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Writer's Guide to Using DITA CMS Web

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About this document

This document is a intended as a quick start guide or cheat sheet for DITA CMS users such as writers and information architects who are using DITA CMS Web as a way for subject matter experts or editors to provide content or make changes directly in existing content.

For more complete information, please see the relevant guides available on the DITA CMS web site:

http://www.ixiasoft.com/en/products/dita-cms/documentation/

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Technical support

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New in this documentation release

Release DITA CMS 4.5

A new feature called Collaboration Review has been added to DITA CMS Web, which allows multiple reviewers to simultaneously annotate the content of a map. For more information, see **Sending a map for a Collaborative Review** on page 23.

Build 4.3.31

- This is a brand new document intended for writers and information architects who are using DITA CMS Web as a way for subject matter experts or editors to provide content or make changes in topics.

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Getting started

This guide assumes that the DITA CMS administrator has correctly configured DITA CMS to support DITA CMS Web, including:

- The appropriate roles in DITA CMS and DITA CMS Web.
- The status for each role that determines when documents are active for that role.

Typical scenarios

Several types of assignments are available in DITA CMS Web. The type of feedback that you want to receive determines the type of assignment you create.

The Assignments page is the default page that opens when a user logs in to DITA CMS Web. The list of assignments displayed on that page depends on the type of assignment, the status of the objects included in the assignment, and the role given to the user.

You might be creating assignments for:

* Content contributors
* Reviewers who are allowed to edit the content directly
* Reviewers who provide feedback on content, but cannot edit the content

Creating an assignment for a content contributor

A content contributor can be a subject matter expert who is expected to write the first draft of the content. In this case, the technical writers refine the content written by the subject matter experts.

For example, a typical scenario could be (depending on the configuration in your deployment):

* The information architect or writer uses the DITA CMS Eclipse Client to create the topics that require content, assigns these topics to the person with the role of content contributor (however that role is configured in your deployment), and changes their status to the appropriate one for the topics to become active (for example, changes status to Authoring:contribute or the equivalent).
* The assignee opens DITA CMS Web and sees these topics in the Assignments page. The assigned topic will only appear on the Assignments page once the topic is in the appropriate status (for example, Authoring:contribute or the equivalent). The assignee simply needs to click a topic to open it in the Editing page, enter the required content, and check it in. The content is then saved in the Content Store.
* The topic returns to its workflow in the DITA CMS Eclipse Client.

For the SME to be able to see the assignment, the following steps are required:

1. If the SME is a new DITA CMS user, the DITA CMS administrator creates a user for the SME in DITA CMS. This step must be done only once.
2. The DITA CMS administrator assigns the **contributor** role (or the equivalent) to the SME. This step must be done only once.

3. A DITA CMS user (typically the writer or information architect) assigns the topic as a contributor (or the equivalent) to the SME. This step must be done for every topic to which you want them to add content.

4. A DITA CMS user (typically the writer or information architect) puts the topic in the appropriate state (for example, Authoring:contribute or the equivalent). This step must be done for every topic to which you want them to add content.

Once these steps have been performed, the SME will see his or her assigned topics when logged in to DITA CMS Web.

Creating an assignment for a reviewer who can edit the content directly

When you want to ask a subject matter expert, copy editor, peer, or other to make edits in the content, you can assign the topics you want them to review and they can edit them in DITA CMS Web.

For example, a typical scenario could be (depending on the configuration in your deployment):

• Once the topics are written, the writer assigns the topics to the SME and then puts them in the reviewing status (for example, Authoring:review or the equivalent) .

• The SME starts DITA CMS Web and sees these topics in the Assignments page. The SME clicks on a topic to open it in the Editing page and changes some of the content and adds an image. The SME checks in the topic. The content is then saved to the Content Store.

• The topic returns to its workflow in the DITA CMS Eclipse Client.

For the SME to be able to see the assignment, the following steps are required:

1. If the SME is a new DITA CMS user, the DITA CMS administrator creates a user for the SME in DITA CMS. This step must be done only once.

2. The DITA CMS administrator assigns the **reviewer** role to the SME. This step must be done only once.

3. A DITA CMS user (typically the writer or information architect) assigns the topic to review to the SME. This step must be done for every topic to review.

4. A DITA CMS user (typically the writer or information architect) puts the topic in the reviewable state (for example, Authoring:review). This step must be done for every topic to review.

Once these steps have been performed, the SME will see his or her topics to review when logged in to DITA CMS Web.

Creating an assignment which sends content to several reviewers as a Collaborative Review

When you want to ask subject matter experts, peers, or others to check or proofread the content but want them to provide feedback only by annotating the content rather than editing the content directly, you can send them a Collaborative Review assignment in DITA CMS Web. A Collaborative Review allows several reviewers to simultaneously review content, add annotations, and view each other's annotations.

For example, a typical scenario could be (depending on the configuration in your deployment):

- Once the topics in a map are ready to be reviewed, the writer creates a Collaborative Review and assigns it to several reviewers.
- Each SME starts DITA CMS Web and sees their the Collaborative Review assignment in the Assignments page. Each SME clicks on their assignment to open it in the Collaborative Review page and begins adding annotations on the content.
- Once the writer wants to begin incorporating the feedback from the annotations into the source content, he or she can close the Collaborative Review so the assignments are no longer accessible in DITA CMS Web.
- The writer opens the Collaborative Review in DITA CMS and begins incorporating the feedback from the annotations.

For the SME to be able to see the assignment, the following steps are required:

1. If the SME is a new DITA CMS user, the DITA CMS administrator creates a user for the SME in DITA CMS. This step must be done only once.
2. The DITA CMS administrator assigns the **reviewer** role to the SME. This step must be done only once.
3. A DITA CMS user (typically the writer or information architect) creates the Collaborative Review.

Once these steps have been performed, the SME will see his or her Collaborative Review assignment when logged in to DITA CMS Web.

Example of a workflow for contributing and editing a topic

This is an example to illustrate how a topic could be handled using DITA CMS Web.

In this example Taylor, the technical writer, has to document a new feature. His subject matter expert and reviewer is Jordan who will provide Taylor with the initial content.

Done in DITA CMS	Done in DITA CMS Web
1. Taylor, the technical writer, creates a topic.	
2. He is automatically assigned as the *Author* on the topic.	
3. He assigns Jordan as the *Contributor* and *Reviewer* on the topic.	
4. He changes the status of the topic from **Authoring:work** to **Authoring:contribute**.	5. Jordan, the subject matter expert, opens the Assignments page, and sees the topic displayed as available.
	6. She clicks **Check Out** and opens the topic.
	7. She adds content to the topic.
	8. She clicks **Check In**. In the dialog box that opens, she selects the **Change status of topic** checkbox, sets the new status as **Authoring:work**, and clicks **Check In**.
9. Taylor sees the topic appear in his Todo List view.	
10. He locks the topic and begins working on the content provided by Jordan.	
11. He completes the changes to the topic, releases the topic, and changes the status from **Authoring:work** to **Authoring:review**.	12. Jordan sees the topic appear in her Assignments page.
	13. She clicks **Check Out** and opens the topic.
	14. She reviews the topic and is pleased with the content.
	15. She clicks **Check In**. In the dialog box that opens, she selects the **Mark topic as finished** checkbox, selects the **Change status of topic** checkbox, sets the new status as **Authoring:done**, and clicks **Check In**.

Example of a workflow for a Collaborative Review

This is an example to illustrate how a Collaborative Review is performed.

In this example Taylor, the technical writer, has finished a draft of a user guide so it is ready for review. His subject matter experts and reviewers are Jordan, Tim, and Roselyn.

Done in DITA CMS	Done in DITA CMS Web
1. Taylor, the technical writer, creates a Collaborative Review and assigns Jordan, Tim, and Roselyn as reviewers.	
	2. Jordan, Tim, and Roselyn, the assigned reviewers, open the Assignments page. Each sees their Collaborative Review assignment.
	3. Each opens their assignment and adds annotations.
	4. Jordan and Tim click **Mark as Finished**. Roselyn adds annotations, but does not mark the assignment as finished.
5. Taylor decides to end the review since the due date he set has passed. He right-clicks the map, clicks **Collaborative Review**, and then clicks **Close Review**.	
	6. The Collaborative Review assignments for Jordan, Tim, and Roselyn no longer appear on the Assignments page.
7. Taylor decides to start incorporating the feedback from the Collaborative Review into his topics. He right-clicks the map, clicks **Collaborative Review**, and then clicks **View Annotations**. In the **Select Review** dialog box, he clicks the desired Collaborative Review. The Collaborative Review opens in the Annotations view.	
8. Taylor double-clicks an annotation in the Annotations view. The annotation opens in the Annotated Content view and the topic on which	

Done in DITA CMS	Done in DITA CMS Web
the annotation was made is locked and opens in the editor.	
9. Taylor changes the topic based on the feedback provided in the annotation and proceeds with the next annotation. After completing the changes in a topic, he releases it. He repeats the process until the annotations have been addressed.	
10. Once Taylor is finished, he right-clicks the map, clicks **Collaborative Review**, and then clicks **Set Review as Done**.	

Important things to know

The following things are useful to know when you are using DITA CMS Web.

Introducing DITA CMS Web to teammates

When you introduce DITA CMS Web to your subject matter experts or reviewers, take some time to point out the editing or reviewing tools that you expect them to use. The interface contains a number of features that are intended for a range of users, from those who have little to no knowledge of markup languages to those who are familiar with HTML, XML, or even DITA. By focusing them on what you want them to use, you can alleviate the trepidation of learning a new tool (and perhaps prevent eager users from hunting for the elements and attributes to produce the formatting they want instead of focusing on providing the content).

Since each company's workflow is different, you should also explain when and how you want your subject matter experts and reviewers to check in the content assigned to them. Do you want them to change the status of the topic at check in? Do you want to use the **Mark as Finished** checkbox?

Choose assignments wisely

When you decide which topics to assign, remember the knowledge level of the person who will be working on the topic. Since DITA CMS Web camouflages the complexity of DITA and allows users to work on the content in a simplified, user-friendly environment, topics which contain a complex use of DITA elements may be too difficult for others to edit. For example, a topic

containing a lot of conditional text may be confusing to work on since the attributes are not prominently displayed.

> **Note:** Do not assign referable-content topics to be worked on using DITA CMS Web unless you provide the base element that you want them to use; for example, include a `p` element in the `rcbody` element.

Avoid entities in your topics

DITA CMS Web only supports the following standard (predefined) entities:

- quot ("): the double quotation mark (")
- amp (&): the ampersand (&)
- apos ('): the apostrophe (')
- lt (<): the less-than sign (<)
- gt (>): the greater-than sign (>)

Other entities may be converted into Unicode code. Instead use the keyboard keys, DITA keys, or the appropriate DITA elements and attributes as recommended by DITA best practices. For example, the following entities will be replaced by Unicode code if they are present in your DITA source:

- non-breaking space ( )
- soft hyphen (­)
- micro symbol (µ)
- division symbol (÷)
- en dash (–)
- em dash (—)
- ellipsis (…)

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Assigning topics to others

Topics:

- **Assign objects to users**
- **Change the status of an object**

Before someone can access a topic in DITA CMS Web, the topic must be assigned to them and the topic must be in the correct state.

Assign objects to users

The DITA CMS lets you quickly and easily assign objects such as maps or topics to the people who will be responsible for them in the different phases of the content development cycle.

> **Note:** User roles must be configured for each type of object.

The procedure for creating an assignment differs depending on what kind of feedback you want and what your assignees will be using to provide that feedback. If you are assigning an object (map, topic, etc.) to someone who will be modifying the source content (contributing or editing content) using the DITA CMS Eclipse Client or DITA CMS Web, use the following steps to complete the assignment. If you want to send a map to a group of reviewers so they can simultaneously annotate the content, then you must first create a Collaborative Review.

If you intend to use DITA CMS Web for users to contribute or edit content, then you must set a Context Map when you assign the topic. A Context Map is the map in which the topic is contained. This map not only provides the user with context for the topic so they understand how the content fits in to the object as a whole, but it also provides the source from which to resolve any keys contained in the topic.

> **Note:** Depending on the configuration in your Content Store, if you assign an individual to a topic under multiple roles, he or she might see what appears to be duplicate assignments on their Assignments page, but which are actually two assignments for the same topic under different roles. If this situation occurs and causes confusion, ask your DITA CMS system administrator to review the roles configured in the Content Store to make sure each role is configured with a different active status.

To assign objects to users:

1. **Locate the objects that you want to assign; for example, you can perform a search.**
2. **Right-click the required objects from a view.**
3. **Click Assign to from the menu.**

   The **Assignments** dialog appears with a left and a right pane. The left pane displays all the roles that are configured for the types of objects you selected.

   If any of the check boxes are selected, this means that some of the objects you selected are already assigned to people.

4. **If you want to filter the list of names displayed in the Assignee pane, select as desired:**

- To filter by project, select the **By project** checkbox and click the name of the project from the list. To further filter the choices of projects to those of which you are a team member, select the **My projects only** checkbox.

- To filter by group, select the **By group** checkbox and click the name of the group from the list.

5. **In the Assignee pane, expand each role to see the list of people who are available and select the required people from each role.**

   You can enter text in the **Filter results on the first column's text...** field to find certain people.

6. **(Optional) If you are assigning objects that are part of a project and you want to use the project's default role assignments, right-click the role name and select *Use Project Default(s) > projectname* (where projectname specifies the project whose role assignments you want to use).**

   If there are no available projects, this section will be disabled.

   The objects are assigned to the people who hold the default role assignments in the selected project.

7. **(Optional) Expand each person's name to assign selected objects to that person.**

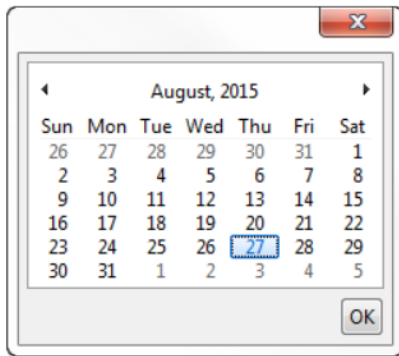   In the following diagram, two reviewers have been assigned topics.
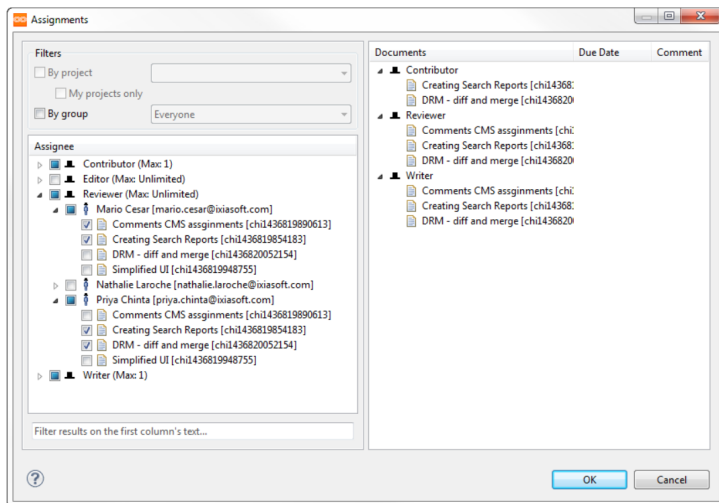
Figure 1: Example of reviewers being assigned to topics

8. **(Optional) In the right pane, set the due dates for the objects:**
   a) **Right-click an object and then select Set Due Date from the menu.**

      An interactive calendar appears. For example:

b) **Select the required date, then click OK.**

The selected date appears in the **Due Date** column.
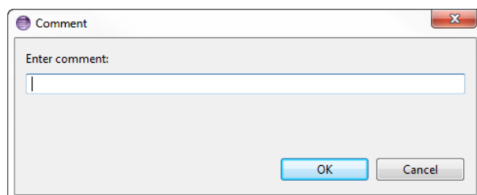
c) **Repeat for each object or role, as required.**

When these objects are assigned to specific people, the object names and their due dates will appear in their Todo Lists.

> **Note:** If you need to clear the date from an object, right-click the object and click **Clear Due Date**.

9. **(Optional) Add comments as desired:**

a) **Right-click an object and click Edit Comment.**

A **Comment** window opens. For example:

b) **In the Comment dialog box, type a comment and click OK.**

The comment appears in the **Comment** column.

c) **Repeat for each object, as required.**

> **Note:** If you need to clear the comment from an object, right-click the object and click **Clear Comment**.

10. **Set the context map for topics (required when using DITA CMS Web):**

a) **Right-click a topic and click Set Context Map.**

b) **In the Set a Context Map dialog box, click the map in which the topic is contained. The associated map provides assignees context for the topic within its parent map and is also used to resolve the keys.**

> **Important:** The parent map must be open in the DITA Map view for it to be available as a Context Map in the **Assignments** dialog box.

   c) **Click OK.**

   d) **Repeat for each topic, as required.**

11. **Set the approval system for the objects:**

   a) **Right-click an object and click Set Approval System.**

   b) **Click the approval system you want to use. The available selections are based on your system configuration.**

     For example, you might have one of the following default approval systems included in DITA CMS:

- **Unanimous**: All users in this role must approve an object or image before it can pass to the next status.
- **Simple majority**: A majority of users must approve an object or image before it can pass to the next status. By default, this means that more than 50% of users must approve this object before it can pass to the next status.
- **Single approval**: an object or image can pass to the next status once any user in this role has approved it.

   c) **Set approval systems for each object or role, as required.**

> **Note:** If you need to clear the approval system from an object or from a role, right-click the object and click **Clear Approval System**.

12. **(Optional) Add a link to a web site to point the assignee to additional information; for example, provide a link to a wiki page or to a ticket in a bug tracking system.**

   a) **Right-click an object and click Set external link.**

   b) **In the External Link dialog box, type the HTTP or HTTPS-based URL to the web site.**

   c) **Click OK.**

> **Note:** If you need to clear the external link from an object or from a role, right-click the object and click **Clear external link**.

13. **Click OK.**

The people to whom you have assigned objects will see the object names in their Todo Lists.

Change the status of an object

This procedure describes how to update the status of a document object in the document cycle.

Prerequisites:

- The document object must have a status other than **published** (or as defined in your configuration).
- The document object must be unlocked.

This function is available from all DITA CMS views.

To change the status:

1. **Locate the documents; for example, you can perform a search.**
2. **Release any locked document objects for which you want to change the status.**
3. **Select and right-click the document(s).**

   Note: If you are selecting more than one document, they must all have the same status (check the **Status** column).

4. **Click Change Status from the menu.**

   The **Change Status** window appears:
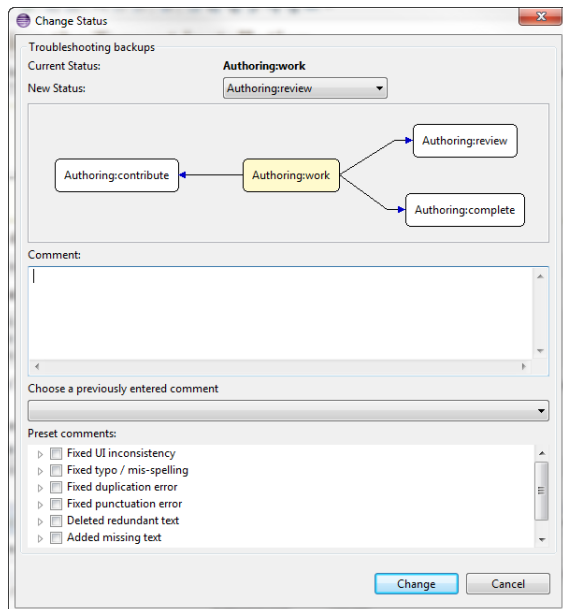
Figure 2: Change Status window

   The statuses available depend on which cycle is applicable for the parent map (**Authoring** in the example above) and the states configured for your DITA CMS.

5. **Do either of the following:**

   - Beside **New Status**, select a status from the drop-down list.
   - Click a status in the flow chart.

        Note: If you cleared the **Substantial Change** option when releasing the document object, certain states may not be available.

6. **(Optional) To enter a comment, do one of the following:**

   - Under **Comment**, enter a comment.
   - Select a comment from the **Choose a previously entered comment** area.
   - Select one or more comments in the **Preset comments** area.

        Note: If preset comments have not been configured for your DITA CMS, the **Preset comments** area will be blank.

   The comment that you enter will appear under **Last User Comment** in everyone's **Todo** Lists, as well as in the other places that file properties are displayed.

7. **Click Change.**

        Note: If your system is configured for obligatory comments, you will need to enter a comment.

   If this change impacts other documents—other maps that refer to a topic, for example—a warning dialog appears.
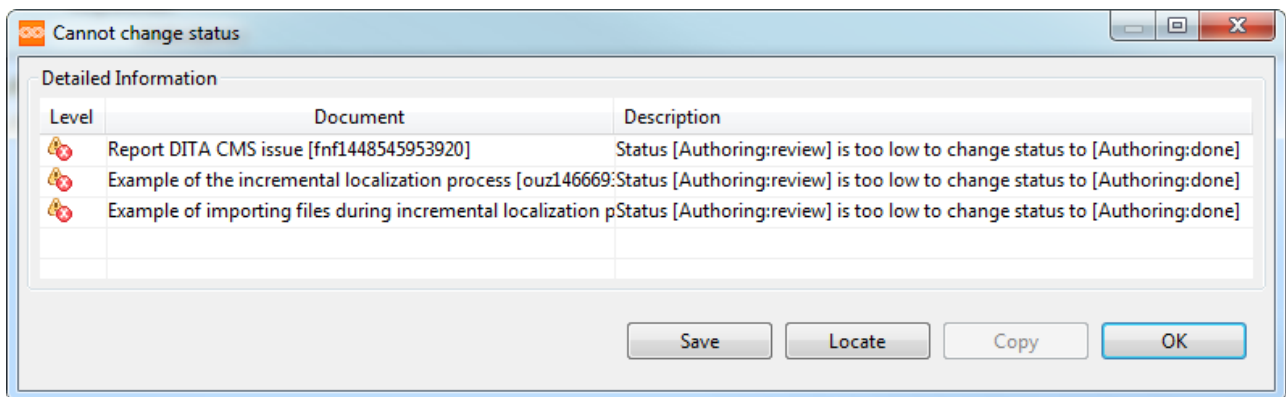
8. **Click OK to continue with the change.**

   The status is updated and displayed in the various views.

   If you have demoted a document to the beginning of its cycle, you are automatically assigned that document.

3 Sending a map for a Collaborative Review

Topics:

- **Understanding the collaborative review process**
- **Create a Collaborative Review**
- **Search for a Collaborative Review**
- **View the annotations from a Collaborative Review**
- **Incorporate annotations into your topics**
- **Close the Collaborative Review**
- **Change the status of a Collaborative Review to Done**

You can assign your map to be simultaneouly reviewed by multiple people in DITA CMS Web.

Understanding the collaborative review process

DITA CMS Web offers the Collaborative Review page from which reviewers can add annotations to their assigned content from a browser.

The first step of the process is creating a Collaborative Review. The Collaborative Review is a DITA CMS object that allows you assign one or more reviewers to a map, set the ditaval file for the map, and set a due date for reviewing the content. Once the Collaborative Review is created, an assignment automatically appears in the Assignments page in DITA CMS Web for each of the assigned reviewers. The reviewers access DITA CMS Web, open their Collaborative Review assignment from the Assignments page, and annotate the content.

Once you decide to end the Collaborative Review, you close it so it is no longer listed in the reviewer's Assignment page in DITA CMS Web regardless whether the reviewers have set their assignment to Mark as Finished.

When you are ready to incorporate the annotations into your topics, you view the Collaborative Review. The annotations are retrieved from DITA CMS Web and are displayed in the Annotations view. When you double-click an annotation in the Annotations view, the Annotated Content view opens to display the content and the selected annotation from the Collaborative Review, and opens and locks (if possible) the related topic in the editor.

Once you have edited the topic based on the annotations, you can set the Collaborative Review to done.
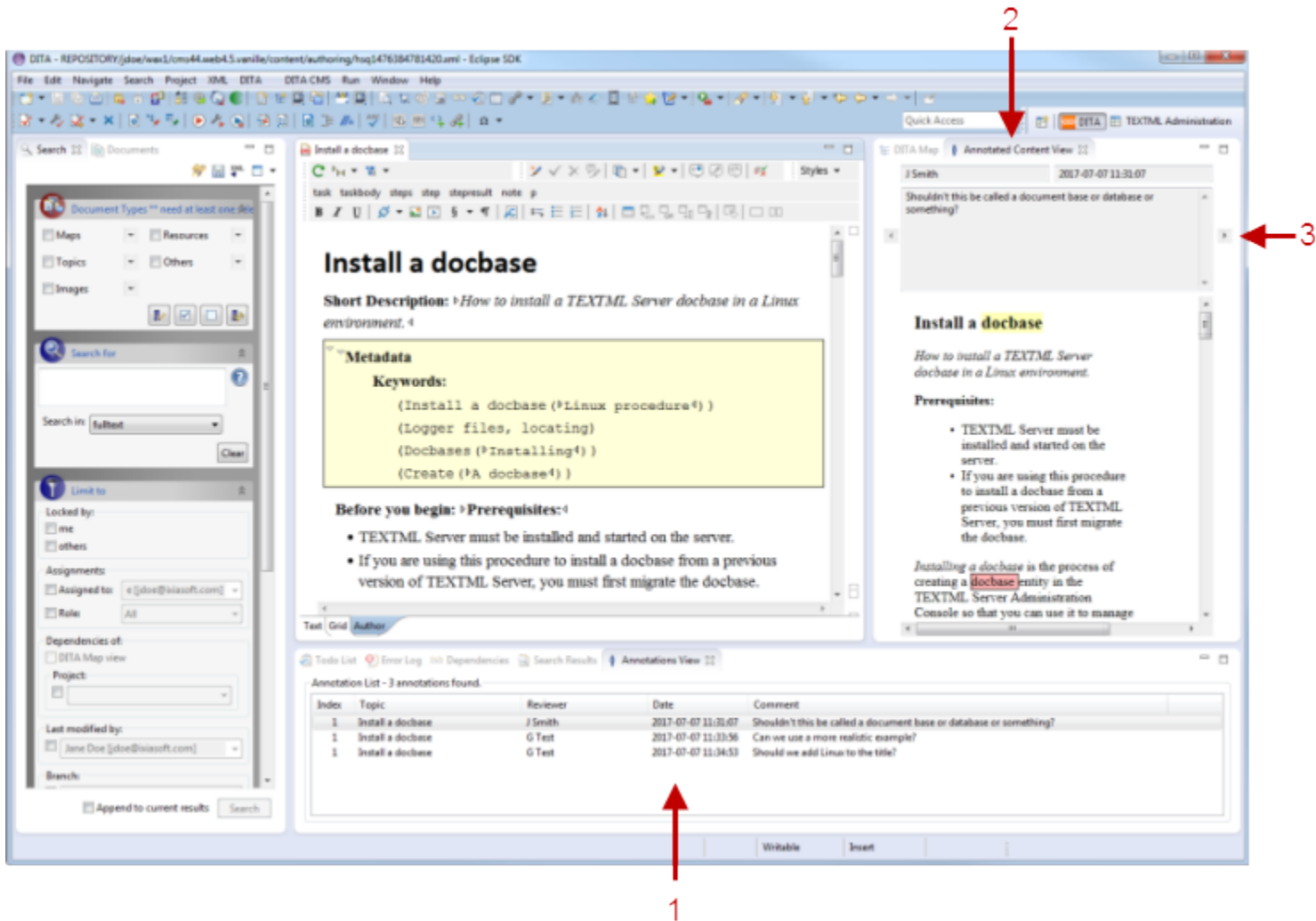
Figure 3: Example of an open Collaborative Review

	Area	Description
1	Annotations view	Displays the annotations contained in the selected Collaborative Review.
2	Annotated Content view	Contains the details of the selected annotation: • The name of the reviewer who made the annotation. • The date and time when the annotation was made (or last modified). • The information provided by the reviewer. • The content containing the annotation as it appeared when the Collaborative Review was created.

	Area	Description
		• The annotation marker which highlights content on which the annotation was made.
3	Navigation arrows	Allows you to display the previous or next annotation in the topic open in the editor.

Create a Collaborative Review

A Collaborative Review allows you to select a map to be sent to DITA CMS Web for multiple people to work collaboratively to review its contents.

The Collaborative Review is a DITA CMS object used to specify the due date, DITAVAL file, and reviewers for a given map. When the Collaborative Review is created, an output of the map is generated using the specified DITAVAL file and sent to DITA CMS Web where an assignment is created for each reviewer on their Assignments page.

If you want to send specific topics for review instead of an entire map, you can create a separate map containing only the topics you want reviewed and create a Collaborative Review for it instead.

1. **Right-click the map.**
2. **Click Collaborative Review.**
3. **Click Create Review.**
4. **In the Title box, type a title for the Collaborative Review.**

    By default, the title of the Collaborative Review is the same as the map's title, but it is recommended that you change it to a more meaningful title for the Collaborative Review, especially if you have used a DITAVAL file. This title is appears as the title of the assignment in the Assignments page in DITA CMS Web.

5. **In the Message box, type a message which will appear in the assignment banner in the DITA CMS Web.**

    It is recommended that you provide a meaningful message to describe the work required since this message appears in the Assignments page in DITA CMS Web.

6. **In the Due Date box, type a date for when you expect the reviewers to complete their Collaborative Reviews or click the calendar icon 🗓 to select a date.**

7. **If you want to use a DITAVAL file, click the browse icon and select the DITAVAL file you want to apply when the map output is generated.**

8. **In the Reviewers box, select the checkboxes beside the names of the people you want assigned to review the map.**

9. **Click OK.**

   Assignments are created for each reviewer and appear on their Assignments page in DITA CMS Web.

Search for a Collaborative Review

Collaborative Reviews are categorized as "Others" document types in the Search view.

To search for a Collaborative Review:

1. **In the Cycles panel of the Search view, select Authoring.**
2. **In the Document Types panel, select arrow beside Others.**
3. **Click collaborative-review.**
4. **Click the Search button.**

View the annotations from a Collaborative Review

The Annotations view displays the list of annotations contained in a selected Collaborative Review.

To view the annotations:

1. **Right-click the map on which you created a Collaborative Review.**
2. **Click Collaborative Review.**
3. **Click View Annotations.**
4. **In the Select Review dialog box, click the desired Collaborative Review from the list.**
5. **Click OK.**

   The annotations from the selected Collaborative Review open in the Annotations view.

Incorporate annotations into your topics

Edit your topics based on the annotations provided by the assigned reviewers.

Since the content in the topic may have changed between when the Collaborative Review was created and when you begin to incorporate the changes suggested in the annotations, you can use the Annotated Content view to provide context for the annotations and locate the position of the corresponding content in the topic open in the editor.

To work on the annotations:

1. **Right-click the map associated with the Collaborative Review on which you want to work.**

2. **If you want to end the Collaborative Review so reviewers can no longer add annotations to that assignment, close the Collaborative Review.**

3. **View the annotations from a Collaborative Review:**

   a) **Click Collaborative Review.**
   b) **Click View Annotations.**
   c) **In the Select Review dialog box, click the desired Collaborative Review from the list.**
   d) **Click OK.**

   The annotations from the selected Collaborative Review open in the Annotations view.

4. **In the Annotations view, double-click an annotation.**

   The Annotated Content view opens to display the content and the selected annotation from the Collaborative Review, and opens and locks (if possible) the related topic in the editor.

5. **Use the content displayed in the Annotated Content view to locate the corresponding content in the topic.**

6. **Make the required changes as suggested by the annotation.**

7. **Click the right arrow in the Annotated Content view to move to the next annotation**

8. **Once you have finished incorporating the feedback from the reviewers into the topic, change the status of the Collaborative Review to done.**

Close the Collaborative Review

When you close a Collaborative Review, the Collaborative Review assignment for each reviewer is removed from the Assignments page.

You can close a Collaborative Review at any time; for example, you can decide to close a Collaborative Review once all or most the reviewers have clicked **Mark as Finished** or the due date has passed.

To close a Collaborative Review:

1. **Right-click the map associated with the Collaborative Review you want to close.**

2. **Click Collaborative Review.**

3. **Click Close Review.**

4.   **In the Select Review dialog box, click the desired Review from the list.**

5.   **Click OK.**

Change the status of a Collaborative Review to Done

Once you are finished incorporating the feedback from the annotations, you can change the status of the Collaborative Review to done.

To change the status of a Collaborative Review:

1.   **Right-click the map associated with the Collaborative Review you want to change.**

2.   **Click Collaborative Review.**

3.   **Click Set Review as Done.**

4.   **In the Select Review dialog box, click the desired Collaborative Review from the list.**

5.   **Click OK.**