# Technical writing – Training

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# Purpose and scope

- Purpose
  - Present the self-training plan
  - Present the document management chain
  - Go through the main steps of the document management chain

- Scope
  - Customer technical documentation
  - XML editing is mentioned but not covered in the slide set
    - Contact Sheila D'ANNUNZIO
    - Register to workshops and training sessions run by Marc MEDJAD

# References

- Technical documentation procedure - CD17655101

- Technical literature style guide - CD17978802

- DMS user guide - Link

- Revalidation of active documents - CD10062963

- ST corporate template user guide - DM00013104

- SOP 17.1.7 – Classification and protection of company information

- Link to Technical documentation support
  http://olm.st.com/node/173

- Link to Project Management System (PMS)
  http://agrnt48.agr.st.com/projtrack/login.php

# Additional references (ST-Ericsson)

- Editing guidelines - Working with unstructured Adobe FrameMaker - DMS000002241

- Editing guidelines - Adobe FrameMaker to PDF printing - DMS000002242

- Editing guidelines - Checking the SPIRIT compliance of register descriptions - DMS000002243

- Editing guidelines - Applying the latest IP specification template in unstructured FrameMaker - DMS000002244

- Editing guidelines - Editing FrameMaker documents managed in ClearCase - DMS000002245

- Editing guidelines - Converting MSWord documents to Adobe FrameMaker - DMS000002246

- IP specification template in unstructured Adobe FrameMaker - DMS000002247

# Finding documents in DMS Viewer

- Log into DMS Viewer at http://idp.sgp.st.com/

- Type the document ID (CD00######, DM000###### or DMS000#####) in the Quick search field

- Press the Search button
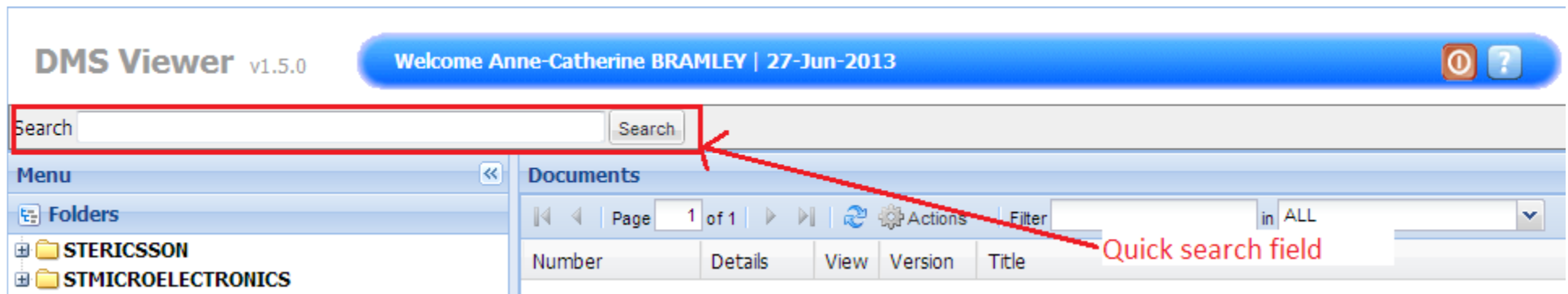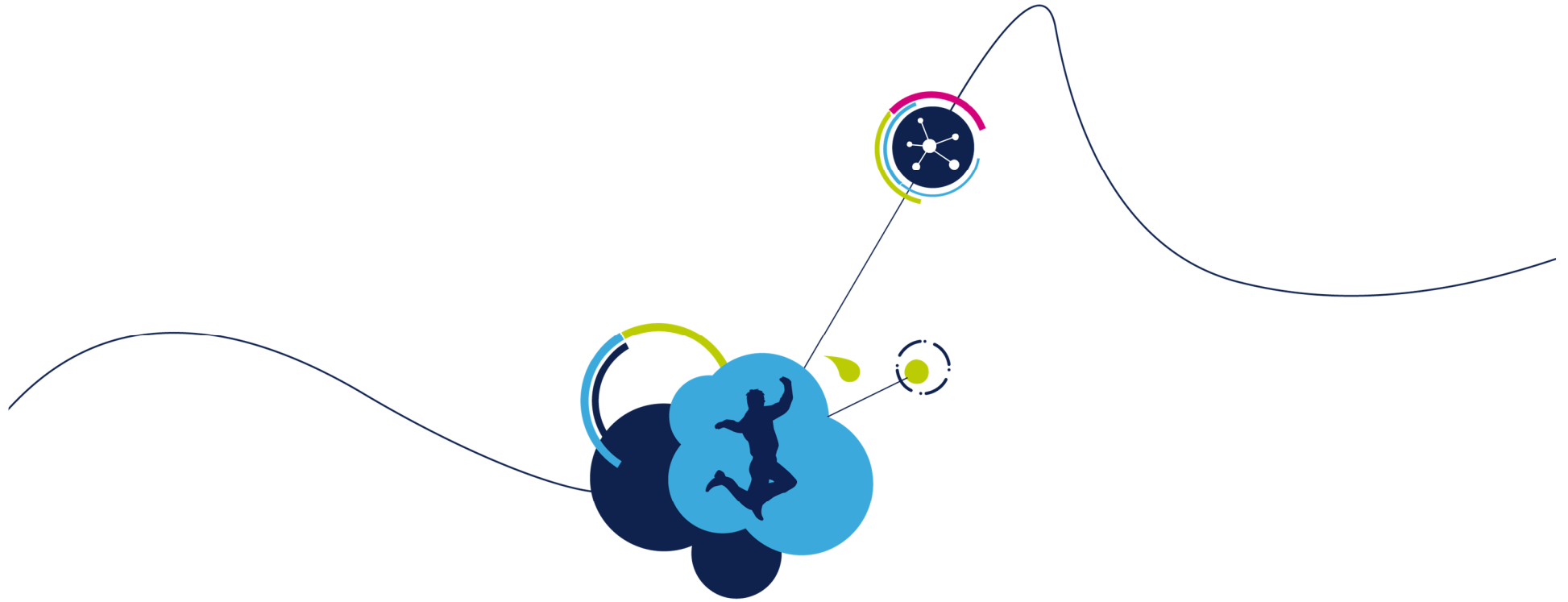
# Editing tools and applications

# Editing tools and applications

| Category | Tool or application name |
| --- | --- |
| Editing tool | Adobe FrameMaker (Rev 10 or 11 with DITA plugin) |
| Editing tools: | MSWord (for specific document categories) |
| Graphics tool | Microsoft Visio |
| Graphics tool | Adobe Illustrator |
| Application * | Document Management System: DMS@ST (editor profile for Technical Literature document type) |
| Application * | Project Management System (PMS) |
| Application * | PRMIS |

* See with the product group documentation organization about the access and profile
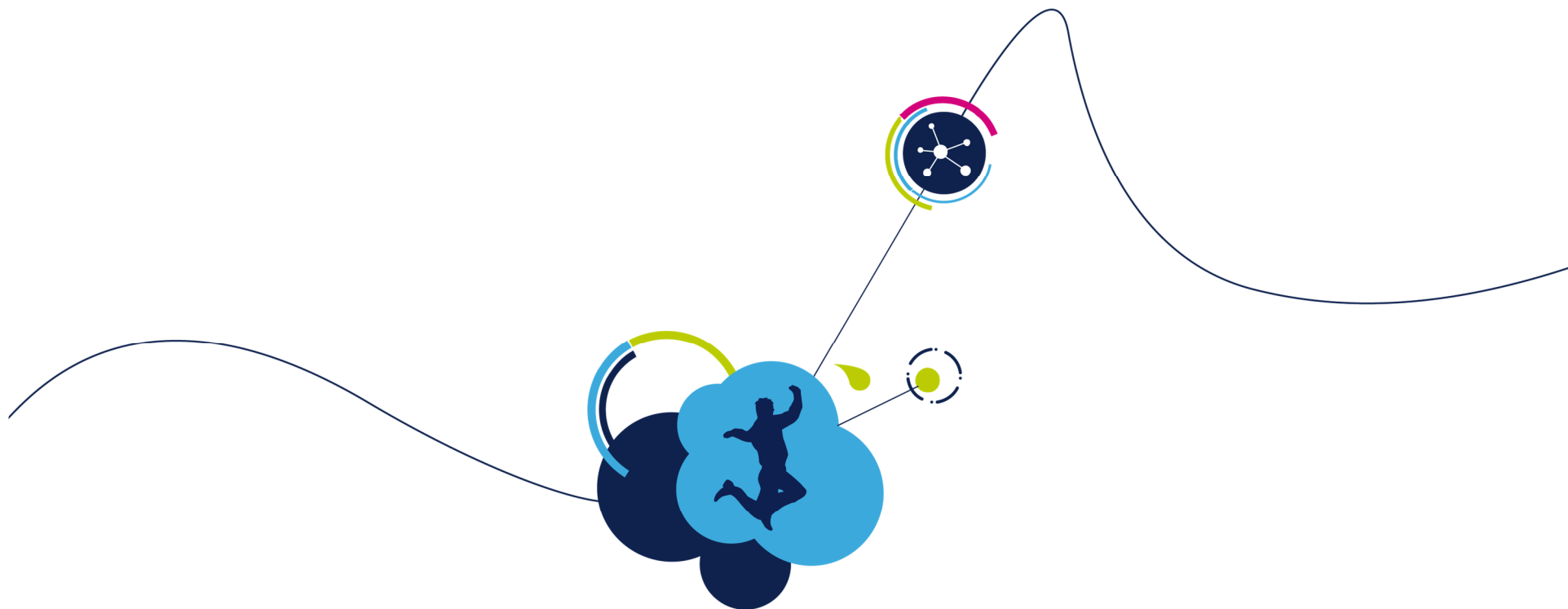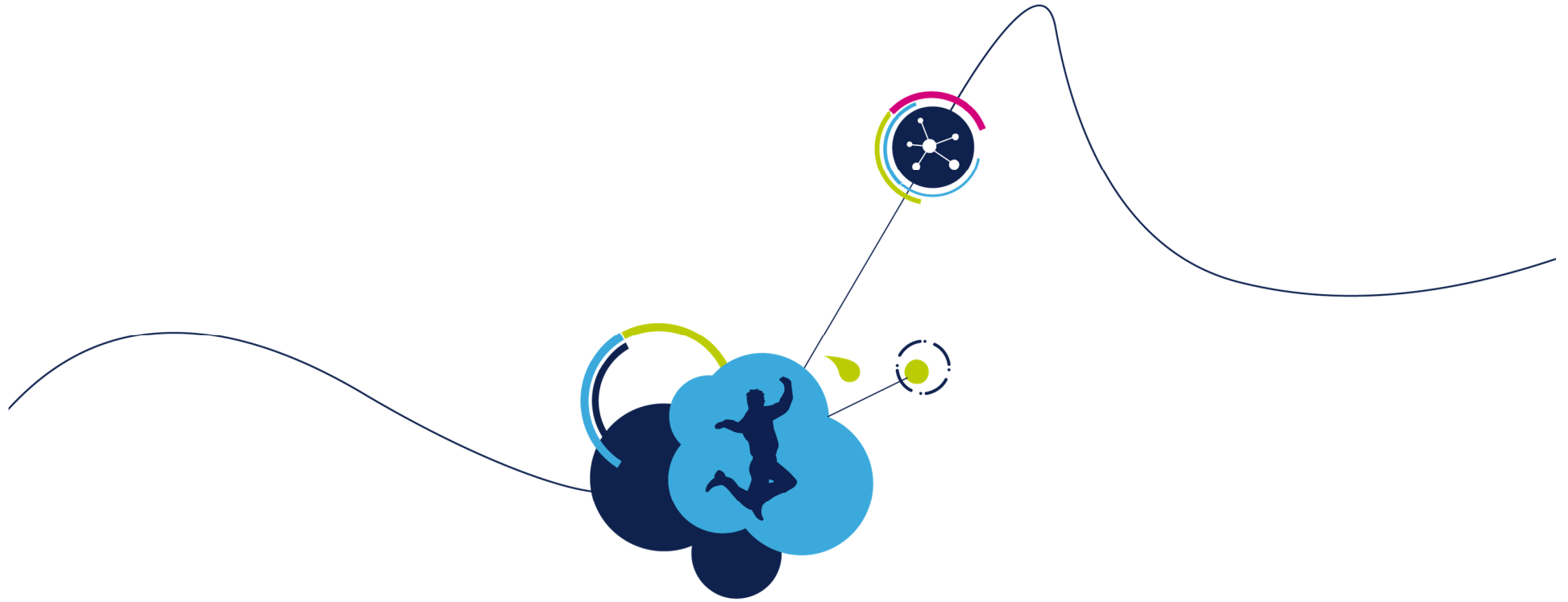
Customer document
management chain

# Customer document management chain

- Document identification

- File creation

- Content rework

- Review workflow

- Quality control

- Approval workflow

- Document inactivation

Adobe Acrobat
7.0 Document

Document identification

# Document identification

- Document are identified by a set of properties
  - Document category
  - Confidentiality
  - Product class, subclass, Root Part Number(s) (RPN)
  - Actors
  - Revision history
  - Identification number + alternate ID

- The document variables should match the document properties in DMS@ST
  - Same document title
  - Document category
  - Version number (same number as targeted revision number in DMS@ST)
  - History (usually a copy/paste, although there can be additional internal information in DMS@ST)

# Document category

| Document category | Document category (continued) |
|---|---|
| Application note | Product preview |
| Data brief | Programming manual |
| Datasheet | Reference manual |
| Design note | Release note |
| Die description | Technical article |
| Errata sheet | Technical note |
| Package information | User manual |

Refer to the chapter "Definitions" of the technical documentation procedure (slide *References*)

# Document confidentiality

- Compliance between the document confidentiality level and information classification at ST

| Document confidentiality level | Comment |
| --- | --- |
| Public | Can be viewed by all ST employees in DMS Viewer and is sent for publication on www.st.com – The scope in DMS must be Public |
| ST Restricted | Can be viewed by all ST employees in DMS Viewer – Scope in DMS = custom or internal |
| ST Confidential | Can be viewed only by document actors and readers – Scope in DMS@ST = custom or internal |
| ST Secret | DO NOT USE |

# Product class/subclass and RPN

- Most document categories are related to products (root part numbers in DMS)

- Some documents may have a broader relation, applying to a product subclass or product family or an application

- There can only be one datasheet and one data brief for one RPN

- Root Part Numbers (RPN) are defined in PRMIS application

- Commercial Part Numbers (CPN) defined in PRIS are assigned to RPN

- PRMIS and DMS@ST are synchronized twice a day

- Refer to the section "Specific document attributes" of the Technical documentation procedure (#3. References)

# Actors

- The following is copied from the table "Actors" in Technical documentation procedure (see slide *References* )

| Actor | Role |
| --- | --- |
| Document responsible | The person responsible for the document. The responsible is usually the division engineer who requested the document or created the first draft. |
| Editor | The person who created or updated the document. |
| Author | The person who has the right to update the document and so become the Editor of a future revision. |
| Reviewers | The people required to review the draft. A reviewer is someone who has a technical responsibility for his/her group, P&L and/or products. More than one reviewer can be selected to review a document. |

# Actors (Continued)

| Actor | Role |
| --- | --- |
| Quality controller | The person/people who receive the doc control task, one of whom will do the control. The doc controller verifies that the documents submitted for control are in line with the technical documentation rules of the company. It is forbidden for a person to have both an editor's and doc controller's profile. |
| Approver | The person/people required to validate the draft. The approver typically has a marketing responsibility for his P&L. If more than one approver is selected all approvers must validate the draft for it to become active. It is forbidden for a person to have both an editor's and approver's profile. |
| Notifier | The person/people who require to be notified when the document is updated. |
| Reader | The person/people who can read the document if it is classed as confidential. |

# Revision history

- Includes the list of changes applied since the very first publication of the document

- Details the changes applied to the content, of interest for the users of the document

- Does not describe changes related to internal information

- The revision history in DMS@ST can include more details, including the ones related to internal information

- Always located at the end of the document, before the disclaimer. Organized with the last revision in the last row

File creation

# File creation

- Use the relevant editing tool
  - MSWord for Design notes and Product previews
  - Adobe FrameMaker for all other document categories (Datasheet, Data brief, Application note, User manual, etc.)
  - DITA XML editing tool (replacement of Adobe FrameMaker)

- Templates in use for customer technical documentation
  http://olm.st.com/node/181
  - FrameMaker templates
  - MSWord templates
  - FM template for conversion to DITA XML
  - Job option for PDF renditions
  - Etc.

# Templates

## Templates for technical documentation

| Title and Description | Author | Last Update |
|---|---|---|
| **Read me! ST Corporate FrameMaker template V5-2** (2 KB)<br>Read me file to install ST Corporate FrameMaker template | Beatrice Filosa | 20-May-13<br>Edit |
| **ST Corporate FrameMaker template V5-2** (813 KB)<br>ST Corporate FrameMaker template (ZIP file) | Beatrice Filosa | 20-May-13<br>Edit |
| **Design document templates** (835 KB)<br>Word templates and guidelines for creating design note (designs from our labs) and design tip documents. | Sheila Dannunzio | 18-Apr-13<br>Edit |
| **Freescale / ST FrameMaker MAGIC template** (894 KB)<br>FrameMaker Template V1-1 based on ST Corporate V4 with Freescale tag names to use for conversions | Beatrice Filosa | 21-Sep-12<br>Edit |
| **Empty FrameMaker Corporate template based on V4** (14 KB)<br>Template to use for DITA conversion and localization preprocessing | Beatrice Filosa | 20-Sep-12<br>Edit |
| **Readme for the Plug-Ins V3** (3 KB)<br>Read me to install the FrameMaker Plug-Ins V3 | Beatrice Filosa | 04-Oct-11<br>Edit |
| **Corporate FrameMaker template user guide** (496 KB)<br>How to use the technical documentation ST Corporate FrameMaker template | Sheila Dannunzio | 27-Sep-11<br>Edit |
| **FrameMaker: template mapper files** (1508 KB)<br>Template mapper to convert from one FrameMaker template to another | Cecile Petron | 06-May-09<br>Edit |
| **Corporate Template Plug-ins V3** (226 KB)<br>Plug-ins to ST Framemaker Corporate Template to write registers, errata sheets, software documents (necessary for SPIRIT compliancy) | Cecile Petron | 06-May-09<br>Edit |
| **Adobe Acrobat job options file** (7 KB)<br>Zip file for Adobe Acrobat job options | Cecile Petron | 04-Aug-08<br>Edit |
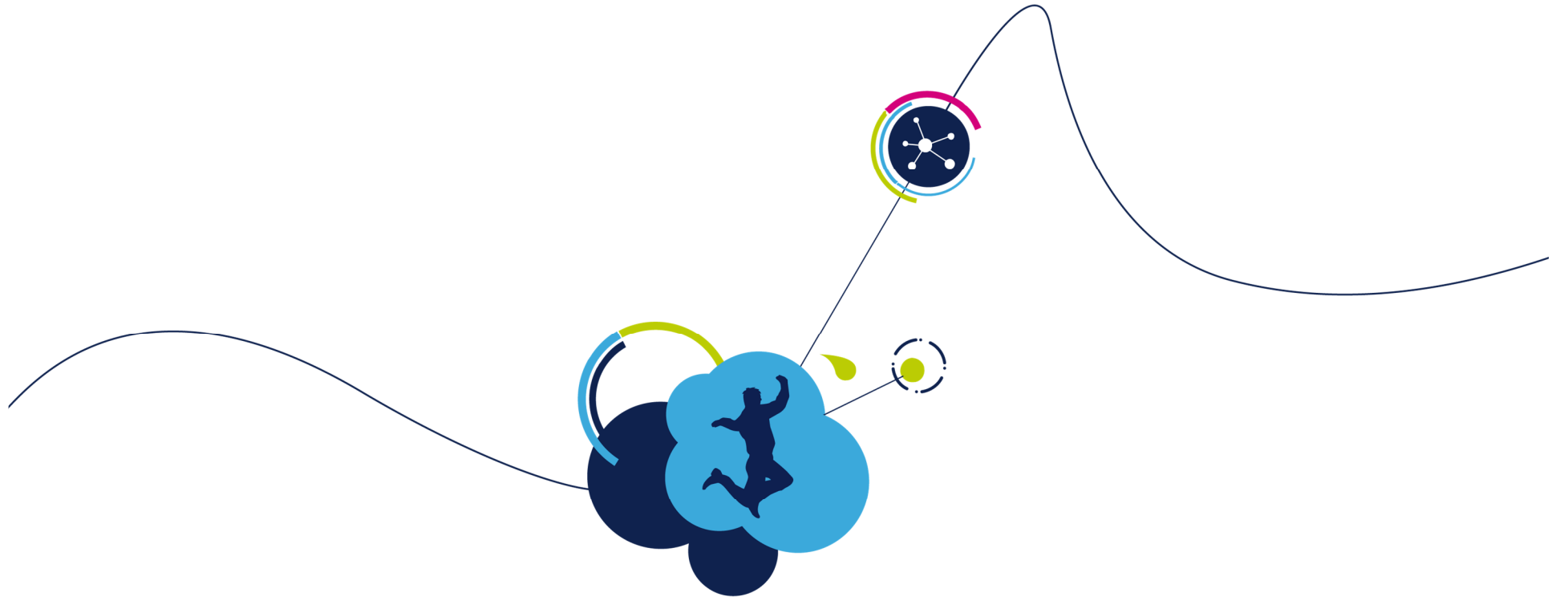
Content rework

# Content rework

- Content rework applies when the document did not pass the review of approval workflow
  - Select the REJECTED version in the DRAFT/Technical literature folder in DMS@ST
  - Go to Document
  - Select Status change
  - Select Create new DRAFT
  - Select the DRAFT, open the Renditions tab
  - Select the source file, apply a right-mouse click
  - Select Export (check the path)
  - Open the source file(s) stored locally
  - Update the files
  - Generate a PDF and check the PDF
  - Once all the necessary changes are applied, close the source files
  - Prepare an archive (ZIP) with all the source files (figures + FM or MSWord files)
  - Upload the source and PDF rendition in DMS@ST
  - Launch the review or control workflow

Quality control

# Quality control

- Quality controllers check the compliance with the company branding, the templates and any other item described in the technical documentation procedure, as well as the style guide - see *References*

- Editors submit the documents to the control workflow, either directly or after a completed review workflow

- The quality controller group is set by default for each product group

- Proceed as follows when the quality controller rejects the document
  - Read the comments written by the quality controller (email notification)
  - Select the REJECTED version in DMS@ST
  - Go to Document, select Change status and select Create new DRAFT
  - Open the Rendition tab in DMS@ST, select the source file (does not apply if the document is edited in DITA  XML). Apply a right-mouse clock and select Export file
  - Rework the content and upload in DMS@ST, with the PDF rendition, and launch the control workflow
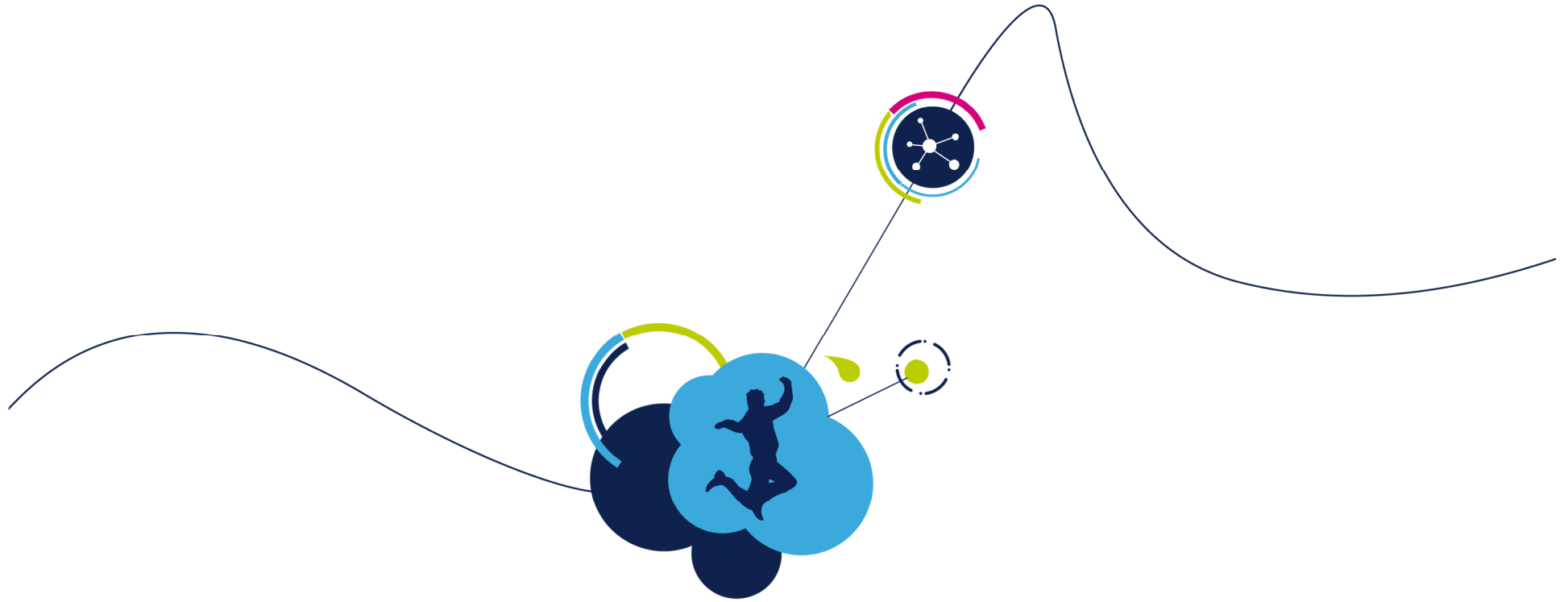
Approval workflow

# Approval workflow

- The document status changes to IN APPROVAL once the quality controller has approved the document

- All the approvers must complete their approval task in DMS@ST

- Once all approvers have completed their tasks, an email notification is sent to all the actors of the document in DMS@ST

  - If all approvers approved the document, the email notification confirms that the document was approved and released. The document status changes to RELEASED and later on ACTIVE. If the document is set as public, it is published on www.st.com at the next synchronization, providing that the root part number is set as public in PRIMS

  - If one or more approvers rejected the document, the email notification mentions that the document was rejected, and includes all the comments from the approvers. The editor needs to select the REJECTED document in DMS@ST, create a new DRAFT, export the source file (ZIP) and rework the content

Revalidation

# Document revalidation

- Customer technical documents have a revalidation period of 3 years

- The revalidation process is detailed in the technical documentation procedure (see *References* )

- The main document actors (editor, approver, responsible) receive a notification 1 month, 2 weeks and 1 week before the revalidation date

- Guidelines for revalidation
  - If the related products are still ACTIVE, the editor/responsible should check and potentially update the approver, and approve the task, so the document is submitted to revalidation approval
  - If the related products are ALL obsolete, the document category is datasheet and the document is published on www.st.com, the editor/responsible should approve the revalidation, knowing that the document will be watermarked as Obsolete product, and remain active for 10 years, after which it will automatically become INACTIVE

# Revalidation (Continued)

- Guidelines for revalidation (continued)
  - If the related products are ALL obsolete and the document category is NOT datasheet, the editor/responsible should reject the revalidation workflow task
    - Select the REJECTED document
    - Go to Document, select Status change and select "INACTIVATION DRAFT"
    - Select the INAC DRAFT, fill in the properties: check the approver and update the revision history with the justification for inactivation
    - Submit the INAC DRAFT to control workflow
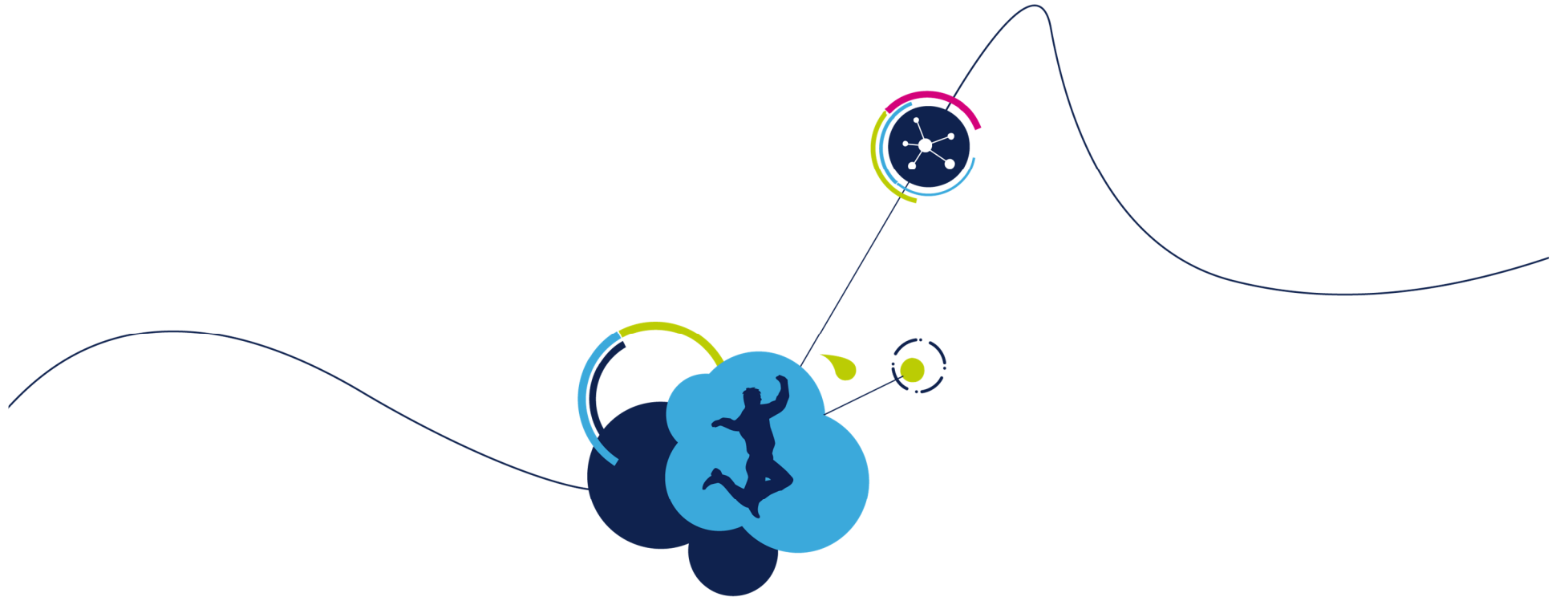
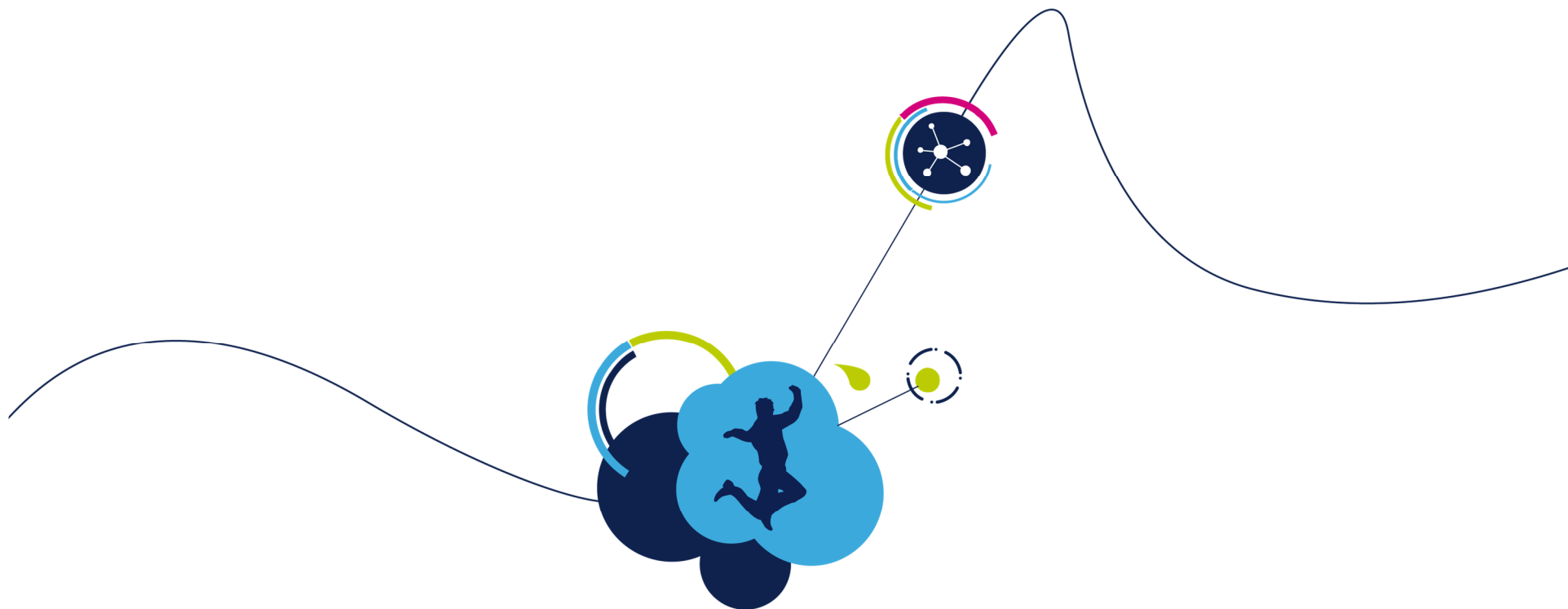Inactivation

# Inactivation

- Document inactivation
  - All the root part numbers linked to the document are obsolete
  - The document is no longer relevant (project discontinued, product never went to production)

- The editor submits the last version of the ACTIVE document to inactivation workflow

- Public documents are unpublished from the company website when their last version becomes INACTIVE in DMS@ST

- Datasheets and data briefs related to obsolete products are NOT INACTIVATED, instead they are revalidated for 10 years, and watermarked "Obsolete product"

- Inactive versions of documents cannot be modified nor changed back to active

Editing workload

# Editing workload

- Multiple editing tasks and review/approval workflows in parallel
  - Try as much as possible to complete the editing of one document prior to starting another one
  - Use the Project Management System (PMS) or an Excel file to register all the editing tasks and update their status until they are fully completed (document released or editing task cancelled)
  - In case you cannot complete the editing because you are missing some information, change the status of the editing task to AWAIT INPUT instead of draft or Edit
  - Common status for documents are: DRAFT – EDIT – AWAIT INPUT – REVIEW – APPROVAL – CLOSED/DONE - CANCELLED

- Follow up on the review and approval workflow status of the documents
  - Select the document IN REVIEW or IN APPROVAL in DMS@ST
  - Open the Audit tab
  - Send a reminder to the late reviewers or approvers

Thank you