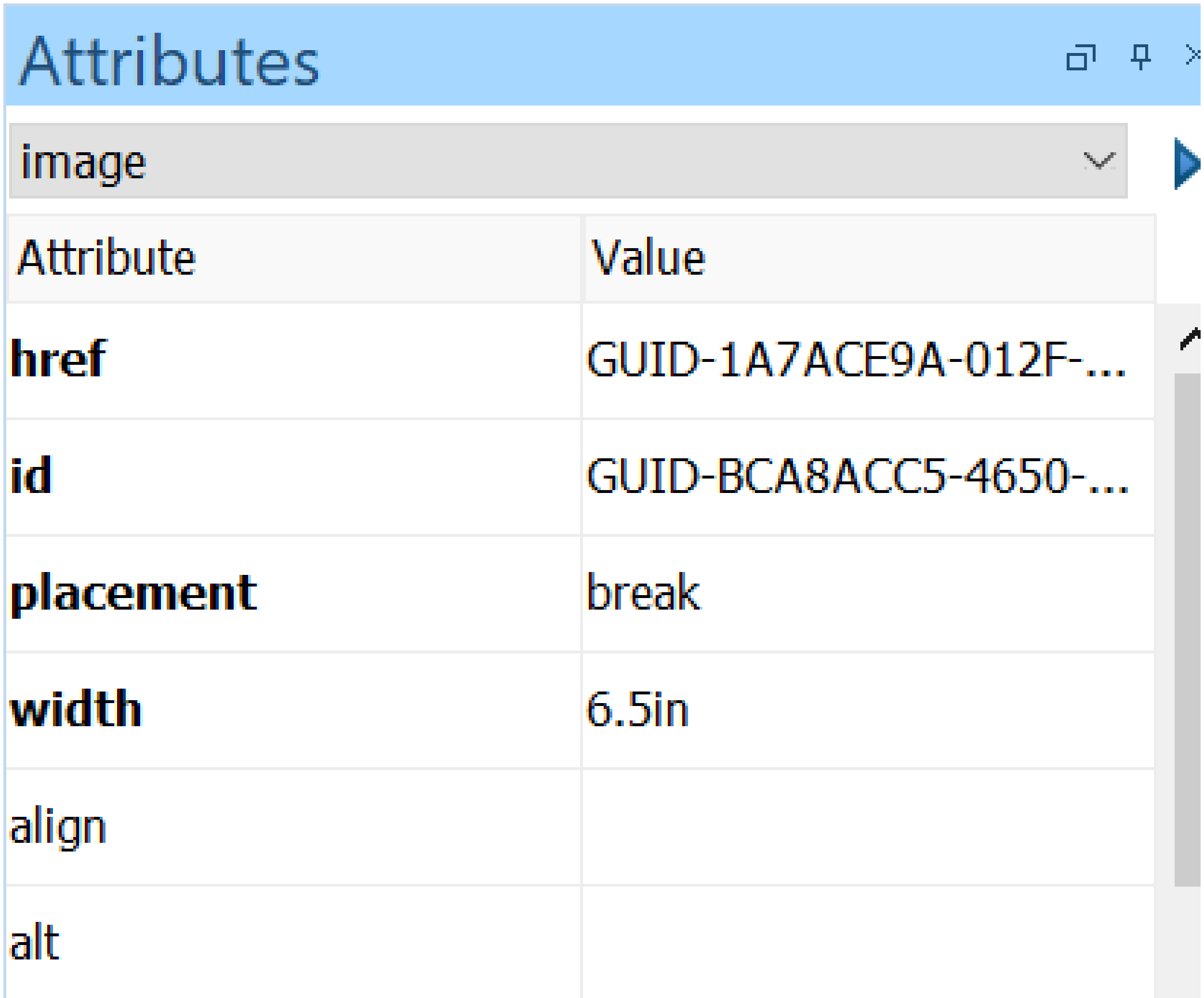
Extending an image past the right margin

By default, images are scaled during PDF generation to 6.25” in width to align with the text box, if the **placement** attribute is set to **break** on the image element. To extend an image beyond the right margin, but still within the page, you can override the default setting.

Procedure

1. In the publication, check out the topic in Oxygen XML Author.
2. Double click or select the image element.
3. In the Attributes window, type a value between `6.3in` and `6.75in` in the **width** field.

   The value you enter depends on how far you want the image to extend past the text box margin. If the image is available on the first page of a chapter, you can extend beyond 6.75 inches.



Updating an image by checking it out and modifying it

Before you begin

If the status of a image that you want to modify is released, create a new version of the image in the desktop repository. This is especially important if you are working on multiple releases simultaneously and have multiple active versions of publications.

Procedure

1. In the Tridion Docs repository, navigate to the folder that contains the image that you want to update.
2. Right-click the image and click **Check Out With**.

3. On the Open With dialog box, select the application that you want to use to modify the image and click **OK**.
4. Modify the image, save your changes, and close the file.
5. In the Tridion Docs repository, right-click the image and click **Check In**.
6. On the Check In dialog box, click **OK**.
7. In Publication Manager, open the publication, navigate to the topic that contains the image you updated, and check the preview to validate that the changes that you made in the image.

Updating an image by uploading a new version in the web interface

Before you begin

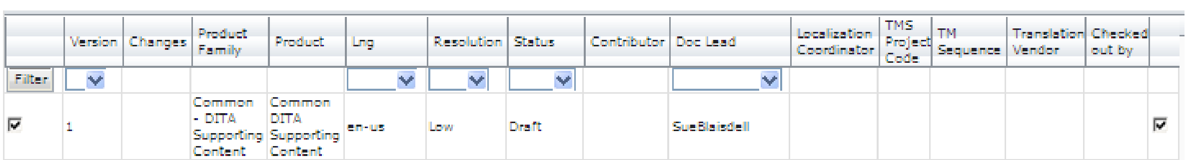
If the status of an image that you want to modify is released, create a new version of the image in the desktop repository. This is especially important if you are working on multiple releases simultaneously and have multiple active versions of publications.

Procedure

1. In the Tridion Docs web interface, navigate to the folder that contains the image that you want to update.
2. From the list, select the image that you want to update.

   The details about the selected image appear in the lower part of the page.
3. Select the appropriate version and language check boxes.

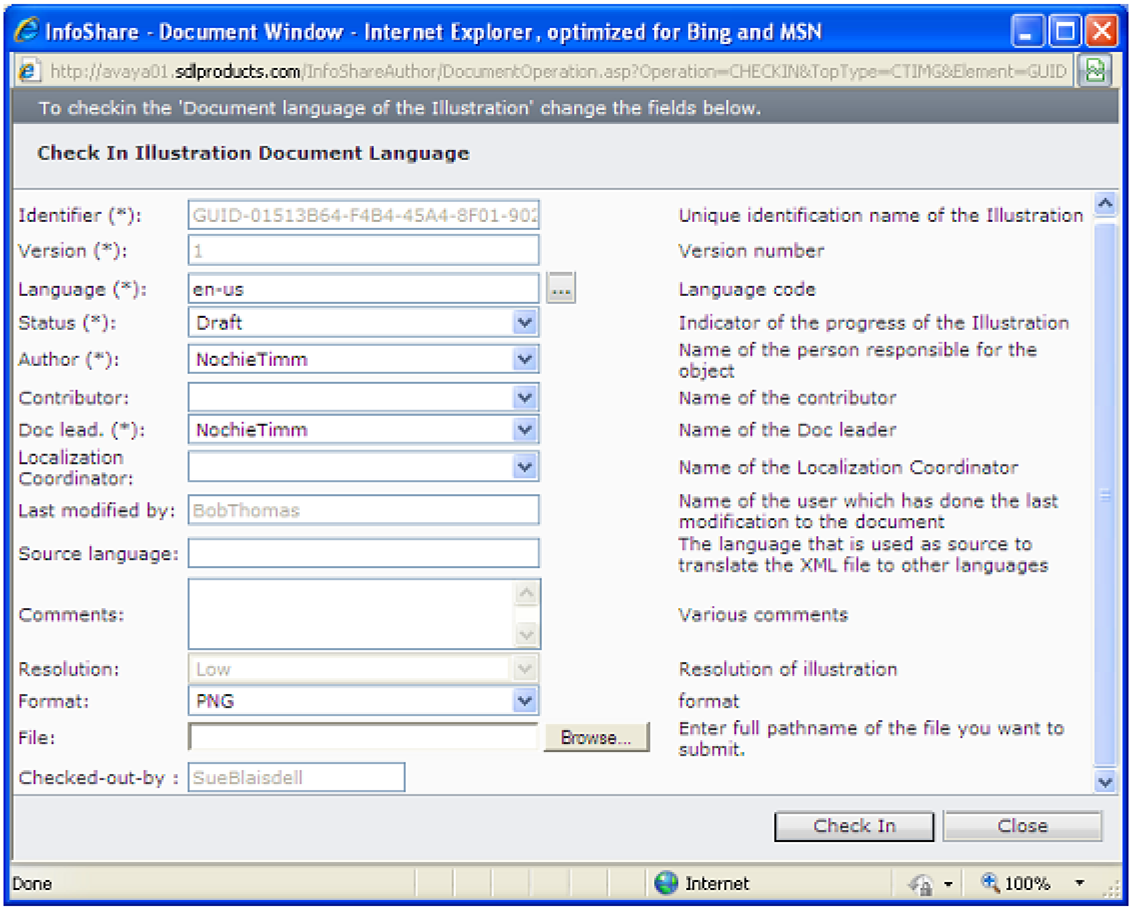
   The version check box is the check box shown below to the far left that appears under the **Filter** button. The language check box is the check box shown to the far right below. If the image is not translated, only one language for English is displayed.

	Version	Changes	Product Family	Product	Lng	Resolution	Status	Contributor	Doc Lead	Localization Coordinator	TMS Project Code	TM Sequence	Translation Vendor	Checked out by	
Filter															
☑	1		Common - DITA Supporting Content	Common DITA Supporting Content	en-us	Low	Draft		SueBlaisdell						☑

4. Click **Check In** from the menu on the right side of the page.

5. When the InfoShare — Document Window displays, click **Browse** next to the **File** field, then navigate to the updated version of the image that you want to upload and click **Open**.



6. If the image that you are uploading is a different format than the original, select the appropriate option from the **Format** menu.
7. Click **Modify**.
8. In Publication Manager, open the publication, navigate to the topic that contains the image that you updated, and check the preview to validate the changes that you made.

Forcing a large image to the next page in a 3-column quick reference guide

About this task

Some projects might need to include large images, such as a navigation map of keypresses or options, in a Quick Reference output. These images are unreadable if constrained to a column. We cannot span the columns due to limitations in processing, but we can make the large images appear to take up a whole page. To try this functionality and you have any questions, contact Information Architect.

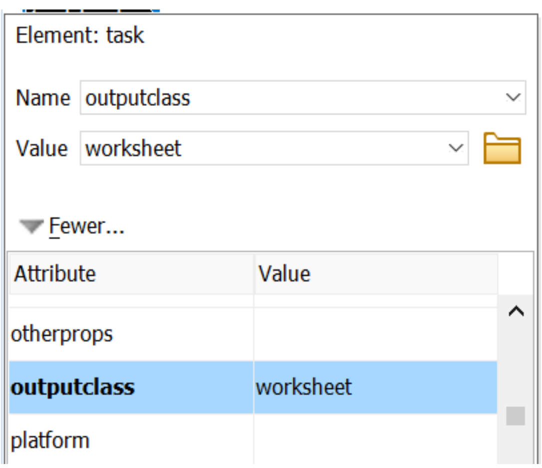
Before you begin

- The topic must contain only the large image besides the topic title.
- You must already have an image that is approximately the right size for the landscape page in the 3–column quick reference output.

Procedure

1. In the publication, check out the topic with the large image in Oxygen XML Author.
2. Double click or select the topic's root element.

   For example, task element in a task template.
3. In the Attributes window, in **outputclass**, type `worksheet`.

4. Click **OK**.
5. Check in the topic and produce the output to validate that the topic starts on a new page.

Creating images with links

DITA provides support for image maps, which are images with “hot spots” that link to other topics or files. The linked topics or files can be displayed in the active window or in a new pop-up window. Image maps are supported only for HTML outputs.

Before you begin

Create the image that you want to use as an image map and import it into Tridion Docs.

Procedure

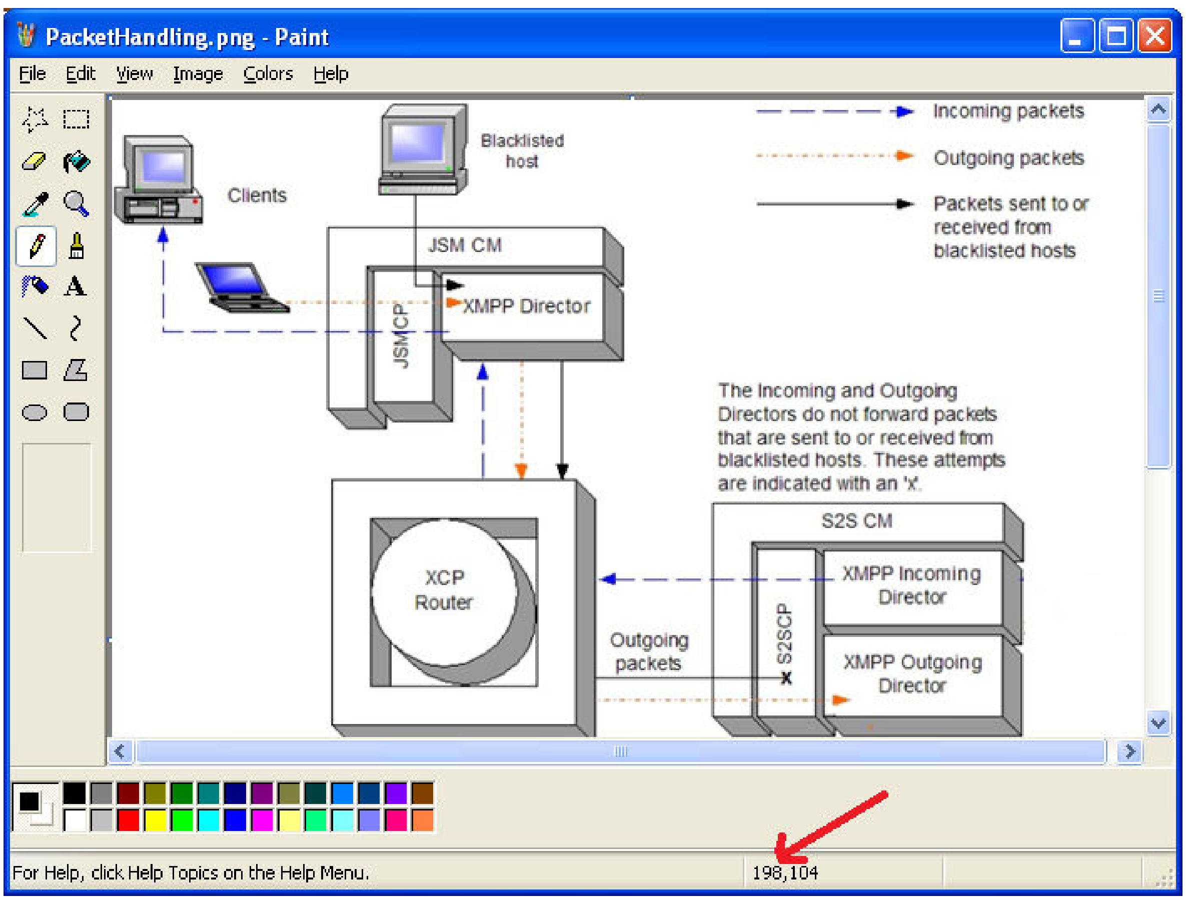
1. Open the image in any tool such as Microsoft Paint.

2. Do the following to record the coordinates of each object or shape for which you want to create a link.

   The number of coordinates that you need to record depends on the shape of the object (rectangle/square, circle, or polygon):

   - For a rectangle or square, record the coordinates of the top left corner and bottom right corner.
   - For a circle, record the center coordinates and right center coordinates (radius).
   - For a polygon, record the coordinates of all angles. Start at the top left angle. Or you can simply identify coordinates of an area that surrounds the polygon. It depends on how closely you want the image map area to follow the shape of the object and how many coordinates you want to capture. The first and last coordinate pair must always be the same to close the polygon.

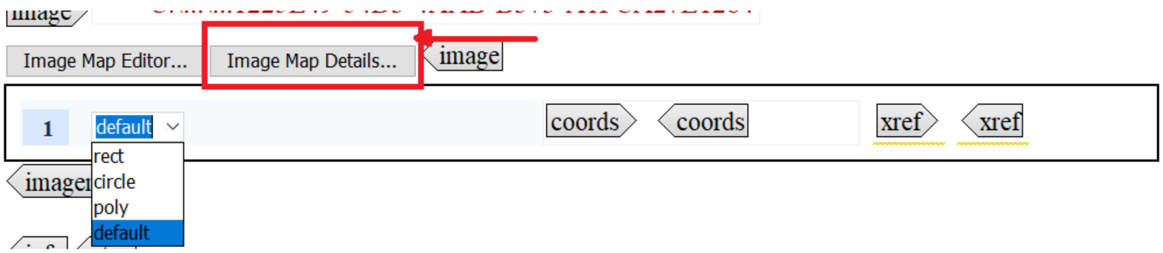
   The method used to capture the coordinates of a shape varies across image editor applications. For example, in Microsoft Paint, when you hover the pencil tool over a point in the drawing, the coordinates are displayed in the lower-right corner of the screen. In the sample below, the coordinates of the upper-left corner of the XMPP Director box are 198,104 as shown in the lower-right corner of the screen.



3. In the Tridion Docs repository, locate the image that you want to use for the image map, right-click the image and select **Properties**.
4. In the Properties dialog box, copy the GUID value from the **Identifier** field.
5. In the publication, check out the topic in Oxygen XML Author.
6. In the topic, insert an imagemap element, click the Tridion Docs icon and browse to the image that you want to add as image map.

   The editor adds an image element within the imagemap element.
7. In the image element, click **Image Map Details**.

   The editor displays the following fields:

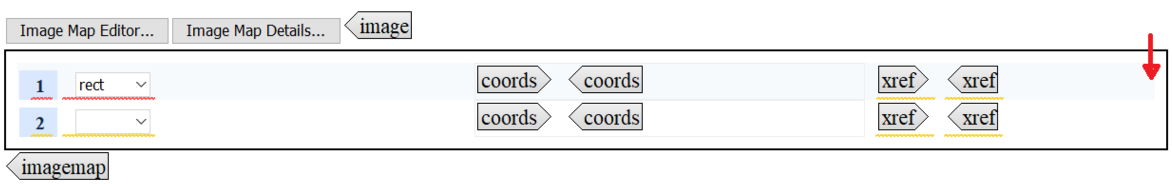
8. In **Image Map Details**, select a shape for the first linkable area that you want to define in the image:
   - `rect`: Define a rectangular, square, or triangle region. If you leave the shape element blank, a rectangular shape is assumed.
   - `circle`: Define a circular region.
   - `poly`: Define a polygonal region.

   The area element is located immediately after the image element.
9. Within the area element, in **coords**, type the coordinates for the linkable area that you are defining, separating each coordinate with a comma:
   - For a rectangle, square, or triangle, enter the top left coordinates and bottom right coordinates, for example `65,74,119,128`.
   - For a circle, enter the center coordinates and the radius, for example, `263,348,41`.

     Tip:

     To calculate the radius, subtract the center first coordinate (center x coordinate) from the right first coordinate (right x coordinate). For example, if the center coordinates are 263,348 and the right coordinates are 304,348, subtract 263 from 304 to calculate the radius of 41.
   - For a polygon, type the coordinates of every angle. The first and last coordinates must be the same to close the polygon, for example, `192,135,357,132,217,158,216,238,192,135`.

10. Within the area element, in the **xref** element, define a target for the linkable area that you are defining:
    - To link to another topic, get the GUID (ID) of the target topic, and paste it in the **href** field of the source, and click **OK**.
    - To link to an external target, select the xref element, and in Attributes window, enter the full path to the target location in the **href** field, set the **scope** to **external**, and click **OK**.
11. **(Optional)** If the xref target must display in a new pop-up window instead of the active window, perform the following steps:
    a. Double-click or select the xref tag.
    b. In the Attributes dialog box. type `popup` in the **outputclass** field.
    c. Click **OK**.
12. To add more linkable areas, place your cursor before the ending imagemap tag, press `Enter`, select **New area**, and then repeat Steps 7 through 10 for each area element.

    The editor adds a new row **2** below where you can add the details for the second linkable area.
13. Check in the topic.
14. Produce the HTML output and test the links from the image.

Chapter 20: Working offline

Local storage

In Tridion Docs, you can make content available in your local storage, and work on that content when you are not connected to the Tridion Docs repository. When you connect to Tridion Docs again, you can check in the topics that you modified locally.

All topics that you open in Oxygen XML Author are added to your local storage. You can modify only the topics that you checked out. However, you can view the content in your local storage that is not checked out. If you have checked out topics in Oxygen XML Author, and you are unexpectedly disconnected from the network and Tridion Docs, you can continue to work on topics that you have checked out.

You cannot edit topics in your local storage that others checked out.

Note:

Do not keep topics checked out in your local storage for longer. Use local storage only when you need and then check in topics immediately after you make the updates so that the repository has the latest version of the content.

You must be connected to Tridion Docs to make topics available in your local storage.

Important:

Your local storage can grow large over time, and due to which Publication Manager might close unexpectedly while you are working. Therefore, delete content from your local storage regularly.

Viewing a list of topics in your local storage

About this task

In the local storage, the **Mode** column displays the status of a topic. When disconnected from the network, you can work on topics in the **Checked out** status. You cannot work on topics in Checked in and Released states when you are disconnected from the network.

Procedure

In Oxygen XML Author, click **SDL Tridion Docs** > **Open local storage**.

The Local storage window displays the topics, maps, images available in your local storage.

Checking out a topic in preparation for working offline

You can check out a topic and save it to your local storage so you can work on the topic while you are offline.

About this task

Before going offline, you must check out the topics that you want to work when you are offline. Or if you lose your connection to the repository while you are working, you can continue to work on files that are currently checked out to you and then save them to your local storage.

Procedure

1. Check out the topic or topics that you want to work while you are offline.
2. In Oxygen XML Author, click **SDL Tridion Docs** > **Make Available in Local Storage**.

   If you unexpectedly lost connectivity while working on a topic, perform this step when you finish working on the topic.

   The system saves the topic to your local storage and closes.

Next steps

Modify the topic in the local storage and check in the topic to the Tridion Docs repository as soon as you are reconnected to the repository.

Managing topics open in Editor if you lose your connection

If you lose your network connection, you can save the topic to your local storage and continue to work on it. When you connect to Tridion Docs again, you can check in the updated topic into Tridion Docs.

About this task

You might notice that the network connection is unavailable or you might not notice until you try to check in the topic. In either case, you can save the changes to your local storage and then either close the topic or continue to work.

Procedure

1. In Oxygen XML Author, click **SDL Tridion Docs** > **Make Available in Local Storage**.

   If you unexpectedly lost connectivity while working on a topic, perform this step when you finish working on the topic.

The system saves the topic to your local storage and closes.

2. You can continue to work on the topic or close the editor.
3. If you close Editor, you can reopen it and work on the topic stored locally.
4. Check in the topic into Tridion Docs when you are connected.

Related links

Modifying a topic in local storage on page 277
Checking in a locally stored topic to the Tridion Docs repository on page 279

Modifying a topic in local storage

About this task

You can modify a topic when you are disconnected from the network. If the system displays the following message, click **OK** to continue: `Unable to reach the SDL repository 'avaya001.sdlproducts.com'...`. This message might be displayed at different points in the following procedure.

Before you begin

The file that you want to modify must be checked out by you before you disconnect from the network.

Procedure

1. Open the file in Oxygen XML Author if it is not already open:
   a. In Oxygen XML Author, click **SDLTridionDocs** > **Open Local Storage**.
   b. In the Local Storage window, select the topic to modify, and then click **Check Out**.
2. Modify the topic as required.
3. Click **SDLTridionDocs** > **Make Available in Local Storage** to save the updates to local storage on your hard drive.

   The system closes the topic.
4. Repeat this procedure to modify the locally saved topic any number of times.

Next steps

Check in the topic to Tridion Docs as soon as you can so that the repository has the latest version of the content.

Related links

Managing topics open in Editor if you lose your connection on page 276
Checking in a locally stored topic to the Tridion Docs repository on page 279

Comparing a topic in Local Storage with the version stored in the Tridion Docs repository

You can compare the version of a topic stored in Local Storage with the version currently stored in the Tridion Docs repository. This is helpful if you have topics checked in your Local Storage and you want to determine if there are changes you should check in.

Before you begin

You must be connected to the Tridion Docs repository to compare a topic in Local Storage with the topic that is stored in the repository.

Procedure

1. In Oxygen XML Author, click **SDL Tridion Docs** > **Open local storage**.

   The Local storage window displays the topics, maps, images available in your local storage.
2. Locate the topic in the Local Storage dialog box, right-click the topic, and click **Compare**.

   The Differences dialog box highlights any differences in the topics.
3. To exit the Differences dialog box, click **Close**.

Opening a topic in Oxygen XML Author in read-only mode

About this task

You can view a topic in read-only mode when the topic is:

- In the Released state
- Checked out by other user
- Located in a folder to which you do not have permissions

Procedure

1. Start Publication Manager.
2. Do one of the following:
   - In Browse Repository, select the topic, right-click, and click **Open**.
   - In Oxygen XML Author, click **SDLTridion Docs** > **Open**, navigate to the topic, right-click and click **Open**.

   The topic opens in read-only mode. You can see details, such as tags, conditions, and conrefs.

Checking in a locally stored topic to the Tridion Docs repository

About this task

You can check in a topic that you have modified in the local storage.

Before you begin

You must be connected to the Tridion Docs repository to perform this procedure.

Procedure

1. In Oxygen XML Author, click **SDL Tridion Docs** > **Open local storage**.

   The Local storage window displays the topics, maps, images available in your local storage.

2. Select the topic that you want to check in to the repository, click **Open**, and then click **Check In** from the editor.

   The system displays the Check in dialog box.

3. To change the workflow status of the topic:

   a. Select **Change status**.

   b. In the **Status** field, select the appropriate status.

4. Click **OK**.

Related links

Managing topics open in Editor if you lose your connection on page 276

Deleting content from your local storage

About this task

Your local storage can grow large over time, and due to which Publication Manager might close unexpectedly while you are working. Therefore, delete content from your local storage regularly.

Important:

Do not delete checked out topics from your local storage unless you do not want to save your changes to the repository. Check in the topics before deleting them.

Procedure

1. In Oxygen XML Author, click **SDL Tridion Docs** > **Open local storage**.

   The Local storage window displays the topics, maps, images available in your local storage.

2. Select the topics to delete, and then click **Delete** in the tool bar.

Chapter 21: Troubleshooting

SDL server maintenance schedule

SDL performs the following standard maintenance operations of Tridion Docs servers:

Database jobs

- Full backups: 10:30 PM BST (3:00 AM IST, 5:30 PM EDT) every Friday for about a day and 4 hours.
- Differential backup: 10:45 PM BST (3:15 AM IST, 5:45 PM EDT) daily for about 45 minutes.
- Standard InfoShare Job: 1 :30 AM BST (6:00 AM IST, 8:30 PM EDT) every Monday, Wednesday, and Friday for about 2 to 2.5 hours to clean event logs, revisions, check database, and index maintenance.

Server maintenance

- Monday to Friday: 02:00 AM BST to 04:00 BST (6:30 AM to 8: 30 AM IST, 9:00 PM to 11:00 PM EDT)
- Saturday and Sunday: 02:00 AM BST to 08:00 BST (6:30 AM to 12:30 PM IST, 9:00 PM EST to 3:00 AM EST)

UTC-time	Pune	Tel Aviv	Prague	Dublin	Ottawa	Denver
01:00 – 07:00	Sat 06:30-12:30	Sat 03:00-09-00	Sat 02:00-08:00	Sat 01:00-07:00	Fri 20:00-Sat 02:00	Fri 18:00-Sat 00:00
01:00 – 07:00	Sun 06:30-12:30	Sun 03:00-09-00	Sun 02:00-08:00	Sun 01:00-07:00	Sat 20:00-Sun 02:00	Sat 18:00-Sun 00:00

The SDL server continues to run during these maintenance periods. The system performance might be slower during the daily database maintenance. However, backups do not have impact on system performance.

Requesting assistance with the DITA authoring tools

DITA Authoring Tools support

When you have questions, issues, or requests related to the DITA authoring environment, submit requests to the Infosolutions project. You can view Jira tickets that other team members submitted and the resolution.

Note:

- Before you create a support ticket, consult DITA and Tridion Docs Guidelines for the information you need.
- Log in to Avaya Documentation Center to view the content in DITA and Tridion Docs Guidelines.

Creating a new support request

Before you begin

- Log in to the Avaya network to use the Jira software.
- Request for access to the INFOSOLUTIONS project.

Procedure

1. Go to the Infosolutions Jira project.
2. Click **Create**.
3. Provide the issue type, priority, and severity of the issue.
4. In **Components**, select an appropriate value.

   See Create the DITA support ticket.
5. Click **Create**.

   The form is submitted and the assignee is notified of the issue.

Example

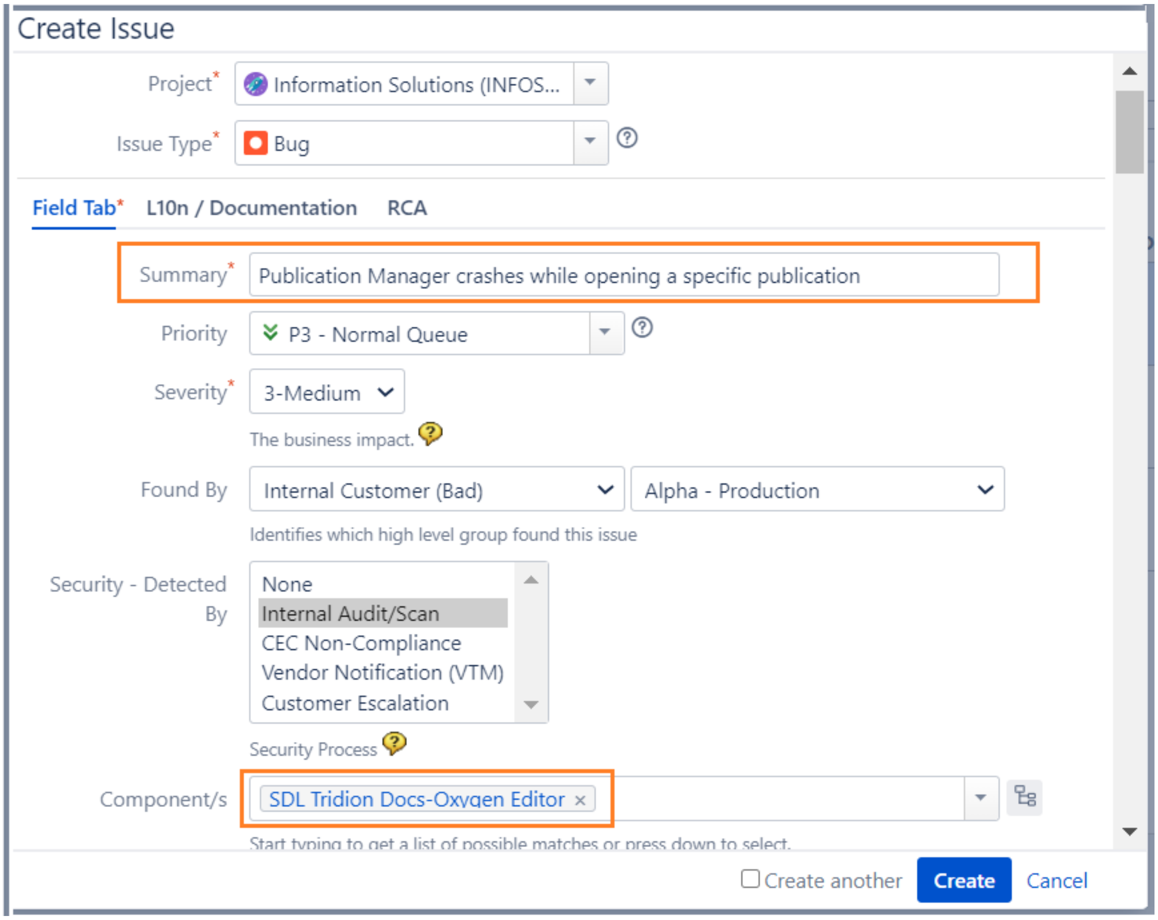


Figure 7: Create a DITA ticket in Jira

Related links

[Create DITA support ticket](#) on page 283

Create DITA support ticket

General tab

Name	Description
Issue type	Type of issue. The options are: • Bug • Enhancement • Task Tridion Docs title for the topic. You can include only alphanumeric characters, spaces, hyphens, and underscores. Do not use characters, like slashes, asterisks, periods, parenthesis, or other special characters. The maximum length is 100 characters including spaces. The length restriction is important because Tridion Docs uses the Tridion Docs topic title as part of the topic's temporary filename. This is a required field.
Priority	To determine, how urgently you need the fix. • P1: Resolve immediately • P2: Give High Attention • P3: Normal Queue • P4: Low Priority
Severity	To determine the impact of the issue. • 1: Critical • 2: High • 3: Medium • 4: Low
Components	The request or problem area. The options are: • Documentation Center • Oxygen license and Tridion Docs account & Folder Permissions • SDL Tridion Docs-Oxygen Editor

Table continues…

Name	Description
Description	The detailed description of the issue or request. Also, provide the following details to get the issue resolved on time: • Publication name and version number. • Location of the publication in Tridion Docs. • Topic name and version number. • Any other information that can help identifying the cause.
Attachment	Add a screen capture or any supporting email or document that helps resolving the issue or providing the support.
Affected versions	Area that this issue belongs. The options are: • Documentation Center • SDL Tridion Docs • Oxygen XML Author
Create	Saves and submits the form. Also, the assignee receives an email notification with the issue details.

Filtering or sorting the Jira tickets

About this task

By default, all requests display in the list. But you can filter the list of requests based on the status, by the originator of the ticket, the status, etc.

Procedure

1. Go to the Infosolutions Jira project.
2. From the menu, click **Issues** > **Search for issues**.
3. Select the filters, such as type, status, assignee.
4. Click **More** and add more search filters, such as create date, and components.
5. Click Search.
6. Click **Save as** at the top to save the search results.

How support requests are managed

Submitted requests for support are handled by Information Architect, Russ Pierce, and DITA Mentors.

Standard working hours for support are:

- United States:
  - 6AM to 4PM Mountain time
  - 8AM to 6PM Eastern time
- India – 9.30AM to 6.30PM IST

The following is the expected response and resolution times:

- Priority 1 – Picked up within one hour and resolved ASAP (during standard hours)
- Priority 2 – Picked up within four to six hours and resolved within one working day
- Priority 3 – Picked up within six to eight hours and resolved within five working days
- Priority 4 – Enhancement will be reviewed 1x/month and action taken if appropriate

However, issues that require a support ticket with a vendor or that require modifications to our stylesheets might take longer. We always try to resolve issues as quickly as possible

Examples of issues at different priority levels:

- Priority 1: SDL system is not reachable, no one can publish any outputs, you have installed or reinstalled the software and you are unable to use it.
- Priority 2: Errors in logs you cannot troubleshoot, outputs does not appear as expected, need assistance releasing content, need a permissions change, or request for addition of new product or application name, and request for a new condition.

Capturing log files for troubleshooting

About this task

When you report an issue through Jira ticket in the Infosolutions project, provide SDL client log files, such as `Oxygen Connector.log` and `Publication Manager.log` files.

Procedure

1. Go to `C:\Users\<username>\AppData\Local\SDL\InfoShare Client\14.0\Log`.

   From **View**, enable **Hidden items** if you are unable to see hidden items like the `AppData` folder.
2. Add the log files to zip.
3. Attach the zip file to your support ticket.

Capturing data on a Tridion Docs connection issue

About this task

When you experience continuous connection issue or slowness with the RWS server outside the maintenance window of RWS, you must capture the data necessary for RWS to investigate the issue.

Important:

You must capture the data only while you experience the slowness or connectivity issue. Capturing data after the issue is resolved or the connectivity resumed might mislead RWS's investigation.

Before you begin

- Download Fiddler, a free web debugging tool.
- Ensure you have access to the DITA Authoring Tools sharepoint.
- Go to the Trisoft connection issue tracking, and download the TEMPLATE_Trisoft Connection Incident Report.

Procedure

1. Open a Infosolutions Jira ticket, and mention the following in the ticket:
   - Time when you first got the timeout error or when the performance significantly dropped.
   - Take a screen capture of the error message, and attach with the DITA ticket.
2. Capture the Fiddler data:
   a. Start the Fiddler tool and click **File** > **Capture Traffic** to capture the traffic data.
   b. To limit the data capture to Publication Manager, select the crosswire icon (⊕) from the menu, drag and drop into the Publication Manager window.

   The application captures the traffic data only from and to Publication Manager.
   c. To stop filtering, right-click on the crosswire icon.

   The status changes of the icon changes back to Any process.
   d. Save the file in the format username_date, for example, KavithaSamudrala_1120.
   e. Upload the Fiddler data at Trisoft connection issue tracking.
3. Do the traceroute and ping tests:
   a. In the TEMPLATE_Trisoft Connection Incident Report, capture the requested information.
   b. Save the file with the name *username_date*, such as KavithaSamudrala_927.docx.

c. Upload the report at [Trisoft connection issue tracking](#).

Alternatively, you can attach the report to the ticket.

Conref errors appear in the Publication Manager preview

You might see the following conref unresolve error message:

{Conref} [ERROR: Cannot resolve conref 'GUID-70863539-D148-42E2-9000-45C781824A09#GUID-70863539-D148-42E2-9000-45C781824A09/ALASKA'. The conref target is not defined in any of the attached objects.] provides a web interface for administrative tasks.
The administration interface allows setting the following parameters related to the functionality of {Conref} [ERROR: Cannot resolve conref 'GUID-6ED14FDE-8F96-4CB5-AAC6-14B738A39F05#GUID-6ED14FDE-8F96-4CB5-AAC6-14B738A39F05/AVAYAOUTBOUNDCONTACTEXPRESSWEBAGENT'. The conref target is not defined in any of the attached objects.] :

The error typically caused due to one of the following reasons:

- When you do not select the correct version of the referenced topic that has the ID in your publication.
- When the ID has been removed from the referenced topic.

Solution

Procedure

1. In Publication Manager Content tab, click the arrow sign before the topic name that has the conref error.

   Publication Manager displays `Topics` and `Conrefs` within the topic.
2. Expand the `Conrefs` folder to view the topics being reused from.
3. Select the first topic listed under `Conrefs` to display the versions in the upper-right corner of the Content tab.

4. Validate that you are using the correct version of the topic and select a different version if necessary.
5. Repeat steps 3 and 4 if multiple topics are listed within `Conrefs`.
6. Validate that the conrefs are resolved correctly in the preview.

Conref was not expanded error

Condition

- Reused content does not show up in the PDF output.
- The reused element displays the “Conref was not expanded” error in the editor.
- Displays the following message if you use a product element to reuse content from an application element that is set for reuse. In specific, if you add GUID#GUID/ReuseID in the conref attribute of the product element in the target topic.

  ```
  The source element "product" with class value "+ topic/ph ai-d/
  product " is not a generalization of target element "application"
  with class value "+ topic/ph ai-d/application "
  ```

Cause

A mismatch between the source element that has the ID and target element that references the ID is the cause for the missing reused content.

Solution

1. Check out the topic in Oxygen XML Author.
2. In Oxygen XML Author, click **SDL Tridion Docs** > **Conref** > **Insert conref**.
3. In the Reuse Content dialog box, browse to and select the topic from which you want to reuse content.

   The Reuse Content dialog box displays the list of elements, IDs, content set for reuse, and preview of the content.
4. Select the reusable content and click **Insert and close**.
5. Check in the topic.

Publication Manager crashes while opening a publication

Condition

- Publication Manager crashes while opening a publication.
- Publication fails to open.

Cause

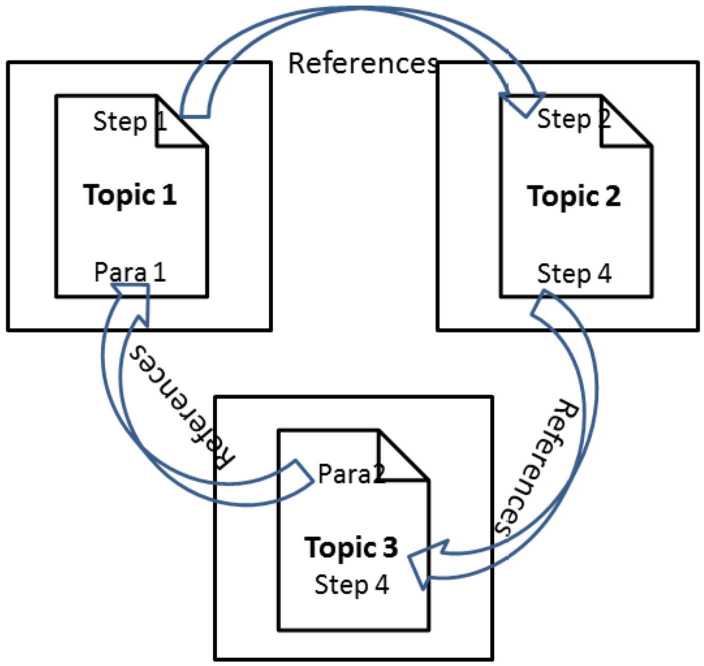
Publication either takes unusually longer to open or fails to open due to multiple circular references within topics. If the number of recursions cross the threshold in a publication, Publication Manager crashes before the publication opens.

You must avoid these loops by removing the circular references.

The following are some examples of circular references in the order of severity:

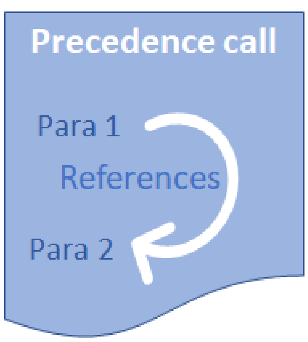
1. Para A from Topic 1 referenced in Topic 2, para B from Topic 2 referenced in Topic 3, and para C from Topic 3 referenced in Topic 1.

For example, a step from “Adding users” topic is referenced in “Editing users” topic, a paragraph from “Editing users” topic is referenced in “Duplicating users” topic, and a step from “Duplicating users” topic is referenced in “Adding users” topic.



2. Step 1 from Topic 1 referenced in Topic 2, Step 2 from Topic 2 referenced in Topic 1.

   For example, a step from “Adding users” topic is referenced in “Editing users” topic, and a paragraph from “Editing users” topic is referenced in “Adding users” topic.
3. A para or a step from a topic referenced in the same topic.



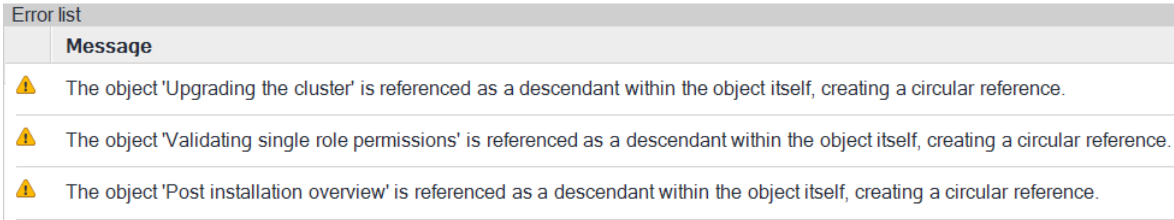
Circular references also applies to content references made by using xref element.

Solution

1. Start Publication Manager and open a publication.

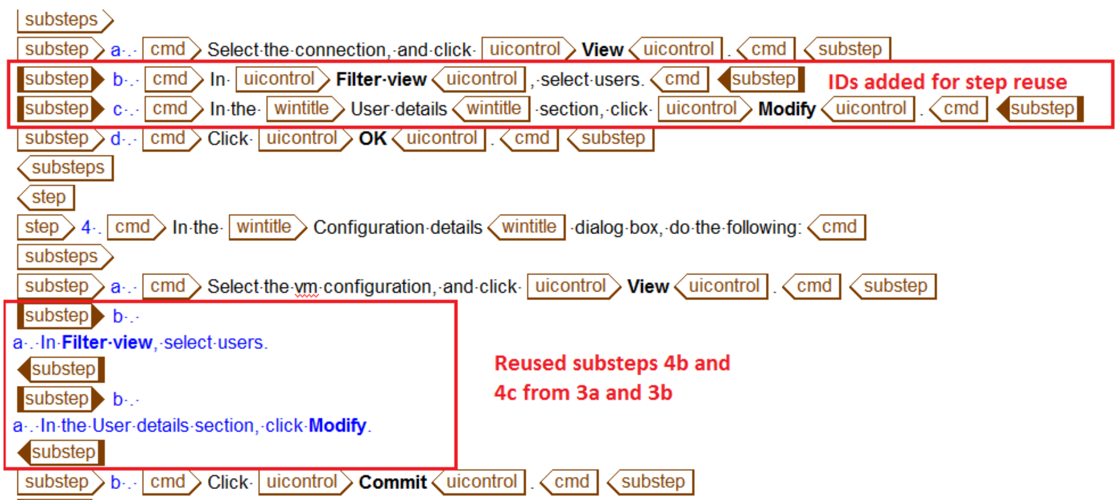
   Publication Manager lists errors in the publication in the Error list section at the bottom, if any. For example, any unresolved hyperlinks, conrefs, and circular references.

2. Note the topics with circular references:



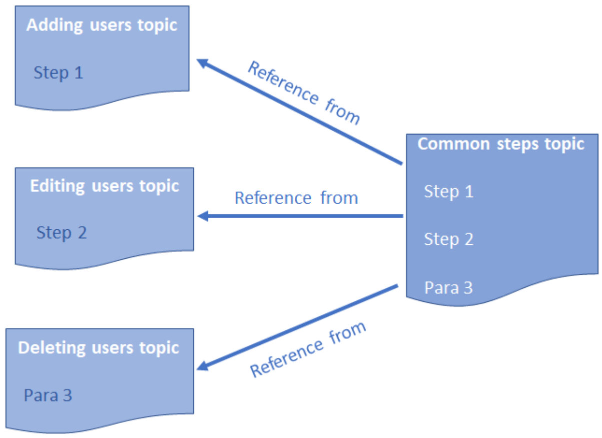
Error list	
	Message
⚠	The object 'Upgrading the cluster' is referenced as a descendant within the object itself, creating a circular reference.
⚠	The object 'Validating single role permissions' is referenced as a descendant within the object itself, creating a circular reference.
⚠	The object 'Post installation overview' is referenced as a descendant within the object itself, creating a circular reference.

3. In Error list, double-click the error message to navigate to the topic, and check out the topic.
4. If the content is referenced in the same topic, do one of the following:
   a. If a simple paragraph or a step is reused, copy from the first location, and paste in the second location.



   b. If the reused content is a complex step with substeps, an ordered list, or unordered list, and if you want to reuse more than once, move the content to a common topic, and reuse in all applicable topics.
5. If the first topic references content from the second topic, and the second topic references content from the third topic, and the third topic references content from the first topic:
   a. From the three topics, remove the reused content and add the content in a common topic.

b. Reuse the appropriate content from the common topic in three topics.



Important:

In a common topic, do not reuse content from other common topics. Because common topics are used across publications and programs, reuse from other common topic multiplies the references very quickly causing loops resulting in delays in opening publication or publication crashes.

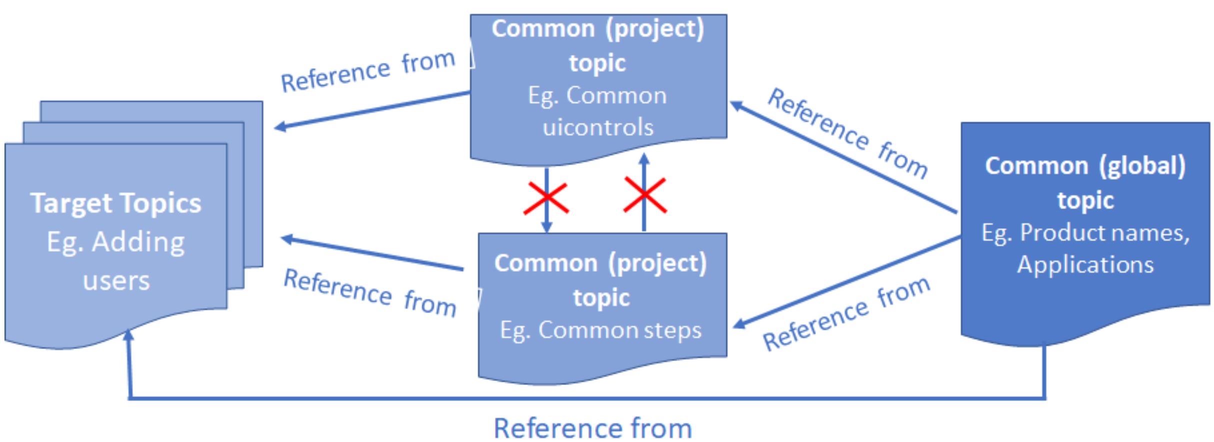
The only exception is common topics: Product names, Applications, Snapin-names, and Languages.

6. After you resolve the circular references in topics, consult Information Architect to replace the topics in the publication that fails to open.

   This step applies only if the publication fails to open and crashes Publication Manager.

To prevent circular references, when you reuse content:

- Always make references to common topics instead of the peer topics used in the project.
- Ensure that the direction of references must be in the direction depicted in the image.



For example, add frequently used content, such as steps, uicontrols, and wintitles in a common topic and reuse the content in Adding users, Editing users, and Deleting users. Do not reuse content from the Adding users topic in the Editing users topic.

Link text of cross reference does not match the target topic

The link text of a cross reference does not match the title of the target topic.

Solution

About this task

When you insert an xref to another topic, the **Text to display** field shows the current title for the target topic. You should always clear the Text to display field unless you want to enter different link text. If you don't clear the field and you later change the title of the target topic, the link text will no longer match the title of the target topic.

Use the following procedure to change the link text to the title text in the topic.

Procedure

1. Check out the topic that contains the cross reference with incorrect link text.
2. Remove the text between the xref tags. There should be no blue, underlined text between the tags.
3. Check in the topic.

Directories appear to be empty

If you try to view the contents of a directory, like a topic directory, and it appears to be empty even though you know there's content in it, there are a couple of possible reasons:

- You've got the wrong type selected in the Objects of type menu.
- There's an issue with the permissions of the folder and you don't have permissions to view the files.

Procedure

1. In the Tridion Docs repository, navigate to the directory that appears empty and do the following:
    a. Refresh the directory.
    b. Check that the **Objects of type** menu at the bottom of the right side of the page is set to **All**.

2. If this does not solve the issue, submit an issue to the Infosolutions project because the cause could be a permissions issue.

Local storage is blocked by another application error

When you have to stop Publication Manager and try to restart immediately, you might see the following message . This error indicates that the local storage is blocked because the previous session of Publication Manager or Oxygen XML Author still has it open.

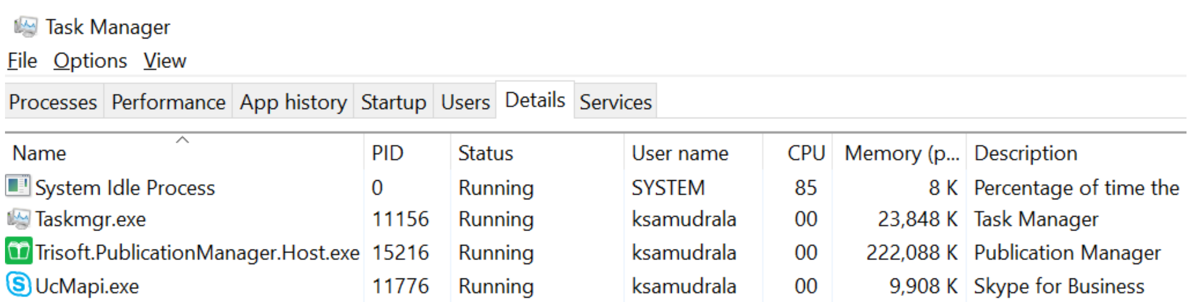
Solution

Procedure

1. Exit Oxygen XML Author if the application is open.
2. Open the Windows Task Manager and click the **Details** tab.
3. Locate the process `Trisoft.PublicationManager.Host.exe`.

   Tip:

   Click **Name** to sort the processes alphabetically.



4. Select the process and click **End Process**.
5. When the Task Manager Warning displays, click **Yes**.
6. Start Publication Manager.

Error that configuration file could not be saved because it is in use

When you are starting Publication Manager and Oxygen XML Author at the same time, if you try to open a publication or try to check out a topic from Publication Manager, you might see an error message `The configuration file C:\Users\<username>\AppData\Local\SDL\InfoShare Client...could not be saved. The process cannot access the file because it is being used by another process`. This is typically a timing message because your local client configuration is being accessed by both Publication Manager and Oxygen XML Author. Wait a minute and try the task again. If the message persists, submit an issue to the Infosolutions project.

Error when trying to generate workflow report about no information found

If you try to generate a workflow report on a publication that has never been opened in Publication Manager, you get an error with the message “No information found to generate translation statistics off” and the report will not generate.

Solution

Procedure

To generate the workflow report, do one of the following:

- Open the publication in Publication Manager, save it, and close it, and then try to generate the workflow report again.
- Try to generate the report again, but on the Workflow management window, select the option to “use the latest available versions (if there is no information in the baseline)”.

Baseline freeze fails even though publishing log shows no errors

In DITA, any topics that are referenced in topics you use in a publication become part of the dependency chain. For example, if you’re reusing elements from a topic that includes xrefs to other topics, those other topics become part of the dependency chain for your publication, even if you aren’t reusing the elements that contain the xrefs. In this case, if you are not reusing the topics that are the link targets of the xrefs, this will not cause publication errors—because you aren’t including the content that contains the links in your output. However, when you attempt to freeze your publication baseline, it will fail, and the Baseline Freeze report displays errors about references that cannot be resolved. If your baseline freeze activity fails after publishing an output with no errors in the log, submit an issue to the Infosolutions project.

Related links

Freeze Baseline report on page 228

Table goes off the page in the PDF output

A table might run off the page in a PDF output. This occurs when a table uses fixed column width that exceeds the available width of the page.

Solution

Tables should use relative column widths rather than fixed widths. Relative widths are represented as a number followed by an asterisk. The values are converted to percentages during production.

Procedure

1. Check out the topic in Editor.
2. If the table uses the table element:
    a. In the table/tgroup element, expand colspecs, and select the appropriate colspec element.
    b. If the width is a set value (such as 3.25in), modify the value to be a number followed by an asterisk (such as .75*).
    c. Repeat for all of the columns in the table.
3. If the table uses simpletable or parttable:
    a. Double-click or select the table.
    b. If the values in the relcolwidth are set values (such as 4.25in 3.75in), modify the values to be percentages (numbers each followed by an asterisk), modify the values to be percentages followed by an asterisk (such as .25* 1.75*).
    c. Click **OK**.

Tables cells are blank in the output even though the table cells contain content

The table cells might appear empty in the output even when the cell in the DITA topic contains content. The cause for the issue could be:

- A condition applied to the cell and the condition is not included in the publication.
- Invalid character in the char attribute of the cell in the table. This character gets included cells of table that you have created by copying from another table.

Solution

Procedure

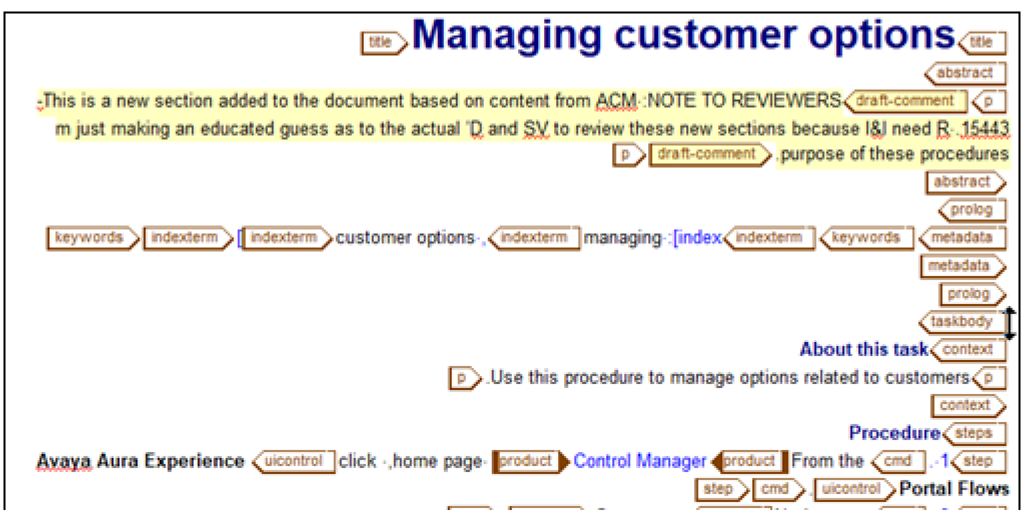
1. Open the topic that has the missing content in the table cells.
2. Double-click or select the table element.

   The Attributes windows displays all attributes applied to the table.
3. Look for any conditions applied to the table element and, if you find any, determine which of the following applies:
   - Select the applied condition to your output to display the content in your output.
   - Change the condition to apply to the whole row rather than cells so that the whole row does not appear in the output.
4. Select cells, in the Attributes window, look for an entry in the **char** attribute and, if you find any, do the following:
   a. Remove value in the **char** attribute.
   b. Click **OK**.
5. Check in the topic, generate the output, and verify if the content appears correctly.

Elements in Oxygen XML Author are right aligned

Condition

Tags and text in Oxygen XML Author are right aligned instead of left side.



Cause

The Region format on your computer might be set to the region based on your locale. For example, Arabic and Hebrew. These language use right to left scripts.

Solution

1. From Control Panel, go to **Region**.

   The page displays Region dialog box.
2. In **Formats** tab, click **English (United States)** in the **Format** field.
3. Click **Apply** and **OK**.

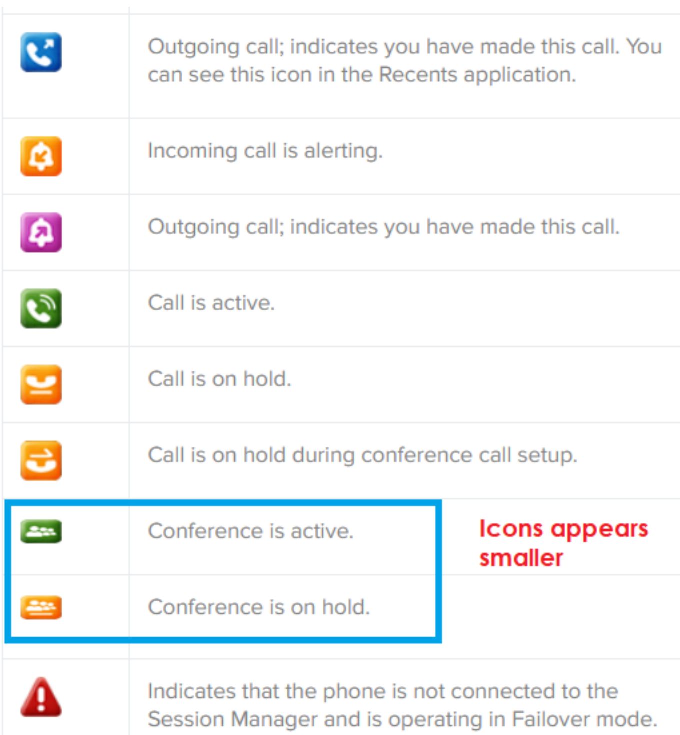
Images appear smaller on Documentation Center

Condition

On Avaya Documentation Center, the page displays some images smaller than others, though you have set to the same size.

Cause

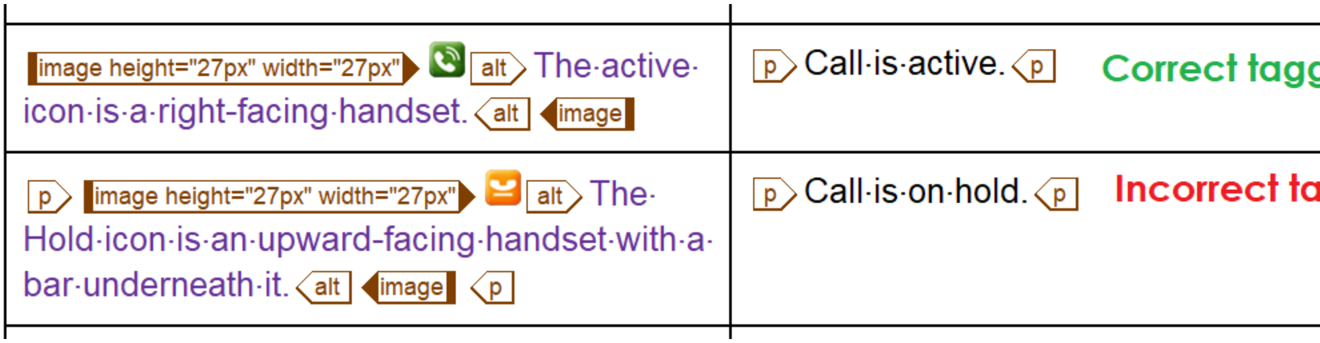
When you add an image element inside a <p> element in the topic, in the Avaya Documentation Center output, the `.css` file imposes a maximum height restriction of 16 pts.



Solution

1. Check out the topic with images.

2. Identify the image that appears smaller on Avaya Documentation Center and move the image element out of the <p> element.



3. Delete the empty <p> element.
4. Publish the output on Avaya Documentation Center and verify that the page displays the image size correctly.

Icon size is larger than expected

Condition

The icon size on Avaya Documentation Center is larger than expected, specifically in French, Spanish, German, Japanese, and Chinese (Simple & TW) languages. This issue occurs despite the alt text has the word 'icon‘ and its height set to about 11 or 12 points.

Cause

The word 'icon' in the alt text of the image makes the icon appear smaller than other images. However, you might still see the following issues:

- Writer might miss adding an alt text to the image or miss adding 'icon' in alt element in the image.
- When content in alt text is translated, the condition icon term is not met, therefore, the page displays the image larger.

Solution

1. Check out a topic that has the icon in Oxygen XML Author.
2. Select the image element of the icon.
3. Add the word icon in the alt element.

   For example, the Accept Voice Interaction icon.

4. In the Attributes dialog box, type `icon` in the **outputclass** field.

Note:

If you reuse the image element, add the attribute in the source image topic and not in the target topic.

5. Check in the topic and generate the Avaya Documentation Center output.
6. Verify that the page displays the icon size correctly.

Copyright year in the legal page is incorrect

Condition

The legal page displays 1234 instead of the copyright year on Avaya Documentation Center. For example, © 2015-2023, Avaya LLC.

Cause

The legal page is incorrectly added in the bookmap in the Front Matter element.

Solution

1. In Publication Manager, open the publication with incorrect copyright year.
2. Right-click **Front Matter** and then click **Add Within** > **Notices**.
3. On the Insert Values for Notices window, click **OK**.

4. Within the **Notices** topic head, add the legal topic.
5. Click **OK**.
6. Check in the bookmap.

Unable to add accounts

Condition

Adding an account in RWS Tridion Docs fails with Access Denied error.

Cause

- A difference in time clock between the user's laptop and the server.
- The issue is related to connectivity to the RWS server.

Solution

1. Connect to the Avaya network or VPN and close all Microsoft applications.
2. Press and hold the Windows logo key on your keyboard and then press the `L` key to lock your Windows computer.
3. While connected to the VPN, do the following to unlock your Windows computer:
    a. Press and hold the Windows logo key on your keyboard and then press the `L` key.

       The lock screen displays.
    b. Wait for 5 minutes.
    c. Enter your correct Windows credentials and log in.

   The unlock action refreshes your Kerberos or Windows security protocol ticket and restores the connectivity to the server again.
4. Add your user account information in Publication Manager.

   Addition of the account in RWS completes successfully.

Publishing-related issues

Locating a GUID referenced in a publishing log error

When you produce an output from Tridion Docs, you receive a notification message when the publishing request completes. You must always open the log and look for errors. The error message uses the GUIDs of the objects in many cases and it might be difficult to determine which topics or maps the error is referencing.

Procedure

1. When you receive the email notification from Tridion Docs, open the log file and search for the “error” word.

   The following is a sample of common error:

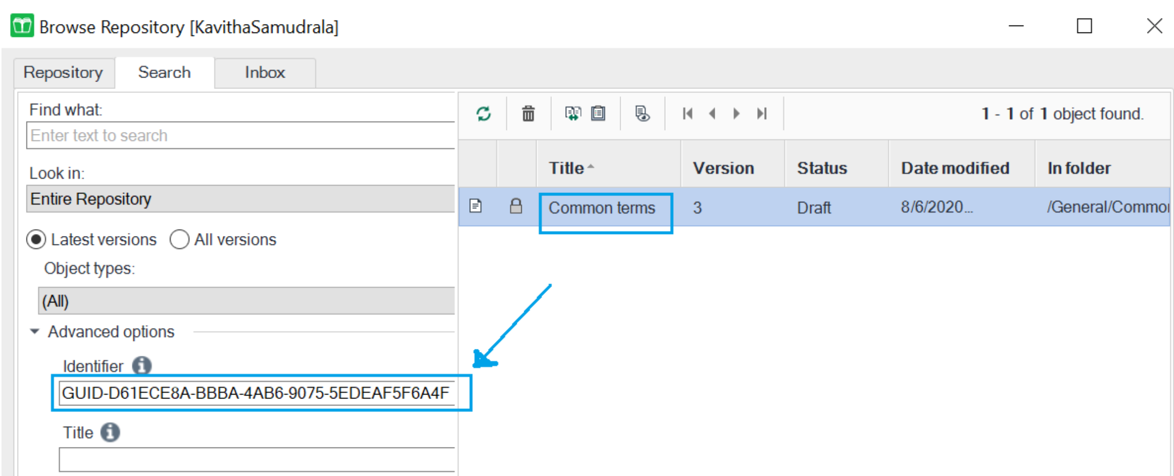
   ```
   [xslt] [DOTX006E][ERROR]: Unknown file extension in href:
   'GUID-93A613C9-3646-4104-849E-F52017049DB6'. If this is a link to a non-DITA
   resource, set the format attribute to match the resource (for example, 'txt',
   'pdf', or 'html'). If it's a link to a DITA resource, the file extension must
   be 'dita' or 'xml'. Set the format attribute and specify the format of the
   file if href link doesn't point to dita topic file. Otherwise, change the file
   extension name to 'dita' or 'xml'.The location of this problem was at (File
   = W:\InfoShare\Data\PublishingService\Data\DataExports\GUID-570C1EE4-F4A9-4A89-
   BF6F-DA9DC6C3886E.20130123195114668\1\en-us\workset\GUID-B57F8CAC-246F-4327-
   A81A-6EEDA79B879F.ditamap, Element = topicref:12)
   ```

   The sample error indicates that there is an issue with a topicref in a map. The issue is specifically with the 12th topicref in GUID-B57F8CAC-246F-4327-A81A-6EEDA79B879F . And the object being referenced in the topicref is GUID-93A613C9-3646-4104-849E-F52017049DB6.

2. To identify the objects, go to the Search tab in the Tridion Docs desktop repository.
3. Expand the **Advanced Options**.
4. Copy and paste the GUID in which the issue occurs in the **Identifier** field and click **Search**.

   If the GUID refers to a DITA Map, do not include the extension in the **Identifier** field.

   The Browse Repository window displays the name and location of the object in the results pane on the right side of the page, similar to the following sample.

5. **(Optional)** Repeat Step 4 to identify the object that is causing the error.

Publishing fails with error [DOTJ013E][ERROR] Failed to parse the referenced file

When you publish a HTML output, you might see an error similar to the following sample in a log. The error indicates that a topic could not parse because a required element is missing. In this sample, the topic included an unordered list without at least one li (list item) element. The cause could be that you have applied conditions, however the conditions are not included in the publications.

```
[DOTJ013E][ERROR] Failed to parse the referenced file 'AccessbilityStandards.dita. The
XML parser reported the following error:
AccessbilityStandards.dita Line 15:The content of element type "ul" is incomplete, it
must match "(li)+".
```

Solution

About this task

Only HTML and HTML5 outputs fail due to missing elements.

Procedure

1. Locate the topic referenced in the error.

   The easiest way to find the topic is typically to look at the publication baseline.

2. Check out the topic and locate the element causing the error.

   The element type will be noted in the error. In the sample error, the element where the error occurred is a ul (unordered list).

3. Identify the cause of the error and correct it.

   If you cannot determine the cause of the error in the element, ask for assistance.

Publish fails with null error in log file

When a publishing request fails and there is a log attached, a common error that you might see in your log is `[ERROR] Topic reference (href : #null) not found !`. This error indicates that a topic in the publication has an invalid character in the Tridion Docs Title field.

Solution

Procedure

1. Open the publication in Publication Manager.
2. Go to the Baseline tab and look at the values in the **Title** column to locate topics that have invalid characters in the Title.

   The title can contain alphanumeric characters, spaces, hyphens, and underscores.

3. When you the topic with an invalid character in the title, right-click the object, select **Properties**, and remove the invalid characters from the **Title** field.
4. Save the publication and generate the output again.

Error opening PDF: “There was an error opening this document. The file is damaged and could not be repaired”

Condition

When you try to open a PDF produced from Tridion Docs, the displays “There was an error opening this document. The file is damaged and could not be repaired” error, and you cannot open the PDF.

Cause

When a table breaks across pages in the PDF, the text “Table continues” appears at the bottom of the table to indicate that the table continues on the next page. When certain tagging, such as conditionalizing columns is used in tables in a larger publication, the combination of the tagging and the “Table continues” can cause an issue in Antenna House, which is one of the applications used in our DITA processing.

If you encounter this issue, you can turn off the “Table continues” at the publication level.

Solution

1. Right-click the bookmap and select **Check out with** in Oxygen XML Author.
2. Expand the **bookmeta** element.
3. Position the cursor before the ending **bookmeta** tag, press `Enter`, and select **othermeta**.

   If you are using the <bookid> element, position the cursor before < bookid> instead of putting the cursor before the ending <bookmeta> element.
4. In the Attributes dialog box, type `yes` in the **content** field and `turnOffTableContinues` in the **name** field.
5. Click **OK**.
6. Click **SDLTridionDocs** > **Check in** and follow the prompts to check in the map.

   If you have the publication open that uses the bookmap that you edited, Tridion Docs displays a reload message “The object *bookmap-name* has been changed by another application and the new content has been loaded.”

[DOTX031E][ERROR] File is not available to resolve link information

An error similar to the following sample in a publishing log typically indicates a broken xref. The error can occur for a couple of different reasons. For example, it can occur if you have an xref to a topic that has not been included in your publication or if you have a link to a web site and you haven’t set the scope attribute to external.

```
[DOTX031E][ERROR]: The file file:/W:/InfoShare/Data/PublishingService/Data/DataExports/
GUID-83353436-0BE6-4DEF-8BC5-44350CC70F6B.20140220070729305/2/en-us/workset/temp/GUID-
CED91A5D-3923-4762-B90E-0F2B56996D21 is not available to resolve link information.
The location of this problem was at (File =
W:\InfoShare\Data\PublishingService\Data\DataExports\GUID-83353436-0BE6-4DEF-8BC5-44350C
C70F6B.20140220070729305\2\en-us\workset\GUID-BD163880-2936-4512-9022-B09AEF6D5A23.xml,
Element = xref:1;11:349)
```

Solution

Procedure

1. Locate the topic referenced in the error using the GUID provided in the error.

   For example, in the sample error, the GUID is `GUID-BD163880-2936-4512-9022-B09AEF6D5A23` and you would search for that ID.

2. Check out the topic and locate the element that is causing the error.

   The element is noted in the error. In the sample error, the element occurred in the first xref in the topic (`Element = xref:1`).

3. Correct the error and check in the topic.

   If you cannot determine the cause of the error in the element, ask for assistance.

Publication fails with no log included in the zip file

When you get a failed publication notification with no log file included in the zip file, typically, the reason would be that two or more objects with the same Override Output File Name (base attribute) exists in the publication. When this occurs, you can identify the duplicate name by looking at the publishing log in the web interface.

In the publication logs, double-click the `SHELL command output` event and scroll down to look for the following message to identify the duplicate name:

```
ERR AvayaPublUtil::RenameObjects -> Rename file <file name> to <file
name> failed since there is already an existing file with this name.
Please check the metadata of the objects in your publication to correct
this duplicate filename.
```

Solution

About this task

The **Override Output File Name** field is populated by the base attribute in the topic. This attribute specifies the filename for the topic that will appear in HTML and HTML5 outputs.

If a topic does not have a base attribute, the parser uses the topic file name to process.

Here are some scenarios on topic file name and Override Output Filename:

Topic filename (Title)	Override Output Filename (OOF)	Output	Example	
			Filenames	OOF
Same topic filenames	OOFs are different	Successfully publishes	`avtar`	`avtar_01`
			`avtar`	`avtar_02`
Same topic filenames	OOF set in one topic which is unique	Successfully publishes	`avtar`	None
			`avtar`	`avtar_02`

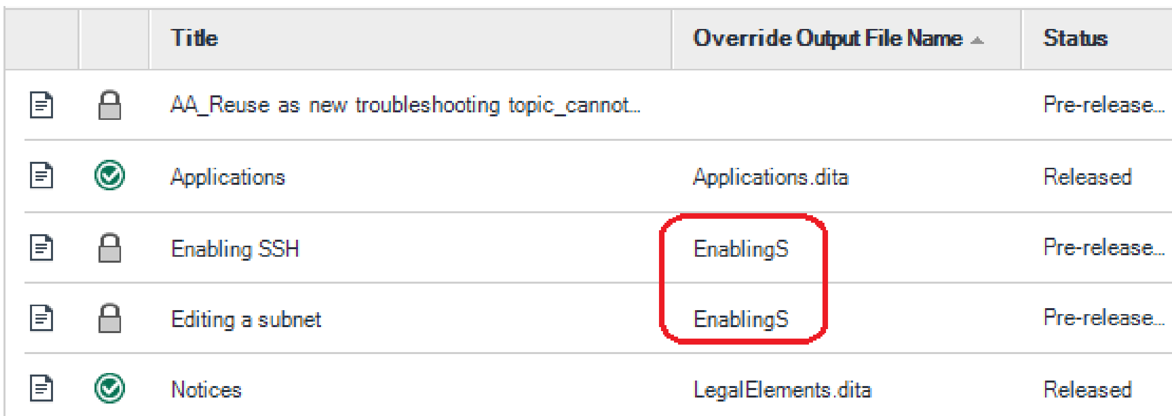
Table continues…

Topic filename (Title)	Override Output Filename (OOF)	Output	Example	
			Filenames	OOF
Different topic filenames	OOF of one topic is set and matches with topic name of other	Output fails	`avtar`	`avtar_02`
			`avtar_02`	Not set
Same topic filenames	OOF not set in two topics	Output fails	`avtar`	Not set
			`avtar`	Not set

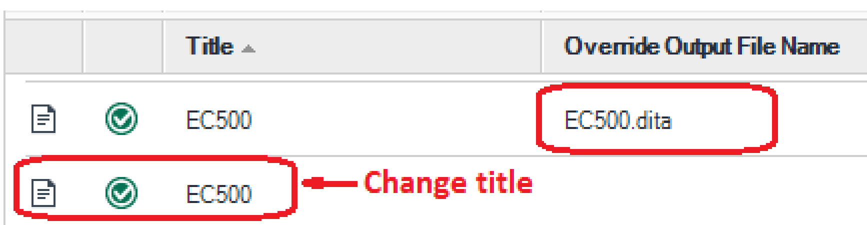
This example applies for two or more topics with duplicate filename or override output filenames.

Procedure

1. Open the publication in Publication Manager.
2. Click the **Baseline** tab.
3. Click the **Override Output File Name** column heading to sort the baseline report by the values in that column.
4. Look for duplicate text strings in the **Override Output File Name** column.



		Title	Override Output File Name	Status
		AA_Reuse as new troubleshooting topic_cannot...		Pre-release...
		Applications	Applications.dita	Released
		Enabling SSH	EnablingS	Pre-release...
		Editing a subnet	EnablingS	Pre-release...
		Notices	LegalElements.dita	Released

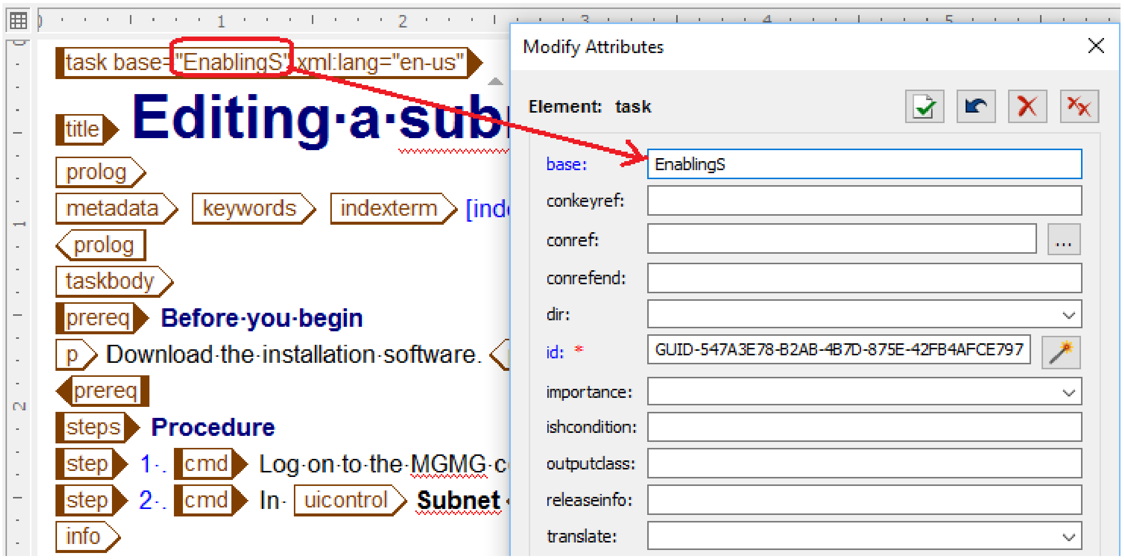


		Title	Override Output File Name
		EC500	EC500.dita
		EC500	

5. For each duplicate file name that you see:
   a. Check out the topics with the duplicate file name.
   b. Double-click or select the root element, for example, the structure element in a structure topic.
   c. In the **base** field, remove the text string or enter a unique text string, and then click **OK**.

Important:

Do not include the file extension in the file name.



Related links

[Logging on to the Tridion Docs web interface](#) on page 26

[Viewing publishing logs on the Tridion Docs web interface](#) on page 138

[exec] AHFCmd :WARNING: Error Code : 11792 (2E10)

Condition

An error message similar to the following is in the log file that is e-mailed to you when you publish a publication.

```
[exec] AHFCmd : AH XSL Formatter V5.3 MR3 for Windows (x64) (2011/11/16
16:00:35)
     [exec]          Copyright (c) 1999-2011 Antenna House, Inc.
     [exec]
     [exec] AHFCmd :WARNING: Error Level : 2
     [exec] AHFCmd :WARNING: Error Code  : 11792 (2E10)
     [exec] AHFCmd :WARNING: Duplicate id value:
id="unique_38_Connect_42_GUID-F2EFC027-1605-450E-A615-B501A5D8CAE5".
     [exec] AHFCmd :WARNING: Line 1192,
Col 295, file:///W:/InfoShare/Data/PublishingService/Data/DataExports/
GUID-44C88502-FF3A-48AE-A01D-435F5EE63724.20120925215134543/1/en-us/out/
topic.fo
```

The id value varies. This error message usually appears toward the bottom of the log file. There can be multiple instances of this error message in a log file.

Cause

These error messages come from Antenna House, which generates the PDFs. The error indicates that there are two or more elements in a topic that have the same ID. This can happen when you copy a conreffed element that has an ID assigned.

Solution

These errors do not impact the output or prevent you from releasing the content, so you can ignore them.

Publish report includes a note that “Illustration xxx en-us High is unavailable”

When you click **View Report** on the Output tab in Publication Manager, you might see a note in the report that is similar to `Note: Illustration "1100-SIP-Icon-Inbox_Nov07-rev5 v 1 en-us High" is unavailable.`

You can typically ignore this note in the Publish report. But there have been a couple of cases where someone set the resolution for an image to High somewhere in Tridion Docs when the image is Low resolution. Low and High resolution are based on the graphic type. For example, png and gif files are Low resolution.

Solution

When the image is a low-resolution file, this error will cause issues in the outputs or prevent you from releasing your content.

[DOTX019W] [WARN]: The type attribute on a topicref element does not match the target topic

You might see the following warning in the publishing logs:

```
[xslt] [DOTX019W] [WARN]: The type attribute on a topicref element does
not match the target topic. The type attribute was set to 'concept',
but the topicref points to a more specific 'reference' topic. This may
cause your links to sort incorrectly in the output. Note that the type
attribute is inherited in maps, so the value 'concept' may come from an
ancestor topicref. Check and make the type of topicref match with the
actual type of topic.The location of this problem was at...
```

Solution

You can typically ignore these warnings. They can be caused when the parent topic is one topic type and the child topics are other types. The type is inherited, so the processing finds a mismatch, even though the type is correct on the topic. It doesn't cause any issues in the output and it won't prevent a baseline freeze.

Publishing fails with error: “Expected scheme-specific part at index 5: http:”

Condition

When the output you published fails, review the DITA-OT log. You might see the following error:

```
[filter] Processing file:/D:/InfoShare/Data/Publish/Data/<outputid>/work/<version>/
<lang>/<GUID.xml
 to file:/D:/InfoShare/Data/Publish/Data/<outputid>/work/temp/<GUID>.xml
Error: java.lang.RuntimeException: Expected scheme-specific part at index 5: http:
```

Solution

1. In Tridion Docs web interface, search for the topic using the GUID.
2. Look for the <xref> element that has a URL issue.
3. Do one of the following:
    a. Ensure that the URL added in the href attribute in the xref element is valid.
    b. To provide a format or an example of URL and not the actual URL, use the cite element instead of xref.
        - <cite>http://username:password@...</cite>
        - <cite>http://localhost:nnnn</cite>
        - <cite>http://IDP_IP</cite>

Localization-related issues

Unable to translate objects

Condition

Translation Management (TM) sequence not selected on production job.

Cause

Objects with the **Requested languages** field value set fail to translate. Therefore, ensure that the **Requested languages** field is blank for all objects in a publication that is getting localized.

Objects include topics, maps, and SVG images.

Solution

1. Start Publication Manager.
2. Open the publication, and click the **Baseline** tab, sort by first column, the object type.
3. Select objects of the same type, for example, all images, right-click **Properties**.
4. Ensure that the **Requested Languages** check box is clear, and the field is blank.
5. Click **OK**.

Unable to translate

Condition

Tridion Docs does not integrate with Translation Management (TM).

Cause

Objects with the GUID number in the title field breaks the Tridion Docs and TM integration.

Solution

1. Start Publication Manager.
2. Open the publication.
3. Select object with GUID in the title and select **Properties**.
4. Keep the name and remove the GUID, version, and the language that follow the name.
5. Click **OK**.

Unable to translate objects for the new program

Condition

The translation of the publication for the new program fails with the following error:

```
Expanding failed with error: Unable to complete your request,
you are not allowed to alter publication version "GUID-ABC76443-
BB67-454A-9885-78D31AB82B96=1". [c:6286332 ce:GUID-30BFB5CE-FADD-4F6B-
B0BA-4885045EEBFC ct:CTPUBLICATIONV] [102009;ObjectIsReadOnly]
```

Cause

When a user group for the new program is added in the Tridion Docs repository, the new user group value might not be available to the service user, the user that Localization team uses for translation job.

Solution

The localization coordinator must ensure the following:

1. Send a request to Information Architect (IA) to add the new program to the ServiceUser user in the Tridion Docs web interface.
2. If you still see the issue, report the issue to the IA or create a Jira ticket in the Infosolutions project.
3. When the issue is resolved, ensure that IA gets the RWS support team restart the Translation Builder Service on the RWS server.

4. When IA resolves the issue, delete the failed translation job.
5. Restart the translation job.

Chapter 22: Defining variables using key references

Key references

The key-reference mechanism in DITA provides a layer of “abstraction” so that referenced content strings can be defined externally at the DITA map level instead of locally in each topic. Key references (keyrefs) are conceptually similar to content references (conrefs) in that they’re references that point to content that resides somewhere else. There are many possible implementations of key references in DITA. Currently in GIS we’re using keyrefs to define variables.

When you use DITA topics in different publications, there might be names of objects that should have different values, depending on the context. With keyrefs, you name the variables using the <keydef> element. For example, you might have a keydef for the name of a server that changes depending on the implementation When you insert a <keydef> element in a topic, it has no defined value—it’s just a placeholder reference. You define the <keydef> value in special “key” DITA Maps. Each key map can contain different values for the <keydef> elements that you’ve defined. Then, depending on which key map you include in your bookmap, the value of the <keydef> is applied during production. You can change the value of the variable by using a different key maps in different bookmaps. Or you can include multiple key maps in single bookmap and apply conditions to them. You can then use the bookmap in different publications and select different conditions to achieve different values in the outputs.

Using existing elements as keyrefs

You can also use existing elements as variables using the keyref mechanism. This implementation has an additional level of indirection, but it allows us to use elements already set up for reuse as keyrefs. You can think of keyrefs defined directly in key maps as “direct” keyrefs and keyrefs that reuse elements as “indirect” keyrefs.

Important:

Because of the way that keys are referenced in the topics, each variable you want to use must always be specified directly in the maps or must always be referenced indirectly through reuse. You cannot define a key reference that’s defined directly in some contexts and indirectly in other contexts.

Key references vs. conditions

Keyrefs can be used in some cases in ways that are similar to conditions. In the case of conditions, the possible values reside in the topics, with conditions applied, and the conditions used in the publication determine the value that appears in the output. With keyrefs, you include a single placeholder (keydef) and the possible values are defined externally in key maps. Whether conditions or keyrefs are the right approach really depends on the specific situation and what you need to implement. If you think your project has a use for keyrefs, contact Sue.

Creating key maps to define key references for variables

Before you begin

Before setting up any key references, consider the variables you need for your project. Create a list of the keys and the possible values. Only define keyrefs for things that require more than one possible value, where the value will be consistent across every use in a particular context.

About this task

This procedure provides the steps for defining the key definitions (keydefs) and their associated values in special maps (referred to as key maps).

Procedure

1. Create a DITA map to use for the key definitions.

   Give the map a descriptive name that's specific to the context and makes it clear that the map is for keys. You'll create multiple maps that define the values of the keys for the different contexts in which the keys are used.
2. Open the DITA Map in Arbortext Editor.
3. If the map contains a topichead element, delete it.
4. Put the cursor after the map element, press `Enter`, and select **keydef**.
5. When the Modify Attributes dialog displays, type a name for the key in the **keys** field and click **OK**.

   This is the name that you'll use in the topics to point to this key reference. The keynames are case-sensitive and should not include any spaces or special characters.
6. Position the cursor at the end of the keydef element, press `Enter`, and select **topicmeta**.
7. Position the cursor at the end of the topicmeta element, press `Enter`, and select **keywords**.
8. Position the cursor at the end of the keywords element, press `Enter`, and select **keyword**.
9. Type the value of the key in the keyword element.

   This is the value of the keydef that will appear in outputs that include this key map.
10. Repeat for each key you want to define in this key map.
11. Check in the map.
12. Create as many key maps as you need for your project to define the possible key values.

It's very important that you use the same keydef names in the key maps in which you define different values for the keydefs.

13. Add a new last chapter to the publication and then add the key map to the chapter and set the **format** attribute to `ditamap` like you do for other maps.

    The use of the keydef elements signal the processor that the map contains key references instead of topics.

14. If you want to use the same bookmap and apply different values in different outputs, repeat step 5 for each key map and then apply the appropriate condition to each map.
15. If you added multiple conditionalized keymaps to your publication, select the **Conditions** tab in Publication Manager to select the condition to apply.

Next steps

Use the variables (keydefs) in your topics.

Using keydef variables in your topics

About this task

Use this procedure for adding keyrefs to your topics that have been defined in key maps using the keyword element. This procedure includes steps for setting up the keywords for reuse since you'll be using the keyrefs multiple times across your content.

Before you begin

Create the key maps that define the key references.

Procedure

1. Create a common topic to store the keywords that contain the keydefs.
2. To set up common elements that use keyrefs directly defined in a map:
   a. Position the cursor where you want to add the variable, press `Enter` and select **keyword**.
   b. Put the cursor in the keyword element and press `Ctrl+D` to open the Modify Attributes dialog box.
   c. In the **keyref** field, enter the name of the key that you defined in the map.
   d. Insert a name in the **ID** field; you can use the same name as the **keyref**.
   e. Click **OK**.
   f. Repeat steps a through e for each keyword you need to set up for reuse.
   g. Check in the common topic.
3. Reuse the keyword elements in any topics where you want to insert the key variables.

   If you're inserting a variable in a bookmap or DITA map, you must check out the map in Arbortext Editor from the desktop repository.

Setting up variables using key references that reuse existing elements

Before you begin

Create the necessary keymaps. See the topic “Creating key maps to define key references for variables”.

About this task

This procedure provides the steps for defining the key definitions (keydefs) in special maps that reuse existing elements (indirect keyrefs). You can include indirect keydefs in the same maps as keyrefs that define the values directly in the maps.

Important:

- The elements you want to reuse must be in different topics.
- Because of the way that keys are referenced in the topics, each variable you want to use must always be specified directly in the maps or must always be referenced indirectly through reuse. You cannot define a key reference that’s defined directly in some contexts and indirectly in other contexts.

Procedure

1. Add the keyref attribute to the elements you want to reuse:
    a. Open a topic that contains one of the elements you want to reuse as a keyref.
    b. In Arbortext Editor, put the cursor in the element and press `Ctrl+D` to open the Modify Attributes dialog box.
    c. In the **keyref** field, type the name of the key.

       This is the name that you’ll use in the topics to point to this key reference. The keynames are case-sensitive and should not include any spaces or special characters.
    d. Repeat for at least one other topic that contains elements you want to reuse as keyrefs.
2. Check out one of the maps that you have created for the keys.
3. Put the cursor after the map element, press `Enter`, and select **keydef**.
4. When the Modify Attributes dialog display, type a name for the key in the **keys** field.
5. When the Modify Attributes dialog displays, type a name for the key in the **keys** field and click **OK**.

   This is the name that you’ll use in the topics to point to this key reference. The keynames are case-sensitive and should not include any spaces or special characters.
6. In the desktop repository, navigate to the topic that contains the element you want to reference in this map, right-click and select **Properties**, and copy the **Identifier**.
7. Paste the identifier you copied into the **href** field.

8. Click **OK**.
9. Check in the map.
10. Repeat steps 2 through 9 for each of your key maps.

    It's very important that the **href** field for the **keyrefs** in each map point to a different topic.
11. Add a new last chapter to the publication and then add the key map to the chapter and set the **format** attribute to `ditamap` like you do for other maps.

    The use of the keydef elements signal the processor that the map contains key references instead of topics.
12. If you want to use the same bookmap and apply different values in different publications, apply the appropriate condition to each key map.
13. If you added multiple conditionalized keymaps to your publication, select the **Conditions** tab in Publication Manager to select the condition to apply.

Next steps

Use the variables (keydefs) in your topics.

Adding a keydef variable that reuses an existing element

About this task

Use this procedure for adding a keyref to your topics that reuses an existing element. This will be much less common than a direct keyref.

Before you begin

- Create the key maps that define the key references and add the key(s).
- If you are going to use any keyrefs that reuse existing elements, you must know the element the existing content is contained in.

Procedure

1. To use a keyref that reuses an existing element:
    a. Position the cursor where you want to add the variable, press `Enter` and add the appropriate element.

       The element you should insert depends on the element you're reusing that has the keyref applied. For example, if the keyref is based on a <uicontrol> element, you should select **uicontrol**.
    b. Put the cursor in the element and press `Ctrl+D` to open the Modify Attributes dialog box.
    c. In the **conkeyref** field, enter the name of the key that was applied to the element you're reusing, followed by a slash, followed by the ID of the element.

For example, if you want to reuse an element that has keyref of “APPLICATIONNAME” and an id of “Portal”, you would insert `APPLICATIONNAME/PORTAL`.

When you assign IDs to elements in topic, they’re converted to all caps when they’re checked in. So it’s important to double-check the ID of the element to make sure you enter it correctly in the **conkeyref** field.

d. Click **OK**.

2. Check in the topic.

Chapter 23: Searches and metrics

Searching the repository

About searches

Search text is not case-sensitive. You can type search text in uppercase or lowercase letters.

- The wildcard operator * can be used only for single word searches.
- In phrase searches, * is not interpreted as a wildcard character. For example, search text `comput*` produces results, such as computer and computing.
- When searching for multiple words, the search engine interprets the search text differently if the text includes quotation marks.
- When you do not use quotation marks, the search engine searches for each word in the text string.

  Results that contain all words in the search string rate higher than results that contain only one or two words in the string.
- When you use quotation marks, the search engine searches for the exact text string that you typed. Only instances of that exact string are included in the results.

  For example, searching "`content management system`" finds instances of that exact phrase. Whereas, searching `content management system` will finds all instances of the words *content*, *management*, and *system*.

Performing searches

About this task

Use this procedure to search for a topic, map, image, or other object in the Tridion Docs repository.

Procedure

1. On the Publication Manager menu bar, click **Tools** > **Browse Repository**.

   The Browse Repository window is displayed.
2. In the left pane, click the **Search** tab.
3. In **Find what**, type the text that you want to search.

4. Enter and select other search parameters to limit the scope of your search.
5. To filter the search results by type of object, in the **Object types** field, click topics, maps, or images.
6. To narrow down the search results, complete the appropriate fields in the Advanced options section.

   For example, GUID, author, topic type, and date modified.
7. Click **Search** at the bottom of the left pane.

   Search results are displayed in the right pane. Tridion Docs displays 100 search results at a time. Use the navigation buttons on the toolbar to move forward or backward through the results.
8. To change or remove the search text, click **Reset**.

Search parameters

Use search parameters to limit the search scope when you search the Tridion Docs repository.

Name	Description
Latest versions	Searches only the latest versions of objects.
All versions	Searches all versions of objects.
Object types	Type of object to search for. The options are: • **All** • **Images** • **Library Topics** • **Maps** (maps) • **Topics** (topics) • **Other (Word, PDF..)** • **XML object types**, includes topics, maps, and library topics

Advanced options

Name	Description
Identifier	The unique identifier or GUID of the object that you want to search.
Title	The title of the object that you want to search.
Topic type	Topic type that you want to search.
Library	Currently Tridion Docs library is not in use.

Table continues…

Name	Description
Illustration type	The type of graphic as set in the properties for the graphic. Options are: • **Block diagram** • **Component diagram** • **Icon** • **Other diagram** • **Other illustration** • **Process diagram** • **Screenshot**
Map type	Type of map, book map or DITA map, that you want to search.
Version	The version of the object that you want to search.
Language	The language of object as set in the object properties.
Status	Workflow status that you can search. The options are: • **Contributor draft** • **Draft** • **Editorial review** • **In translation** • **Obsolete** • **Pre-release validation** • **Ready to be translated** • **Released** • **System** • **System Read Only** • **Technical review** • **To be translated** • **Translated** • **Translation rejected**
Author	Name of author as set in the object properties.
Last modified by	The author who last modified this object.
Resolution	Resolution of graphics as set in the graphic properties. Options are **High**, **Low**, **Source**.
User group	User group that has permission to objects. Only system administrators with rights to give user groups permissions to specific folders in the repository use this search parameter.
Checked out by	The name of author who has objects checked out.

Table continues…

Name	Description
Date created	Date that objects were created in Tridion Docs.
Date modified	Date or date range that objects were last modified in Tridion Docs.
Product Family	Product family as set in the object properties.
Product	Product as set in the object properties.
Component	Component as set in the object properties. Values for the component are created on a per project basis by request.
Localization Coordinator	For use by translation only.
TMS Project code	For use by translation only.
Translation Vendor	For use by translation only.

Searching for an element and attribute in a topic

About this task

You can search for the following in a topic:

- An element

  You can also search by the text in an element
- An attribute used within an element

  You can also search by the text in an attribute.

To search for an element or an attribute in a publication, search in the associated bookmap.

Procedure

1. Start Oxygen XML Author, and open a topic.
2. From the menu, click **Find** > **Find All Elements**.

   Oxygen XML Author displays the Find All Elements dialog box.
3. To search for an element, in **Element name**, type the element name that you want to search.
4. To search for an attribute, in **Attribute name**, type the attribute name that you want to search.
5. Click **Find All**.

   Oxygen XML Author displays all occurences of the element and the attribute in the message window.

   You can click each entry to go to the occurrence of the element or attribute.

Capturing metrics

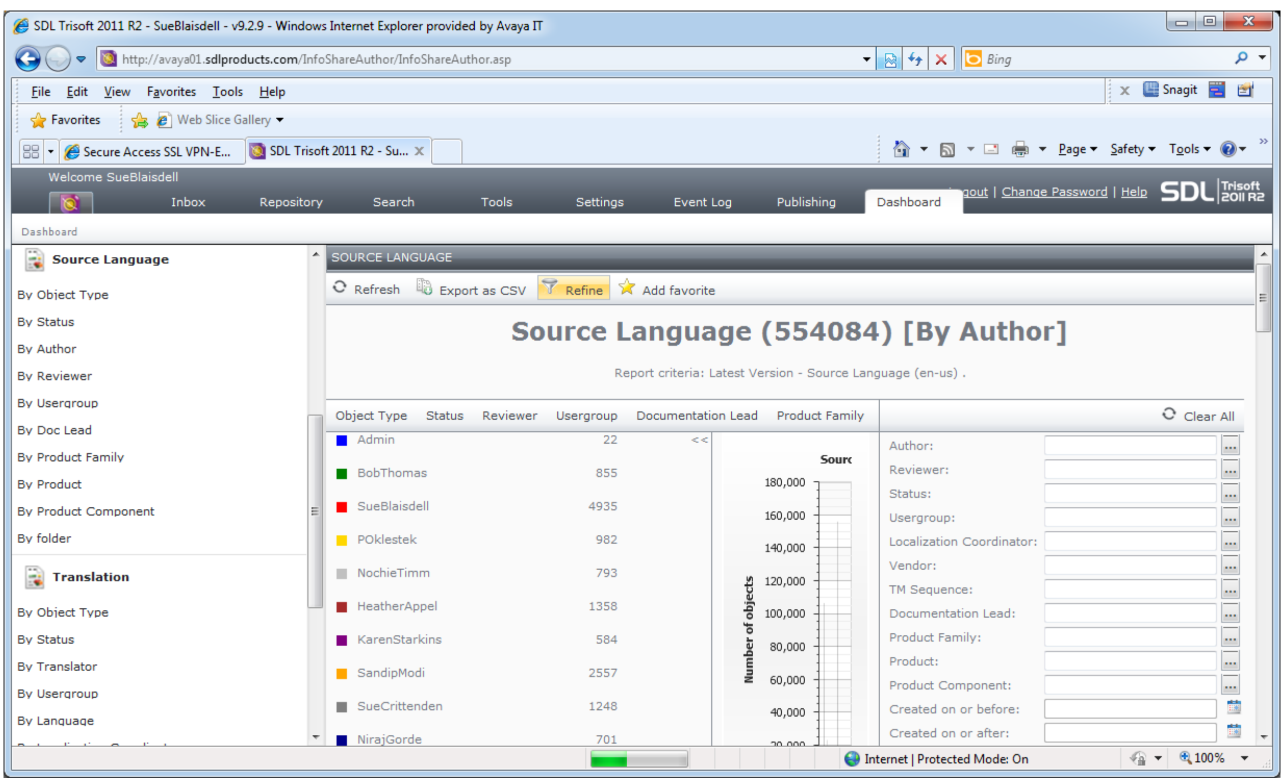
Tridion Docs dashboard

You can use the dashboard tab in the Tridion Docs web interface to gather information about content stored in the system and to compare publications. You can get the following information in the dashboard:

- Number of objects by type (topics, maps, images)
- Number of objects in each workflow status
- Number of objects owned by system users in different roles (Author, Reviewer, Doc Lead)
- Number of objects in a user group (user groups are how we manage permissions)
- Number of objects for a product family (these are the high-level folders in the repository)
- Number of objects for a product
- Number of objects in a folder

You can narrow the scope of the metrics by combining categories. For example, you can capture the number of objects by product and then narrow the scope by adding the object type to find the number of topics for each project. You can refine the results further by limiting the scope. For example, you can limit the metrics to the number of objects for one project.

You can also use dashboard to locate a publication and compare two publications.



Capturing metrics using the dashboard

You can use the Dashboard to capture a wide variety of metrics by selecting different options. This procedure provides the basic steps for generating metrics. But specifics for capturing different metrics are not provided because of the number of combinations that you can create.

Procedure

1. Log into the Tridion Docs web interface and click the **Dashboard** tab.
2. On the Dashboard, in Source Language, select the way you ’want to view the information.

   Source Language is English. To view the information for other languages, select an option under Translation. The numbers are determined by the metadata assigned to objects in the database. If the metadata is assigned incorrectly, for example, you did not select the right product in the topic properties, the metrics show up incorrectly.

   The results are displayed on the right pane. For example, if you select By Product, the total number of objects for each product are listed. Because of the amount of data on the system, it might take some time to display and update results.
3. **(Optional)** To add another dimension to the metrics, such as searching not just by product but also see the number of objects owned by each author in each project, select an option from the selections under the title on the right pane. For example, Object Type, Status, and Author.

   The page displays the updated results.
4. **(Optional)** To limit the scope of the metrics (for example, maybe you want to capture the metrics for a specific project):
   a. Click **Refine** from the options above the title on the right side of the page.

      The page displays a list of fields on the right pane.
   b. Click the browse button next to the field that you want to use to scope the metrics.
   c. On the dialog box with the value, select the options in **Available values** and move them to the **Selected values** box.
   d. Click **OK**.
   e. To add additional categories to the scope, repeat a through c.
   f. Click **Apply** at the bottom of the list.

   The display changes based on the values you selected.
5. To change or clear the selections you made in step 4, click **Refine** and then select **Clear All** and **Apply**.

Example

Creating reports from the Dashboard

About this task

You can view or save the Dashboard results in a spreadsheet. The charts that you see in the Dashboard display are not included in the report.

Procedure

1. Log into the Tridion Docs web interface and click the **Dashboard** tab.
2. Use the Dashboard to set up and display the results that you want to capture.
3. Click **Export as CSV** from the list above the title on the right side of the page.
4. When the File Download dialog box displays, click **Open** or **Save**.

   The results display in a spreadsheet.

Saving Dashboard selections as favorites

About this task

You can save Dashboard selections as favorites to view updated results whenever you want.

Procedure

1. Log into the Tridion Docs web interface and click the **Dashboard** tab.
2. Use the Dashboard to set up and display the results that you want to capture.
3. Click **Add Favorite**.
4. If you see a message prompting you to allow scripted windows, click the message and select scripted windows temporarily and then click **Add Favorite** again.
5. In the Explorer User Prompt, enter a name for the favorite in the field and click **OK**.

   The saved report displays under Favorites on the left pane. You can get an updated view of the report any time by selecting the report under Favorites.
6. To delete a favorite, click the red X symbol next to the favorite.

Appendix A: Checklists

Project checklists

In the Summer of 2020, the GIS team created a new series of checklists that supplement the checklists shown in this appendix. The checklists are stored on ADMS and should be downloaded and used for every project. When you start a new project, always download a new set of checklists in case the checklists have been updated since your last project was completed.

- Program Owner Checklist – https://adms.avaya.com/documents/192368
- Preparatory Checklist – https://adms.avaya.com/documents/192369
- General Checklist – https://adms.avaya.com/documents/192370
- GA Publishing Checklist – https://adms.avaya.com/documents/192371
- Post-GA Checklist – https://adms.avaya.com/documents/192372

Topic authoring checklist

Use the check list as reference. You do not have to mark each item when you complete the task.

#	Task	✔
1.	Create a new topic in Tridion Docs or check out an existing topic.	
2.	Give the topic a title that is correct for its type. For converted and renamed topics, change the title if it is not correct for the type.	
3.	Insert a comment at the top of the topic to list any topics for which a relationship should be identified. You will create those relationships in the map topics.	
4.	Insert the required content, and tag all the content semantically. If you have any questions on the correct tag to use, look at the tag help or contact your IA.	
5.	Ensure that you are using conrefs and reusable topic elements appropriately, as determined by your project.	
6	Ensure that you add conditions in topics and maps, preview conditions, and select the conditions in the Conditions tab of Publication Manager, as determined by your project.	

Table continues…

#	Task	✔
7.	Add the appropriate index entries.	
8.	Delete any empty elements. For example, if you are working on a task topic and you do not have any prerequisites, delete the prereq element.	
9.	Remove any comments from the default topic or tag template.	
10.	Perform a spell check on the topic (**Edit** > **Check spelling**).	
11.	Perform a completeness check on the topic (**Document** > **Validate**).	

Related links

Creating a new topic on page 70

Checklist for creating a new publication

This checklist provides the high-level process of creating and managing a publication.

Use the check list as reference. You do not have to mark each item when you complete the task.

No.	Task	Description	Notes	✔
1	Open Browse Repository and create the product name folder if the folder is not already available.	Creating a new folder from Browse Repository on page 24		
2	In the product name folder, create a folder for the deliverable, for example, Administering.			
3	Create the following child folders and set the correct content type: • `images` • `maps` • `topics` • `publications`			
4	In the `publications` folder, create a new publication.	Creating a new publication on page 30		

Table continues…

No.	Task	Description	Notes	✔
5	In the `maps` folder, create the following: • One bookmap, called deliverable map • Maps for each chapter and component maps as required	Creating a map on page 44		
6	In the `topics` folder, create topics.	Creating a new topic on page 70		
7	Open the publication and add the deliverable map to the publication.			
8	To each chapter, add maps.	Editing a bookmap on page 55		
9	Add topics to chapter maps.	Adding a topic or map to a map on page 49		
10	Select the output format for the publication.	Selecting the output format for a publication on page 122		
11	Generate and download output as needed. **Important:** Verify the log files attached to the notification email each time for error and resolve them.	• Generating output on page 125 • Downloading output on page 136		
12	Manage the workflow of topics, maps, and images in the publication.	Workflow on page 211		
13	Verify that you select correct versions of objects in the publication.	Use the baseline to view the version of all objects that are used in the publication. See Working with publication baselines on page 223.	**Note:** The Baseline tab does not display branches that are not selected. You can view branches from the version selector in the right pane in the Content tab.	

Table continues…

No.	Task	Description	Notes	✔
14	Freeze the baseline when the deliverable is finalized, and all components have released status.	Freezing the baseline on page 227		
15	Generate the final output.	Generating output on page 125		
	(Optional) Download the final Avaya Book output.	• Avaya Doc Center output: http://documentation.avaya.com. • Avaya Doc Center development output: https://avaya-dev.zoominsoftware.io/. • For Avaya Book: Downloading output on page 136		
16	Release the publication.	Releasing a publication on page 215		

Checklist for releasing a publication

You must release your publications right before or right after you deliver your final content.

You release the publication to:

1. Submit the publication source files to the Localization team for translation.
2. Complete the changes for a product release and publish all documents for GA.

Complete the steps in this checklist each time you release a publication. Failure to complete all the steps can result in issues during the release process.

Note:

This is a mandatory checklist, and you must mark each item when you complete the task.

No.	Task	Notes	✔
1.	Before you prepare the content for release, ensure that you accept or reject change tracking in all topics and turn off the **Use draft output format** option in the output properties.	To check for any final change tracking, you can produce a Validator output.	
2.	In Publication Manager, check the **Newer Version** column in the **Baseline** tab to determine if there are newer versions of the objects that you are using in your publication. If so, determine if you must select the new version and, if so, click **Locate** to find the object in the **Contents** tab and then select the newer version from the list of versions in the upper-right corner.		
3.	Generate output and check the logs attached to the notification email for any errors. For more information on generating output and viewing the publishing logs, see Working with output on page 117.	You must check the logs every time you publish your outputs, not just at the end of the cycle. **Note:** Generate a Validator PDF output to check for issues, such as elements tagged with <b> or <i>, that you must correct before freezing the publication baseline.	
4.	Correct any errors present in the publication log and republish the output.	If you fail to correct any errors, the freeze baseline fails.	

Table continues…

No.	Task	Notes	✔
5.	On the Output tab in Publication Manager, click **View Report** to view the publish report and ensure that there are no errors.	This report might show additional errors that are not in your output logs that could prevent the baseline freeze. Therefore, check the report as you get ready to release your content.	
6.	In Publication Manager, check the **In Folder** column in the publication baseline to determine if you're reusing any objects from other writers. If you are reusing objects from other writers and the Status is anything but Released, contact the writers and inform them when you need them to release their objects. Perform this step ahead of time to give the topic owner time to resolve the error if any.	You can sort the **In Folder** column to see any reused topics that are located in folders for which you do not have write access.	
7.	When you are ready to release the content, try freezing the baseline before releasing the objects. If the freeze operation reports issues, you have the opportunity to make corrections in the content before you release the objects.	Freezing the baseline on page 227.	
8.	Release all objects in your publication that you own.	For information on changing the workflow status of individual objects, see: Changing the workflow status of an object from the Desktop Repository on page 213, Changing metadata in bulk on page 101, or Changing the workflow status when checking in a topic on page 213. You can use the workflow report in the Tridion Docs web interface to change the status of multiple objects simultaneously on page 219.	
9.	Check the **Status** column in the publication baseline to validate that all objects are in the Released state.	You can sort by the **Status** column to identify and locate any objects not in the Released state.	
10.	Freeze the publication baseline.	Freeze the publication baseline on page 227.	
11.	If the Freeze operation fails, check the Freeze Baseline report on page 228 for errors and correct them.		
12.	After you freeze the baseline, produce the output again so that it shows a Release Candidate status when complete.		

Table continues…

No.	Task	Notes	✔
13.	To correct any errors in the baseline freeze, go to the **Output** tab and click **View Report** to view the publish report again and ensure that there are no errors.		
14.	On the Output tab, select the output with a Release Candidate status and click **Release**.		
15.	Repeat steps 11 through 13 for any other output formats for the publication.	After all outputs are released, release the publication.	

Checklist for preparing content for Localization

Ensure that you complete every step in this checklist before you deliver the content to Localization. Some of these items require an investment of time, such as completing an editorial review and the associated updates. If there are items that you cannot complete, ensure that you have discussed those items with your Localization Project Manager. It is critical that you prepare the content well and release by the scheduled date.

Important:

This is a mandatory checklist, and you must mark each item when you complete the task.

Failure to complete these items according to schedule can result in changes after translation, which increases our costs and can cause delays.

No.	Task	Description	✔
Quality checks			
1.	Run a spell check on your content.		
2.	Submit your content for an editorial review and make the updates.		
3.	Run a Validator output on page 130 and ensure that all issues are addressed.		
Content			
4.	Ensure a manual line break at the end of the mainbooktitle is included in the bookmap for publications to be produced as PDF.		
5.	Ensure that all strings from the product interface are set up for reuse.	Reuse and localization on page 187	
6	Ensure that no conrefs used in bookmap titles, topic titles, and index.		
7.	Ensure that you use uicontrol and wintitle: • Only to reference an item on the user interface (UI) • Do not use as common words in a sentence even if you must use the same word or phrase.		
Images			
8.	Ensure that all images with embedded text are created in SVG.	Creating a new vector image in Inkscape on page 367	
9.	Select the **Enable translation management** box in the Properties for all SVG images with text to be translated.	Do not enable translation management for topics or images that do not include text to be translated.	

Table continues…

No.	Task	Description	✔
10.	Validate that all SVG images allow for text expansion.		
11.	Validate that all image elements have alt text on page 255.	Avoid any punctuation marks in the alt text.	
12.	Reuse icons that are used more than once.		
Before you deliver			
13.	Check log files on page 136 and ensure that all errors are corrected.		
14.	Remove all change tracking from topics on page 97.		
15.	Release the publication version.	Checklist for releasing a publication on page 329.	
16.	For a new project, inform the Localization coordinator to get the new user group added to the ServiceUser.		

Related links

Delivering content to localization on page 214

Appendix B: DITA element definitions

DITA element reference

The following table lists frequently used DITA elements, and elements that we can use inline and translate.

A complete list of DITA elements is available in the subsequent sections.

Element	Description	Inline (Y/N)	Translatable (Y/N)
application	To tag application names. Always reference from the common `Applications.dita` topic. Do not add the Application element directly.	Y	Y
cite	To refer the title of a document or article. To refer a topic from the same document, create the relationship table link.	Y	N
choices	Use in table rows and step elements to describe more than one way a user can accomplish a current step.	Y	Y

Table continues…

Element	Description	Inline (Y/N)	Translatable (Y/N)
cmdname	To represent the name of a command used in an application. When the cmdname is part of a command string or a block of code, wrap the entire string in a container element. If the string is: • what the user must enter, use <userinput> as the container, and then tag the command with <cmdname> and variables with <varname>. • a code phrase or block of code, use <codeph> or <codeblock> depending on the string size.	Y	N
codeblock	To present a block of code as an example.	N	N
codeph	To add code snippets within the main flow of text.	Y	N
feature	To tag a product feature	Y	Y **Note:** Do not reuse the feature element in titles, specifically when the title contains only the reused feature element and does not contain any additional text.

Table continues…

Element	Description	Inline (Y/N)	Translatable (Y/N)
ph	Use to organize content for reuse or conditional processing. For example, when part of a paragraph applies to a particular audience.	Y	N **Important:** Avoid using the ph element to prevent any translation issues.
filepath	Use for: • A file, directory, or a directory path. • URL that is not part of an xref.		
msgph	Use for the system message, usually, associated with an ID.	Y	Y
msgblock	Use for multiline system message or a group of system messages.	Y	Y
menucascade	To represent a path or cascade of menus. Usually used as a container for two or more uicontrol elements. For example: <menucascade><uicontrol>File</uicontrol><uicontrol>Print</uicontrol></menucascade>.	Y	Y
systemoutput	Use for system output in response to commands, actions, or queries. If the text must be translated, use msgph or msgblock.	Y	N

Table continues…

Element	Description	Inline (Y/N)	Translatable (Y/N)
uicontrol	To specify the names of elements in a user interface. For example, buttons, field labels, menu items, or any object that allows the user to control the interface. You also use <uicontrol> inside <menucascade>.	Y	Y
userinput	To tell users that they must enter the text. Use <varname> if the text has a variable.	Y	Y
wintitle	To specify the name of a window, dialog box, or the static title on a page. For example, wizard title, wizard page title, section title on a page, and window pane title.	Y	Y
Tip	Additional information to help users better understand the benefits and capabilities of the product or technology.		Y
Product	To tag Avaya or third-party product names. Always reference from the common `Product names.dita` topic. Do not add the Product element directly.	Y	N
Info	To provide additional information about a step. Add the element inside step.	N	Y

Table continues…

Element	Description	Inline (Y/N)	Translatable (Y/N)
xref (cross reference)	To create a link to: • Another topic within the same deliverable. • A different location within the current topic. **Note:** Avoid linking to the content in the same topic to prevent circular references issue that might result in Publication Manager crash.		
xref (web link)	To create a link to an external source such as a web page.		

Tags to annotate content

Element	Description
avaya-note	Use to call attention to neutral information or positive information that: • Supplements the main text • Is valuable information that is independent of the main text
important	Use to call attention to a situation that can cause serious inconvenience.
caution	Use to call attention to situations that can result in harm to software, loss of data, or an interruption of service.
warning	Use to call attention to a situation that can result in harm to hardware or equipment.
danger	Use to call attention to situations that can result in harm to personnel.

Table continues…

Element	Description
esd	Use to call attention to situations that can result in electrostatic discharge (ESD) damage to electronic components. Add the following text as is, and include any additional information in a new paragraph if necessary. **Electrostatic alert:** ESD can damage electronic circuits. Do not touch electronic hardware unless you wear a grounding wrist strap or other static-dissipating device.

Related links

Elements that are not used on page 363

A

abstract

Use to provide a brief overview of the topic to help the user decide whether this topic is relevant to them. Introduce the topic and provide a concise answer to the question "What is this?" and in some cases "Why do I care about this?" Avoid using the abstract to lead in or build up to a topic. Use complete sentence rather than sentence fragments, and do not repeat the title. Avoid starting abstracts with phrases such as "This topic describes . . . ." or "This topic is about . . . ."

Use the shortdesc element for single paragraph with within 50 words.

alt

Use to describe visual elements to users who cannot see them, either because the image failed to load or because they are using a screen-reader.

Use to describe the contents of an image that makes the image accessible to users who use a screen reader.

Use to describe the contents of an image to:

- Make the image accessible to users who cannot see it and use a screen reader.
- Enable search engines to better crawl and rank your website.
- Enable translation tools access alt text easily for translation than the alt attribute.

  Therefore, do not use the alt attribute for alternative image text.

apiname

Indicates the name of an application programming interface (API).

For example, wrap the <apiname> element around a Java class name or method name.

application

Use the <application> element for names of applications, include names of mobile applications, and interfaces within a product. Rather than typing each occurrence of an application, reuse the defined application elements from the reusable elements topic.

C

category

We do not currently use this element.

cause

Use the <cause> element in a resolution topic to describe a possible cause of the issue. A resolution topic can include more than one cause.

caution

As defined in the Avaya Style Guide, use the <caution> element to call attention to situations that can result in harm to software, loss of data, or an interruption of service.

chdesc

Describes a choice presented in a Choice table. Choice tables are part of a task topic.

Use the <chdesc> element in the second column of the Choice table. You must include a <chdesc> element for each <choption> you define.

The text in each <chdesc> element explains why the user would choose that option. The text can also explain the result of the choice when it is not immediately obvious.

chdeschd

Specifies a heading for the Description column in a Choice table. Choice tables are part of a task topic.

If you do not specify a <chdeschd> element, the Description column will display the default heading “Description”.

Use the <cheschd> element with the <choptionhd> element. Both elements must be inside a <chhead> container element.

chhead

Specifies the header row for a Choice table.

The <chhead> element is a container element inside the Choice table. The <chhead> element must contain the two header elements: <choptionhead> and <chdeschd>.

To specify a header row for a Choice table:

1. Use the <chhead> element .
2. Define the <choptionhd> and <chdeschd> elements inside the <chhead> element.

choice

Describes one way that a user can accomplish a current step.

You must define more than one <choice> element. Every <choice> element must included in a <choices> element.

choices

Contains a list of <choice> elements.

Use the <choices> element when a user must choose one of several actions within the steps of a task.

If you are presenting a series of possible actions, use the phrase “Perform one of the following actions” in the step.

choicetable

Contains a series of optional choices available within a step of a task.

Use the <choicetable> element when a user must choose one of several actions within the steps of a task and you want to provide additional information. For example, use the <choicetable> element if you need to explain why the user would choose that option or the result of the choice.

choption

Indicates the name of an option in a Choice table. Choice tables are part of a task topic.

Use the <choption> element in the first column of a Choice table. You must include a <chdesc> element for each <choption> you define.

Each <choption> in a Choice table contains a choice that a user can make to accomplish a step of a task.

choptionhd

Specifies a heading for the Option column of a Choice table. Choice tables are part of a task topic.

If you do not specify a <chdeschd> element, the Option column will display the default heading “Option”.

Use the <choptionhd> element with the <cheschd> element. Both elements must be inside a <chhead> container element.

chrow

Identifies a row inside a Choice table. Choice tables are part of a task topic.

The <chrow> element contains the two row elements: <choption> and <chdesc>.

cite

Use the <cite> element to refer to the title of a book or article. For references to other topics, our best practice is to use a reltable link and no reference. You can still use an xref if it meets one of the criteria.

cmd

Provides the required first element inside a <step>.

The <cmd> element provides the active voice instruction that the user needs to complete a step in a task topic. The text should not be longer than one sentence.

If appropriate, provide context for the action at the beginning of the command, such as “On the Add User page,...”.

If the step requires additional explanation, include that information in an <info> element after the <cmd>.

cmdname

Indicates the name of a command used in an application.

When the <cmdname> is part of a command string or a block of code, the entire string should be wrapped by a container element. If the string is something you're instructing the user to enter, use <userinput> as the container for the string, and then tag the actual name of the command with <cmdname> and any variables with <varname>. If you're presenting a string or block of code, the appropriate container element is <codeph> or <codeblock>, depending on the size.

codeblock

Use <codeblock> for code samples. If you are presenting a block of code as an example, and the semantics of each element within the block of code is not critical in the particular context, you do not have to tag each individual element within the block of code.

In the output, all text you enter in the <codeblock> element has preserved line endings and is displayed in a monospaced font.

If you're using <codeblock> within a step, note that you cannot insert it directly within a <cmd>, but you can insert it in an <info> element after the <cmd> within the step.

If you are directing the user to enter some code, use the <userinput> element instead.

condition

Use the <condition> element to describe the problem, alarm, event, error in a resolution topic if the title doesn’t provide enough information

codeph

Use codeph element for snippets of code within the main flow of text. The code phrase is displayed in a monospaced font for emphasis.

component

We do not currently use this element.

conbody

Provides the main body-level element for a Concept topic.

The <conbody> element can include paragraphs, lists, and other elements. If you use the <conbody> element for a section or an example, you can only follow that element with other sections or examples.

concept

Provides the top-level element for a concept topic that answers the question "what is?" All concept topics must include the <concept> element.

Concepts provide background information that users must know before they can successfully work with a product or interface. A concept can also include an example or a graphic.

condition

Use the condition element to provide a description of the problem or condition within a resolution topic. You can provide one or more recommended corrective actions for each condition.

context

Provides background information for the task. This information helps users understand what the purpose of the task is, when to perform the task, and what they will gain by completing the task. This element should be brief and does not replace or re-create a concept topic on the same subject, although the context might include some conceptual information.

This element is optional and should only be included when a context provides value to the user. If the <abstract> element for the task includes some context information, you can use <context> to elaborate further on that information.

D

danger

As defined in the *Avaya Style Guide*, use the <danger> element to call attention to situations that can result in harm to personnel.

dbitem

Use for database item names. The <dbitem> element appears as plain text in outputs.

dbtable

Use for database table names. The <dbtable> element appears as plain text in outputs.

dd

Describes a term (<dt>) in a Definition list <dl> entry.

You must include a Definition description <dd> element for each <dt> element. Include both elements inside a <dlentry> container element.

A <dd> should provide a simple description. If you require a longer, more complex description, consider using a different element, such as <section> or <subsection>.

ddhd

Provides the heading for a column of descriptions or definitions in a Definition list. This element is optional. You do not need to have a heading on columns in a Definition list.

You must include a <ddhd> element for each <dthd> element. Include both elements inside a <dlhead> container element.

desc

Provides the description for a table or a figure.

The text in the <desc> element must provide more information than the title.

Include a <desc> in a <table> or <figure> element to reuse the description and the <image> within a <figure> element or a <table> element.

dl

Provides a list of terms and corresponding definitions.

Use the <dl> element to provide a brief list of descriptions, such as a list of command parameters or a list of hardware requirements.

You can include an optional Definition list heading <dlhd> in a Definition list. To add a heading to a Definition list, insert a <dlhead> element in the <dl> element before the first <dlentry> element.

dlentry

Defines a list item in a Definition list.

The <dlentry> entry element must include a term <dt> and associated description <dd>.

dlhead

Provides the heading for the term and description columns in a Definition list. This element is optional. You do not need a heading on columns in a Definition list.

The <dlhead> element must contain a heading <dthd> for the column of terms and a heading <ddhd>for the column of descriptions.

draft-comment

Includes any questions or comments that you do not want to appear in the final output.

For example, use the <draft-comment> element for questions to reviewers or comments for the next owner of the topic.

dt

Provides the term in a Definition list <dl> entry.

Each <dlentry> container element includes a Definition term <dt> and its associated description <dd> element.

dthd

Provides the heading for a column of terms in a Definition list. This element is optional. You do not need to have a heading on columns in a Definition list.

You must include a <dthd> element for each <ddhd> element. Include both elements within the <dlhead> container element.

E

email

Use the <email> element for e-mail addresses.

emphasis

Use the <emphasis> element to indicate text that requires emphasis.

Note:

Do not use this element when a semantically specific element is available, for example, uicontrol, cite, and wintitle.

entry

Defines a single cell in a table.

If no data is appropriate for an entry, insert a centered em dash (—) into the cell (**Insert** > **Symbol**) so that the reader knows that the omission is not an error.

esd

As defined in the Avaya Style Guide, use the <esd> element to call attention to situations that can result in electrostatic discharge (ESD) damage to electronic components. Use the first two sentences exactly as those sentences appear in the following example. Add other text if necessary.

Electrostatic alert:

ESD can damage electronic circuits. Do not touch electronic hardware unless you wear a grounding wrist strap or other static-dissipating device.

example

Contains examples that illustrate or support the current topic. The <example> element is a section element.

You can include an example in concept, task, and reference topics.

To create a topic-length example, use the Scenario information type.

This element automatically inserts a heading above the text.

F

feature

Use this element to tag official product feature names. Before using this element, get a definitive list of features from your Product Manager. Do not use the feature element to tag anything other than feature names and do not include anything other than the feature name in the element. For example, do not use the feature name to tag functionality or industry-standard names.

fig

Provides a container element around an <image> element when you want to provide a description <desc> for that image.

Include a <fig> element in a conref to reuse the image and its description.

filepath

Indicates the name of a file, directory, or a directory path.

For example, <filepath>C:\Program Files\Avaya\index.html</filepath> or <filepath>setup.exe</filepath>.

Also use filepath for a URL that is not part of an xref.

In the output, the text you enter in the filepath element is displayed in a sans serif font.

fn

Use footnote (<fn>) to annotate text with notes that are not appropriate for inclusion in line or to indicate the source for facts or other material used in the text.

Don’t use footnotes in table header rows due to an issue in the software we use to produce our PDF outputs (Antenna House).

G

glossdef

Specifies the definition of glossary term within a glossary topic.

glossterm

Specifies the glossary term being defined in a glossary topic.

I

image

Identifies artwork or images in a topic.

The <image> element has optional attributes that indicate whether the graphic or artwork should be:

- Inline, such as a button or icon
- On a separate line, such as a larger image

An href attribute is required on the <image> element. The href attribute creates a pointer to the image, and allows the output formatting processor to bring the image into the text flow.

To make the intent of the image more accessible for users using screen readers or text-only readers, always include a description of the image content in the <alt> element. If you want to include a description of the image for reuse, include the <image> and a <desc> element inside a <fig> element.

important

As defined in the Avaya Style Guide, use the <important> element to call attention to a situation that can cause serious inconvenience.

indexterm

Defines an index entry.

The text in an <indexterm> element is not output as part of topic content.

When you're adding index entries, any index entries that relate to the whole topic should be inserted in the prolog section of the topic. Index entries that apply to a specific section of the topic should be inserted in that element as an inline. This ensures that the link to that index entry goes to the right location in the topic (helpful in cases where the topic is not all contained on the same page in an output). It also ensures that the index entry is moved or deleted with the content that it relates to.

To create multi-level indexes, nest the elements as follows:

<indexterm>users

<indexterm>adding</indexterm>

</indexterm>

Nest index entries to one level only.

info

Provides additional information about a step.

Always use the <info> element inside a <step> element.

K

keyword

<keyword> represents a word or phrase with relevance to the content. This is useful for identifying things like terms not used in the product that a user might search for (for example, a user might search for an industry-standard term instead of the feature name Avaya has assigned to something). Keywords are searchable in our HTML outputs. Providing industry-standard terms and other additional relevant terms as keywords in the prolog will improve the findability of our HTML content and help the user locate the right topic.

keywords

The <keywords> element contains a list of key words (using indexterm or keyword elements) that can be used by a search engine.

L

li

Identifies a single item in a list.

An <li> element can be a list item in an ordered <ol> or unordered <ul> list.

List items should:

- Start with a capital letter, unless the first word is context-sensitive and lowercase.
- Ensure that each item in the list is parallel in both purpose and structure.

- When possible, ensure that items in a list are either all sentence fragments or all complete sentences, and not a mixture of both. If you must include both sentences and sentence fragments, end each entry in the list with a period. In a list that consists of sentence fragments only, do not include punctuation at the end of any item, including the last item.

lq

The long quote (<lq>) element indicates content quoted from another source. Use the quote element <q> for short, inline quotations, and long quote <lq> for quotations that are too long for inline use, following normal guidelines for quoting other sources. You can store a URL to the source of the quotation in the attribute.

M

menucascade

Indicates a series of menu choices.

The <menucascade> element can contain one or more <uicontrol> elements. For example: <menucascade><uicontrol>File</uicontrol><uicontrol>Print</uicontrol></menucascade>. If the <menucascade> element includes more than one <uicontrol> element, connecting characters are inserted automatically between the menu items to represent the menu cascade.

metadata

The <metadata> section of the prolog contains information about a topic such as audience and product information. Metadata can be used by computational processes to select particular topics or to prepare search indexes or to customize navigation.

msgblock

Identifies a multi-line system message or set of system messages.

The <msgblock> element can contain multiple message number <msgnum> elements. The <msgblock> element can also contain just the text of the message.

msgnum

Contains the number or identifier of a message produced by an application or program.

The <msgnum> element is an optional element inside a <msgblock> element.

Use the <msgnum> element with the message description <msgph> element.

msgph

Identifies the text content of a message produced by an application or program.

The <msgph> element can also contain the variable name (varname) element to illustrate where variable text content occurs in the message.

Use the <msgnum> element within a <msgph> element when you need to include the message number or identifier.

Use <msgph> only for specific messages generated by the system. Use <systemoutput> for general computer output or responses to a command or situation.

N

note-avaya

As defined in the Avaya Style Guide, use the <note-avaya> element as a general note to call attention to neutral information or positive information that:

- Supplements the main text
- Is valuable information that is independent of the main text

You do not want readers to ignore a note. However, use a general note only when the situation that you describe does not have serious consequences for the user who ignores the note. Specifically, do not use notes to call attention to situations that can result in data loss, damage to software or hardware, or harm to personnel. When a situation is that serious, use the appropriate admonishment.

O

object

DITA's <object> element corresponds to the HTML <object> element. The <object> element allows authors to include animated images, applets, plug-ins, ActiveX controls, video clips, and other multimedia objects in a topic for rendering after transformation to HTML. In our environment, we use the object element when projects need to embed external tutorial files in a topic.

ol

Provides an ordered list. Items in an ordered list are numbered and sorted by sequence or order of importance.

The <ol> element must contain one or more <li> elements.

option

Use the option element for command line interface options. However, make sure you use userinput element for any text entries that you explicitly tell the user to make.

P

p

Indicates a paragraph element. Each paragraph is a block of text containing a single main idea.

Some elements automatically include a <p> element.

parml

Use the parameter list (<parml>) element to document a list of terms and definitions that describes the parameters for a command or an API. Parameter lists contain a series of parameter entries <plentry>.

If you are referencing the name of a parameter within the text flow of your topic or in a syntax, use <parmname>.

parmname

Use <parmname> when referencing the name of a command parameter or API parameter within the text flow of your topic or in a syntax.

If you're documenting a list of parameters and their descriptions, use <parml>.

partdesc

Use the <partdesc> element to define the heading of the description column in a parts table. The default value for this element is **Description**.

parthead

The <parthead> element defines the heading row of the parts table and includes the <partname> and <partdesc> elements.

partname

Use the <partname> element to define the heading of the name column in a parts table. The default value for this element is **Name**.

partrow

The <partrow> element contains <partname> and <partdesc> elements that you can use to provide the names and descriptions in a parts table.

parttable

Use the <parttable> element within a structure topic type to create a parts table that describes the components of a container of some kind, such as a product interface or a hardware component. The <parttable> element contains the <parthead> and multiple <partrow> elements.

ph

The phrase (<ph>) element is used to organize content for reuse or conditional processing (for example, when part of a paragraph applies to a particular audience).

Take care not to overuse the <ph> element for reuse to the point that it becomes difficult to manage and maintain. See Guidelines for reusing content on page 188 for more information about reuse through conrefs.

pd

Use a parameter definition (<pd>) to provide a command or API parameter term description within a parameter list entry (<parml>). Each <pd> must have a corresponding parameter term (<pt>).

If you are referencing the name of a parameter within the text flow of your topic or in a syntax, use <parmname> instead of a parameter list.

platform

The <platform> metadata element contains a description of the operating system and/or hardware related to the product being described by the <prodinfo> element.

plentry

The parameter list entry element (<plentry>) contains one or more parameter terms and definitions (pd and pt) within a <parml>. Parameter entries document terms and definitions that describes the parameters for a command or an API.

postreq

Describes steps or tasks that the user must perform after the successful completion of the current task.

The <postreq> element is optional. This element automatically inserts a heading above the text.

pre

Use <pre> for samples of preformatted ASCII outputs, such as log files or report outputs.

In the output, all text you enter in the <pre> element has preserved line endings and is displayed in a monospaced font.

Do not use <pre> for code samples; use <codeblock> instead because it is more semantic.

prodinfo

The <prodinfo> metadata element in the prolog is a container for prodname, platform, featnum, component, vrmlist.

prodname

The <prodname> metadata element contains the name of the product that is supported by the information in this topic.

prereq

Describes steps or tasks that user must perform before starting the current task. Do not include concept or reference information in a <prereq> element.

The <prereq> element is optional. This element automatically inserts a heading above the text.

product

Use the <product> element for names of products. Rather than typing each occurrence of a product name, reuse the defined product elements from the team reusable elements topic.

propdesc

Provides a short description of a property type and its values in a properties table. Properties tables are part of reference or structure topics.

You must use the <propdesc> element with a <property> element.

Tip:

You can also use the <propvalue> element to provide the values for the property type.

propdeschd

Specifies a heading for the Description column in a properties table. Properties tables are part of reference or structure topics.

You must use the <propdeschd> element inside a <prophead> container element.

properties

Provides a list of properties, typically rendered in a table format. Properties tables are part of reference or structure topics.

Each property in a <properties> element can include the type, value, and a description.

To represent multiple values for a type, create additional property elements. Use the <propvalue> element for each successive value. You can also use <propdesc> when needed.

property

Defines a property in a Properties table. Properties tables are part of reference or structure topics.

The <property> element contains three optional elements: type, value, and description.

prophead

Specifies the header row for a Properties table. Properties tables are part of reference or structure topics.

The <prophead> element is a container element inside the Properties table. The <prophead> element can contain the following header elements: <propdeschd>, <proptypehd>, and <propvaluehd>.

proptype

Defines the type for the current property in a Properties table.

proptypehd

Specifies a heading for the Type column in a Properties table.

You must use the <proptypehd> element inside a <prophead> container element.

propvalue

Defines the value or values of the current property type in a Properties table. Properties tables are part of reference or structure topics.

If each value for the property needs a separate description, enter the values in separate rows of the table and leave the <proptype> element blank.

propvaluehd

Specifies a heading for the property value column in a Properties table. Properties tables are part of reference or structure topics.

You must use the <propvaluehd> element inside a <prophead> container element.

pt

Use a parameter term (<pt>) to provide a command or API parameter term name within a parameter list entry (<parml>). Each <pt> must have a corresponding parameter definition (<pd>).

If you are referencing the name of a parameter within the text flow of your topic or in a syntax, use <parmname> instead of a parameter list.

Q

q

A quotation element (<q>) indicates content quoted from another source. This element is used for short quotes which are displayed inline. Use the long quote element (<lq>) for quotations that should be set off from the surrounding text. If the quote ends a sentence, do not include the period within the <q> element unless it is part of the actual quote.

Do not use the q element to:

- Text reference to other topics.

  Instead, you can reference other topics using a relationship table or an xref element.
- Set off new words or phrases you are introducing. For example, to quote someone else.
- Highlight or emphasize a phrase or a word.

R

refbody

Provides the main body-level element for a Reference topic.

The <refbody> element can include the following elements in any sequence or number:

- Simple and standard tables
- Property lists
- Generic sections
- Generic examples

report-element

Use this element to tag elements in a report output, such as the report column title, the data elements in the report, etc. These elements are not for elements in the product interface that are used to generate the reports. Instead, these elements are for resulting reports that are generated.

report-name

Use this element to tag the names of reports that are generated by a product.

reference

Provides the top-level element for a reference topic, which provides necessary facts about a subject. All reference topics must include the <reference> element.

Reference topics typically provide facts that a user needs to successfully complete a task or to work with a product or interface. For example, a reference topic can include commands and field descriptions. A reference topic cannot include an explanation of concepts or procedures.

related-links

Provides links to the related information of a topic.

In the output, the related links are displayed at the end of the topic similar to the relationship table links. You must add the link to topics in related-links/link/link text element.

relcell

Identifies a cell in the Relationship table.

A <relcell> element contains <topicref> elements. These elements are related to <topicref> elements in other cells of the same row.

By default, <topicref> elements in the same cell are not related to each other. To make <topicref> elements in the same cell related to each other, you must change the collection-type attribute of the <relcell> element.

relcolspec

Defines a column in a Relationship table.

Use the <relcolspec> column definition to set the default attributes for <topicref> elements in the column. For example, set type="concept" to treat all untyped <topicref> elements in the column as concepts.

relheader

Identifies a row of column definitions in a relationship table. Each column definition is a <relcolspec> element inside the <relheader> element.

Each relationship table can have only one set of column definitions.

relrow

Identifies a row in a relationship table.

The <relrow> element creates a relationship between the cells in the row. In the output, this relationship is expressed as links among the <topicref> elements in the cells.

reltable

Identifies a relationship table, which defines the relationships between topics.

The <reltable> is based on the table model of the following elements:

- Rows contained in <relrow> elements
- Columns identified by <relheader> elements
- Cells contained in <relcell> elements

The <relcell> elements can contain <topicref> elements. <topicref> elements are then related to other <topicref> elements in the same row. <topicref> elements do not have to be in the same cell.

By default, the contents of a <reltable> element are not output for navigation purposes or in the table of contents. The contents of the <reltable> element define relationships that are output as related topic links.

See Relationship tables overview on page 175 for a more detailed description of relationship tables.

remedy

Use the <remedy> element within a resolution topic to provide steps to solve the issue. You can include more than one remedy in a resolution topic if there’s more than one possible solution. The elements used are the same as for steps in task topics.

resolution

Use the resolution topic type to provide information about detecting and resolving product issues, events, alarms, and errors. The resolution type can include an identifying name or number, a description, and one or more recommended resolutions.

When creating a new resolution topic, use the Resolution tag template.

resolutionbody

The <resolutionbody> element is the main body-level element of a resolution topic. The <resolutionbody> element allows the <condition>, <corrective-action>, <example>, <postreq>, and <result> elements.

required-cleanup

Provides a placeholder for cleanup that needs to be take place after a conversion.

Clean up the text or other content contained in this element and delete the element from the topic.

result

Describes the expected outcome of the current task.

Do not use the <result> element to describe the outcome of a step in the task. Do not include concept or reference information in a <result> element.

The <result> element is optional.

S

section

Represents an organizational division in a topic. Sections are not available in task topics.

Use sections to organize subsets of information that are directly related to the topic. You can include multiple <section> elements in a topic. However, the sections do not represent a hierarchy. They represent peer divisions of that topic.

You cannot nest sections. You can modify the attributes of a <section> element to add a title to a section.

security

As defined in the Avaya Style Guide, use the <security> element to call attention to situations that can increase the potential for unauthorized use of a telecommunications system.

shortcut

Identifies a keyboard shortcut for a menu or window action inside a <uicontrol>. The character that you identify as a shortcut is underlined.

For example, <uicontrol><shortcut>P</shortcut>rogram</uicontrol>.

shortdesc

The short description represents the purpose or theme of the topic, using which readers can determine whether a topic might be of interest to them. You can add the element both in topics and maps.

Keep the short description to a single, concise paragraph with one or two sentences of about 50 words. Otherwise, use the <abstract> element to provide richer content around the <shortdesc> element.

shortdesc is used in link previews and HTML outputs as hover text, and in search results.

simpletable

Creates tables with a s structure that do not need a caption.

The <simpletable> element must contain the following elements:

- An <sthead> element to define for column headings.
- One or more <strow> elements to define for rows of data in the table.
- One or more <stentry> elements to define table cells.

Use <simpletable> instead of table whenever possible. If you do require a more complex table, use the <table> element.

Do not include tables within the paragraph element for the preceding paragraph. Make sure that you insert any tables after the closing tag.

simple-equation

Use the <simple-equation> element when you are including a simple equation in your content.

sstitle

Provides the heading in a <subsection> element.

This element is automatically inserted when you select the <subsection> element. The <sstitle> element is only supported for use within a <subsection> element. If you select <sstitle> in any other context, auto-generated text warns you that this element is only supported with a <subsection>.

stentry

Represents a single table cell in a simple table.

Use the <stentry> element in the <simpletable> element. You can place any number of <stentry> cells in the following elements:

- An <sthead> element if the cell will be part of a column heading.
- An <strow> element if the cell will be part of a table row.

step

Represents a particular action that a user must complete to accomplish the overall task in the topic.

Each <step> element task must contain a command <cmd> element. The step element can also contain the following optional elements:

- <info> element for additional information
- <substep> element for one or more substeps
- <stepxmp> for an example related to the step
- <choices> for choices that need to be made during the step
- <stepresult> for the rare occasion when the result of the step is not obvious

If a step is optional, insert the word Optional in parenthesis at the beginning of the step.

stepresult

Provides useful information on the expected outcome of a step.

Only use the <stepresult> element if the result is not obvious and only when the result will provide value to the user.

steps

Provides the main content of a task topic.

The <steps> section includes a series of steps that the user must follow in the specified order to accomplish the task. The <steps> section of a task must contain one or more <step> elements.

stepsection

The <stepsection> element provides expository text before a step element. This element is useful if you need to describe a series of upcoming steps or if there's important information you need to include before a step that isn't appropriate to include in the previous step. This element should not be used to insert a title before a group of steps. In the output, the stepsection appears without a step number.

steps-unordered

Contains one or more steps that must be performed to complete a task.

Use the <steps-unordered> element when the order of steps may vary from one situation to another, or when the task requires only a single step.

The <steps-unordered> element must contain one or more <step> elements.

stepxmp

Describes an example that illustrates how to perform a step in a task. The example can be a single sentence or an entire paragraph.

Do not use the <stepxmp> element to provide an example of the entire task. Use the <example> element to provide an example of the entire task.

sthead

Specifies the header row for a simple table.

The <sthead> element is a container element inside the simple table.

The header row is optional in a simple table.

strow

Identifies a row in a simple table>.

The <strow> element must contain at least one <stentry> element.

structbody

The <structbody> element is the main body-level element for a structure topic. The <structbody> element allows <structbody> and <required-cleanup> elements.

structsection

The <structsection> element represents an organizational division in a topic. Sections are used to organize subsets of information that are directly related to the structure. Multiple sections within a single topic do not represent a hierarchy, but rather peer divisions of that topic. Sections cannot be nested and may have an optional title.

structure

Use the structure topic type to describe the components of a container of some kind, such as a product interface or a hardware component. For a user interface, this can include application fields and icons, report fields, etc. For hardware components, this can include a list of components of a server or an image followed by a description of the image contents.

When creating a new structure topic, use the Structure tag template.

sub

Indicates that the text must be subscripted, or placed lower in relationship to the surrounding text.

The <sub> element determines the appearance of the text in the output.

subsection

Use this element to create run-in headings, where the text of the paragraph immediately follows the title and the entire contents is contained with the <subsection> element. <subsection> should only be used for single paragraphs.

The difference between <section> and <subsection> is related to the scale of the content. You should use <section> when you need to break the topic into parallel groups of content, basically creating a level of hierarchy in the topic. Use <subsection> when you have a group or list of items that with titles that don’t require breaking the topic into major groupings or creating another level of hierarchy.

Never add additional paragraphs after the subsection element that you intend for the sstitle to be grouped under. The subsection element is intended only for use as a run-in heading, and no additional structure or paragraphs should be added.

substep

Indicates an action that is part of a step.

The <substep> element has the same structure as a <step>. However, you cannot include lists of choices or substeps within a <substep> element. This restriction prevents unlimited nesting of steps.

You must contain a <substep> element inside a <substeps> element.

substeps

Breaks a step down into a series of separate actions.

Only use the <substeps> element after you have tried to describe the steps of a task in a single level of steps. If you need to use more than one level of substep nesting, rewrite and simplify the task.

The <substeps> section of a task must contain one or more <substep> elements.

sup

Indicates that the text must be superscripted, or placed higher in relationship to the surrounding text.

The <sup> element determines the appearance of the text in the output.

systemoutput

Identifies computer output or responses to a command or situation. This is typically intended for messages that come out from scripts or a command line, such as the Windows command line.

Do not use the <systemoutput> element for messages generated by an application, use the <msgph> element instead.

In the output, all text you enter in the <systemoutput> element is displayed in a monospaced font.

T

table

Presents tabular information in a standard table markup.

The <table> element column or row spanning and table captions or descriptions. Use the optional <desc> element inside the table element to add a description of the table to be included when you conref the <table> element.

Use the <simpletable> element for tables that do not require complex presentation, such as spanning.

Avoid decision tables, which are also known as “if-then” tables. The format of a decision table is to use the table headings to begin and complete a “sentence.” Many languages do not support this sentence-like structure. Use <choicetable> for these types of tables instead.

Do not include tables within the paragraph element for the preceding paragraph. Make sure that you insert any tables after the closing tag.

task

Provides the top-level element for a task topic that answers the question of "how to?" All task topics must include the <task> element.

Task topics typically provide step-by-step instructions that enable a user to perform a task. A task must tell the user precisely what to do and specify the order in which to perform the steps.

taskbody

Provides the main body-level element for a Task topic.

The <taskbody> element must include steps.

tbody

Contain the rows in a table.

The <tbody> element must include one or more <row> elements.

tgroup

Contains column, row, spanning, and the body elements of a table.

The <tgroup> element must include a <tbody> element.

thead

Defines the heading row in a complex table.

The <thead> element must precede the <tbody> element.

tip

As defined in the Avaya Style Guide, use the <tip> element to provide information that helps users apply the techniques and the procedures that are described in the text. Information in a tip can include keyboard shortcuts, or alternative methods that might not be obvious. You also can use tips to help users better understand certain benefits and capabilities of the product.

title

Provides a heading or label for the main parts of a topic, a topic itself, or a table or figure.

Use sentence capitalization for topic titles.

tm

The trademark (<tm>) element in DITA is used to markup and identify a term or phrase that is trademarked. Trademarks include registered trademarks, service marks, slogans and logos. When you insert a trademark, the Modify Attributes dialog box displays so that you can select the trademark type.

topicgroup

Creates groups of <topicref> elements.

The <topicgroup> element does not affect or imply a structural hierarchy of <topicref> elements. The <topicgroup> element is typically used outside a hierarchy or within a relationship table to identify groups for linking without any impact on the table of contents or the navigation output.

Tip:

To imply a structural hierarchy, nest <topicref> elements within a <topicref>.

topichead

Provides a title-only entry in a navigation map.

Use the <topichead> element as an alternative to the fully-linked title provided by the <topicref> element.

U

uicontrol

Indicates the names of elements in a user interface.

For example, use the <uicontrol> element to identify buttons, entry fields, menu items, or other objects that allow the user to control the interface. The <uicontrol> element is also used inside the <menucascade> element to identify a sequence of menu choices in a nested menu, such as **File** > **New**.

In the output, all text you enter in the <uicontrol> element is displayed in bold text.

ul

Provides an unordered list. Items in an unordered list are bulleted. The sequence or order of importance of an unordered list is not significant.

The <ul> element must contain one or more <li> elements.

Do not include lists within the paragraph element for the preceding paragraph. Make sure that you insert any unordered lists after the closing tag.

userinput

Indicates the text a user must input or keys the user must press. For example, use the <userinput> element to identify user-entered text in a UI or a command-line interface. This includes when you are specifying a range of entries.

In the output, all text you enter in the <userinput> element is displayed in a monospaced font.

Tag any code that you are presenting as an example and are not instructing the user to enter with the <codeblock> or <codeph> element instead of <userinput>.

V

varname

Identifies a variable in the text.

The variable is text that will be different, depending upon something that cannot always be predicted in the documentation, such as a system configuration. For example, use the <varname> element to identify a variable in a user input command.

In the output, all text you enter in the <varname> element is displayed in italics.

version

You can use the <version> element to tag the number of the version. This element can be useful for reuse so that you can easily change the version number used in topics. Only include the number in the element; do not include any text such as the words “version” or “release”.

voice-prompt

Use the <voice-prompt> element to indicate audio prompts voiced by a system, such as messages voiced by a messaging system's telephone user interface.

voltage

use the <voltage> element to warn of situations in which a high voltage can cause physical injury and/or damage equipment.

vrm

The vrm empty element contains information about a single product's version, modification, and release, to which the current topic applies.

vrmlist

The <vrmlist> element contains a set of <vrm> elements for indicating the version, release, and modification information for multiple products or versions of products to which the topic applies.

W

warning

As defined in the Avaya Style Guide, use the <warning> element to call attention to a situation that can result in harm to hardware or equipment.

wintitle

Identifies the names of windows, dialog boxes, or other static titles on a page.

For example, you can use the <wintitle> element to identify wizard titles, wizard page titles, section titles on a page, and window pane titles.

X

xref

Creates a link to a different location.

The href attribute in the <xref> element provides the location of the target.

You can use the <xref> element to create a link to:

- A different topic within the same deliverable.
- An external source such as a web page.
- A different location within a topic.

Note:

Referencing a location within the same topic might create circular references. When circular references in a publication reach a threshold, the publication might fail to open. Therefore, avoid adding links to content within a topic.

Use relationship tables to create relationship between topics in a document. Use the <xref> element only when necessary. See Cross-reference links in topic on page 170 for guidance about when to use an xref.

Elements that are not used

This is an evolving list, visit this section for latest additions to the element list.

The following list contain elements you might see in Oxygen XML Author that we do not use:

- b
- i
- indextermref
- sl and sli
- synonym
- version

Appendix C: Creating SVG images using Inkscape

Creating SVG images using Inkscape

Introduction

Scalable Vector Graphics (SVG) is an XML-based image format.

- SVG images have higher resolution than png and gif images. Therefore, have high image quality.
- SVG is XML-based, therefore, you can extract and translate the text from an SVG image.

Inkscape is an open-source SVG tool similar to Adobe Illustrator or CorelDraw. Inkscape is available to download and use at no cost and produces clean SVG files.

Use Inkscape as the image tool to create and edit SVG images.

Using Inkscape, you can create images and save them as `.svg`. When you produce a PDF output, the SVG image will be included. When you produce an HTML output, the SVG image will be automatically converted to a `png` image if the browser does not support SVG.

Example

For more information about features such as layers and groups, see the resources available from the **Help** menu in Inkscape, such as a Tutorial, User Guide, and FAQ

Note:

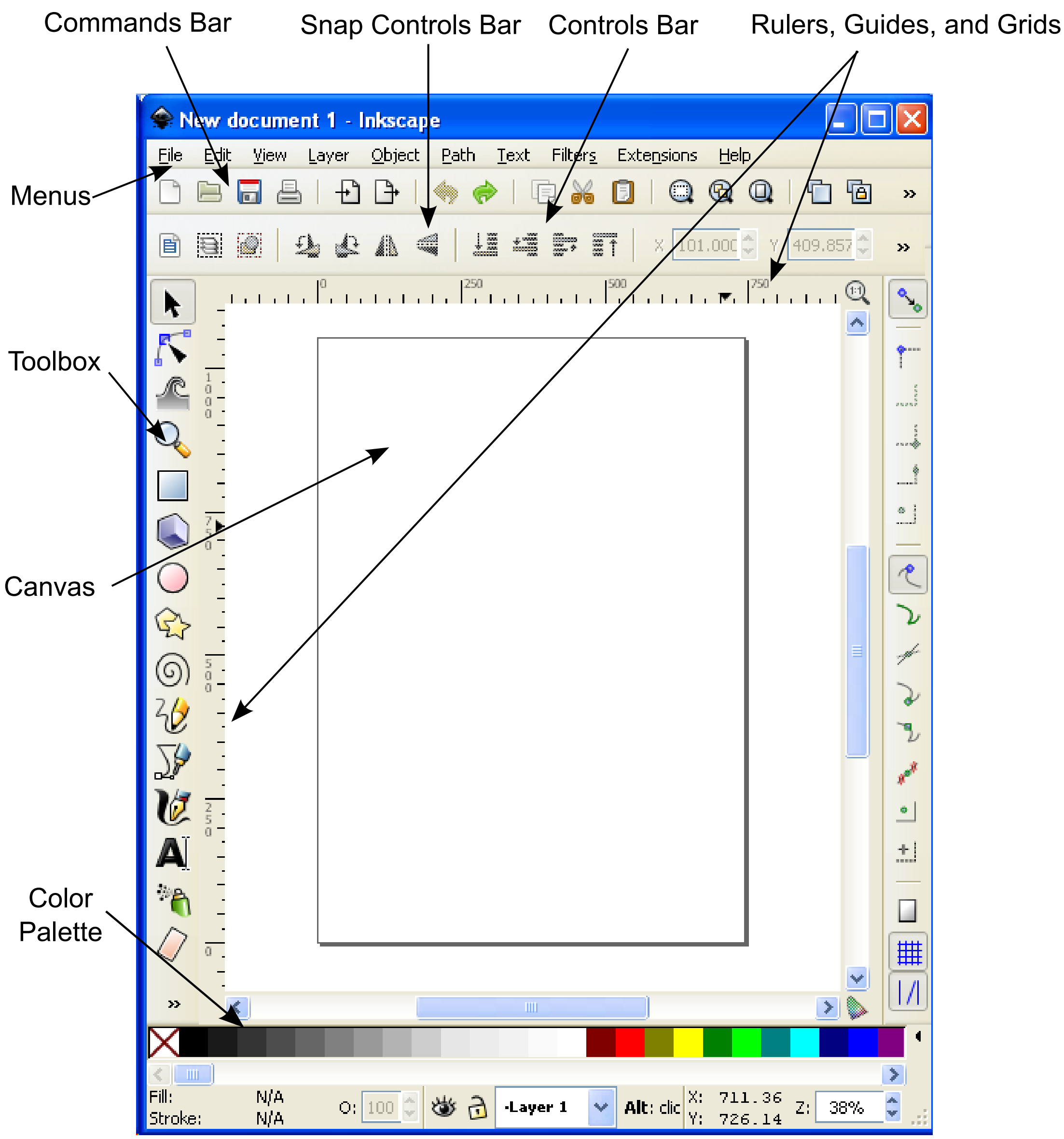
When you preview topics in Editor or Publication Manager, if the SVG images does not display or displays a small box with a red x instead, ensure that the image is correct in the output. Otherwise, fix the issue.

Using Inkscape you can create images and save them as `.svg`.

- When you produce a PDF output, the output includes the SVG image.
- When you produce an HTML output, the SVG image will be automatically converted to a `png` image if the browser does not support SVG.

The Inkscape interface

The Inkscape interface provides a drawing area and a collection of toolbars, palettes, and guides to help you create illustrations.



The following section list the functions of the main tools in Inkscape.

Name	Description
Menus	Provides access to all of the functionality available in the tool. The options available from the toolbars and toolboxes is also available from the main menus.
Commands Bar	Contains shortcuts to commands otherwise accessible from the menus or shortcut keys. It also provides other controls for manipulating the document and drawing objects.

Table continues…

Name	Description
Snap Controls Bar	Lets you easily align items (snap to guides), force objects to align to paths (snap to paths), or snap to bounding boxes and edges.
Rulers, Guides, and Grids	Guides along the topic and left side of the interface to help you size illustrations.
Tool Controls Bar	Selecting a tool in the Toolbox changes the Tool Controls Bar to show the options associated with that tool. Depending on context, some of these options affect a selected object while some take effect only when drawing a new object; others can affect either existing or new objects.
Canvas	The drawing area. It can be extended outside the viewable area and can be panned (scrolled left/right and up/down) and zoomed.
Toolbox	Main editing controls that contains the basic set of drawing utilities, including those for creating and editing shapes.
Color Palette	Controls fill and stroke color options . Colors can be dragged from the palette onto objects to change their Fill. Using the Shift key while dragging will change the Stroke color instead. The color used by some tools can be set by clicking on a color swatch.

The Inkscape toolbar

The Inkscape Tools or Controls bar is the main editing tool. It contains the set of tools for drawing and editing objects.

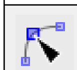
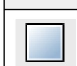
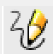
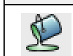
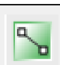
Icon	Name	Function
	Selector	Selects objects with the mouse.
	Node tool	Edits individual nodes of an object to resize, morph the object.
	Sculpt or tweak tool	Changes the shape or style of only those objects (or parts thereof) that the tweak brush touches.
	Zoom tool	Zooms in, out, and fit the drawing in the viewable area of the canvas.
	Rectangle tool	Creates four-sided polygons. Use `Ctrl+drag` to draw squares.
	3D box tool	Draws 3D objects.

Table continues…

Icon	Name	Function
	Ellipse tool	Creates polygons with infinite number of sides . `Ctrl+drag` to draw perfect circles.
	Star/Polygon tool	Draws stars and other multi sided polygons.
	Spiral tool	Creates spirals.
	Pencil tool	Draws lines both straight and freehand.
	Bezier or pen tool	Draws lines.
	Calligraphy tool	Draws calligraphic characters.
	Paint bucket tool	Edits or fills an object color.
	Text tool	Creates text objects from keyboard input.
	Connector tool	Draws lines connecting two or more objects.
	Gradient tool	Adds and edits linear and radial color gradients of an object.
	Eye dropper tool	Edits or fills the color of the object.

Downloading and installing Inkscape

Procedure

1. In your Web browser, go to: https://inkscape.org/en/download/windows/
2. Go down to Previous version (0.48.5) and click **installer**.
3. When you are prompted if you want to run or save the file, click **Save**.
4. When the file finishes downloading, run the executable file and choose the default prompts.

Using Inkscape

Creating a new vector image in Inkscape

About this task

Some sample Inkscape graphics are available in Tridion Docs under `Samples/SVG Library`. You can use these examples as a starting point for images that you create by duplicating the image or using the Check Out With option to open the drawing in Inkscape, then save it locally as a new file, and undo your checkout. After you modify the drawing, you can then import it into Tridion Docs.

Procedure

1. Open an Inkscape window or, if Inkscape is already open, select **File** > **New** > **Default**.

   The system opens a new file.
2. To change the document size, click **File** > **Document Properties**.
3. Set **Page orientation**, **Page size**, or create a custom size by setting the **Width** and **Height** in the **Custom size** section.
4. To remove white space around the image:
   a. Select the elements in the image (you can select **Edit** > **Select All**.
   b. In the Document Properties, expand **Resize page to content**.
   c. To leave a margin around the selection, use the margin fields.
   d. Click **Resize page to drawing or selection**.
5. To change the units of measure in the file, change the **default units** under General.
6. When you finish working on the file:
   a. Select **File** > **Save**.

      The Save dialog displays.
   b. In **File name**, type a name.
   c. Leave the **Save as type** field as **Inkscape SVG (*.svg)**.

      Important:

      Do not save graphics as **Compressed Inkscape SVG (*.svgz)** or **Compressed Plain SVG (*.svg)**. Our environment does not support compressed formats.
   d. Click **Save**.

Related links

Importing images on page 259

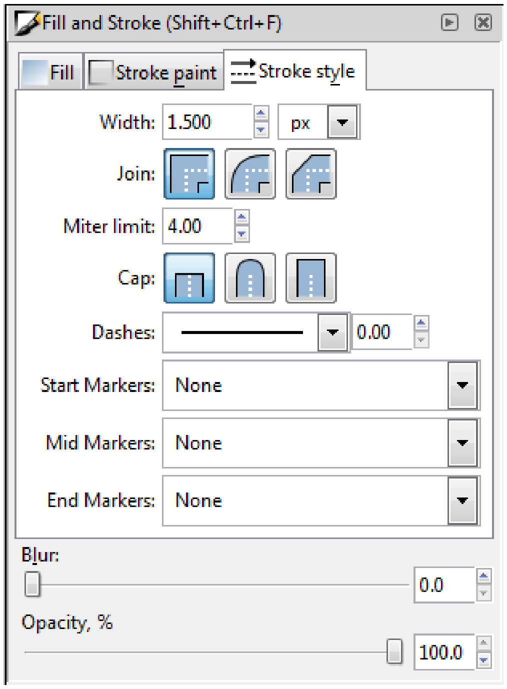
Drawing shapes

Like other drawing programs, Inkscape offers creation of basic shapes, such as ellipses, rectangles, stars, polygons, and spirals, as well as the ability to transform and manipulate these basic shapes by rotation, stretching, and skewing.

Procedure

1. Click on the shape in the left tool pane, drag it to the canvas, and drop it.
2. Click the selector tool , select the shape, and resize using the arrows.

3. To change the appearance of the shape, select **Object** > **Fill and Stroke**) to open the Fill and Stroke panel.



- Use the Fill tab to select a solid color, a linear or radial gradient, or no color.
- Use the Stroke paint tab to change the color of the outline of the shape or click X to choose to not have an outline.
- Use the Stroke style tab to change the appearance of the line to 1.5 px, which is our standard line width.

4. To close the Fill and Stroke panel, click the X in the upper-right corner of the panel.

Drawing a diamond shape

About this task

Diamond shapes are common used in flow diagrams, and can be easily created in Inkscape starting with a standard rectangle.

Procedure

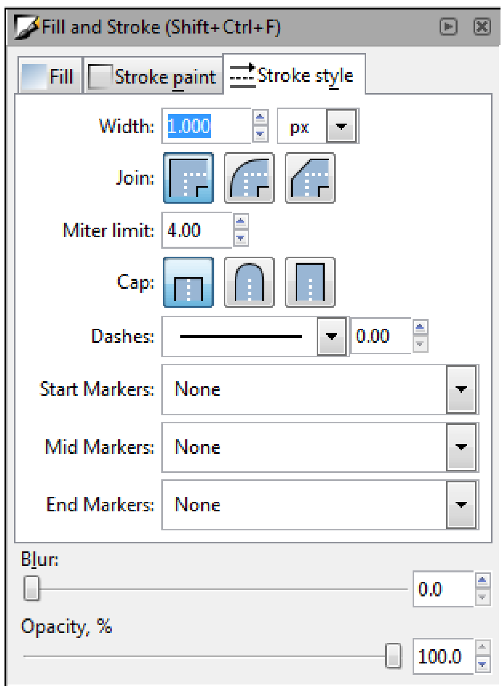
1. Select the rectangle tool.
2. Hold down the `Ctrl` key and drag to create a square.

   Holding down the `Ctrl` key while creating the shape forces it to a square.
3. To convert a square to a triangle, select the **Selector** tool, then click the square twice to get the rounded arrows, and rotate while holding down the `Ctrl` key.

Drawing lines

Procedure

1. Select the Bezier tool .
2. Click (not drag) on the canvas where you want the start of the line and then click again where you want the next point of the line.
3. To end the line, press `Enter`.
4. To change the line style:
   a. Select **Object** > **Fill and Stroke** to open the Fill and Stroke panel.
   b. Click the **Stroke Style** tab.
   c. Set the **Width** to **1.00 px**.

   d. Modify the other fields as appropriate.
   e. To close the Fill and Stroke panel, click the X in the upper-right corner of the panel.

Related links

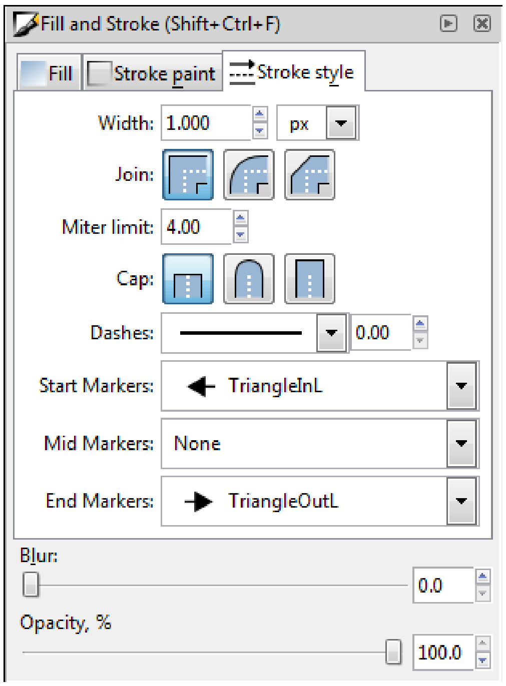
Drawing arrows on page 370

Drawing arrows

To draw arrows in Inkscape, you first draw a line and then you attach the arrowheads to the ends of the line appropriately. If you want to manipulate the line and arrows together, you can group the line and arrowheads into one object.

Procedure

1. Draw a line.
2. Click the Selector tool and select the line.
3. Select **Object** > **Fill and Stroke** to open the Fill and Stroke panel.
4. Click the **Stroke Style** tab.
5. Set the **Start Markers** to **TriangleInL** and set the **End Markers** to **TriangleOutL**.



   If you don't want to add an arrow to one end of the line, leave that field set to **None**.
6. To close the Fill and Stroke panel, click the X in the upper-right corner of the panel.

Related links

Drawing lines on page 370

Embedding text in an object

Inkscape treats text as an object and thus, a text object has attributes that can be set in Inkscape. Therefore, you can extract and replace the text object appropriately during translation.

Important:

Leave sufficient space in your objects for text expansion during translation. You must leave space for at least 20% text expansion, even if the illustration isn't initially going to be translated.

Before you begin

Create the object in which you want to embed the text. For example, create a rectangle with the necessary properties into which you will write the text.

Procedure

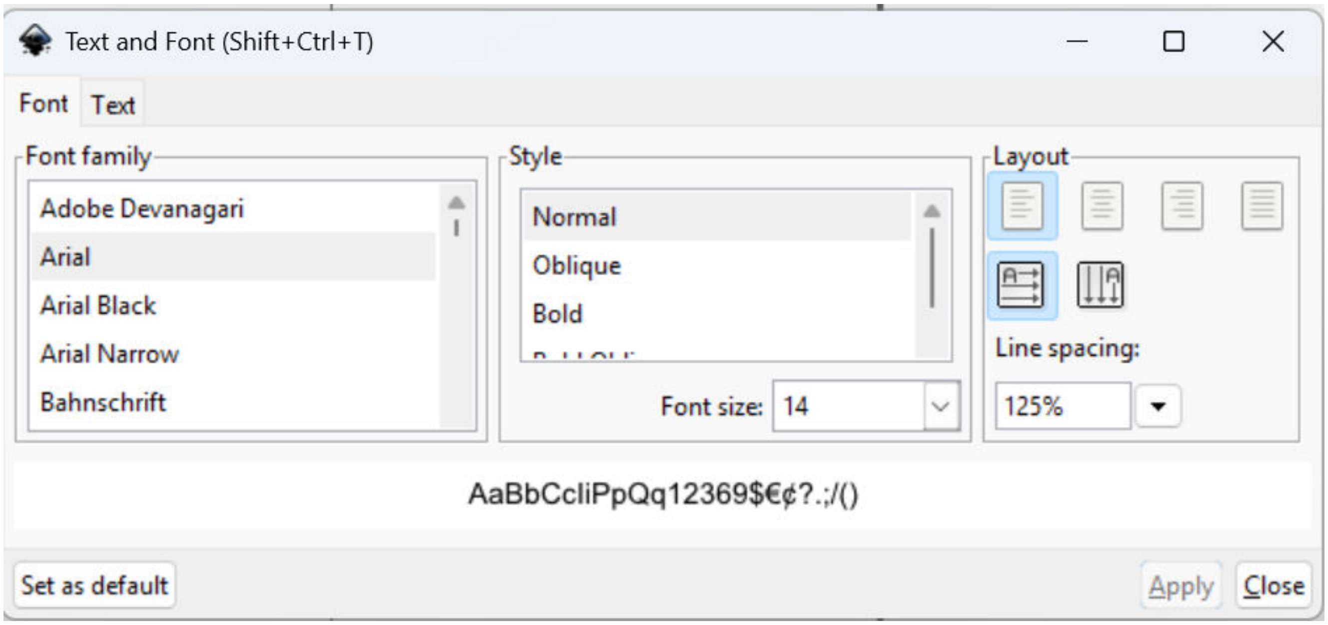
1. Click on the text tool .
2. Position cursor where you need the text to be and start typing.

   Important:

   Do not drag the text tool to create a text box. This creates what's called "flowed text", and this is not fully supported in SVG. If you do this, the text will not appear in the graphic in your output. Instead just position the cursor and start typing as stated in the step.
3. Allow enough space for expansion during translation:
   a. Copy the text you entered and paste it into the shape (typically text won't expand more than double during translation).
   b. Increase the size of the object if necessary.
   c. Remove the second instance of the text.
4. To set the text style and size:
   a. Select **Text** > **Text and Font**.
   b. On the Text and Font dialog, set the **Font family** to **Arial**, the **Style** to **Normal**, and the **Font size** to **14**.

      Note:

      Arial 14 is the required size because it is the minimum size necessary for Asian characters to be readable in translated images. The way Inkscape renders text, a font size 14 actually looks like Arial 11 in other tools. When you set Arial as the font style and set the size to at least 14, select **Set as Default** on the Text and Font panel.
   c. Click **Apply** and then **Close**.



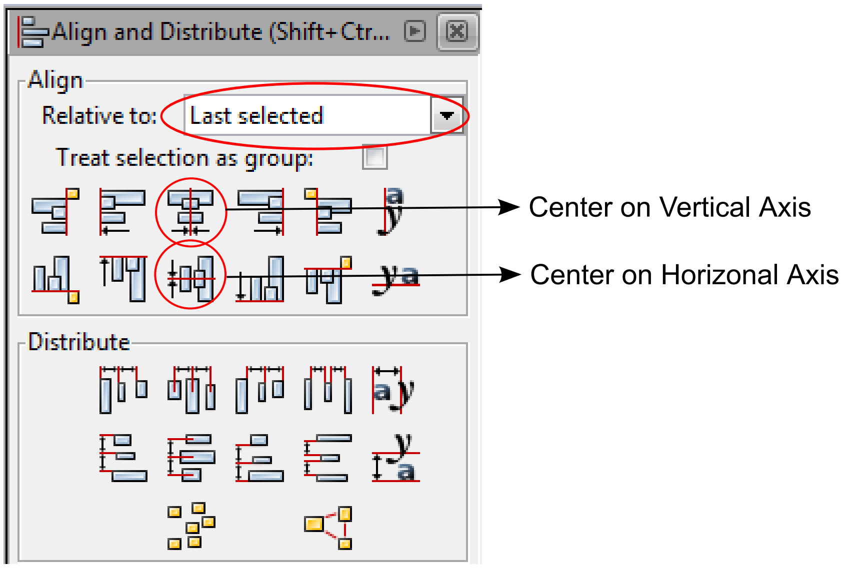
To change the color of the text, select **Object** > **Fill and Stroke** to open the Fill and Stroke panel, change the settings, and click **Apply** and then **Close**.

5. To center the text in the object, do the following:

   a. Select the text object.
   b. Press the `Shift` key and select the object in which you want to align the text.
   c. Select **Object** > **Align and Distribute**.
   d. In the Align and Distribute menu, under Align, select **Last Selected** in the **Relative to** field.
   e. Click **Center on Vertical axis** (icon is third from the left in the first row)
   f. Click **Center on Horizontal axis** (icon is third from the left in the second row).

Example

The figure shows the Align and Distribute menu values for centering the text:



Altering the dimensions of an object

Procedure

1. Click the Selector tool and select the object.
2. Use one of the following methods to modify the object's size:
   - Drag the handles on the object to increase or decrease its size.
   - Use the **X**, **Y**, **W**, or **H** fields in the toolbar above the drawing area to modify the object's size.
3. To skew an object.
   a. Click on the object twice to change the handles.
   b. Drag the handles to rotate and skew the object.

Importing graphics into Inkscape

Inkscape imports non-native files as flattened graphic files, so you can't edit anything within the graphic.

Important:

A non-SVG graphic that you import has lower resolution compared to the SVG graphic created in Inkscape, and the Localization team cannot extract text from non-SVG graphics for translation. Therefore, to build a drawing, import only non-SVG graphics that do not contain text and components.

Procedure

1. Open or create a file in Inkscape.
2. Navigate to **File** > **Import**.

3. The Select file to import menu pops up.
4. Navigate to the graphics file to import.
5. Click **Open**.

   A pop-up menu displays prompting you to select **embed** or **link**.
6. Select **Embed** and click **OK**.

   The selected graphic displays in the Inkscape file.
7. Reposition the imported graphic to ensure it is contained within the work area.

   Inkscape ignores parts that do not lie within the work area.

Menu shortcut keys

Shortcut keys for file manipulation

Shortcut key	Task
`Ctrl+N`	Create a new document
`Ctrl+O`	Open an SVG document
`Shift+Ctrl+E`	Export to PNG
`Ctrl+I`	Import bitmap or SVG
`Ctrl+P`	Print document
`Ctrl+S`	Save document
`Shift+Ctrl+S`	Save under a new name
`Shift+Ctrl+Alt+S`	Save a copy
`Ctrl+Q`	Exit Inkscape

Shortcut keys to open dialogs

Shortcut key	Dialog
`Shift+Ctrl+F`	Fill and Stroke
`Shift+Ctrl+W`	Swatches
`Shift+Ctrl+T`	Text and Font
`Shift+Ctrl+M`	Transform
`Shift+Ctrl+L`	Layers
`Shift+Ctrl+A`	Align and Distribute
`Shift+Ctrl+O`	Object Properties
`Shift+Ctrl+H`	Undo History
`Shift+Ctrl+X`	XML Editor
`Shift+Ctrl+D`	Document Preferences
`Shift+Ctrl+P`	Inkscape Preferences

Table continues…

Shortcut key	Dialog
`Shift+Ctrl+E`	Export to PNG
`Ctrl+F`	Find
`Shift+Alt+B`	Trace Bitmap
`Shift+Ctrl+7`	Path Effects

Checklist for delivering SVG graphics to Localization

If you are delivering SVG graphics to Localization for translation, it's very important that you validate the following steps. Failure to do so can cause issues with translation.

No.	Task	✔
1	Ensure that only Arial font is used in the graphic for all textboxes.	
2.	Ensure that the vector graphics containing lines and curves does not include any text. The translation tool does not process as text for localization. Texts should never be in vector graphics consisting of lines and curves, otherwise it can't be processed as a text for localization.	
3.	Validate that the **Enable translation management** box is checked in the graphics's properties.	
4.	Create image directly in Inkscape or other image editor unless it's a picture that you must copy and paste into the SVG drawing. If you have objects that you can create in Inkscape that have been copied into the drawing, re-create the objects in Inkscape. **Note:** Resolution of the bitmap objects that you copy into Inkscape have lower than the native SVG drawings. And the text copied into an Inkscape drawing from another source cannot be translated.	
5	For long sentence, the text is rendered as a single line because SVG 1.1 does not provide text wrapping. Therefore, break the content by separating text into multiple lines within the same textbox during SVG design stage. Do not split the text label into separate text boxes. Use the **Enter** key to break the text into multiple lines.	
6	To support text expansion in other languages, use proper text justification in textbox and decide the textbox location that can handle text expansion up to 2.5 times the English text.	
7	Ensure that the text flow or alignment does not interfere with the image or other text. If the text expands after translation in some languages, the text alignment and the textbox position ensure the overall aesthetic of the image..	

Glossary

baseline
: A baseline lists the specific versions of the topics, graphics, and variable libraries that are used in a publication. This baseline is saved for future use, so that it is always possible to know which version of an object was used for the publication. A publication always contains one baseline.

GUID
: Globally unique identifier. Tridion Docs assigns each object a unique ID, called a globally unique identifier, and uses GUID for addressing and linking. Because Tridion Docs uses GUID instead of a file name or location, you can freely move or rename objects or folders to different locations without breaking links or references.

publication
: Object that manages how a deliverable is generated. Publications provide the context for how DITA content in the repository is assembled for output. For example, the publication controls the version of topics, maps, and graphics that are included in the deliverable (by means of the baseline), the conditions that are included or excluded, and the output format.

Index

Special Characters

A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

Q

R

S

T

U

V

W

X

Z