Tridion Docs Demonstration

Collective Spaces

January 2022

RWS

Table of Contents

1 Demonstration Summary

Summary	

Products	• Tridion Docs Collective Spaces
	    o Tridion Docs Draft Space
	    o Tridion Docs Review Space
	• Tridion Docs Web Client

Use Cases	• Subject Matter Expert (SME) Authors can create and edit new content, upload new images, reuse existing repository content, integrate review comments at their discretion and maintain control over the final content workflow status • Subject Matter Expert Reviewers can view and add comments in context, track approval status, and even participate with multiple reviewers from a single view of the content within one simple online interface
Unique Selling Points	Tridion Docs **Collective Spaces** • Ensures you get all of the benefits of a structured content approach to authoring and managing content while eliminating the need for your contributors to understand and use the underlying XML directly Tridion Docs **Draft Space** • Whole-document view: scroll smoothly through your entire publication/document and edit anywhere • Easy-to-use: WYSIWYG browser-based editor for SMEs, hiding underlying DITA XML from the casual contributor • Intelligent UX: access essential features based on user activities and permissions • Highly configurable: Integrate with other solutions and systems to create dashboards, monitor performance and derive business insights • Extensible: Extend functionalities by linking with your enterprise toolset to facilitate content quality checks, automated tagging and reuse • Compliance and audit-trail visibility: Gain a bird's eye view on critical information workflows with reports on reviewer comments, suggestions and their resolutions through full API support Tridion Docs **Review Space** • Review overlays: Allow multiple reviewers to provide feedback on the same content simultaneously - the author maintains

	control over the final content and can integrate review comments at their discretion • Highly scalable: Collaborate with distributed global teams, both in-house and inter-organization • Easy to use: Jumpstart enterprise-wide structured authoring and reviewing workflows with minimal training • Unified collaboration: Centralize enterprise-wide structured collaboration workflow through easy authoring and reviews, with synchronized commenting and threaded conversations Tridion Docs **Document History** • Optional change tracking add-on provides a detailed view of changes in a component – who changed what and when they changed it
Audience	**Be aware of your demo audience**, specifically whether the authors are traditional "technical" authors or more business focused SME authors/content contributors, possibly without formal authoring training. **The demo script is in three sections:** 1. Review Space for reviewer commenting 2. Draft Space for author integration of review comments 3. Further Draft Space for more advanced content authoring, including Document History ***Consider the final section optional*** as it may not be appropriate for an audience of business focused SME authors who are most interested in a simple and easy online UI experience. The final section is more technical and showcases many of the benefits of the Tridion Docs solution, such as content reuse and repository interactions, but may be too much information for a true SME audience. When presenting the final section, progress through the demo script as far as you want for the audience, or pick and choose which items to show for a deeper look beyond basic content editing. Additionally, several *Optional* sections in the demo script are intended to only be included for a technical author audience, so please skip them entirely for a SME author audience.
Terminology to USE During Demo	Terminology can be modified based on audience and while both are acceptable, generally first term is more business/SME focused and second term is more technical author/existing user focused: • Document / Publication • Component / Topic (or Image, Map, Library) • Properties / Metadata • Outline (or Table of Contents) / Structure

	• Reuse content / Content Reference • Unlock that component to me / Check Out • Save my changes / Check In • SME author (or content contributor) / non-technical author
Terminology to AVOID During Demo	Terms to AVOID using during demo: • DITA • Conref • Concept • Map • Topic Head / Group • Non-technical author • Technical author

Audience	
Audience Member	**Relevance**
Reviewer / Subject Matter Expert	• Centralize and simplify enterprise-wide content collaboration with easy synchronized online reviews
Author / Contributor / Subject Matter Expert	• Easy yet powerful structured authoring experience with minimal training

Roles			
Role	**Name**	**Username**	**Password**
SME Reviewer	Rachel Reviewer	Rachel Reviewer	rachel
SME Author	Yourself	Firstname Lastname	firstnameRWS

2 Configuration Requirements

Item	Tool	Description
Launch Tridion Docs AWS demo environment		• Make sure to use a fresh AWS instance • From Task Manger ensure all the Trisoft InfoShare Services are running
Gmail [optional] *(or other email system)*	*Firefox*	• *[RWS only] Login to Gmail account for Rachel Reviewer* • *[Partners] Create optional sample email if desired and include Review Space link below*
Tridion Docs Review Space	Firefox	• Login to Web Client as Rachel Reviewer • Select Content Manager and then Repository tab • Navigate to Sales Guide publication (General > 01. Marketing Collateral > Publications) • Select Version 2 of the publication • From the version toolbar, click Review Online and select en-US • Publication will load in Review Space to open for English source review • *[Optional] If Review Translations is intended to be included in the demo, then open an extra browser tab and load the Spanish (es-MX) v2 publication in Review Space*
Tridion Docs Draft Space	Chrome	• Login to Web Client as yourself • On Home page, select Sales Guide favorite, or… • Or, if no shortcut exists, go to Content Manager, then Repository tab, and then navigate to General > 01. Marketing Collateral > Publications folder • Select Version 2 of the publication • From the version toolbar, click Draft Online • Publication will load in Draft Space **Note:** two separate internet browsers are recommended to allow two different users to login to Collective Spaces during demo **Note:** if planning to demonstrate MathML integration, then also open v2 of MathML Examples publication from General > 06. General Pubs > MathML Examples > Publications folder

3 Collective Spaces Demo Script

Role	User	Environment	Action	Messaging
Reviewer / Subject Matter Expert	Rachel Reviewer	Email System	[*Optional: Below actions reference RWS demo but sample email with Review Space link to demo publication can easily be replicated by partners using their own email accounts]* *[To avoid logging in during demo, the below actions can also be completed prior to start of demo and then just show email but don't click on link]* • Select **sample email** (setup in advance) with Review Space link to publication to be used for demo • **Click on** Review Space **link** to load Tridion Docs Web Client login page	**Role Explanation** ***and [Optional] Email Link to Review Content*** • Give your SMEs and content contributors a simple approach to structured collaboration • Reviewers can comment and provide feedback all within an intuitive and easy-to-use browser-based interface • You may be notified to review a publication/document via email link
		Tridion Docs Review Space	*[Below actions can also be completed prior to start of demo and then just go to active Review Space browser window during demo]* • **Login** to Tridion Docs Web Client • **Publication will load** in Review Space	**Demo Dataset** • We are opening the entire publication/document in the online unified collaboration tool • This content is Sales and Marketing content that is being written by Subject Matter Experts in Sales team • The content is used by Sales to learn the sales messaging appropriate for the product

Role	User	Environment	Action	Messaging
			• Click **F11 for full screen** mode • Explain **brief overview** of UI	**Review Space UI** • Online Browser based solution • Part of Tridion Docs suite • Allows multiple reviewers to provide feedback on same content simultaneously • Simple to use, with minimal training • Highly scalable for distributed global teams • Centralize enterprise-wide content collaboration with easy authoring and reviews
			• **Scroll down** and show that all the content components are visible in a **single view** • Point out **friendly message** at top, then **Hide message** • Point out the **existing comments** loaded in the **Comments panel**	**Full Publication/Document View** • Instead of a fragmented single component/topic experience, you can scroll and see your entire publication/ document (and all its components) at one time • The content is loaded as read-only in Review Space, but comments can be added to the content

Role	User	Environment	Action	Messaging
			• In the **right** panel, click **Outline** • Explain publication structure, expand sections and scroll down if desired • Click on **Offer > Benefits** or another component near the top	**Publication/Document Outline View** • In addition to seeing all the components, you also have an outline/structure view that shows you the TOC and allows TOC navigation through the publication/document • Easily see the overall structure of the publication/document
			• Click **ellipsis** button > **Quick Navigation** > type "market" • Click bottom result > **Market Customer – Customer Reference** • Comment that this component is Released • **At top**, click on **Components to review** > **Next button** • Click **Next again** to cycle through	**Navigation Options** • Easily navigate to specific sections of content using Quick Navigation • Easily focus on content for review using Components to review
			• Click **ellipsis** button > **Expand All** • Scroll to show status badges for **To be reviewed** components • Click **filter** button > **To be reviewed** > **Set filters**	**Filtering & Status Badges** • Easily focus on most relevant content by using filtering and status badges
			• In the **right** panel, click **Search** panel • Enter "APAC" > click **Search** button > 4 results • Click **Match case** > click **Search** button > 1 result	**Search** • Easily find specific terms within the content

Role	User	Environment	Action	Messaging
			• **Click on result** to navigate to that component	
			• In the **right** panel, click **Comments**	**Unified Collaboration** • Simplify and centralize company-wide content review and collaboration processes
			• Click on **1st comment** • Enter Reply: "**Yes, that's correct**" • Click **Edit** button • Change reply to "Yes, **$6B is** correct" • Scroll down past next few comments	**Replying to a Comment** • Synchronized commenting and threaded conversations for unified collaboration
			• Scroll down in Comments panel • Click on **last comment** • Click **Resolve** button • Enter Resolution comment: "**Actually, 10th is a later release, so leave as-is**" • Select **Not changed** option • Click **Done** button	**Resolving a Comment** • Reviewers view and add comments in context, track approval status and even participate with multiple reviewers from a single view of the content within one interface
			• **Explain** that the **comment just resolved is no longer displayed** since default filter is to show only Unresolved comments • Click **Filter button** at top of Comments panel • Select **Resolved** option > also discuss other options > click **Set filters** • Two Resolved comments are displayed	**Comment Filtering** • Default view of Unresolved comments that need attention • Powerful filtering of comments by Resolution, Type, Creator and Creation date

Role	User	Environment	Action	Messaging
			• Cancel the filter > **click the 'x'** on Resolved filter	
			• Scroll up to **Market Opportunity** (or click on 1st comment to navigate there) • **Highlight "cloud"** in final paragraph • Click **Add comment** button • Enter Comment: "**Should we also add DesignFlow?"** • Select **General** option • Click **Save** button • *[Optional]* **Click on** *Worldwide IT Hardware image* and **point out** *Add comment* **popup**	**Adding a New Comment** • Use a comment to leave feedback about the selected content without suggesting a replacement • Comments are stored in context with the content, so reviewers no longer need to collate feedback into a source publication/ document, transfer comments from marked-up PDFs, copy/paste or manage feedback via email • Comments can also be added on images and other structural elements like variables
			• **Highlight "HW or SW"** in final paragraph • Click **Add suggestion** button • Enter **Proposed change**: replace with "**hardware or software"** • Enter **Reason: "Spell out for clarity"** • Select **Editorial** option • Click **Save** button	**Adding a New Suggestion** • Use a suggestion to provide specific feedback about what to replace the selected content with • Suggestions are stored in context with the content, so you can track the entire process, including any deletions or additions

Role	User	Environment	Action	Messaging
			• Click **Add global comment button** at top of Comments panel • Enter "**Please have the Legal team review too, thanks!**" > General	**Inserting a Global Comment** • Use a global comment to provide feedback for the entire publication/ document
			• Point out new comments are **Unshared** • Click **Share comments** button • Click **Share** button	**Sharing Comments** • Annotations (comments and suggestions) are created with an unshared status • Share your comments to reveal them with the rest of the team • Synchronized commenting and threaded conversations for unified collaboration
			• Explain **workflow statuses** • Click on **To be reviewed** in sheet header and change to **Reviewed** - Needs Change status	*[Optional] Changing Workflow Status* • *Enterprise-wide structured authoring and reviewing workflows with minimal training* • *Optionally change workflow status for components when review is complete*
			• In the **OUTLINE tab**, click on **Market Opportunity** (or use Quick navigation) • Click **Show changes** from top of component in main view • **Explain** timeline view to select between revisions to compare	*[Optional] Document History* • *Optional change tracking add-on provides a detailed view of changes in a component – who changed what and when they changed it* • *Available in both Review Space and Draft Space*

Role	User	Environment	Action	Messaging
			• Select a **prior revision** and click **View changes** • **Explain** authors in Draft Space can also see change history too • **Click left arrow** in top left of screen to return to Review Space	
Author / Contributor / Subject Matter Expert	[You]	Tridion Docs Draft Space	• Switch to active **Draft Space browser window** (already opened *prior to start of demo*) • **Click F5 to refresh browser** to ensure latest comments display	**Role Explanation** *[Role transition from Reviewer to Author for implementing review feedback]* • You may be notified that review is complete for this publication/document via email
			• Click **F11 for full screen** mode • Explain **brief overview** of UI	**Draft Space UI** • Online Browser based solution • Part of Tridion Docs • Allows content authoring and editing (without DITA knowledge) • Simple to use, with minimal training • Familiar and easy WYSIWYG online editor with toolbars, similar to MS Office • Familiar looking icons help user to create content (which is DITA underneath) • Ease of use and ability to quickly add/edit/delete content – and

Role	User	Environment	Action	Messaging
				interact with content in the Tridion Docs repository (CCMS)
			• **Scroll down** and show that all the components are visible in a **single view** • At **top**, go to **Tools** > **Document View**	**Full Publication/Document View** • Instead of a fragmented single component/topic experience, you can scroll and see you entire publication/ document (and all its components) at one time • You can view the components with separation or as a seamless publication/ document • The components are loaded as readable initially, they are not checked out
			• At **top**, go to **Tools** > **Structure**, or just click **OUTLINE** in the right panel • Explain that same Quick navigation feature is available in Draft Space too • Explain that sheet header provides information about **workflow and status** • Point out that **Market Opportunity** is available for editing as it is **Reviewed – Needs Change** status • **Scroll down** in main panel and point out that **Industry Trends** is also available for editing as it is **Draft** status • **Scroll down** in main panel and point out that **Pain Points** is grayed out as it is	**Publication/Document Outline View** • In addition to seeing all the components, you also have an outline/structure view that shows you the TOC and allows TOC navigation through the publication/ document • This is where you author content and organize into publications/documents • Friendly messages about the status of the components

Role	User	Environment	Action	Messaging
			Released status (and with system permissions, a user can create a new version to update content)	• Easily see which components are potentially editable, and which are Released or otherwise locked
			• **Scroll down** and point out that **Target Markets** is **checked out by Frank**, so I cannot edit it until he saves his changes (just for this component, not other components within publication)	**Unified Collaboration** • Bring together content contributions across your organization • Centralize company-wide knowledge creation and reviews • Simplify collaboration processes • Friendly messages about the status of the components • Easily see which components are potentially editable, and which are Released or otherwise locked
			• Click on **Comments** tab • Click on **2ⁿᵈ comment** • Click in main panel and **change 3 to 6** • Explain **new icons** appear – **Save / Discard** • Click **Resolve** button • Enter **Resolution comment: Changed** • Select **Applied** option • Click **Done** • Explain that same Filter feature is available in Draft Space too	**Implementing Reviewer Feedback** • Simple to use, intuitive, minimal training • Familiar and easy WYSIWYG online editor with ribbon toolbar, similar to MS Office online • Familiar looking icons help user to author and edit content (which is DITA underneath) • Ease of use and ability to quickly edit content

Role	User	Environment	Action	Messaging
				• Component was automatically checked out to me in the background • For a Released component, to make content changes, first create a new version
			• Click **next (3ʳᵈ) comment** • **Highlight *** in publication • Select **Structure > Footnote** • Replace ***** with **CloudFutures** in footnote • **Resolve** comment as above	**Inserting structures, e.g. footnotes** • Familiar looking icons help user to author and edit content (which is DITA underneath)
			• Click **next (4ᵗʰ) comment** • Click **Apply proposed suggestion** button • **Resolve** comment as above • *Click **next (5ᵗʰ) comment** (optional)* • *Click **Apply proposed suggestion** button* • ***Resolve** comment as above*	**Applying Proposed Suggestions** • Simple to use, intuitive, minimal training • Note: Resolving the comment automatically also saves any unsaved changes in the component
			• **Skip** next (6ᵗʰ) comment (come back later) • Click **next (7ᵗʰ) comment** • Click **Apply proposed suggestion** button • Click **View Original** in comment • **Explain** this shows original content • **Resolve** comment as above	**Seamless Component Editing** • Notice that this component was not in a Released state, so as we started editing the component/topic, the component was automatically checked out to me in the background • This content component/topic is now checked out to this user from

Role	User	Environment	Action	Messaging
				Tridion Docs Content Manager repository
			• Scroll to top of component • Select **Save all changes** in sheet header • Or Save all documents (components) button at top	**Saving Changes** • Saves the edits for this component, checks the changes back into the Tridion Docs repository
			• *[POTENTIAL STOPPING POINT]*	• ***Shorter Collective Spaces demos can stop here, but for a deeper look beyond basic content editing, keep on progressing through the demo script as far as you want, with a focus on more interactions with the Tridion Docs repository…***
			• **Go back and click (6ᵗʰ) comment** • Click **Outline** tab • Click **ellipsis** button next to **Market Insight** • Click **Insert existing document** (component) • Select **Search** tab > enter "**trends**" • Or, navigate to **Repository** tab > **General > 01. Marketing Collateral > Topics** and click on any component to show a **Preview** • Then select **New Trends in the Market** • Click **Insert** on the bottom right	**Content Reuse – Inserting Existing Components** • Easy outline/map/TOC editing • Integrated search to find relevant content within Tridion Docs Content Manager repository • Point out the preview as you select the component/topic • *[Optional] Explain that Search remembers last folder location (for each user action, within session)* • *[Optional] Notice that as we made changes to the publication/ document structure, it was*

Role	User	Environment	Action	Messaging
			• In the outline/map navigation, click the **ellipsis** icon next to **New Trends in the Market** and **show Move up** etc. options • Click back to Comments tab • **Resolve** comment as above (or skip) • *[Optional] **Scroll to top** of publication and point out that the overall outline/map was checked out in the background once a change was made to it*	*automatically unlocked to me in the background* • *Publication/document structure is now checked out to this user from Tridion Docs Content Manager repository*
			• In **Outline** tab • Click **New Trends in the Market** component • **Drag and drop** to new location in the publication structure	***[Optional] Outline drag and drop*** • *Easily drag a component title to a new location* • *Change order or nesting level of any component* • *Clear messaging if moving a component to an invalid position or outline is locked*
			• **Click in the title** in New Trends in the Market and **change to** "New Trends in the **Emerging** Market"	**Seamless Component Editing** • Notice that as we started typing in the component/topic, the component was automatically unlocked to me in the background • This content component/topic is now checked out to this user from Tridion Docs Content Manager repository

Role	User	Environment	Action	Messaging
			• In **second paragraph add** "**and beyond**" at the **end** of the paragraph • Click in the **first paragraph** and select **Structure > Note > Generic Note** and notice that the paragraph changes into a note • Click the **ellipsis icon** next to the note and select **Change to warning note** • Notice **breadcrumbs** at bottom. Select the **up arrow** icon next to Warning in the breadcrumbs and select **Change to caution note**	**Easy and Intuitive Editing Experience** • Simple to use, intuitive, minimal training • Familiar and easy WYSIWYG online editor with ribbon toolbar, similar to MS Office online • Familiar looking icons help user to author and edit content (which is DITA underneath) • Ease of use and ability to quickly add/edit/delete content • Actions can also be performed from breadcrumbs at the bottom
			• Click at **start of second paragraph** and hit **Enter** to add a blank paragraph above, then click up to go there • Then click **Advanced > Reuse Content** • Select **Search** tab > enter "**disclaimer**" • Or, navigate to **Repository** tab > **General > 01. Marketing Collateral > Resources** and select **Disclaimers** • Select **either note** and click **Insert** at bottom right • Click in the body of the conref and show the pop-up > click **Show the origin**	**Inserting Content References** • Small chunks of content or entire components can be reused whole in other publications/documents • Also, can reuse smaller pieces of information likes warnings, cautions or list items • Inserted into content as read only, so grayed out • Can only be edited in the source file, not where reused • Will automatically update where reused, when the single source is updated

Role	User	Environment	Action	Messaging
				• A Library folder is a good location to store content references specifically identified for reuse • Further reuse and savings occur when translating content references one time into other languages
			• Place cursor at the beginning of the **next/second paragraph** • Select **Structure > Table > Generic Table** • Insert a table with **3 columns and 2 rows** • Click the **ellipsis icon** next to the table and click **Add title** • Type "**Market Trends**" as the table title • Label the headings **Trend, Reason and Proof** • Leave your **cursor in the first row**, then from top green menu bar select **Table > Headers > Rows > Add row to header** • Place your **cursor inside the second row** and **enter**: "**Arrows point upwards**" and "**They look better like that**" in the first two cells in row 2 • Click in one cell and drag to another to **select multiple cells** • Select **Start** menu > apply **Italics** text • Select **Table** menu > **Expand table** to maximize working table size, useful for	**Easy to Use Table Editing** • New contextual Table menu appears when you insert a table • When inserting the image, point out the preview • Further advanced tools that also interact with the content repository, e.g. explain images can also be uploaded *(and show this in next section if desired, or simply upload new arrow.jpg image now, to combine both sections)* • Tables bigger than 10x10 collapse automatically to boost performance • *[Optional] If desired, select Show / Hide, useful for hiding large tables when working with content around tables* • *[Optional] If desired, select Table > Compressed view to fit all columns*

Role	User	Environment	Action	Messaging
			working with wider complex tables > and also close side panel too for more space **Click in cell 3** in row 2 and select **Inline > Inline Image** from top menu - Navigate to **General > 01. Marketing Collateral > Images** and select **Arrows-up-and-down** **Explain images can also be uploaded** *(and show this in next section if desired, or simply upload new arrows-zigzag.jpg image now, to combine both sections)* **Click Insert** button **Remove extra space above** image and then **select image** *[Optional] In **breadcrumb, click arrow** to right of Image, then click **Add alternative text*** *Enter **"Red arrow going up"***	*in available screen width (with text wrapping), useful to see all columns in one view without scrolling*
			- Place cursor at the beginning of the **next/second paragraph** - Select **Structure > Figure with image** from top menu - Navigate to **General > 01. Marketing Collateral > Images** and click **Upload a new image** - Navigate to **This PC > Pictures** folder - Select **arrows-zigzag.jpg** and click **Show the preview pane**	**Uploading New Images** - Further advanced tools that also interact with the content repository, e.g. explain images can also be uploaded - Provides ability for author to create new images to use in this publication/ document and reuse in others

Role	User	Environment	Action	Messaging
			• Click **Open** • **Enter Title > "Zigzag Arrows"** • Click **Create** button • Click **Insert** button • Enter **Title "Arrow Combo"** • Select **Description,** click **Backspace** twice	• E.g. authors may need to upload images for new screenshots or features • System prompts for image name/title and also any required properties/metadata – can be configurable
			• Highlight **Gartner** in bullet point #4 below table • Click **Inline > Link > Hyperlink** • Enter **www.gartner.com** > Insert • Click on link to show hyperlink view	**Inserting Hyperlinks** • Simple to use, intuitive, minimal training • Familiar looking icons help user to author and edit content (which is DITA underneath)
			• Highlight **Quantum Computing** in bullet point #2 below table • Click **Inline > Link > Cross-link** • Navigate to **General > 01. Marketing Collateral > Topics** • Select **Opportunities** > Insert • Click on link to show cross-link view	**Inserting Cross Links** • Simple to use, intuitive, minimal training • Familiar looking icons help user to author and edit content (which is DITA underneath)
			• Scroll to top of component • Select **Save all changes** in sheet header • Or Save all documents (components) button at top	**Saving Changes** • Saves the edits for this component, checks the changes back into the Tridion Docs repository
			• Explain **workflow statuses** • Click on **Draft** in sheet header and change **To be Reviewed**	**Changing Workflow Status** • Enterprise-wide structured authoring and reviewing workflows with minimal training

Role	User	Environment	Action	Messaging
			• Scroll up in main panel to **Pain Points** • Explain component is **released** • Click **New version** button • **Explain** Properties, click **Create** • **Point out** component is now Draft and a new version has been created in Tridion Docs	**Creating a New Version** • Provides ability for author to create a new version of an existing component/topic that was previously released
			• In the **OUTLINE** tab, click on **Offer** and click the **ellipsis icon** next to it, then select **Insert new document** (component) • Navigate to **General > 01. Marketing Collateral > Topics** and click **Next** • Select **Task** template • Click **Next** button • Enter **Title > "Sales Process Overview"** • Click **Create** button • **Highlight** existing **short description** and **type "Process overview for new sales."** • Click in **Step 1** • At top, go to **Task menu** • Scroll to top of component • Select **Save all changes** in sheet header	**Creating New Components** • Easy outline/map/TOC editing • Provides ability for author to create new components/topics to use in this publication/document and reuse in others • Explain templates setup to assist authors with creating different types of content • Task template is more prescriptive in structure than others, like Concept • New contextual Task menu appears depending on component/topic type • System prompts for component name/title and also any required properties/metadata – can be configurable

Role	User	Environment	Action	Messaging
			- Click **PROPERTIES** tab in right panel - Scroll down to **Workflow** section - Select **Status > To be reviewed** - Click toggle to turn on **Show optional fields** **Minimize General** and **Version** sections - Scroll down to **Workflow** section **Type ahead** for **Reviewer >** and then select **Chip Gettinger** *If desired,* **scroll up** to **Version > Changes** - Enter "**Changes for version 2 release**" - Click **Save** button	**Updating Properties** - Single source for content itself and also Properties (metadata) within Tridion Docs repository (CCMS) - Exposes object properties/metadata to content contributors and reviewers to make updates as needed - Can be configured to expose certain metadata
			- In the **OUTLINE tab**, click on **Market Opportunity** (or use Quick navigation) - Click the **ellipsis icon** next to it, then select **Show changes** **Explain** timeline view to select between revisions to compare - Select just the **revisions changed today** and click **View changes** - Show **Detailed changes** panel - Click **DesignFlow addition** and click **Edit here** button **Explain** now back to Draft Space to edit **Use** keyboard shortcut **Shift+Ctrl+Y** to toggle back to Document History **Click left arrow** in top left of screen to return to Draft Space	**Document History** - Optional change tracking add-on provides a detailed view of changes in a component – who changed what and when they changed it - Available in both Review Space and Draft Space

Role	User	Environment	Action	Messaging
			• In the **right** panel, click **Outline** tab • Click **ellipsis** button > **Quick Navigation** > type "garden" • Select **Garden Customer – Customer Reference** component • Select **Tools** menu > **Turn on quality check** • Click **down arrow** in **navigator** window > select correct spelling • **Repeat** as desired through the 5 spelling errors in this component	**Spell checking** • Spell-checking suggestions as you type • US English dictionary out of the box; other languages and dictionaries added as needed • Easily replace a misspelled word from the suggestion list • Respects Lazy Loading - checks only loaded components • Interactive, batch or select specific components to check • Power user can setup word exception list
			• In the **right** panel, click **Search** panel • Enter "**trends**" > click **Search** button • Click **Replace** and enter "**developments**" • Click **Replace** button to make updates • **Explain** that Replace button is disabled for Additional resource component as it is Released	**Search and Replace** • Easily find and replace specific terms within the content
			• Select **Save all documents** (components) at the top • Click **OUTLINE** tab in right panel • Click on any component and click the **ellipsis icon** next to it, then select **Copy link for Review Space**	*[Optional] Sharing Content for Unified Collaboration* • *Content owner can setup publication/document with stub components/topics and TOC outline for content contributor to author content*

Role	User	Environment	Action	Messaging
			Explain that link is a **deep/direct link** to that component, and can be shared in any manner, e.g. email **Explain** that separate links can be created for both Draft Space and Review Space - Click **New tab in browser** **Right click in Address bar** - Select **Paste and go** **Wait for publication to load** and show the Sales Process Overview component	*Easily share direct links to entire publication/document and direct users to specific components* *If desired, draft sample email from author to contributor, and paste link into draft email as demonstration of sharing content for unified collaboration*
			- Click the **tag </>** tab in right panel **Explain** the XML source view shows the DITA XML tags and content structure **Point out breadcrumbs** **Select some content** in content panel and show highlighted text in XML source panel	***[Optional] XML Source for Tags On View*** *For authors who want to see the underlying DITA XML structure, a tab reveals the tags on XML view*
			- Click **OUTLINE** tab in right panel **Scroll down** further and **click on a component** that has not loaded yet (i.e. does not display the page/content icon) **Explain 'lazy loading' concept** for scalability and ability to handle large publications	***[Optional] Scalability for Large Publications /Documents*** *For large publications/documents, components load when selection approaches their location (called lazy loading)* *Design principle commonly used to optimize software efficiency to only load content at the point at which it is needed*
			In the **OUTLINE tab**, click on **Elevator Pitch** (or use Quick navigation)	***[Optional] Support for Conditions***

Role	User	Environment	Action	Messaging

			• Click in 2nd or 3rd paragraphs to show **Conditions: Sale Role** = Inside Sales or Partner
			• **Explain** publication context is **Inside Sales**
			• Click **ATTRIBUTES** tab in right panel
			• Click in **condition** field
			• Explain can be edited here or removed via the trash can icon in Attributes panel
				• *Conditions: way of applying metadata to content, to filter in or out of publication*
				• *Typical use case – product variations/models, different audiences (advanced vs. novice user)*
				• *Today, conditions must be typed or pasted into Edit Condition popup*
				• *Optimized UI experience for adding/editing conditions and variables (e.g. via a condition management picklist, links to variable files, etc..) is on product roadmap*
				• *Note: further examples of Conditions in Sales Guide publication:*
				  • *Industry Trends & Challenges*
				  • *Addressing Competitor FUD component*
				  • *Downloading the Sales Package (also has conditions at component level)*

			• In the **OUTLINE** tab, click on **Elevator Pitch** (or use Quick navigation) • **Click on DesignStream variable** in 2nd or last paragraphs	***[Optional] Support for Variables*** • *Variables: container in which data can be stored and retrieved later*

Role	User	Environment	Action	Messaging
			• **Explain** Variable reference: **ProdName** • Click **Show the content** to show variable definition • **Click Edit** button and **change** to **ProdNameFormal** • Show variable definition changes in content panel • **Click again on DesignStream** variable in content panel • Click **ATTRIBUTES** tab in right panel • Scroll down to **variable ref** • **Click in field** and **change** back to **ProdName** • **Click back in content panel** and variable definition updates again	• *Typical use case – product names, company names, etc.* • *Today, variables must be typed or pasted into Edit Variable Reference popup* • *Optimized UI experience for adding/editing conditions and variables (e.g. via a condition management picklist, links to variable files, etc..) is on product roadmap*
			• Switch Draft Space browser tabs to the **MathML Examples publication** (opened prior to demo) • **Select any equation** of your choice from the publication (note: be sure to select the equation, and not the image of it) • **Right click** and select **Edit equation** • **Make a minor change** in the pop up equation editor window • Click **Save** and reviewed changes back in publication	*[Optional] MathML integration* • *Equations display within Collective Spaces* • *Optional editing of MathML in Draft Space* • *Based on market leading technology from WIRIS (purchased separately)* • *Buttons and contextual operations within the UI* • *Users can add comments on equations and MathML references*

Role	User	Environment	Action	Messaging
Language Reviewer / Subject Matter Expert	Rachel Reviewer	Tridion Docs Review Space	• Switch to active **Review Space browser window for Spanish** (already opened *prior to start of demo*) • **Explain** that some content will still be English as it has been updated during demo, while some unchanged since last translation • Click **OUTLINE** tab in right panel • **Expand Offer** and **Audience** sections • Click on a **component that is translated** • **Explain** comments are stored against the translated language version of the content	*[Optional] Review Translations* • *This capability is covered in more detail during a translation integration demo* • *In-country reviewers can also review target language translations and provide feedback in the same intuitive environment*

About RWS

RWS Holdings plc is the world's leading provider of technology-enabled language, content management and intellectual property services. We help our clients to connect with and bring new ideas to people globally by communicating business critical content at scale and enabling the protection and realization of their innovations.

Our vision is to help organizations interact effectively with people anywhere in the world by solving their language, content and market access challenges through our collective global intelligence, deep expertise, and smart technology.

Clients include 90 of the globe's top 100 brands, the top 10 pharmaceutical companies and approximately half of the top 20 patent filers worldwide. Our client base spans Europe, Asia Pacific, and North and South America across the technology, pharmaceutical, medical, legal, chemical, automotive, government and telecommunications sectors, which we serve from offices across five continents.

Founded in 1958, RWS is headquartered in the UK and publicly listed on AIM, the London Stock Exchange regulated market (RWS.L).

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