XML Documentation for Adobe Experience Manager 6.4 and 6.3 Quick Start Guide

May 4, 2018

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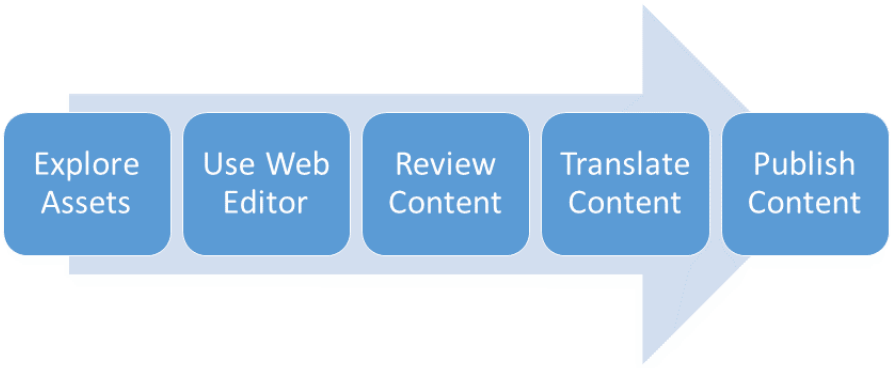
Introduction

XML Documentation for Adobe Experience Manager (referred to as *XML Documentation solution* later in this guide) is a powerful, end-to-end, enterprise solution that enables you to create, manage, and publish DITA-based content using Adobe Experience Manager.

This is a Quick Start Guide that helps you get started with XML Documentation solution. This guide has been organized in such a way that you can understand and perform most of the common workflows supported in XML Documentation solution. The following illustration shows the most typical end-to-end workflows that you would perform using the XML Documentation solution.



After installing XML Documentation solution, you would either upload your existing DITA content or play around with sample content. If you would like to create new DITA content, then the XML Documentation solution's web editor comes in handy. No customer-facing content can be made public without being reviewed, XML Documentation solution allows you to share your content for review.

If there is a need to translate your content, you can do so from within the XML Documentation solution itself. You need to have all your content in a root folder with source folder name as en (for English) and create language copies de(for German) or fr(for French) as target languages.

Finally, when your content is ready to be shared with your customers, you can do so by generating an AEM Site or PDF output.

NOTE: It is assumed that you already have a working setup of XML Documentation solution.

Getting started with AEM repository

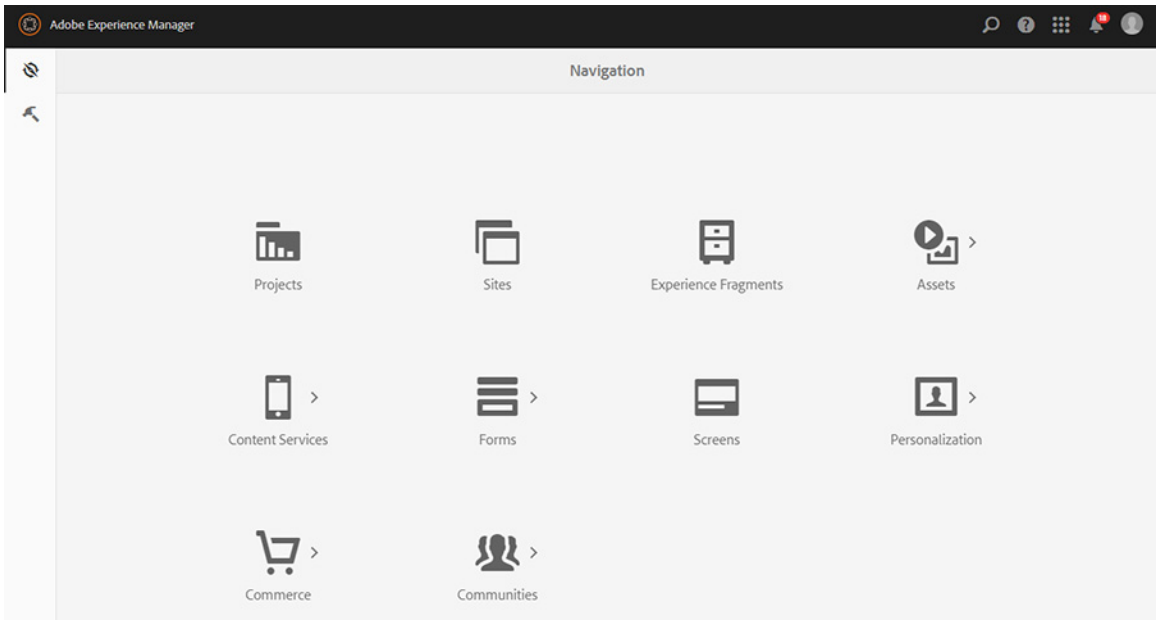
There are various ways for you to access your content on AEM and also upload your content on AEM. In this topic we will cover the following:

- *AEM touch-optimized user interface*
- *Accessing AEM repository from desktop*

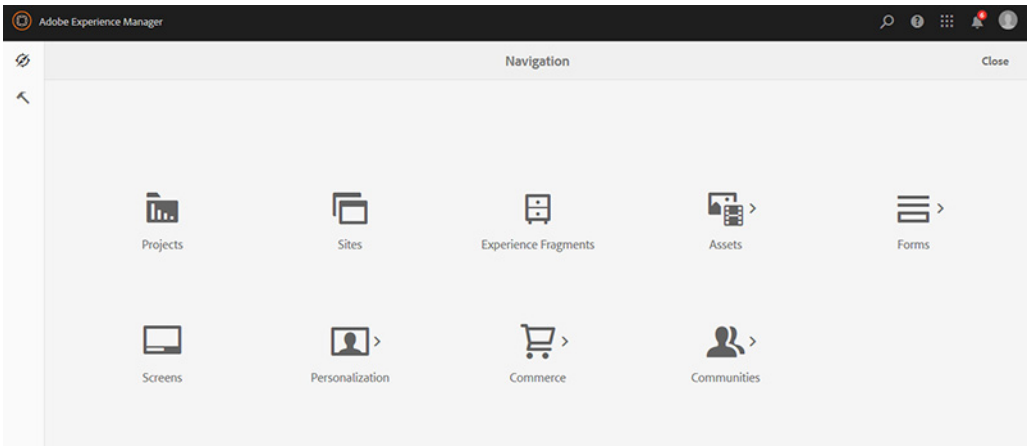
AEM touch-optimized user interface

By default, when you log into AEM, you are shown the following page.

AEM 6.3 Navigation page.



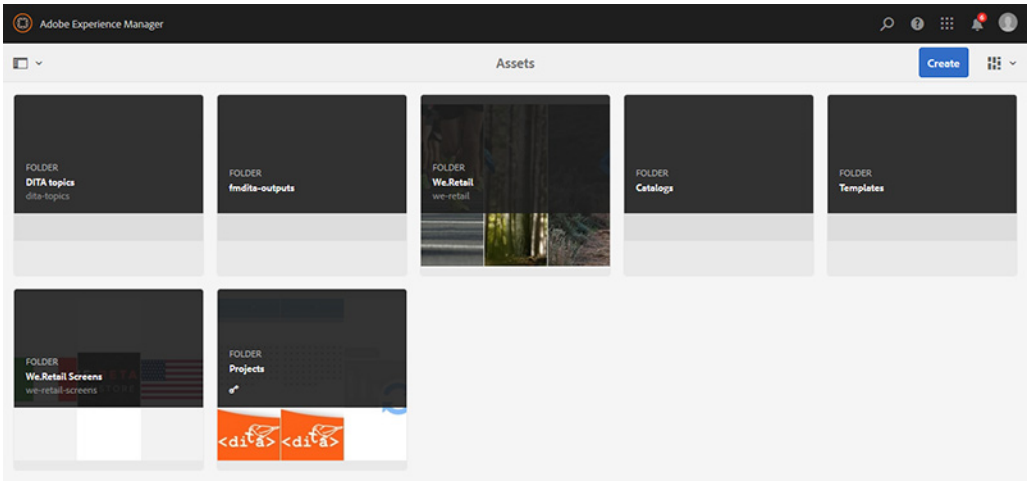
AEM 6.4 Navigation page.



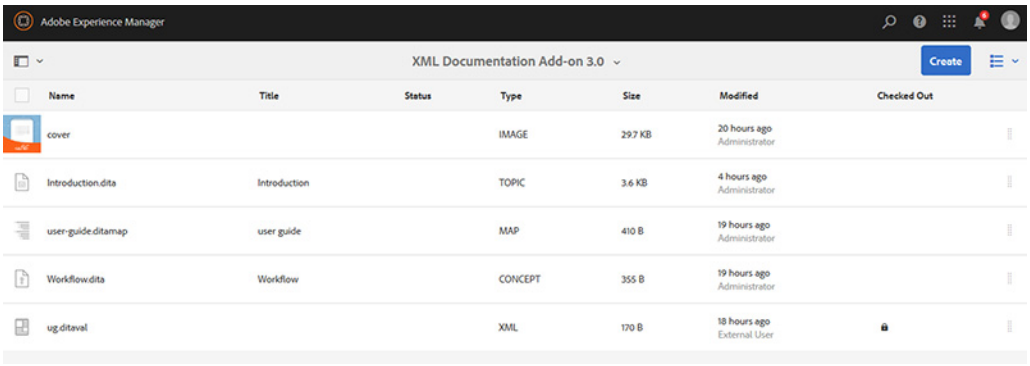
Your files and images, also known as *Assets* in AEM, are available in the Assets console/page.

To access Assets console:

1) Click on the Adobe Experience Manager link (top left).
   The global navigation panel opens up.
2) In the global navigation panel, click **Assets**.
   The Assets console lists your files, collections, templates, and other assets.
   Depending on the view mode, you could see your Assets in one of the following ways:
   – Card view:

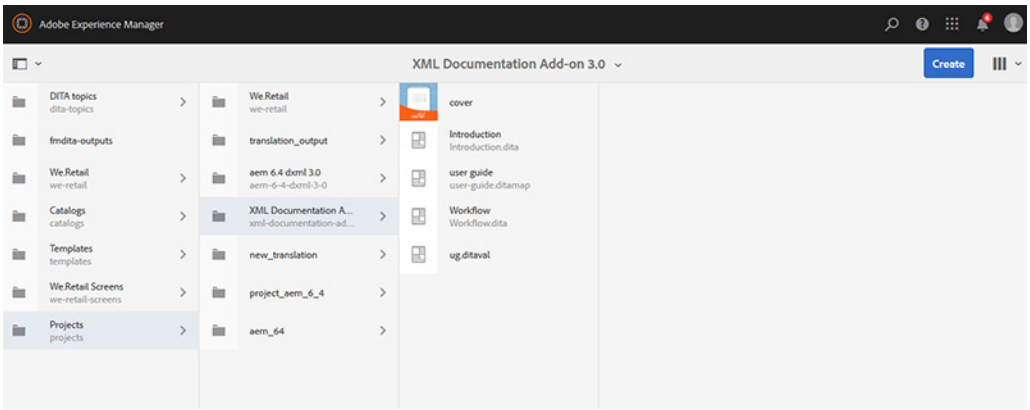


– List view:



The Type column in the List View shows the DITA topic types as Topic, Task, Concept, Map (Dita map). The Type column for a DITAVAL file shows XML.

– Column view:



NOTE: In this guide, we have used the Card view for all demonstrations.

Accessing AEM repository from desktop

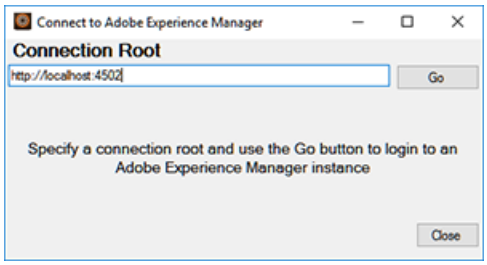
Another way to work with AEM Assets is through AEM Desktop App. This app enables you to map AEM Assets to a network directory. You can create, edit, or delete files from Max OS X Finder/Windows Explorer. The changes are automatically synchronized between AEM Assets and your networked drive.

To use AEM Desktop App:

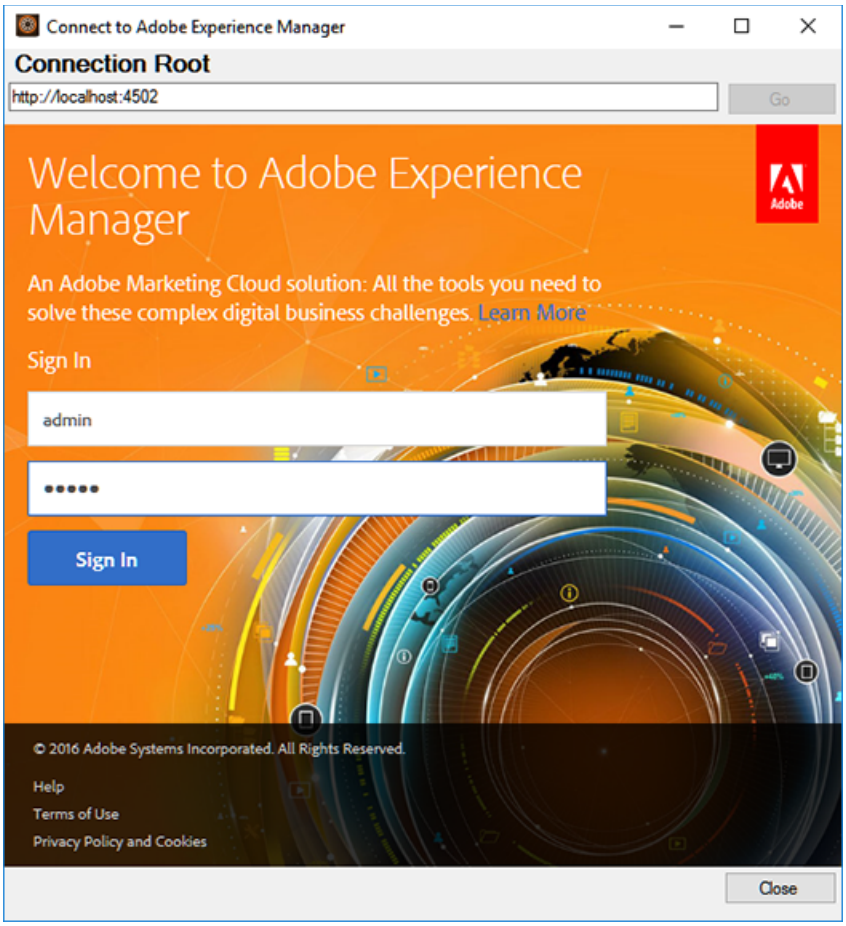
1) Launch the **Adobe Experience Manager Desktop** App.

   The Connect to Adobe Experience Manager dialog appears.

2) Enter your AEM server URL in the **Connection Root** field and click **Go**.



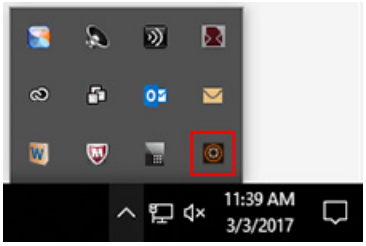
3) Enter your login credentials and click **Sign In**.



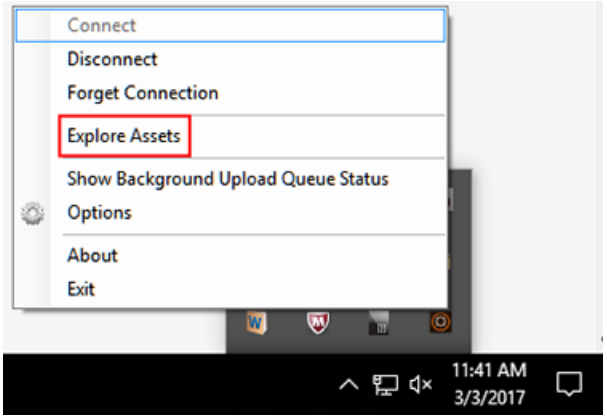
Once a connection to AEM is successfully established, the AEM Desktop App minimizes and keeps running in the background.

4) To upload your existing content:

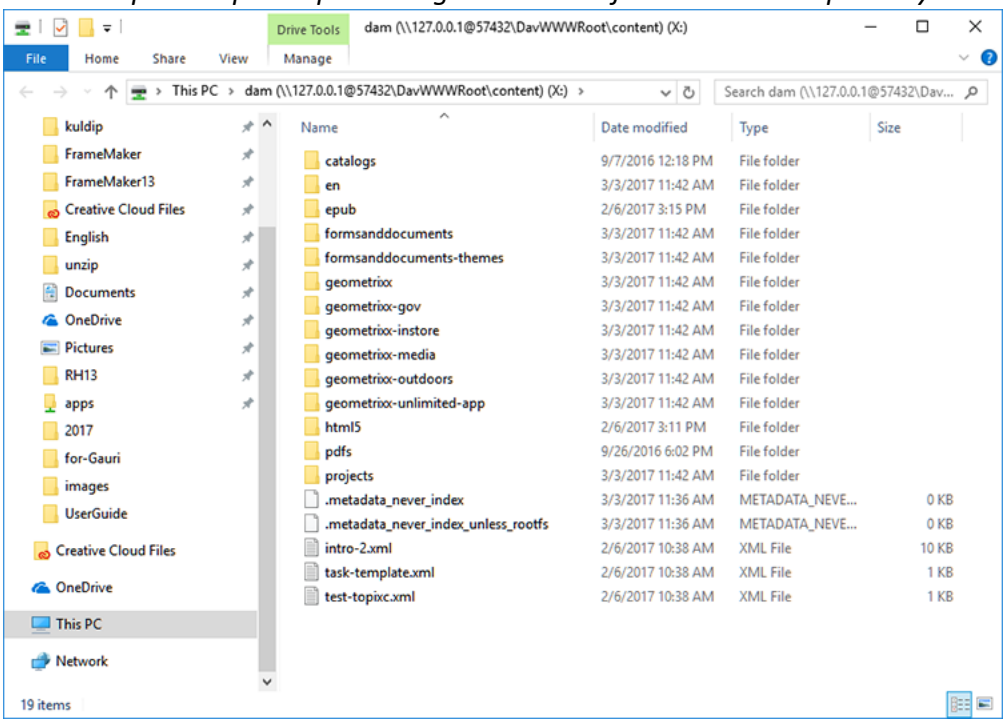
a) Open the AEM Desktop App by clicking on the **Show Hidden Icons** (bottom right) and choosing **AEM Desktop App** icon.



b) From the AEM Desktop App menu, choose **Explore Assets**.



Windows Explorer opens up showing the content from the AEM repository.



You can easily browse, create, update, or delete content using the Windows Explorer.

Upload content on AEM repository

You can upload content on AEM repository using:

- *WinSCP*
- *FrameMaker's AEM Connector*

WinSCP

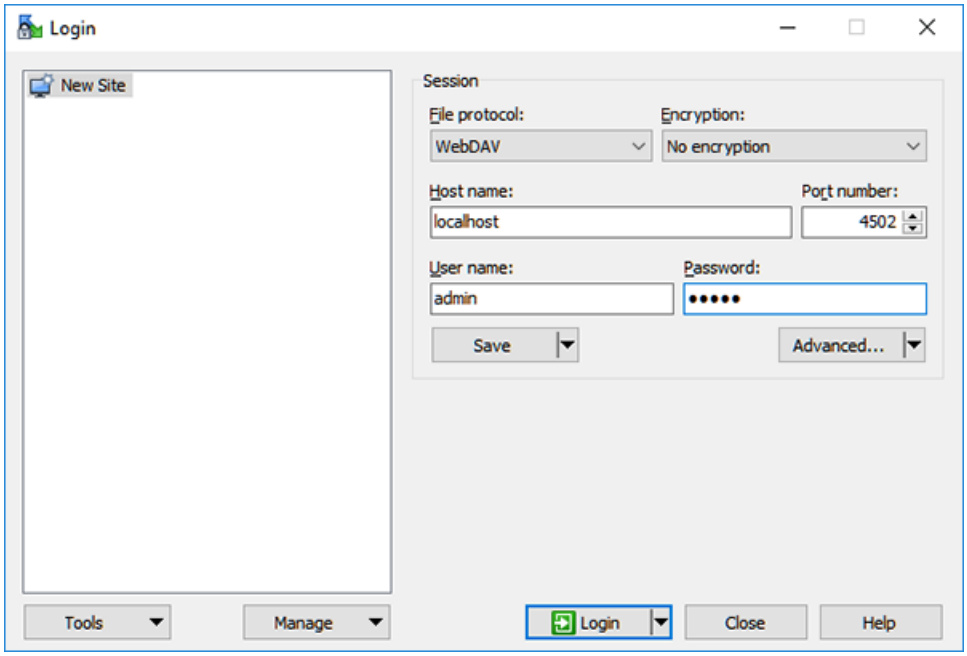
You can also use WinSCP to manage content on the AEM repository.

1) Download and install WinSCP on your computer.

   NOTE: You can download WinSCP from here: https://winscp.net/eng/download.php.

2) Launch the WinSCP app.

   The Login dialog appears.



3) Choose `WebDAV` as the **File Protocol** and provide other connection details such as the URL where you AEM server is hosted, the port number (default is 4502), user name and password to access your AEM server.

4) Click **Login**.

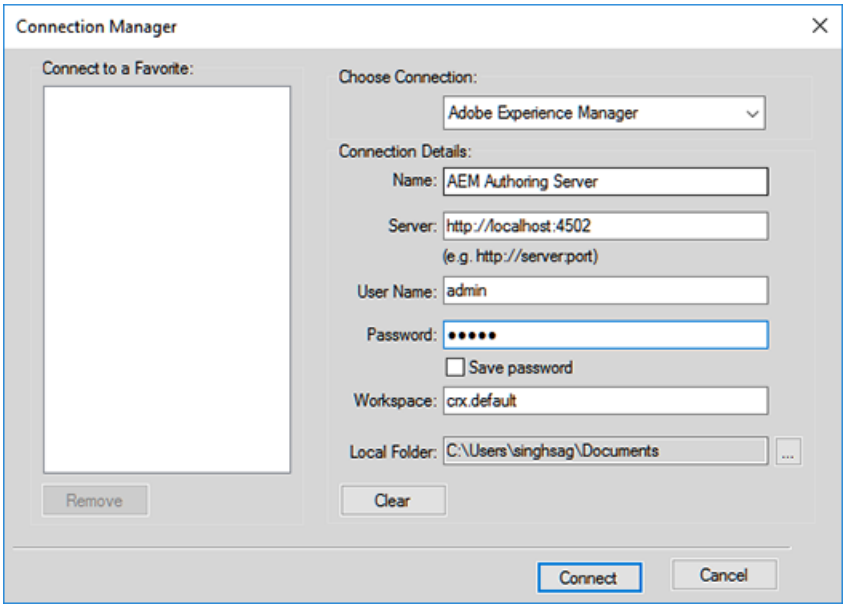
   On a successful connection, you will see the contents of AEM Assets in the WinSCP user interface. You can easily browse, create, update, or delete content using the WinSCP file explorer.

FrameMaker's AEM Connector

Adobe FrameMaker also comes with an AEM connector that allows you to easily establish a connection with AEM repository and work with files.

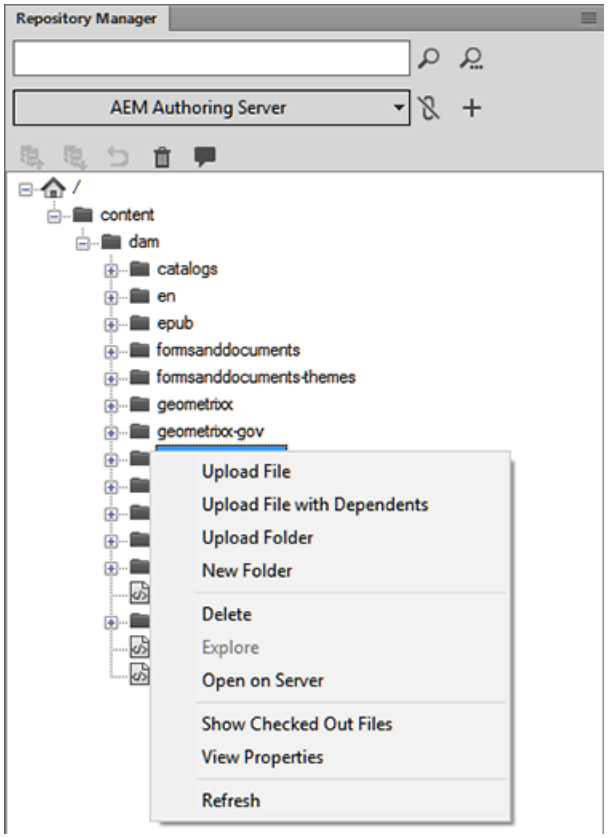
To use AEM Connector in FrameMaker:

1) Launch FrameMaker (2017 release).
2) Open the **Connection Manager** dialog.



3) Enter the following details to connect to the AEM repository:
   - **Name**: Enter a descriptive name to identify the connection to your AEM server.
   - **Server**: Enter the URL and port number of your AEM server.
   - **User Name**/**Password**: Enter the user name and password to access AEM server.
4) Click **Connect**.

Once the connection is successfully established, the Assets from AEM repository are displayed in the Repository Manager window.



Right-clicking on any file or folder allows you to perform related operations. For example, if you right-click on a folder, you get options to upload a file, upload file with dependencies, upload an entire folder and so on.

Using the web editor

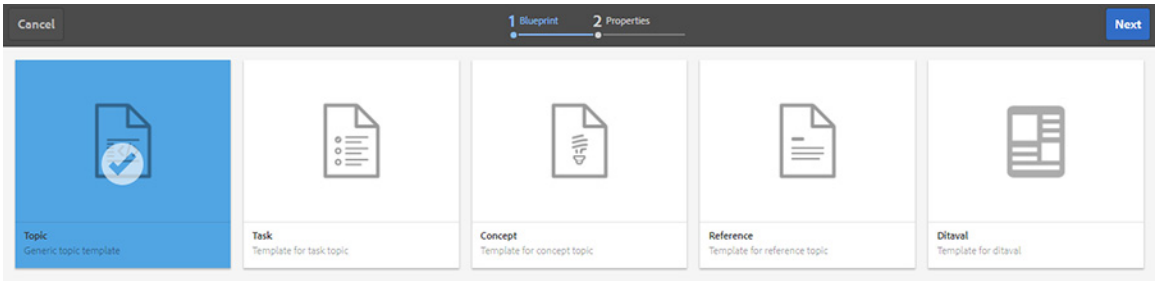
The XML Documentation solution comes with a very powerful What You See Is What You Get web editor. Using the editor, you can easily create or edit a DITA topic or map. DITA uses the concept of topic-based authoring, wherein the information is broken down and created as per its primary objective and structure (Task, Concept, Reference, Glossary Entry, and Troubleshooting). DITA map is a collection of topics that creates a sequence and structure of topics for publishing.

Create DITA topic

Perform the following steps to create a DITA topic:

1) Log into AEM and open the Assets console.
2) Navigate to the location where you want to create the DITA topic.
3) Click **Create** and choose **DITA Topic**.
4) On the **Blueprint** page, select the type of DITA document that you want to create and click **Next**.

   You can choose from five out-of-the-box DITA documents - Topic, Task, Concept, Reference, or Ditaval.



5) On the **Properties** page, enter the following details:

Title

Name of the DITA topic that is shown in the Assets console.

Name

An internal name with which the topic is stored in the AEM repository. The **Name** must end with a *.xml* or *.dita* file extension.

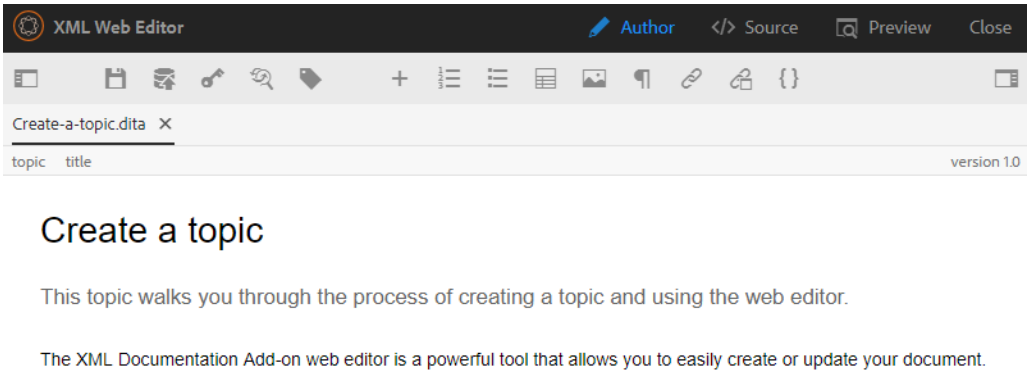
6) Click **Create**.

   The Topic Created message pop-up appears.

7) You can choose to close the topic creation process by clicking **Done** or open the topic for editing by clicking **Open Topic**.

Explore the web editor interface

The web editor comes with a very simple and intuitive user interface. The following screenshot shows a document opened for editing the web editor:



In the top right corner of the web editor, you can see three difference document view modes:

- The **Author** mode is the default editing mode that shows the document in WYSIWYG mode.
- The **Source** view of the document displays the underlying XML of the document.
- The **Preview** mode display how your document would look like after publishing.

The toolbar in the web editor give you the most frequently used functionalities while authoring. Using the toolbar, you can:

- Save topic
- Save revision of the topic
- Key resolution
- Find and replace
- Toggle partial tags view
- Insert DITA elements (only the relevant elements are shown at the given insertion place)
- Insert/remove numbered and bulleted list
- Insert table and image
- Insert paragraph
- Insert cross-reference (or a hyperlink to external content)
- Insert content reference (use this if you want to reuse any content that exists in your repository)

Create DITA map

Perform the following steps to create a DITA map:

1) Log into AEM and open the Assets console.
2) Navigate to the location where you want to create the DITA map.
3) Click **Create** and choose **DITA Map**.
4) On the **Blueprint** page, select **Map** and click **Next**.
5) On the **Properties** page, enter the following details:

Title

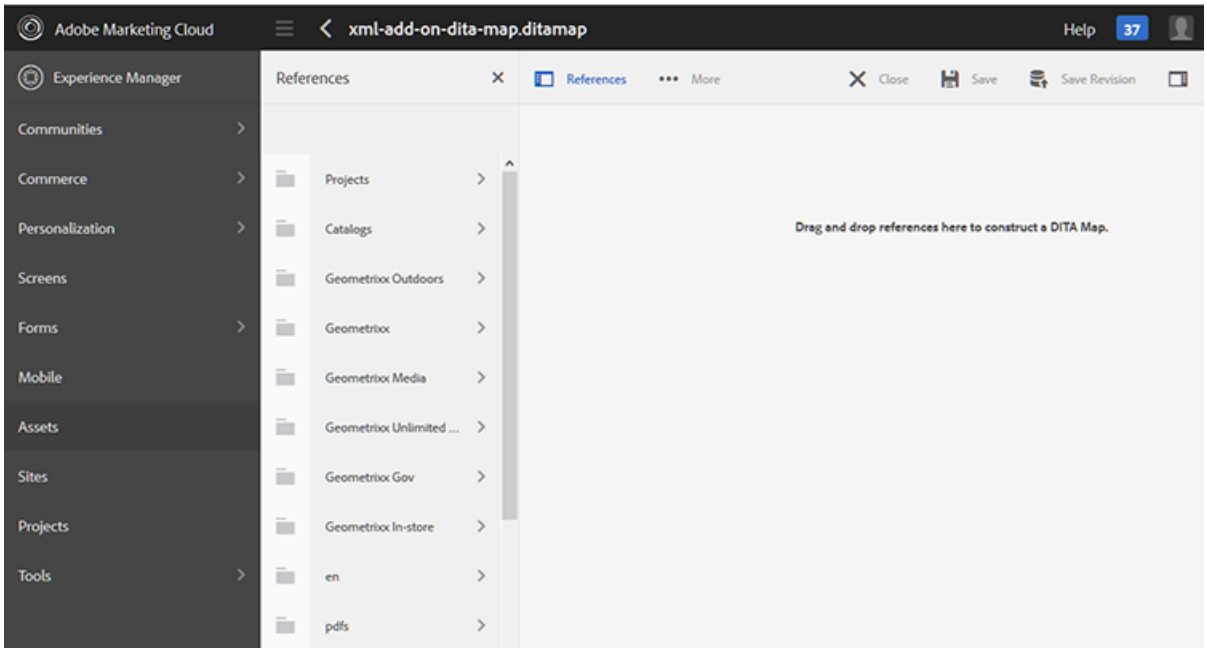
Name of the DITA map that is shown in the Assets console.

Name

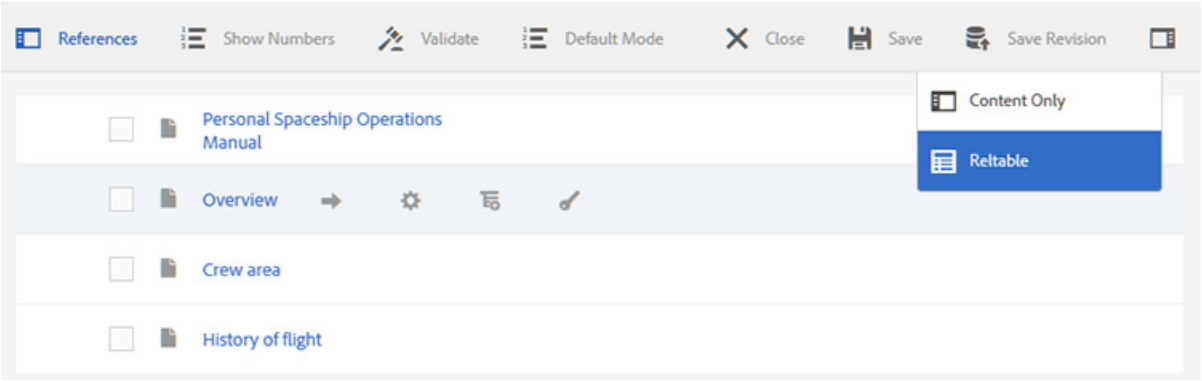
An internal name with which the map is stored in the AEM repository. The DITA map file is stored with *.ditamap* extension.

6) Click **Create**.

   Map created *message appears.*
7) To open and edit the map, click **Open Map**.
8) From the **References** panel, drag-and-drop topics on to the map console to add it to your DITA map.



In the DITA map editor, you can organize topics by moving them up/down the hierarchy or left/right for making them child/parent of their neighboring topic.



Sharing documents for review

XML Documentation solution allows you to share your documents for review with other stakeholders.

Create a review task

To create a review task:

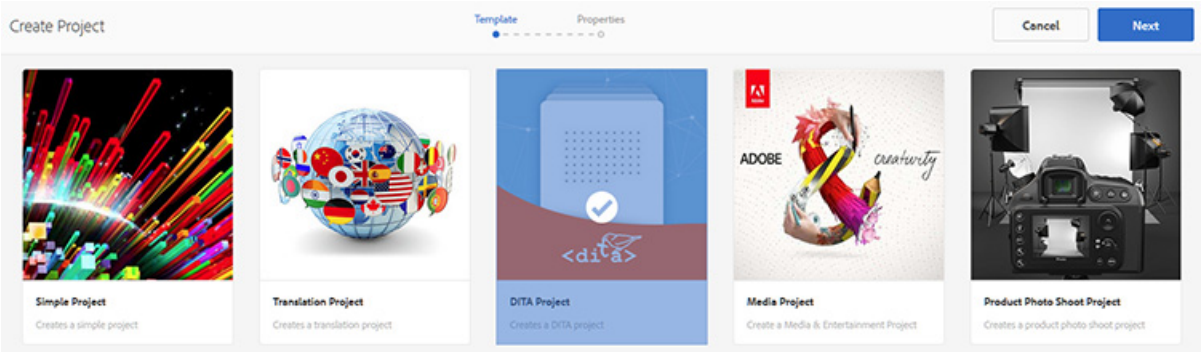
1) Log into AEM.
2) Create a Project.

   A Project in AEM lets you group resources into one entity. A project can have tiles for various things like: assets, experiences, links, project information, team, landing pages, emails, workflows, launches, and tasks. Any review task that you create can be managed from the Tasks tile.

   To create a Project in AEM:

   a) On the **Projects** page, click **Create** and choose **Project**.

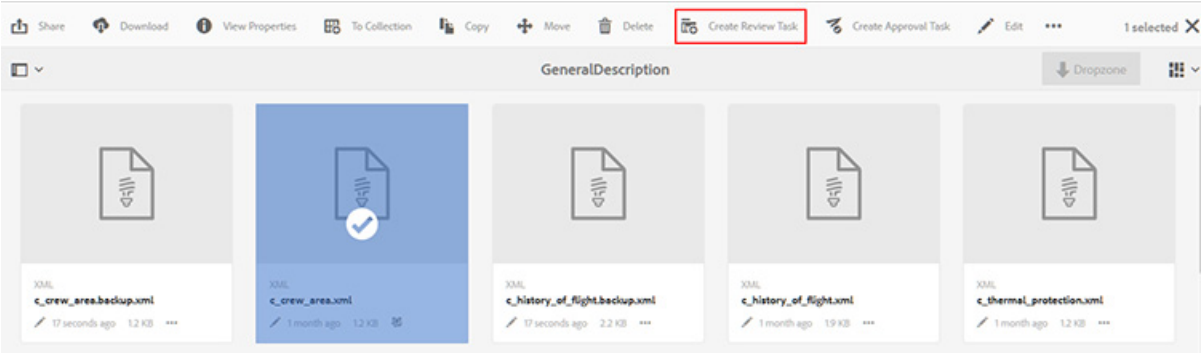
   b) On the **Create Project** (Template) page, select **DITA Project** and click **Next**.



   c) On the **Create Project** (Properties) page, enter the required details and click **Create**.

   d) In the **Success** pop-up, click **Done** to go back to the Project console or click **Open** to open the **Project** page showing the default tiles.

3) Open the Assets console.
4) Select the topic(s) you want to send for review and click **Create Review Task**.



5) On the **Create Review Task** page, enter the following details:

Title

Enter a title for the review task. This task name appears in the Project task details page.

Project

Select a Project from the drop-down list to assign this review task with a project.

Assign To

The team members from the selected project appear in the **Assign To** drop-down list, choose the members to whom you send the review request to.

Description

Enter a description for the review task. This description is used as the body of the notification email sent to reviewers.

Due Date

Select the due date and time to mark the deadline for review.

6) Click **Create**.

The Success message pop-up appears.

Manage review task

Review management allows you to know the status of any review task, make updates to an existing task, or even close a task before reaching its deadline.

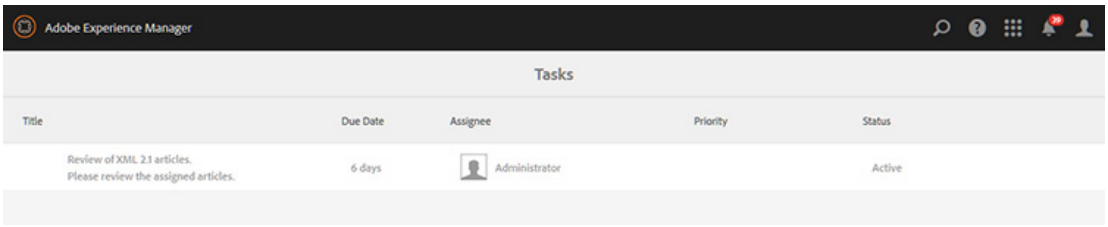
To manage a review task:

1) Open the Projects page.
2) Click on the project to which you had assigned the review task.

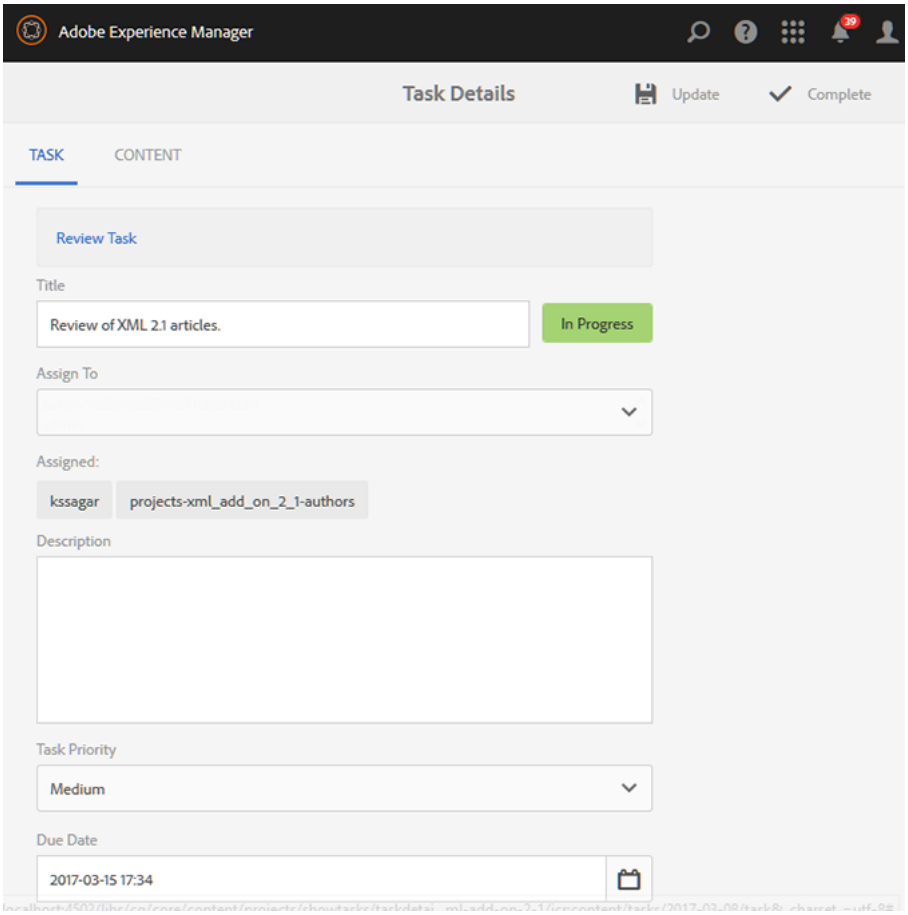
The project's information page appears.

3) Click **Tasks**.

The Tasks page appears showing a list of all review tasks.



4) Click on the review task that you want to work on.
The Task Details page appears showing information in the Task tab.



5) On the **Task** tab, you can change the task title, add or remove members from review process, change description, set task priority and change the task due date.
6) The **Content** tab lists the topics under review.
Clicking on the topic opens the topic in Preview mode.
7) Click **Update** to save any changes.
If you want to close the review task, click Complete.

Sending documents for translation

Once you have the documents reviewed, you can send them for translation. To send your documents for translation:

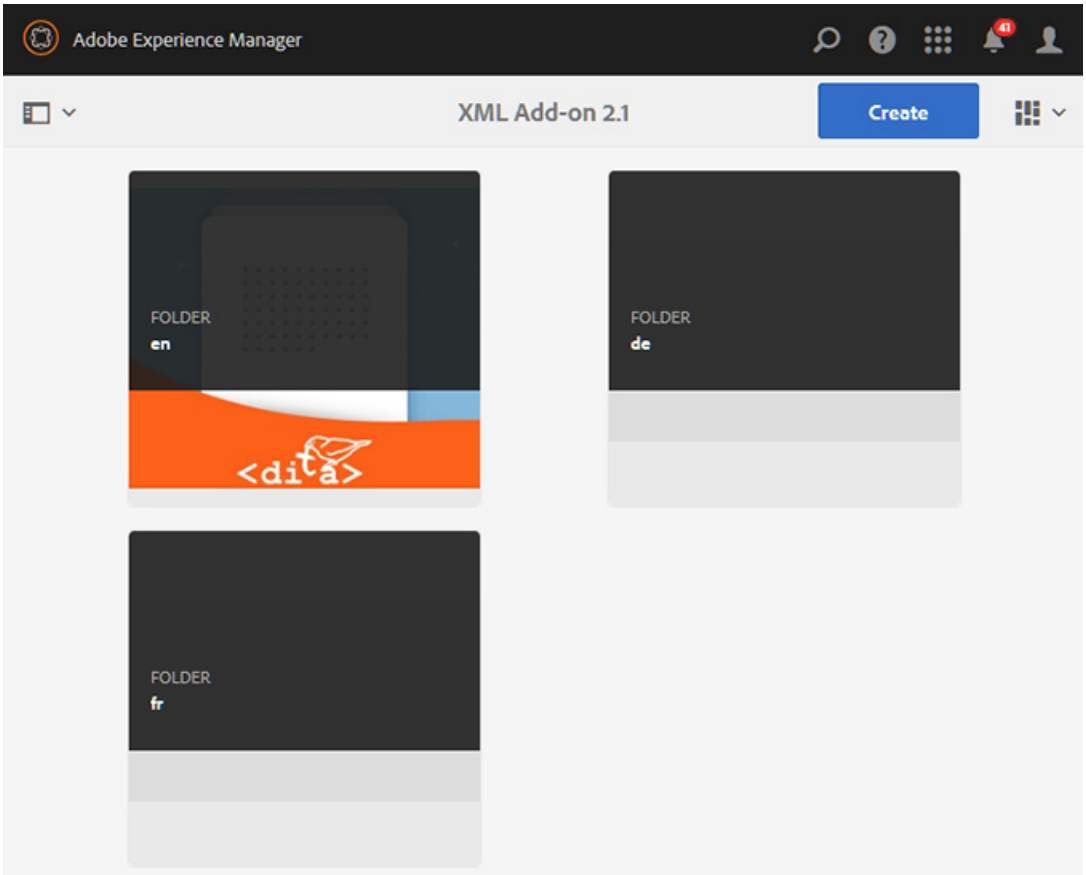
- Create a translation job
- Translate the content

Create a translation job

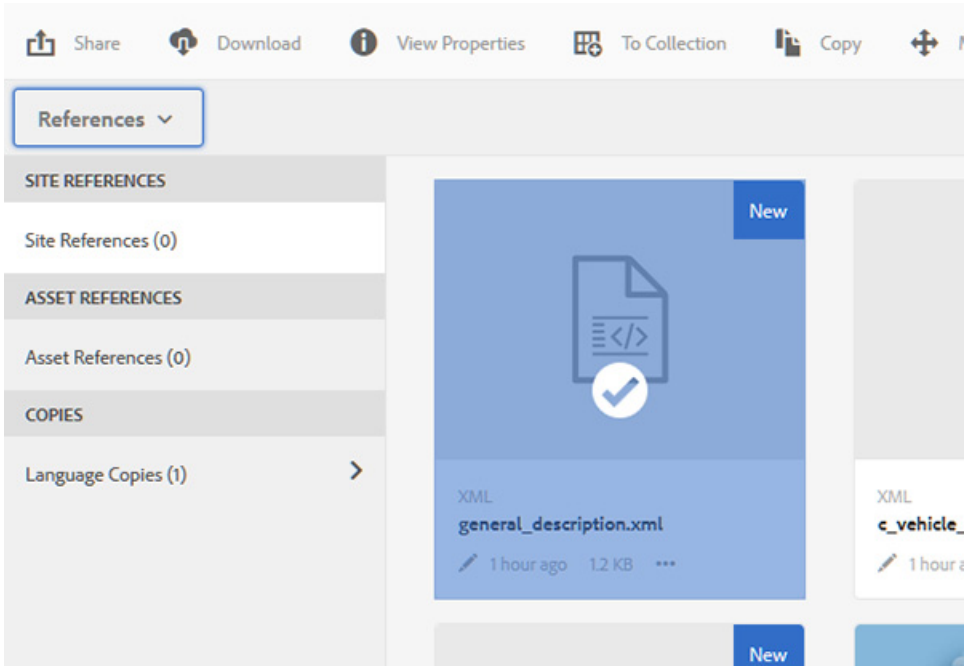
Perform the following steps to create a translation job:

1) Create a root folder to store your source content. The root folder must be created with the language name (such as `English`) or language code (`en`).
2) Create the destination folders to which you want to translate your content. For example, if you want to translate your content into French, then you must create folder named `French` or `Fr`.

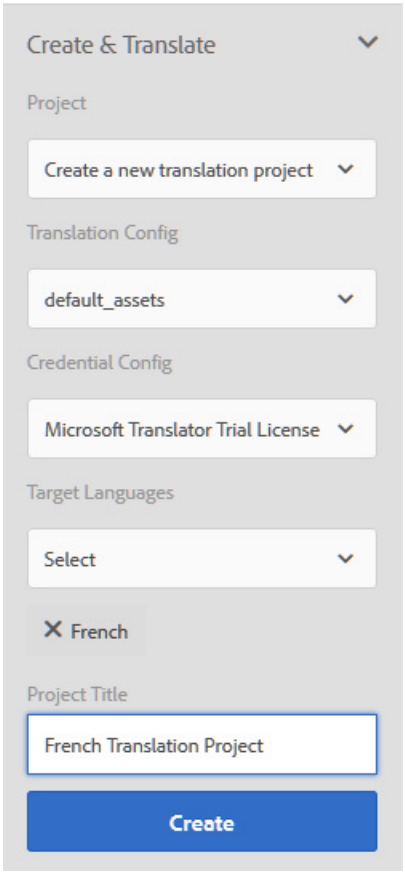
   NOTE: The root folder and the destination folders must be created at the same level.



3) Select to the resource that you want to send for translation and open the **References** pane.



4) Click on **Language Copies**.
5) At the bottom of the **Reference** pane, click **Create & Translate**.
6) In the **Project** drop-down list, select **Create a New Translation Project**.



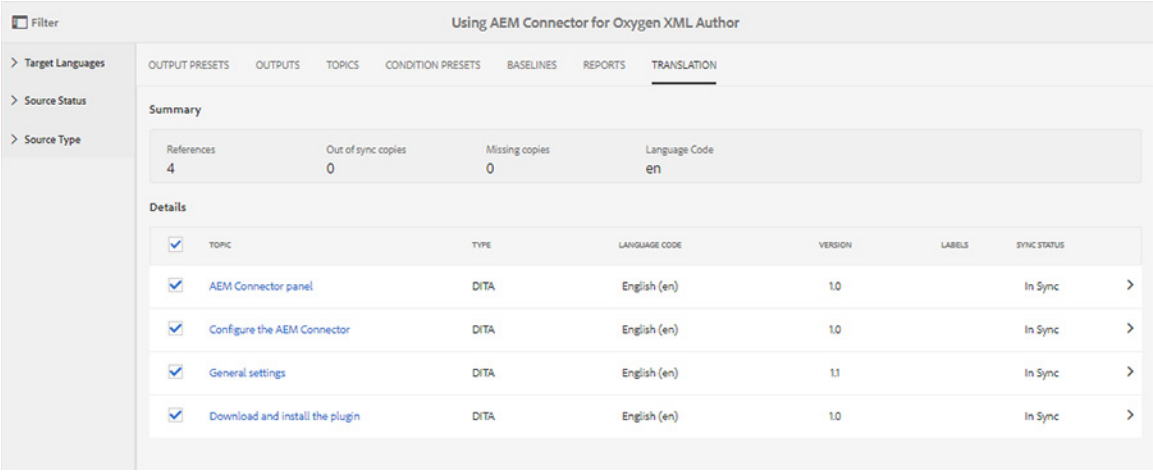
7) Keep the default values in the **Translation Config** and **Credential Config** fields.
8) From the **Target Languages** list, select the languages into which you want to translate your content.
9) Enter the **Project Title** and click **Create**.
   The translation project is created.

Translate the content

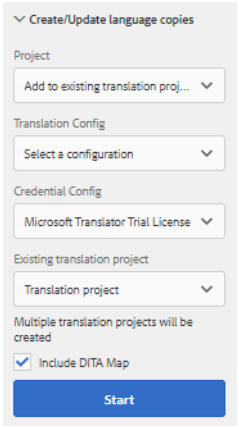
Perform the following steps to translate the content:

Once the project is created, you need to start the translation workflow. To start the translation workflow:

1) Open the DITA map console for the DITA map that you want to send for translation.
2) In the **Translation** tab, select the topics you want to translate.



3) Click **Create/Update language copies** and specify the following details:



- Project: Select **Add to existing translation project**.
- Translation configuration: Select the default configuration.
- Credential Configuration
- Existing translation project: Select the translation project that you have already created.
- Include DITA Map

4) Click **Start**.

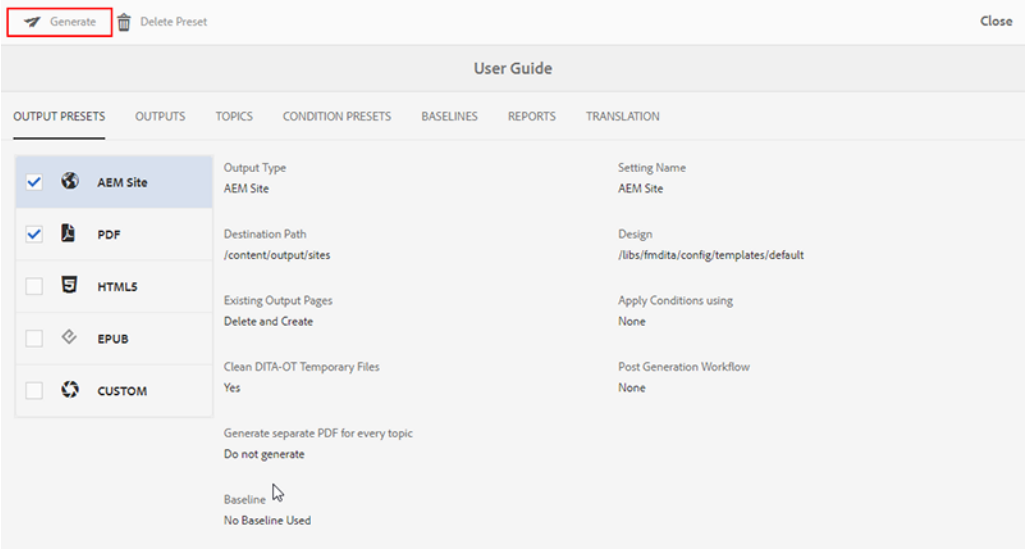
Topics are sent for translation.

Generating output

The XML Documentation solution has built-in publishing capabilities to generate outputs in a variety of industry standard formats.

To generate AEM Site and PDF outputs:

1) In the Assets console, navigate to and click on the DITA map file that you want to publish.
   The DITA map console appears showing the list of Output Presets available to generate output.
2) In the **Output Presets** tab, select **AEM Site** and **PDF** formats.



3) Click **Generate**.
   The output generation process starts. You can check the output generation status and the final output in the Outputs tab.