**SDL Tridion Docs 13 SP2**

Content Manager

Implementation Workbook for Texas Instruments

June 2019

Version 1.0

Professional Services

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# Introduction

## Context

This document is the result of the discussions during the SDL Tridion Docs Content Manager Implementation Workshop sessions. It contains the configuration changes that were collected and agreed upon during the Implementation Workshop with Texas Instruments.

The configuration changes and/or extensions as described in this document will be implemented on the out-of-the-box version of SDL Tridion Docs Content Manager. This customized version will replace the SDL Tridion Docs Content Manager system that is currently used by Texas Instruments.

This is a document that needs formal approval from Texas Instruments. Any changes and/or extensions need to be the result of a joint discussion between Texas Instruments and SDL.

This document is written with the assumption that the reader is familiar with the basic concepts and functionality of the SDL Tridion Docs Content Manager system. Some highly technical configuration changes are implicit and follow the requested configurations as they are specified in this document.

If Texas Instruments decides not to use metadata fields that are currently in the out of the box system, it is recommended to just hide them in the Client Tools and Web Client, and to keep the field in the metadata definition in the database.

This template should be used for SDL Tridion Docs Content Manager 13 or higher.

SDL Tridion Docs Content Manager can be part of a bigger solution that includes SDL Tridion Docs Collaborative Review and SDL Dynamic Delivery. This document only relates to the configuration options of SDL Tridion Docs Content Manager.

In the following pages, content that pertains to metadata that does not have to be reviewed or hardly ever require changes, has been grayed out.

## References

This document was written using information from:

* Implementation Workshop
* SDL Tridion Docs Content Manager online documentation  
  (<https://docs.sdl.com/SDLTridionDocs13SP2>)
* Other meetings between Texas Instruments and SDL.

## Client Infrastructure

|  |  |
| --- | --- |
| **Item** | **Target** |
| Database | Oracle RDBMS 12.1.0.2  Oracle Data Access Client 12.2.1.0 |
| XML Editor | oXygen 20 64-bit |
| Include XML Editor Customizations | Yes (To be developed by TI) |
| FO engine | AntennaHouse XSL Formatter 6.5 |
| DITA-OT | OOB + 3.3.3 |
| DITA-OT folder name for customer plugins | TI |
| Include DITA Specializations | No |
| Authentication STS | ISHSTS (Tridion Docs) credentials Windows (ADFS) credentials (Change Order needed) |
| Translation Integration | SDL WorldServer |
| Other Tridion Docs Components | Draft Space |
| Taxonomy integration | None |

## Version History

|  |  |  |  |
| --- | --- | --- | --- |
| **Version** | **Author** | **Notes** | **Date** |
| V1.0 | Jered Bastinck | Initial Version | 08/22/2019 |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

## Distribution

| Name | Company |
| --- | --- |
| Jered Bastinck | SDL |
| Pam Noreault | SDL |
| Kathy Doane | SDL |
| Josh Steen | SDL |
| Todd Breeding | Texas Instruments |
| Wendy Overturf | Texas Instruments |
| Scott Allen | Texas Instruments |
|  |  |

## Approval

| Name | Company | Date | Signature |
| --- | --- | --- | --- |
| Jered Bastinck | SDL |  |  |
| Pam Noreault | SDL |  |  |
| Todd Breeding | Texas Instruments |  |  |

## Terminology

The UI of Tridion Docs Content Manager is aligned with the DITA terminology but many internal field names are generic and based on a proprietary naming convention. The table below gives an overview of the different terminology.

| DITA/UI term | Tridion Docs Content Manager term |
| --- | --- |
| Topic | Module |
| Map | Master |
| Library topic | Library |
| Image | Illustration |
| Other (Word, PDF, …) | Template |

As an example: the metadata field ‘Topic type’ is represented by the FMODULETYPE metadata field identifier.

## New in SDL Tridion Docs

This section is only relevant for customers upgrading from an older version of Tridion Docs (formerly called “SDL Knowledge Center”, “SDL LiveContent”, or “SDL Trisoft”).

The changes may have impact on existing installations or may introduce the need to change the configuration.

| No. | Change | Possible impact |
| --- | --- | --- |
| 1. | Metadata binding (taxonomy integration) | If an integration with an external (taxonomy) system is required, this is subject to a separate design document.  If existing fields need to be turned into hierarchical metadata fields, this is also subject to a separate design document |
| 2. | In context perfect match (aka pre-translation) is deprecated. | Functionality still works as before in Tridion Docs 13 as an extension but it is not maintained for future releases. |
| 3. | Language scheme (11.4) | It is now possible to configure a more refined language scheme for pivot languages. |
| 4. | Only 64-bit client tools support. | Some customizations for oXygen or XMetaL might need to be redesigned to support the 64-bit architecture. |
| 5. | Publishing engine rewritten using 64-bit components. | Some custom publishing scripts (formerly created in VBScript) will need to be recreated in 64-bit .NET architecture. |

# Electronic Document Types

The table below provides an overview of all electronic file types that can be managed in Texas Instruments’s repository. As SDL Tridion Docs Content Manager needs to be able to recognize the object type (EDT) for each Texas Instruments File Type, only files of recognized object type (EDT) can be imported into the repository. If Texas Instruments needs objects in SDL Tridion Docs Content Manager that are not in this list, those objects should be added during the initial configuration.

The Mime type is an internet standard making it possible to automatically select the software that is used to open this type of document when opening from a browser. Mime types are predefined for most extensions (like doc, xls, etc).

The Extensions relate to the Batch Import and upload functions so that SDL Tridion Docs Content Manager knows which EDT type to choose for which extension. The first extension for an EDT is the extension used when downloading/exporting the content from SDL Tridion Docs Content Manager.

EDT definitions can be added using the Web Services API or ISHRemote.

The Object Type column indicates the intended object type of the EDT. This is not stored in the database but is managed as configuration.

I: Image

O: Other (Word, PDF, …)

The first value for each EDT determines whether this extension will be associated with an Image or an object of type Other when an object is uploaded via the Browse repository of the Client tools.

| **EDT** | **Name** | **MIME Type** | **Extensions** | **Custom** | **Object Type** |
| --- | --- | --- | --- | --- | --- |
| EDT3DXML | 3DXML | application/x-3dxmlplugin | 3dxml | NO | O |
| EDTAVI | AVI | video/x-msvideo | avi | NO | I |
| EDTBMP | BMP | image/bmp | bmp | NO | I |
| EDTCGM | CGM | image/cgm | cgm | NO | I |
| EDTCHM | CHM | application/mshelp | chm | NO | O |
| EDTCSS | CSS | text/css | css | NO | O |
| EDTDOCX | DOCX | application/ vnd.openxmlformatsofficedocument. wordprocessingml.document | docx | NO | O |
| EDTEMF | EMF | image/x-emf | emf | NO | I |
| EDTEPS | EPS | application/postscript | eps | NO | I |
| EDTGIF | GIF | image/gif | gif | NO | I |
| EDTHTM | HTM | text/html | htm | NO | O |
| EDTJAR | JAR | application/java-archive | .jar | NO | O |
| EDTJPEG | JPG | image/jpeg | jpg | NO | I |
| EDTMP3 | MP3 | audio/mpeg | mp3 | NO | O |
| EDTMPEG | MPG | video/mpeg | mpg | NO | I |
| EDTPDF | PDF | application/pdf | pdf | NO | I |
| EDTPNG | PNG | image/png | png | NO | I |
| EDTPPSX | PPSX | application/vnd.openxmlformats-officedocument.presentationml.slideshow | ppsx | NO | O |
| EDTPPTX | PPTX | application/ vnd.openxmlformats-officedocument. presentationml. presentation | pptx | NO | O |
| EDTPSD | PSD | image/psd | psd | NO | I |
| EDTRAR | RAR | application/x-rar-compressed | rar | NO | O |
| EDT-REP-S3 |  | Obsolete | - | NO | - |
| EDTRTF | RTF | application/rtf | rtf | NO | O |
| EDTSVG | SVG | image/svg+xml | svg | NO | I |
| EDTSVGZ | SVGZ | application/octet-stream | svgz | NO | I |
| EDTSMG | SMG | application/octet-stream | Smg | NO | O |
| EDTSWF | SWF | application/x-shockwave-flash | swf | NO | I |
| EDTTAR | TAR | application/x-tar | tar | NO | O |
| EDTTIF | TIF | image/tif | tif | NO | I |
| EDT-TEXT | TXT | text/plain | txt | NO | O |
| EDTUNDEFINED | Undefined | application/octet-stream | - | NO | - |
| EDTVSD | VSD | image/vnd.visio | vsd | NO | O |
| EDTWMF | WMF | application/wmf | wmf | NO | I |
| EDTWMV | WMV | video/x-ms-wmv | wmv | NO | T |
| EDTXLSX | XLSX | application/ vnd.openxmlformats-officedocument. spreadsheetml.sheet | xlsx | NO | O |
| EDTXML | XML | text/xml | xml  dita  ditamap | NO | O |
| EDTZIP | ZIP | application/zip | zip | NO | O |
| EDTDES | DES | image/corel | .des | NO | I |
| EDTGRF | ~~grf~~GRF | Image/dplot | .grf | NO | I |
| EDTXLSM | Xlsm | Application/xlsm | .xlsm | NO | O |
| ? | MD | MarkDown | .md | NO | O |

# List of Values (LOV)

This section defines which Lists of Values are needed for the project. A List of Values links to a special metadata field making it possible for a user to select from a predefined set of values.

Please note that the values can be changed and extended later on using the SDL Tridion Docs Content Manager Web Client. Deleting a value from a List of Values is only possible when the value is no longer used. The information in the LOV fields is used primarily for searching and publishing.

The Description of an LOV Value is never used in the SDL Tridion Docs Content Manager Application. It is only used to give some more information to administrators or IA when they are updating/deleting/adding LOV values. It will only be visible in this workbook and in the Settings tab when selecting the properties of an LOV value.

<Note to SDL PM/SA: After adding values, please sort them alphabetically in the table to make validation by the configuration builder easier.>

## Topic Types

The following table contains the DITA topic types that will be configured in SDL Tridion Docs Content Manager.

This List of Values is linked to the metadata field [FMODULETYPE](#FMODULETYPE).

Remove Yellow Highlighted Items

For the TI Templates, use the Reference DTD. TI will provide the templates. All templates should be imported and assigned to the correct module type in a “Released” state.

| Element Name | DMODULETYPE | | | |
| --- | --- | --- | --- | --- |
| Values | Default | | Description | Custom |
| API Reference |  | |  | No |
| Concept |  | |  | No |
| ~~Dita Composite~~ |  | |  | ~~No~~ |
| ~~Ditabase~~ |  | |  | ~~No~~ |
| ~~General Task~~ |  | |  | ~~No~~ |
| Glossary Entry |  | |  | No |
| Glossary Group |  | |  | No |
| ~~Learning Assessment~~ |  | |  | ~~No~~ |
| ~~Learning Content~~ |  | |  | ~~No~~ |
| ~~Learning Overview~~ |  | |  | ~~No~~ |
| ~~Learning Plan~~ |  | |  | ~~No~~ |
| ~~Learning Summary~~ |  | |  | ~~No~~ |
| ~~Machinery Task~~ |  | |  | ~~No~~ |
| Reference |  | |  | No |
| Task |  | |  | No |
| ~~Topic~~ |  | |  | ~~No~~ |
| ~~Troubleshooting~~ |  | |  | ~~No~~ |
| Features | |  |  | Yes |
| Applications | |  |  | Yes |
| Description | |  |  | Yes |
| Absolute Maximum Ratings | |  |  | Yes |
| Electrical Characteristics | |  |  | Yes |
| ESD Ratings | |  |  | Yes |
| Recommended Operating Conditions | |  |  | Yes |
| Thermal Characteristics | |  |  | Yes |
| Power On Hours | |  |  | Yes |
| Application Information | |  |  | Yes |
| Timing Characteristics | |  |  | Yes |
| Switching Characteristics | |  |  | Yes |
| Typical Characteristics | |  |  | Yes |
| Registers | |  |  | Yes |
| Packaging Information | |  |  | Yes |
| Instructions | |  |  | Yes |
| Pin List | |  |  | Yes |
| Advisory | |  |  | Yes |
| Abstract | |  |  | Yes |
| Getting Started | |  |  | Yes |
| Revision History | |  |  | Yes |
| Trademarks | |  |  | Yes |
| Related Products | |  |  | Yes |

## Image Types

The following table contains the Illustration Type values that will be configured in SDL Tridion Docs Content Manager.

This List of Values is linked to the metadata field [FILLUSTRATIONTYPE](#FILLUSTRATIONTYPE).

All of the OOB Illustration types should be removed. The existing image template should be changed to type ‘imported’

| Element Name | DILLUSTRATIONTYPE | | |
| --- | --- | --- | --- |
| Values | Default | Description | Custom |
| Application Schematic |  |  | Yes |
| Simplified Schematic |  |  | Yes |
| Functional Block |  |  | Yes |
| System Block |  |  | Yes |
| Design Block |  |  | Yes |
| Equation |  |  | Yes |
| Screenshot |  |  | Yes |
| Pinout Diagram |  |  | Yes |
| Package Drawing |  |  | Yes |
| Char Graph |  |  | Yes |
| Timing Diagram |  |  | Yes |
| Switching Diagram |  |  | Yes |
| Wave Form |  |  | Yes |
| Imported | x |  | Yes |
| Eye Chart |  |  | Yes |
| Smith Chart |  |  | Yes |
| Flow Chart |  |  | Yes |
| Bode Diagram |  |  | Yes |
| Board Photo |  |  | Yes |
| Board Layer |  |  | Yes |
| Board Drawing |  |  | Yes |
| Layout Diagram |  |  | Yes |

## Library topic Types

The following table contains the library types that will be configured in SDL Tridion Docs Content Manager for variables and reusable text and graphics.

This List of Values is linked to the metadata field [FLIBRARYTYPE](#FLIBRARYTYPE).

Create for the custom basic Libraries a template. Use the ‘Reference’ DTD

All based on reference topic

| Element Name | DLIBRARYTYPE | | |
| --- | --- | --- | --- |
| Values | Default | Description | Custom |
| Cautions |  |  | No |
| Images |  |  | No |
| Warnings |  |  | No |
| Notes |  |  | No |
| Disclaimers |  |  | Yes |
| Notices |  |  | Yes |
| Variables |  |  | Yes |
| Boiler Plate Paras |  |  | Yes |

## Map Types

The following table contains the map types that will be configured in SDL Tridion Docs Content Manager.

This List of Values is linked to the metadata field [FMASTERTYPE](#FMASTERTYPE).

| Element Name | DMASTERTYPE | | |
| --- | --- | --- | --- |
| Values | Default | Description | Custom |
| Bookmap |  |  | No |
| Map | X |  | No |
|  |  |  |  |

## Publication Types

The following table contains the publication types that will be configured in SDL Tridion Docs Content Manager.

This List of Values is linked to the metadata field [FISHPUBLICATIONTYPE](#FISHPUBLICATIONTYPE).

| Element Name | DPUBLICATIONTYPES | | |
| --- | --- | --- | --- |
| Values | Default | Description | Custom |
| Empty Value (default) | | | |
| Data Sheet |  |  | Yes |
| User’s Guide |  |  | Yes |
| Application Report |  |  | Yes |
|  |  |  |  |
| Errata |  |  | Yes |
| Developer’s Guide |  |  | Yes |
| Getting Started Guide |  |  | Yes |
| Programmer’s Guide |  |  | Yes |
| Product Overview |  |  | Yes |
| Quick Start Guide |  |  | Yes |
| Reference Guide |  |  | Yes |
| Release Notes |  |  | Yes |
| Design Guide |  |  | Yes |
| Technical Reference Manual |  |  | Yes |
| White Paper |  |  | Yes |
| Technical Brief |  |  | Yes |
| Tech Note |  |  | Yes |
| Reliability Report |  |  | Yes |
| Radiation Report |  |  | Yes |

## Resolutions

NOTE: Please refer to the SDL Tridion Docs Content Manager documentation for information on what is meant by “Resolution” in this context.

The following table contains the different resolutions that will be configured in SDL Tridion Docs Content Manager. This LOV contains all different resolutions of an illustration that can be added to SDL Tridion Docs Content Manager. SDL Tridion Docs Content Manager does not generate the different resolutions when an image is created. The different resolutions have to be created by the illustrators and are typically imported in batch using the Web Client.

The exact required resolution is selected in the Output Format definition which can be selected when creating a Publication Output.

This List of Values is linked to the metadata field [FRESOLUTION](#FRESOLUTION).

Remove the highlighted items

| Element Name | DRESOLUTION | | |
| --- | --- | --- | --- |
| Values | Default | Description | Custom |
| High | - | High resolution graphic used in print production. | No |
| Low | x | Used for display on the Internet or HTML preview | No |
| Source |  | Image source variant for editing | No |
| ~~Thumbnail~~ |  |  | ~~No~~ |
|  |  |  |  |

## Product family

The list of values holding all possible publication product family names e.g. 'Tridion Docs (2.0.0)'.

Hide Field

| Element Name | DPRODUCTFAMILINYNAME | | |
| --- | --- | --- | --- |
| Values | Default | Description | Custom |
|  |  |  |  |
|  |  |  |  |

## Product release name

The list of values holding all possible publication product release names e.g. 'Tridion Docs 13 SP1 (13.0.1)'.

Hide Field

| Element Name | DPRODUCTRELEASENAME | | |
| --- | --- | --- | --- |
| Values | Default | Description | Custom |
| N/A |  |  |  |
|  |  |  |  |

## Languages

The following table contains the language codes that will be configured in SDL Tridion Docs Content Manager. The language codes specified below will also be included in the XML object in the language attribute. This is important if you are considering importing legacy content or when you move from the out of the box system to your custom installation package. For additional processing in the DITA-OT or other tools, a mapping may be required. This field is used on multiple objects in the system and is sometimes mandatory. This is specified in the next chapter.

This List of Values is linked to the metadata field [DOC-LANGUAGE](#DOCLANGUAGE).

Changing the value (language code) of the Language is not recommended if the language has already been used because changing the language code in the List of Values will NOT automatically update the language code stored inside the XML files.

4 letter language code classification

Remove all other languages

Update the XML Translation Configuration with the correct language paths

| Element Name | DLANGUAGE | |
| --- | --- | --- |
| Values | Default | Description |
| en-us | X | English |
| zh-cn |  | Chinese Simplified |
| ja-jp |  | Japanese |
| ko-kr |  | Korean |
| de-de |  | German |
| zh-tw |  | Chinese Traditional |
| es-mx |  | Spanish Mexican |

## DTILOGO

DTILOGO specifies the logo type used. Used in the publication process to print the logo in the header of the data sheet. Default is the TI logo.

Label: Logo.

Description: Used in the publication process to print the logo in the header of the data sheet.

Linked to FTILOGO

| Element Name | DTILOGO | |
| --- | --- | --- |
| Values | Default | Description |
| TI | x | Prints the TI Logo |
| TIANDBB |  | Prints the TI and Burr Brown Logo |

## DTIDATASHEETSTATUS

**DTIDATASHEETSTATUS** specifies the data sheet content status. Product Preview, Advance Information, and Production Data. Used in the publication process to print the footer of the data sheet first page, and side banners.

Label: Data Sheet Status

Description: Specifies the data sheet content status

Linked to FTIDATASHEETSTATUS

The default value is blanc.

| Element Name | DTIDATASHEETSTATUS | |
| --- | --- | --- |
| Values | Default | Description |
| Product Preview |  | An IMPORTANT NOTICE at the end of this data sheet addresses availability, warranty, changes, use in safety-critical applications, intellectual property matters and other important disclaimers. PRODUCT PREVIEW Information. Product in design phase of development. Subject to change or discontinuance without notice.  Side Banner: PRODUCT PREVIEW |
| Advance Information |  | An IMPORTANT NOTICE at the end of this data sheet addresses availability, warranty, changes, use in safety-critical applications, intellectual property matters and other important disclaimers. ADVANCE INFORMATION for pre-production products; subject to change without notice.  Side Banner: ADVANCE INFORMATION |
| Production Data |  | An IMPORTANT NOTICE at the end of this data sheet addresses availability, warranty, changes, use in safety-critical applications, intellectual property matters and other important disclaimers. PRODUCTION DATA.  Side Banner: None |
| AdvMix |  | An IMPORTANT NOTICE at the end of this data sheet addresses availability, warranty, changes, use in safety-critical applications, intellectual property matters and other important disclaimers. UNLESS OTHERWISE NOTED, this document contains ADVANCE INFORMATION for pre-production products; subject to change without notice.  Side Banner: None |
| ProdMix |  | An IMPORTANT NOTICE at the end of this data sheet addresses availability, warranty, changes, use in safety-critical applications, intellectual property matters and other important disclaimers. UNLESS OTHERWISE NOTED, this document contains PRODUCTION DATA.  Side Banner: None |
| <BLANC> | x |  |

## DTIDISCLOSURE

Label: Disclosure

Description: specifies the CIP status of the document. Used in the publication process to print under the front page title and on subsequent pages on the data sheet, and on the header of all pages in other doc types. Also prints above the title if a title page is selected.

Linked to FTIDISCLOSURE

| Element Name | DTIDISCLOSURE | |
| --- | --- | --- |
| Values | Default | Description |
| TI Information – Selective Disclosure |  | TI Information – Selective Disclosure |
| TI Confidential – NDA Restrictions |  | TI Confidential – NDA Restrictions |
| TI Confidential – Maximum Restrictions |  | TI Confidential – Maximum Restrictions |
| Not Recommended for New Designs |  | Not Recommended for New Designs |
| No disclosure statement | x | No disclosure statement |

## DTITOPNAVIGATION

DTITOPNAVIGATION determines whether or not top navigation icons print in the data sheet, and how to construct the URLs. Used in the publication process to print navigation aids on the data sheet front page, and to construct URLs or document links.

**Label**: Data sheet Top Navigation  
**Description**: Determines whether or not top navigation icons print in the data sheet, and how to construct the URLs

Linked to FTITOPNAVIGATION

| Element Name | DTITOPNAVIGATION | |
| --- | --- | --- |
| Values | Default | Description |
| No | x | No top navigation is printed. |
| Single |  | In data sheet only, prints navigation icons with links to product folder anchors. |
| Multi |  | In data sheet only, prints navigation icons with links to document anchor. |

# Metadata Fields

For each object type (topic, map, image, library topic, publication, other (Word, PDF, …) a number of standard metadata fields are defined. For some object types additional fields were defined. In this section the list of visible metadata fields is listed. In the next section of this workbook, the configuration per object type is given as well as a brief description of each field. This table does not describe all metadata fields, as some are used only internally by SDL Tridion Docs Content Manager.

The Optional/Mandatory column indicates whether SDL Tridion Docs Content Manager forces setting a value for the field or not. This means that if a metadata field is mandatory and a value is not selected/entered the object cannot be created, updated or checked-in. So if for example the Reviewer is a mandatory field, it must be filled in by the Author upon creation of the object. This is not always known at that point in time; therefore these fields are usually not mandatory.

The 1..n column indicates how many values the field can hold. N represents unlimited.

Metadata fields and their properties cannot be changed post-implementation by Texas Instruments. SDL Professional Services will be needed to make changes post-implementation.

| Metadata label/field | | Description/Help text | Default | Optional / Mandatory in Tools | Optional / Mandatory in Database | 1..n | Type | LOV |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| *General fields* | | | | | | | | |
| **Date created** CREATED-ON | | The date on which the current logical, version or language item was created | Generated | Mandatory | Mandatory | 1 | Date | - |
| **Date content modified**  FISHLASTMODIFIEDON | | The date on which the last revision change was made on the content | Generated | Optional | Optional | 1 | Date | - |
| **Date modified** MODIFIED-ON | | The date specifying the last modification of the logical, version or language item metadata, the last workflow operation or the last revision change. | Generated | Optional | Optional | 1 | Date | - |
| **Title** FTITLE | | Object Title | - | Mandatory | Mandatory | 1 | String | - |
| **Topic type** FMODULETYPE | | Indicates the content type of the topic. | Defined on editor template | Optional | Optional | 1 | LOV | DMODULETYPE |
| **Image type** FILLUSTRATIONTYPE | | Indicates the content type of the image. | - | Mandatory | Mandatory | 1 | LOV | DILLUSTRATIONTYPE |
| **Library topic type** FLIBRARYTYPE | | Indicates the content type of the library topic. | Defined on editor template | Mandatory | Mandatory | 1 | LOV | DLIBRARYTYPE |
| **Map type** FMASTERTYPE | | Indicates the content type of the map. | Defined on editor template | Mandatory | Mandatory | 1 | LOV | DMASTERTYPE |
| **Publication type** FISHPUBLICATIONTYPE | | Indicates the content type of the publication. | - | Mandatory | Mandatory | 1 | LOV | DPUBLICATIONTYPE |
| **Description** FDESCRIPTION | | Free text that describes the object. |  | Optional | Optional | 1 | Long text | - |
| **Folder location** FISHFOLDERPATH | | Link to the folder where the object resides | - | Mandatory | Mandatory | 1 | Card | - |
| **Translation management** FNOTRANSLATIONMGMT | | Used on various logical card types to indicate if Translation Management is used to generate language cards with pre-translated objects. | Yes for Illustrations  No for other objects | Mandatory | Mandatory | 1 | Boolean | BOOLEAN |
| **Requested languages** FREQUESTEDLANGUAGES | | Target languages of the object/publication. | - | Optional | Optional | n | LOV | DLANGUAGE |
| **Inherited languages** FINHERITEDLANGUAGES | | Target Languages that are inherited from objects that links to the current object | Generated | Optional | Optional | n | LOV | DLANGUAGE |
| **Revision management** FISHNOREVISIONS | | Enable revision management. | - | Mandatory | Mandatory | 1 | Boolean | BOOLEAN |
| **Version** VERSION | | Version Number. | Generated | Mandatory | Mandatory | 1 | String | - |
| **Changes** FCHANGES | | Reason for a new version. | - | Optional | Optional | 1 | Long Text | - |
| **Candidate for baseline** FISHRELEASECANDIDATE | | This field is used to complete a baseline with option "Candidate for baseline". | - | Optional | Optional | n | LOV | DDOCUMENTRELEASE |
| **Baseline label** FISHRELEASELABEL | | Used to indicate that an object version is part of a frozen baseline | Generated | Optional | Optional | 1 | Card | - |
| **Language**  DOC-LANGUAGE | | Document language. |  | Mandatory | Mandatory | 1 | LOV | DLANGUAGE |
| **Status** FSTATUS | | Indicator of the progress of the object. | - | Mandatory | Mandatory | 1 | LOV | DSTATUS |
| **Technical Author** FAUTHOR | | Technical Author or subject matter expert responsible for authoring technical content. | - | Optional | Optional | 1 | LOV | USER |
| **Technical Reviewer** FREVIEWER | | Technical Reviewer or subject matter expert responsible for reviewing technical content. | - | Optional | Optional | n | LOV | USER |
| **Translator** FTRANSLATOR | | Translator Name. | - | Optional | Optional | 1 | LOV | USER |
| **Resolution** FRESOLUTION | | Resolution of illustration. | - | Mandatory | Mandatory | 1 | LOV | DRESOLUTION |
| **Source Language**  FSOURCELANGUAGE | | The language that is used as source to translate the (XML) file to other languages. | Generated | Optional | Optional | 1 | LOV | DLANGUAGE |
| **Comments** FCOMMENTS | | Additional free text information. | - | Optional | Optional | 1 | Long text | - |
| **Checked out by** CHECKED-OUT-BY | | User who has checked out the object. | Generated | Optional | Optional | 1 | String | - |
| **Last modified by** FISHLASTMODIFIEDBY | | Name of the user that last modified the object. | Generated | Optional | Optional | 1 | LOV | USER |
| **Word count**  FISHWORDCOUNT | | Word count of the object | Generated | Optional | Optional | 1 | Number | - |
| **Translation Load**  FISHTRANSLATIONLOAD | | Translation Load | Generated | Optional | Optional | 1 | Number | - |
| **To be translated word count**  FISHTOBETRANSLWC | | To be translated word count of the object | Generated | Optional | Optional | 1 | Number | - |
| *Publication (output) fields* | | | | | | | | |
| **Baseline**  FISHBASELINE | | Baseline used in the publication. | - | Mandatory | Mandatory | 1 | Card | - |
| **Map**  FISHMASTERREF | | Map used by the publication | - | Mandatory | Mandatory | 1 | Card | - |
| **Resources**  FISHRESOURCES | | Resources used by the publication | - | Optional | Optional | n | Card | - |
| **Context**  FISHPUBCONTEXT | | The publication context defines which conditional sections will be published. | - | Optional | Optional | 1 | Long text | - |
| **Working Language**  FISHPUBSOURCELANGUAGES | | The language in which you assemble the publication. |  | Mandatory | Mandatory | 1 | LOV | DLANGUAGE |
| **Working resolution**  FISHREQUIREDRESOLUTIONS | | The resolution used for assembling the publication. | - | Mandatory | Mandatory | 1 | LOV | DRESOLUTION |
| **Output format** FISHOUTPUTFORMATREF | | The name of the output format used for the output. |  | Mandatory | Mandatory | 1 | String | - |
| **Language combination** FISHPUBLNGCOMBINATION | | The output languages combination. |  | Mandatory | Mandatory | n | LOV | DLANGUAGE |
| **Publishing status** FISHPUBSTATUS | | Current output status. | - | Mandatory | Mandatory | 1 | String | DPUBSTATUS |
| **Published By** FISHPUBLISHER | | Output Publisher Name. |  | Mandatory | Mandatory | 1 | LOV | USER |
| **Started at** FISHPUBSTARTDATE | | Start date of the output publishing job. | Generated | Optional | Optional | 1 | Date | - |
| **Finished at** FISHPUBENDDATE | | End date of the output publishing job. | Generated | Optional | Optional | 1 | Date | - |
| **Topics and Maps**  FISHFALLBACKLNGDEFAULT | | Select the fallback languages for translations that are not available in the requested output language. |  | Optional | Optional | 1 | LOV | DLANGUAGE |
| **Images**  FISHFALLBACKLNGIMAGES | | Select the fallback languages for images that are not available in the requested output language. |  | Optional | Optional | 1 | LOV | DLANGUAGE |
| **Resources**  FISHFALLBACKLNGRESOURCES | | Select the fallback languages for resources that are not available in the requested output language. |  | Optional | Optional | 1 | LOV | DLANGUAGE |
| **Include metadata** FPUBINCLUDEMETADATA | | Include metadata in the Publication output. This field can be set on the Publication Output when the Output Format supports this option. |  | Optional | Optional | 1 | Boolean | BOOLEAN |
| **Include comments** FPUBINCLUDECOMMENTS | | Include comments in the Publication output. This field can be set on the Publication Output when the Output Format supports this option. |  | Optional | Optional | 1 | Boolean | BOOLEAN |
| **Differences with version** FISHPUBCOMPARE | | Compare the current Publication output with a previous released version of the same Publication. This field can be set on the Publication Output when the Output Format supports this option. |  | Optional | Optional | 1 | Boolean | BOOLEAN |
| **Review end date**  FISHPUBREVIEWENDDATE | | The date when the publication review ends. |  | Optional | Optional | 1 | Date | - |
| **Product family** FISHPRODUCTFAMILYNAME  **HIDE FIELD** | | Product family name | - | Optional | Optional | 1 | LOV | DPRODUCTFAMILYNAME |
| **Product release** FISHPRODUCTRELEASENAME  **HIDE FIELD** | | Product release name | - | Optional | Optional | 1 | LOV | DPRODUCTRELEASENAME |
| *Customer specific fields*  **Create TI tab for TI meta** | | | | | | | | |
| **Marketing Reviewer**  **FTIMARKETINGREVIEWER** | Marketing Reviewer assigned to ensure proper TM usage, brand, and messaging. | | null | Optional | Optional | n | USER | Marketing Reviewer |
| **Technical Illustrator**  **FTITECHNICALILLUSTRATOR** | Technical Illustrator assigned to ensure illustration standards are met. | | null | Optional | Optional | 1 | User | Technical Illustrator |
| **Title Page**  **FTITITLEPAGE** | Determines whether or not a title page is printed with the document. | | null | Optional | Optional | 1 | Checkbox | Checkbox |
| **Top Navigation**  **FTITOPNAVIGATION** | Turns on the navigation icons for data sheets and determines link type. | | null | Optional | Optional | 1 | LOV | DTITOPNAVIGATION |
| **Logo**  **FTILOGO** | Determines the TI logo or variation used in the document. | | TI | Optional | Optional | 1 | LOV | DLOGO |
| **Ref Navigation**  **FTIREFNAVIGATION** | If URL sting present, adds additional navigation icon to data sheet. | | null | Optional | Optional | 1 | String |  |
| **Part Number**  **FTITIPARTNUMBER** | Identifies part number supported by the document. Also used in formed URLs in the header and footer of the data sheet. | | null | Optional | Optional | 1..n | String |  |
| **Data Sheet Status**  **FTIDATASHEETSTATUS** | Prints the information status of the data sheet in the footer. Adds side banners for PP and AI. | | None | Optional | Optional | 1 | LOV | DDATASHEETSTATUS |
| **Prod Link**  **FTIPRODLINK** | In a data sheet, prints the product folder link in the footer beyond page one. | | null | Optional | Optional | 1 | Checkbox |  |
| **EN Lit Number**  **FTIENLITNUMBER** | English lit number used with en-US language variants. | | null | Optional | Optional | 1 | String |  |
| **EN Lit Rev**  **FTIENLITREV** | Indicates the revision letter of the English variant. | | null | Optional | Optional | 1 | String |  |
| **Translated Lit Number**  **FTITRANSLITNUMBER** | Translated lit number used with multiple language variants. | | null | Optional | Optional | 1 | String |  |
| **Orig Date**  **FTIORIGINDATE** | The original date the document was released. | | null | Optional | Optional | 1 | Date |  |
| **Revision Date**  **FTIREVISIONDATE** | The date the document was revised. Prints in the document. | | null | Optional | Optional | 1 | Date |  |
| **TI Disclosure**  **FTIDISCLOSURE** | Prints the selected CIP disclosure in the header of each page of the document. | | null | Optional | Optional | 1 | LOV | DDISCLOSURE |
| **Owner and Organization**  **FTIOWNERORG** | Owner, Organization. Only used for printing of the author and Organization under the banner | | null | Optional | Optional | 1 | Multi String |  |
| **Tech Writer**  **FTITECHNICALWRITER** | The name of the Technical writer who is responsible for the document. | | null | Optional | Optional | 1 | User | Link to Technical Writer User Role |

## Conditional rules for required field values:

The following rules are configured out of the box but these rules can be changed freely.

| Field | Condition | Description | Custom |
| --- | --- | --- | --- |
| FREVIEWER | FSTATUS=To be reviewed |  | No |
| FTRANSLATOR | FSTATUS =In translation | If the solution is integrated with TMS/WorldServer then this rule must be switched off. | No |
| FISHMASTERREF | FISHPUBSTATUS =Publish pending |  | No |
|  |  |  |  |

# Object Configuration

## Metadata Level

SDL Tridion Docs Content Manager has a 3-level metadata hierarchy: Logical level, Version level, and Language level. A metadata field (property) is attached to an object type on one of these levels. This is displayed in the SDL Tridion Docs Content Manager UI when a user right-clicks on an object and selects Properties. This launches a dialog with three Tabs:

* General Properties Tab that displays the metadata on the Logical level for the object.
* Version Properties Tab that displays the metadata on the Version level for the object.
* Workflow Properties Tab that displays metadata on the Language level for the object.

This section describes:

* Where properties are displayed in the Properties dialog
* Which properties can be displayed in various lists in the SDL Tridion Docs Content Manager UI

The table below describes the metadata fields (properties) for the main object types (map, topic, other (Word, PDF, …), image, library topic and publication) along with the level of the object to which it is attached:

* G = Global/Logical level
* V = Version level
* W = Workflow level (also known as the Language level)
* O = Output format (for publication object only)

Customer specific fields should have the Client’s name in the field to avoid confusion at a later stage.

These properties cannot be changed post-implementation by Texas Instruments. SDL Professional Services will be needed to make changes post-implementation.

| **Property name** | **Pub.** | **Map** | **Topic** | **Image** | **Library** | **Other** | **(Client only) Change mode** | **(Client only)**  **Change role** | |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| CREATED-ON | O | W | W | W | W | W |  |  | |
| CREATED-ON | V | - | - | - | - | - |  |  | |
| FISHLASTMODIFIEDON | - | W | W | W | W | W |  |  | |
| MODIFIED-ON | O | - | - | - | - | - |  |  | |
| MODIFIED-ON | V | - | - | - | - | - |  |  | |
| FTITLE | G | G | G | G | G | G | Emptied on create |  | |
| FMODULETYPE | - | - | G | - | - | - |  |  | |
| FILLUSTRATIONTYPE | - | - | - | G | - | - |  |  | |
| FLIBRARYTYPE | - | - | - | - | G | - |  |  | |
| FMASTERTYPE | - | G | - | - | - | - |  |  | |
| FISHPUBLICATIONTYPE | G | - | - | - | - | - |  |  | |
| FDESCRIPTION | G | G | G | G | G | G | Emptied on create |  | |
| FISHFOLDERPATH | G | G | G | G | G | G | Automatically generated  Read-only |  | |
| FNOTRANSLATIONMGMT | - | G | G | G | G | G | Create as No for Map, Lib, and Topic.  Create as Yes for Illustration. Template  inherit for new versions or update |  | |
| FREQUESTEDLANGUAGES | - | G | G | G | G | G |  |  | |
| FINHERITEDLANGUAGES | - | - | G | G | G | - | Emptied on create  Read-only |  | |
| FISHNOREVISIONS | - | G | G | G | G | G | Create as No for Map, Lib, Topic  Create as Yes for Ill. , Template  Inherit for new versions or update |  | |
| VERSION | V | V | V | V | V | V | Read-only |  | |
| FCHANGES | V | V | V | V | V | V | Emptied on NewVersion/Create |  | |
| FISHBASELINE | V | - | - | - | - | - | Update |  | |
| FISHMASTERREF | V | - | - | - | - | - | New Version |  | |
| FISHRESOURCES | V | - | - | - | - | - | New Version |  | |
| FISHPUBCONTEXT | V | - | - | - | - | - | New Version |  | |
| FISHRELEASECANDIDATE | - | V | V | V | V | - | Emptied on New Version/Create |  | |
| FISHRELEASELABEL | - | V | V | V | V | - | Emptied on New Version/Create  Read-only |  | |
| DOC-LANGUAGE | - | W | W | W | W | W | Read-only |  | |
| FISHPUBSOURCELANGUAGES | V | - | - | - | - | - | Emptied on New Version/Create/Publication |  | |
| FSTATUS | - | W | W | W | W | W | Overwritten during Create. NewVersion with Initial status |  | |
| \*FAUTHOR | - | W | W | W | W | W | Overwritten during New Version/Create/Overwrite with current user  Selected from Technical Author, roles | Change Label to Technical Author everywhere in the UI | |
| FREVIEWER | - | W | W | W | W | W | Selected from TECHNICALREVIEWER role | Change label in the UI | |
| FTRANSLATOR | - | W | W | W | W | W | Selected from Translator role |  | |
| FRESOLUTION | - | - | - | W | - | - | Read-only |  | |
| FISHREQUIREDRESOLUTIONS | V | - | - | - | - | - | Mandatory on New Version/Create  Read-only on Update |  | |
| FSOURCELANGUAGE | - | W | W | W | W | - | Read-only |  | |
| FCOMMENTS | - | W | W | W | W | - | Emptied on New version/Create |  | |
| CHECKED-OUT-BY | - | W | W | W | W | W | Automatically maintained |  | |
| FISHLASTMODIFIEDBY | - | W | W | W | W | W | Automatically maintained |  | |
| FISHWORDCOUNT | - | W | W | - | W | - | Automatically maintained |  | |
| FISHTRANSLATIONLOAD | - | W | W | - | W | - | Automatically maintained |  | |
| FISHTOBETRANSLWC | - | W | W | - | W | - | Automatically maintained |  | |
| FISHOUTPUTFORMATREF | O | - | - | - | - | - | Selected when a new output is created  Read-only |  | |
| FISHPUBLNGCOMBINATION | O | - | - | - | - | - | Read-only on Update |  | |
| FISHPUBSTATUS | O | - | - | - | - | - | Automatically maintained |  | |
| FISHPUBLISHER | O | - | - | - | - | - | Automatically maintained |  | |
| FISHPUBSTARTDATE | O | - | - | - | - | - | Automatically maintained |  | |
| FISHPUBENDDATE | O | - | - | - | - | - | Automatically maintained |  | |
| FISHFALLBACKLNGDEFAULT | O | - | - | - | - | - |  |  | |
| FISHFALLBACKLNGIMAGES | O | - | - | - | - | - |  |  | |
| FISHFALLBACKLNGRESOURCES | O | - | - | - | - | - |  |  | |
| FPUBINCLUDEMETADATA | O | - | - | - | - | - |  |  | |
| FPUBINCLUDECOMMENTS | O | - | - | - | - | - |  |  | |
| FISHPUBCOMPARE | O | - | - | - | - | - |  |  | |
| FISHPUBREVIEWENDDATE | O |  |  |  |  |  |  |  | |
| ~~FISHPRODUCTFAMILYNAME~~ | ~~G~~ |  |  |  |  |  |  | Hide Field | |
| ~~FISHPRODUCTRELEASENAME~~ | ~~V~~ |  |  |  |  |  |  | Hide Field | |
| **TI Fields** | | | | | | | | | |
| FTITECHNICALWRITER | - | W | W | W | W | W | Overwritten during New Version/Create/Overwrite with current user  Selected from Technical Writer roles. | | UserRole Technical Writer |
| FTITECHNICALREVIEWER | - | W | W | W | W | W |  | | UserRole  TECHNICALREVIEWER |
| FTIMARKETINGREVIEWER | - | W | W | W | W | W |  | | UserRole  MARKETINGREVIEWER |
| FTITECHNICALILLUSTRATOR | - |  |  | W |  |  |  | | UserRole  TECHNICALILLUSTRATOR |
| FTITITLEPAGE  Title page  To include a title page. | V |  |  |  |  |  |  | | Checkbox |
| FTITOPNAVIGATION  Top Navigation Determines whether or not top navigation icons print in the data sheet, and how to construct the URLs | V |  |  |  |  |  |  | |  |
| FTILOGO | V |  |  |  |  |  |  | |  |
| FTIREFNAVIGATION  Ref navigation  Includes icon for reference design | G |  |  |  |  |  |  | | String Field. (Sample is just URL) |
| FTITIPARTNUMBER Part Number Generic Partnumber, separated by comma delimiter | V |  |  |  |  |  |  | | Multi String Field. Free text |
| FTIDATASHEETSTATUS | V |  |  |  |  |  |  | |  |
| FTIPRODLINK  Product Folder Link.  Turns on product folder links. | V |  |  |  |  |  |  | | Checkbox Default uncheck |
| FTIENLITNUMBER  English Lit Number | G |  |  |  |  |  |  | | Single String Field. Min/Max 7 char. |
| FTIENLITREV  English Lit Rev. | V |  |  |  |  |  |  | | Max 2 char. single string field |
| FTITRANSLITNUMBER  Translated Lit Number | O |  |  |  |  |  |  | | Single String Field. Min/Max 7 char. |
| FTIORIGINDATE  Origination Date  Original date the document was released. | G |  |  |  |  |  | Maintained. | | Date Field  Current Date |
| FTIREVISIONDATE  Revision Date  Date the revision was released. | V |  |  |  |  |  | Current Date on new version. | | Date Field  Current Date |
| FTIDISCLOSURE | V |  |  |  |  |  |  | |  |
| FTIOWNERORG  Owner, Organization  Only used for printing of Author and Organization under the banner. | V |  |  |  |  |  | Emptied on new version | | Multi line String Field, |

## Display in Lists (web client only)

A user can change the display of standard and custom fields in lists using the Client Tools. This information is then stored in the database and preserved for every user.

The table below indicates which properties will be available in various lists in the SDL Tridion Docs Content Manager Web Client UI. Note that not all properties can always be displayed. A description of the lists can be found below the table.

| **Property name** | **Inbox** | **Search Results** | **Global View** | **Version View** | **Workflow Report** | **Translation report** |
| --- | --- | --- | --- | --- | --- | --- |
| CREATED-ON |  |  | X |  |  |  |
| FISHLASTMODIFIEDON |  | X |  |  |  |  |
| MODIFIED-ON |  |  |  |  |  |  |
| FTITLE | X | X | X |  | X | X |
| *DISHTYPE* |  |  |  |  |  |  |
| FMODULETYPE |  |  | X |  |  |  |
| FILLUSTRATIONTYPE | X | x | X |  |  |  |
| FLIBRARYTYPE |  |  | X |  |  |  |
| FMASTERTYPE |  |  | X |  |  |  |
| FISHPUBLICATIONTYPE |  |  | X |  |  |  |
| FDESCRIPTION |  |  | X |  |  |  |
| FFOLDERLOCATION | x | X | x | x | x | x |
| FNOTRANSLATIONMGMT |  |  |  |  |  |  |
| FREQUESTEDLANGUAGES |  |  |  |  |  |  |
| FINHERITEDLANGUAGES |  |  |  |  |  |  |
| FISHNOREVISIONS |  |  |  |  |  |  |
| VERSION | X | X | X | X | X | X |
| FCHANGES |  |  |  | X |  |  |
| FISHBASELINE |  |  |  |  | X | X |
| FISHMASTERREF |  |  |  |  | X | X |
| FISHRESOURCES |  |  |  |  | X | X |
| FISHPUBCONTEXT |  |  |  |  |  |  |
| FISHRELEASECANDIDATE |  |  |  |  |  |  |
| FISHRELEASELABEL |  |  |  |  |  |  |
| DOC-LANGUAGE |  |  |  | X | X | X |
| FISHPUBSOURCELANGUAGES |  |  |  |  | X | X |
| FSTATUS | X | X |  | X |  |  |
| FAUTHOR |  |  |  | X |  |  |
| FREVIEWER |  |  |  |  |  |  |
| FTRANSLATOR |  |  |  |  |  |  |
| FRESOLUTION |  | X |  |  |  |  |
| FISHREQUIREDRESOLUTIONS |  |  |  |  |  |  |
| FSOURCELANGUAGE |  |  |  |  |  |  |
| FCOMMENTS |  |  |  |  |  |  |
| CHECKED-OUT-BY | X | X |  | X | X |  |
| LAST-MODIFIED-BY |  |  |  |  | X |  |
| FISHWORDCOUNT |  |  |  |  | X | X |
| FISHTRANSLATIONLOAD |  |  |  |  | X | X |
| FISHTOBETRANSLWC |  |  |  |  | X | X |
| FISHOUTPUTFORMATREF |  |  |  |  |  |  |
| FISHPUBLNGCOMBINATION |  |  |  |  |  |  |
| FISHPUBSTATUS |  |  |  |  |  |  |
| FISHPUBLISHER |  |  |  |  |  |  |
| FISHPUBSTARTDATE |  |  |  |  |  |  |
| FISHPUBENDDATE |  |  |  |  |  |  |
| FISHPUBREVIEWENDDATE |  |  |  |  |  |  |
| FISHPRODUCTFAMILYNAME |  |  |  |  |  |  |
| FISHPRODUCTRELEASENAME |  |  |  |  |  |  |
| **TI Fields** | | | | | | |
| EDT OR Image Extension | X |  |  | X |  |  |
| **Marketing Reviewer**  **FTIMARKETINGREVIEWER** | x |  |  |  |  |  |
| **Technical Writer**  **FTITECHNICALWRITER** | x | x |  | x | x | x |
| **Technical Illustrator**  **FTITECHNICALILLUSTRATOR** | x |  |  |  | x |  |

1. Show MODIFIED-ON for publications and FISHLASTMODIFIEDON for other object types.

Where these lists appear:

* 1. **Inbox**: Open the web client, select the Inbox tab
  2. **Search Results**: Open the web client, select the Search tab, and conduct a search.
  3. **Global View**: Open the web client, select the Repository tab, and click a folder.
  4. **Version View**: Open the web client, select the Repository tab, select a folder, and then select an object.
  5. **Workflow report**: Open the web client, select a publication object version and start the Workflow report
  6. **Translation report**: Open the web client, select a publication object version and start the Translation report

# Search

## Client Tools Search

In the SDL Tridion Docs Content Manager Publication Manager and Authoring Bridge, a user can search for objects in the repository using a combination of metadata and full-text search (the “Find What” field). There are two sections presented to the user:

* Search Options
* Advanced Options

In the “Search Options” section the user can indicate:

* an object type
* whether to retrieve the Latest version or All versions of objects

Note that you cannot search for Publication Objects from the Publication Manager or Authoring Bridge; this is only possible using the Web Client.

Client search settings cannot be changed post-implementation by Texas Instruments. SDL Professional Services will be needed to make changes post-implementation.

### Advanced Options

The Advanced Options provides additional metadata fields where a user can further constrain a search. The fields available in the Advanced Option section can be extended. The table below lists the fields that will be configured in the Advanced Options section of the Search Tab.

| Name | Advanced Options | | | | | |
| --- | --- | --- | --- | --- | --- | --- |
| User Roles | All | | | | | |
| Object Types | Map  Topic  Library topic  Image  Template | | | | | |
| Element Name Field | Label | Object type filter | Sort | Hid-den | Assist | Description |
| FMAPID | ID |  | Y |  |  | Identifier |
| FTITLE | Title |  | Y |  |  | Title |
| VERSION | Version |  | Y |  |  | Version |
| DOC-LANGUAGE | Language |  | Y |  | Y | The language of the object |
| \*FSTATUS | Status |  | Y |  | Y | The status of the object |
| \*FAUTHOR | Author |  | Y |  | Y | The user responsible for creating the object |
| FISHLASTMODIFIEDBY | Last modified by |  | Y |  | Y | The user that made the last modification |
| FRESOLUTION | Resolution |  | Y |  | Y | Resolution of the illustration. |
| USERGROUP | User group |  | Y |  | Y | As configured OOB |
| CHECKED-OUT-BY | Checked out by |  | Y |  | Y | The user that has checked out an object |
| CREATED-ON | Created on/before/after |  | Y |  | Y | Date on which the language object was created |
| FISHLASTMODIFIEDON | Modified on/before/after |  | Y |  | Y | Date on which the object was modified |
| **TI Fields** | | | | | | |
| FILLUSTRATIONTYPE | Illustration type |  | Y |  | Y | Indicates the illustration type |
| FMODULETYPE | Topic type |  | Y |  | Y | Indicates the topic type. |
| FLIBRARYTYPES | Library type |  | Y |  | Y | Indicates the library type |
| FTITECHNICALWRITER | Technical Writer |  | Y |  | Y | Assigned Technical Writer |
| FTITECHNICALAUTHOR | Technical Author |  | Y |  | Y | Assigned Technical Author |
| FTITECHNICALREVIEWER | Technical Reviewer |  | Y |  | Y | Assigned Technical Reviewer |
| FTIMARKETINGREVIEWER | Marketing Reviewer |  | Y |  | Y | Assigned Marekting Reviewer |
| FTITECHNICALILLUSTRATOR | Technical Illustrator |  | Y |  | Y | Assigned Technical Illustrator |

## Web Client Search

In the SDL Tridion Docs Content Manager Web client, a user can search for objects in the repository using a combination of metadata and full-text search (the “Search Terms” field). There are two search screens from which the user can execute a search:

* Search (for general searches)
* Publications

Web Client search settings cannot be changed post-implementation by Texas Instruments. SDL Professional Services will be needed to make changes post-implementation.

### General (Search)

| Name | General | | | | |
| --- | --- | --- | --- | --- | --- |
| User Roles | All | | | | |
| Object Types | Map  Topic  Library topic  Image  Other (Word, PDF, …) | | | | |
| Element Name Field | Label | Sort | Hidden | Assist | Description |
| ISHSCORE | Relevance | Y | Y |  | Relevance |
| FMAPID | ID | Y |  |  | Identifier |
| FTITLE | Title | Y |  |  | Title |
| VERSION | Version | Y |  |  | Version |
| DOC-LANGUAGE | Language |  |  | Y | The language of the object |
| \*FSTATUS | Status |  |  | Y | The status of the object |
| \*FAUTHOR | Author | Y |  | Y | The user responsible for creating the object |
| FISHLASTMODIFIEDBY | Last modified by | Y |  | Y | Last modified by |
| FRESOLUTION | Resolution |  |  | Y | Resolution of the illustration |
| USERGROUP | User group |  |  | Y | As configured OOB |
| CHECKED-OUT-BY | Checked out by | Y |  | Y | The user that has checked out an object |
| CREATED-ON | Created on or before | Y |  | Y | Date on which the object was created |
| CREATED-ON | Created on or after | Y |  | Y | Date on which the object was created |
| FISHLASTMODIFIEDON | Modified on or before | Y |  | Y | Date on which the object content was modified |
| FISHLASTMODIFIEDON | Modified on or after | Y |  | Y | Date on which the object content was modified |
| FILLUSTRATIONTYPE | Illustration type | Y |  | Y | Illustration type |
| FMODULETYPE | Topic type | Y |  | Y | Topic type |

### Publications (Find)

| Name | Publications | | | | | |
| --- | --- | --- | --- | --- | --- | --- |
| User Roles | All | | | | | |
| Object Types | Publications | | | | | |
| Element Name Field | Label | Sort | | Hidden | Assist | Description |
| FMAPID | ID | Y | |  |  | ID of the document |
| FTITLE | Title | Y | |  |  | Enter the title |
| VERSION | Version |  | |  |  | Enter the version |
| FISHMAPREF | Map | Y | |  |  | Enter the map ID |
| FISHBASELINE | Baseline | Y | |  | Y | Select the baseline |
| FISHPUBSOURCELANGUAGES | Working Language | Y | |  | Y | Select the working language |
| FISHREQUIREDRESOLUTIONS | Required resolution(s) | Y | |  | Y | Select the required resolution(s) |
| FISHRESOURCES | Resource(s) | Y | |  |  | Enter one of the resources attached to the publication |
| FTITIPARTNUMBER | Part Number | | Y |  |  | Part number supported by the publication. |
| FTIDATASHEETSTATUS | Data Sheet Status | | Y |  |  | Data sheet status |
| FTIENLITNUMBER | Lit Number | | Y |  |  | Unique literature number |
| FTITRANSLITNUMBER | Trans Lit Number | | Y |  |  | Unique Translated literature number |

# User Groups and Users

This section describes how the system will be configured for User Groups and User Roles that will be used when administrators add Users to the system. Users can be assigned to multiple user groups and may have multiple roles in the system. Details are described in the subsections below.

User groups and User Roles can be changed or extended using the User Groups, User Roles and Users Screen under Settings in the Web client.

## User Groups

The purpose of a User Group is to define the access that members of the group can have to folders in SDL Tridion Docs Content Manager. A user can be part of multiple User Groups

The following are the User Groups that will be configured for the system. Note that this list can be modified or extended at any time but you can only delete a value from the list of User Groups if the value is not used.

| Values | Description |
| --- | --- |
| Default Department | Default department (contains SDL users including admin – should not be removed) |
| System management (Administrator) | Owns the System folder. This group does not contain any users. Should not be removed. |
| APP | R/W APP/, R Starfish/APP, R Prime/APP |
| APP CIP | R/W CIP/APP |
| ASC | R/W ASC/, R Starfish/ASC, R Prime/ASC |
| ASC CIP | R/W CIP/ASC |
| HIVAL | R/W HIVAL/, R Starfish/HIVAL, R Prime/HIVAL |
| HIVAL CIP | R/W CIP/HIVAL |
| DLP | R/W DLP/, R Starfish/DLP, R Prime/DLP |
| DLP CIP | R/W CIP/DLP |
| EP | R/W EP/, R Starfish/EP, R Prime/EP |
| EP CIP | R/W CIP/EP |
| CIP\* | R/W CIP/, R Starfish/CIP, R Prime/CIP ; (\*.CIP access only) |
| Starfish | R/W Starfish/ |
| Prime | R/W Prime/ |
| Technical Writer | R/W APP/, ASC/, HIVAL/, DLP/, EP/, R Starfish/, R Prime/ |
| CIP Technical Writer | R/W CIP/ |
| SEM | R/W SEM |

## Users

The definition of all required users is not within the scope of this document. The Texas Instruments system administrator will define and add all necessary users to the system. This user information is stored within the database and will always be preserved.

The authentication mechanism that was selected by the customer determines if users are setup as SDL Tridion Docs Content Manager internal users (InfoShareSTS) or if they are set up as external users (ADFS – Windows Authentication)

### User metadata

There is a possibility to add extra metadata to users.

## User Roles

User Roles determine how a user can participate in the workflow and the options in the user interface (for example, Inboxes available to a user). A single user can have one or more roles in the system. These roles also relate to security.

The following are the User Roles that will be configured for the system. Note that this list can be modified or extended at any time but you can only delete a value from the list of User Roles if the value is not used.

| Values | Default | Description |
| --- | --- | --- |
| Administrator | - | A department member who administers the SDL Tridion Docs Content Manager system. This role must never be removed or changed. |
| Technical Author | - | Creates original source content for technical documents. |
| Technical Writer |  | Manages publications, edits technical documentation, and supports Technical Author. |
| Technical Reviewer | - | Reviews technical content for Technical Author. Could be a quality engineer, product engineer, marketing engineer, or peer. |
| Technical Illustrator |  | Creates, reviews and updates art to ensure illustration standards are met. |
| Marketing Reviewer |  | Reviews specific content for TM usage, brand and messaging. |
| Translator | - | Translator, internal user who guides the translation of publication. |
| TRANSLATORSERVICE | - | System role – do not assign this role to users |

# Workflow

This section describes the workflow that the objects go through from creation to release.

Anywhere Technical Reviewer is listed, also list Marketing Reviewer.

## Visualizations of the Workflow

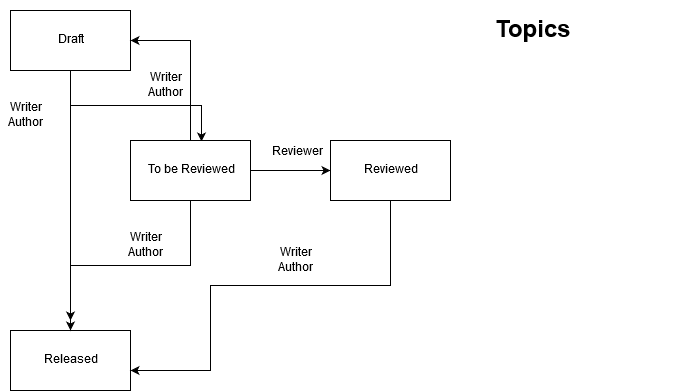
The following sections include the relevant workflow for each object type (topic, map, illustration, etc) in both the source language and the target languages.

### Topics in Source Language

A **Technical Autho**r or **Technical Writer** creates the initial draft of a topic. The Technical Author and Technical Writer work collaboratively to Release all topics in the publication. Both roles can move topics to “To Be Reviewed” or Released.

Once it is in “To be reviewed”, only a reviewer can push it forward to “Reviewed”. Once it is in “Reviewed,” a Tech Author or Writer can push it to “Released” or Draft.

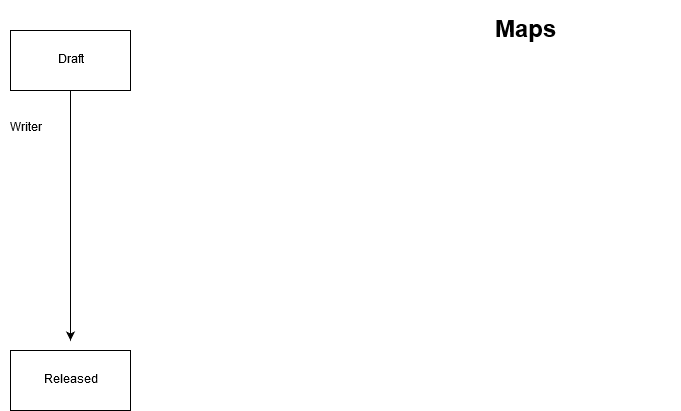
|  |  |  |
| --- | --- | --- |
| From Status | To Status | UserRole(s) |
| Draft | Released | Technical Writer  Technical Author |
| Draft | To be reviewed | Technical Writer  Technical Author |
| To be reviewed | Draft | Technical Writer  Technical Author |
| To be reviewed | Reviewed | Technical Reviewer |
| Reviewed | Released | Technical Writer  Technical Author |
|  |  |  |



### Maps and Libraries in Source Language

A Technical Writer creates the initial draft of a map or Library. The technical writer can move it directly to Released when editing is done.

|  |  |  |
| --- | --- | --- |
| From Status | To Status | UserRole(s) |
| Draft | Released | Technical Writer |

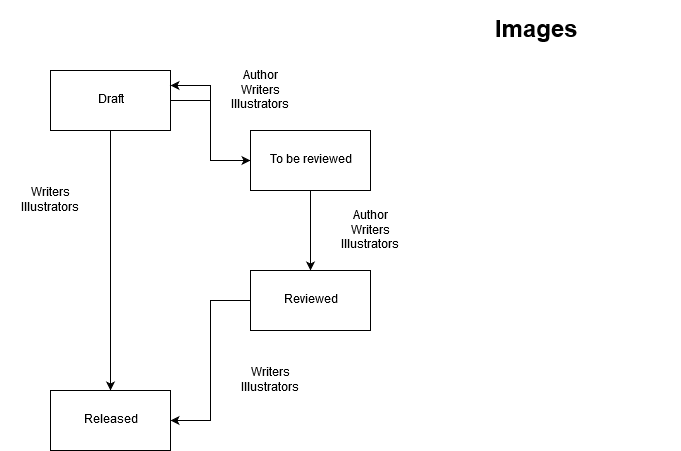


### Images and Templates in Source Language

A Technical Writer, Technical Author or Technical Illustrator create the initial draft of the object. Only a Writer and Illustrator can move it directly to released.

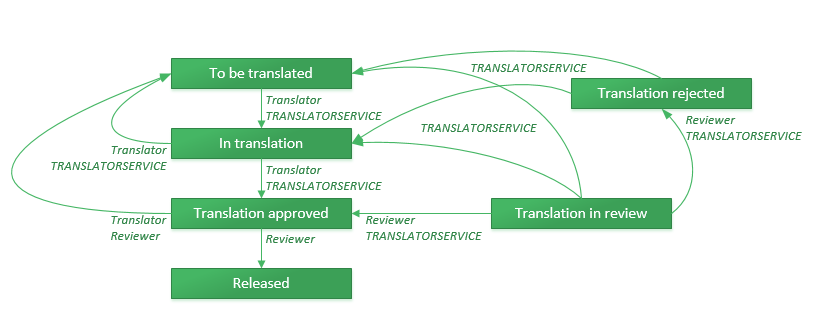
If review is needed, a Technical Writer, Technical Author or Technical Illustrator can move it to To be reviewed where all 3 user roles can move it forward to Reviewed. Only a technical writer or technical illustrator can move it forward to Released

|  |  |  |
| --- | --- | --- |
| From Status | To Status | UserRole(s) |
| Draft | Released | Technical writer  Technical Illustrator |
| Draft | To be Reviewed | Technical writer  Technical Illustrator  Technical author |
| To be Reviewed | Draft | Technical writer  Technical Illustrator  Technical author |
| To be Reviewed | Reviewed | Technical writer  Technical Illustrator  Technical author |
| Reviewed | Released | Technical writer  Technical Illustrator |



### Topics/Maps/Library topics/Images in Target Language

No change in exiting workflow



### Publications

The workflow on publications is fixed and cannot be configured differently. The following diagram describes the out-of-the-box workflow and is presented here for informational purposes only.

A publication in SDL Tridion Docs Content Manager does not follow the regular content object workflow: a publication output can either be draft, a release candidate, or released. The decision when to release (or *freeze*) a publication is a human decision.



## Statuses

A status indicates the state of an object in its life cycle. A status is just a label that is used to process the objects in the workflow.

Irrespective of the label of the object’s status, each status is either a “draft” or a “released” status.

The statuses System and System Read Only are reserved for the system.

### Source Language Statuses

| Element Name | DSTATUS | | |
| --- | --- | --- | --- |
| Values | Default | Description | Released? |
| Draft | X | Draft | No |
| To be reviewed |  | To be reviewed | No |
| Reviewed |  | Reviewed | No |
| Released |  | Released | Yes |
| Expired |  | Released objects that are no longer used | Yes |

### Target Languages Statuses

| Element Name | DSTATUS | | |
| --- | --- | --- | --- |
| Values | Default | Description | Released? |
| To be translated | X | Initial status after the target language objects was created. | No |
| In translation |  | Status indicating the object is being translated outside of SDL Tridion Docs Content Manager | No |
| Translation in review |  | The translation is currently being reviewed. | No |
| Translation rejected |  | The translation has been rejected and need to be re-visited | No |
| Translation approved |  | The translation has been approved for release | No |
| Translated |  | The object was translated but not released yet. It is still possible to update the object. | No |
| Released |  | The translated object has been approved and released. | Yes |

### Publication Statuses (fixed)

| Element Name | DPUBSTATUS | | |
| --- | --- | --- | --- |
| Values | Default | Description | Released? |
| To be Published | X | Indicates that the publication object can be published. | No |
| Pending |  | The publication object is in line for publication. | No |
| Publishing |  | The publication object is in the process of being published. | No |
| Draft |  | Publishing did occur but not all publication objects (topics-maps-reltables-variables-graphics) are present and in Production Released status or invalid links-hyperlinks-conref links were found in the publication. | No |
| Out of Date |  | The content of the publication or the definition of the output format was changed after the last time the publishing was executed. The current content of the output is not up to date and the output should be republished. | No |
| Release Candidate |  | All publication objects (topics-maps-reltables-variables-graphics) are present and in Production Released status and no invalid links-hyperlinks-or conref links were found in the publication. | No |
| Released |  | The author has completed all tasks associated with the publication and it has been released. The baseline is frozen, the context cannot be modified anymore, no resources can be added, … | Yes |
| Cancelled |  | Publishing was cancelled by the user. Possibly the previous publishing result is still available. |  |
| Failed |  | The publishing engine failed to result in a file or set of files. Most probably for a technical reason. |  |

### Initial Statuses (need these to be tight!)

The following table gives an overview of the status in which an object of a certain type can be created for a given role. If no initial status is given the implication is that a user with that role cannot create new objects in the repository.

|  |  |  |
| --- | --- | --- |
| User Role | Object Type | Initial Status |
| Administrator | Map | Draft |
| Topic | Draft |
| Image | Draft |
| Library topic | Draft |
| Other (PDF, Word, …) | Draft |
| Technical Author  Technical Writer  Technical Illustrator | Map | Draft |
| Topic | Draft |
| Image | Draft |
| Library topic | Draft |
| Other (PDF, Word, …) | Draft |
| Technical Reviewer  Marketing Reviewer | Map |  |
| Topic |  |
| Image |  |
| Library topic |  |
| Other (PDF, Word, …) |  |
| Translator | Map |  |
| Topic |  |
| Image |  |
| Library topic |  |
| Other (PDF, Word, …) |  |
| TRANSLATORSERVICE  (system role used for translation management) | Map | To be translated |
| Topic | To be translated |
| Image | To be translated |
| Library topic | To be translated |
| Other (PDF, Word, …) | To be translated |

## Plugins on metadata changes

No plugins needed for metadata changes

# Inboxes

In this section the different inboxes are described. The inboxes appear in the Publication Manager, Authoring Bridge, and Web Client.

At each step of the workflow, the object appears in the inbox of the user assigned in the next step in the production process.

The contents of inboxes for a given user depends on the user roles that have been assigned, the status of objects as they move through the workflows, and can even depend on certain metadata values.

Keep in mind that the Workflow Report and Translation Report in the Web Client can also be used at a publication level to push objects through the workflow.

The following subsections define the inboxes that will be defined for your system.

You can modify or extend inboxes using the SDL Tridion Docs Content Manager Web client but it requires a good understanding of how inboxes work in relation to your workflow, user roles, etc.

## My Draft

This inbox will contain objects (typically topics) that the technical author is working on. SDL Tridion Docs Content Manager automatically places an object in this inbox when an author creates a new version of an object or when he/she checks out an existing version of an object. Additionally, a workflow might define that a reviewer can send an object back to an author so that he/she can incorporate edits/changes. In this case, the object will again appear in the author’s inbox for further action.

The table below describes how this inbox will be configured for your system including the target statuses the author will be allowed to take for objects that are in this inbox.

If target status is not specified, then assume that all possible target statuses from any status of the status filter need to be configured as possible target status!

| Name | My Draft |
| --- | --- |
| Objects | Map, Topic, Image, Library |
| User Roles | Technical Author, Technical Writer |
| Current User identified as | Logged in Technical Author, Technical Writer |
| Status filter | Draft |
| Target status | **To be reviewed**  **Released** |

## My To be reviewed

This inbox will contain objects (typically topics) that are in the To be reviewed state.

The table below describes how this inbox will be configured for your system including the target statuses the author will be allowed to take for objects that are in this inbox.

If target status is not specified, then assume that all possible target statuses from any status of the status filter need to be configured as possible target status!

| Name | My To be reviewed |
| --- | --- |
| Objects | Topic, Image |
| User Roles | Technical Writer, Technical Illustrator, Technical Author |
| Current User identified as | Logged in Technical Writer, Technical Illustrator, Technical Author |
| Status filter | To be reviewed |
| Target status | **Draft, Reviewed** |

## My Reviewed

| Name | My Reviewed |
| --- | --- |
| Objects | Topic, Image |
| User Roles | Technical Writer, Technical Illustrator, Technical Author |
| Current User identified as | Logged in Technical Writer, Technical Illustrator, Technical Author |
| Status filter | Reviewed |
| Target status | **Released** |

## Translation Reviewer

| Name | Translation Reviewer |
| --- | --- |
| Objects | Map, Topic, Library topic, Image, Other (Word, PDF, …) |
| User Roles | Reviewer |
| Current User identified as | Reviewer |
| Status filter | Translation approved, Translation in review |
| Target status | **Reject translation**  **Approve translation**  **Release translation** |

## Translator

| Name | Translator |
| --- | --- |
| Objects | Map, Topic, Library topic, Image |
| User Roles | Translator |
| Current User identified as | Translator |
| Status filter | To be translated |
| Target status | **In translation** |

## In Translation

| Name | In Translation |
| --- | --- |
| Objects | Map, Topic, Library topic, Image, Other (Word, PDF, …) |
| User Roles | Translator |
| Current User identified as | Translator |
| Status filter | In translation |
| Target status | **Translated**  **To be translated** |

# Workflow and Translation Report

In the Web Client there are two reports that are available on publication objects:

* a Workflow Report
* a Translation Report

From either report, you can move objects to the next valid status in the workflow. Statuses can be grouped for each report to support batch workflow processing and/or exporting files.

This section describes how the status groupings will be configured for your system along with the target statuses available from the Workflow and Translation reports.

These reports are available in the Web Client on publication objects.

Workflow and Translation Report settings cannot be changed post-implementation by Texas Instruments. SDL Professional Services will be needed to make changes post-implementation.

## Workflow Report (source language)

To access this report on the Web client, select a Publication from the repository, then, in the lower panel, click on the Workflow option. This opens a new window.

### Groupings

| Grouping Name | Statuses |
| --- | --- |
| Draft States | Draft |
| To be Reviewed States | To be reviewed |
| Reviewed Status | Reviewed |
| Released States | Released |
| To be translated | To be translated |
| In translation | In translation |
| Translated | Translated |
| Released | Released |

### Target statuses

See [Inboxes](#_Inboxes)

## Translation Report

To access this report on the Web client, select a Publication from the repository, then, in the lower panel, click on the Translation option. This opens a new window.

### Groupings

| Grouping Name | Statuses |
| --- | --- |
| Draft States | Draft |
| To be reviewed Status | To be reviewed |
| Reviewed | Reviewed |
| Released States | Released |
| To be translated | To be translated |
| In translation | In translation |
| Translated | Translated |
| Released | Released |

### Target statuses

See [Inboxes](#_Inboxes)

# Translation Configuration

## Metadata Inheritance

When SDL Tridion Docs Content Manager generates translations, it stores these objects in the repository. To trigger the workflow for these automatically generated objects, metadata values must be either defaulted or inherited. Metadata inheritance can be configured in the *XML translation configuration* in the Web Client Settings page.

The values of the following non-system metadata fields will be copied from the source language to the generated target language for all user groups:

| Metadata Field | Internal Name | Implications |
| --- | --- | --- |
| \*Technical Author | FAUTHOR | The same author will be available on all generated translations. |
| Translator | FTRANSLATOR | A translator can be assigned on the source object and will be reused from the source language value by default when a translation is generated. |
| \*Technical Reviewer | FREVIEWER | Target language will get same value as source language although it did not really pass this reviewer on the source object. |
| Technical Illustrator | FTITECHNICALILLUSTRATOR |  |
| Technical Reviewer | FTITECHWRITER |  |
| Marketing Reviewer | FTIMARKETINGREVIEWER |  |

## Metadata Setting during Generate Target Languages

It is also possible to configure the metadata fields to be set upon generation of the Translation objects when manually pushing the translation from the Translation Management function in the Web client.

| Metadata Field | Internal Name | Implications |
| --- | --- | --- |
| Translator | FTRANSLATOR | A translator will be set for all objects in all languages that are selected for the Generate Target Languages. |
| Comments | FCOMMENTS | A comment will be set for all objects in all languages that are selected for the Generate Target Languages. |

## Translation Schema

The following language is always used as the source language: “en-us”.

The language generation schema is:

|  |
| --- |
| zh-cn |
| ja-jp |
| ko-kr |
| de-de |
| zh-tw |
| es-mx |

<languagepaths>

<languagepath from=”en-us” to=" zh-cn"/>

<languagepath from=”en-us” to=" ja-jp"/>

<languagepath from=”en-us” to=" ko-kr"/>

<languagepath from=”en-us” to=" de-de"/>

<languagepath from=”en-us” to=" zh-tw"/>

</languagepaths >

See [Languages](#_Languages) for the full list of languages

## Translation Memories

Texas Instruments may have to interact with their Language Service Provider to make sure the Translation Memory is set up in such a way that it can handle the DITA XML objects.

The actual configuration of translation memories or interaction with Language Service Providers is not in the scope of this Implementation Workbook.

Keep in mind that migration to DITA or changes to existing DITA objects (structure, inline elements) can affect the level of matching in the existing Translation Memories.

# Output Formats

Output Formats require exact specification especially regarding input parameters.

Texas Instruments or its partner is responsible for creation and delivery of the style sheets in a format that is compliant with the SDL Tridion Docs Content Manager system configuration. The out of the box system of SDL Tridion Docs Content Manager comes with a number of sample style sheets that Texas Instruments or its partner can start from when developing their own style sheets.

If Texas Instruments wants to pass along certain parameters when publishing is started, they should have been foreseen in the Publications publishing dialog for that particular output type and should be listed in the table below. Keep in mind that these options have to be implemented in your style sheets for that specific output format (e.g. enabling track changes is typically only done on PDF files).

Some output formats (like CHM) might require to be generated on a system where the Locale is set to the correct Language of the output. Please consult your Style sheet provider if this is the case for you. It might mean that for those languages you manually have to create the output on a separate dedicated PC. SDL may also provide a workaround in some cases.

Texas Instruments is responsible for the creation and management of the output formats. The following output formats should be implemented.

**Rename SDL PDF output Formats so that it has the name SDL in the output format. Example SDL PDF (a4). Also update this in the metadataconfig**

Duplicate the Infoshare Stylesheets and rename them to TI

* TI PDF Pub, Transtype PDF, Stylesheet TI
* TI HTML5, Transtype HTML5, Stylesheet TI
* TI Webhelp, Transtype Webhelp, Stylesheet TI
* TI DITA XML, Transtype DITA XML, Stylesheet TI
* TI Package, TransType TIPACKAGE, stylesheet TI

## Metadata Publish Configuration

If any of the custom metadata fields need to be available for publishing (within the scripts or DITA-OT), please state them here.

ALL TI Metadata Fields should be exported in the corresponding Met files

### XML objects

|  |  |
| --- | --- |
| **Field** | **Level** |
| FTITECHNICALWRITER | LNG |
| FTITECHNICALREVIEWER | LNG |
| FTIMARKETINGREVIEWER | LNG |
| FTITECHNICALILLUSTRATOR | LNG |

### Publication object

See object configuration sections for the levels;

|  |  |
| --- | --- |
| **Field** | **Level** |
| FTITITLEPAGE |  |
| FTITOPNAVIGATION |  |
| FTILOGO |  |
| FTIREFNAVIGATION |  |
| FTITIPARTNUMBER |  |
| FTIDATASHEETSTATUS |  |
| FTIPRODLINK |  |
|  |  |
|  |  |
| FTIENLITNUMBER |  |
| FTIENLITREV |  |
|  |  |
|  |  |
|  |  |
|  |  |
| FTITRANSLITNUMBER |  |
| FTIORIGINDATE |  |
| FTIREVISIONDATE |  |
| FTIDISCLOSURE |  |
| FTIORGANIZATION |  |
| FTITECHNICALOWNER |  |
| FTITECHNICALWRITER |  |
|  |  |

# Editor Templates

When new objects are created using Publication Manager and the Authoring Bridge, users can choose from a number of predefined editor templates. These templates are stored in the repository in a system folder.

This section lists the available templates and their standard metadata.

Texas Instruments is responsible for the creation and management of these templates, but the following templates will already be created and delivered to SDL for inclusion in the database.

Each Topic, Map or Library type requires a template. See chapter 3.1

## Image Templates

| Template Name | Description |
| --- | --- |
| Empty illustration | This dummy illustration will be used when a new object is created from the Browse repository dialog or the Web Client. |

## Topic Templates

See Topic types for a list of types that require a template.

| Template Name | Description |
| --- | --- |
| \*Concept |  |

## Map Templates

See Map types for a list of types that require a template

| Template Name | Description |
| --- | --- |
| \*Map |  |

## Library topic Templates

See Library topic types for a list of types that require a template

| Template Name | Description |
| --- | --- |
|  |  |

## Other (Word, PDF, …) Templates

| Template Name | Description |
| --- | --- |
| Any file | This dummy file will be used when a new object is created from the Browse repository dialog or the Web Client. |

## Publication object Templates

| Template Name | Description |
| --- | --- |
| Empty Publication | The only and default option |

# Linking

## Cross References Elements

List here the elements you need to crossref to. This needs to be compared to the elements that are configured in the viewing XSL (to insert the cross ref) and the Generate.Link.Ends plugin. No Change in the OOB behavior

|  |
| --- |
| **Element Name** |
| ol |
| example |
| section |
| title |
| dlentry |
| note |
| map |
| topic |
| fig |
| step |
| table |
| li |
| equation-block |
| ul |
| tm |
| keyword |
| p |

Possible other candidates for cross reference (currently not configured in OOB): (Just need the one list for cross ref and con ref)

|  |
| --- |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |

## Conref Elements

List here the elements you need to conref to. This needs to be compared to the elements that are configured in the viewing XSL (to insert the conref) and the Generate.Link.Ends plugin.

|  |
| --- |
| **Element Name** |
| ol |
| example |
| section |
| title |
| dlentry |
| note |
| map |
| topic |
| fig |
| step |
| table |
| li |
| equation-block |
| ul |
| tm |
| keyword |
| p |

Possible other candidates for conrefs (currently not configured in OOB):

|  |
| --- |
| **Element Name** |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |

## Variable Elements

List here the elements you need to use as variable. These need to be compared to the elements that are configured in the viewing XSL (to insert the variable) and the SDL Tridion Docs Content Manager DTD where the variable attributes are added to the elements.

|  |
| --- |
| **Element Name** |
| msgph |
| cite |
| ph |
| image |
| glossSymbol |
| hazardSymbol |
| keyword |

Possible other candidates for variables (currently not configured in OOB):

TI needs to discuss the impact of these decisions. This seems ok though.

|  |
| --- |
| **Element Name** |
|  |

# Plug-in Configuration

In addition to the mandatory system plugins, the following plugins will be executed, as per the default out of the box configuration, when an object is submitted:

* SETMASTERORMAPID
* SETXMLLANGATTRIBUTE
* CHECKMASTERORMAPID
  + - GENERATE.LINK.ENDS (See chapter [Linking](#_Linking))
* VALIDATEDTD
* EDITORTEMPLATE.REMOVE.ALL.IDS
* ISHSYSCONVERTTABLECONDITIONS

The following plugins need to be adjusted for Texas Instruments:

* N/A

The following plugins need to be created for Texas Instruments:

* N/A

## Extract Metadata from the bookmap

* Workflow:
* User is adding bookmap
* Plugin is extracting metadata and adds it to the corresponding metadata field on Publication level
* Only for English
* Only for version 1
* Overwrite existing metadata

TI To provide samples of maps and the field mapping

Note, the full specifications will be provided in a design document

## TI Publish Trucking Plugin

The TI Publish Package plugin is a specialized plugin that will run multiple transforms over exported content. When a user selects the Package Output, the system will export all content to the filesystem as usual. However it will run several Dita-OT transformations and it will create specialized files based upon metadata and content.

High level Overview

* Export Content to filesystem
* Create a PDF
* Create a HTML
* Create a XML based upon metadata + Generic XML with overview of the publication
* Copy the Source files into the package
* Transport it to a file location
* Upload it back into the repository

Note, the full specifications will be provided in a design document

# Additional Configuration

The following additional configuration changes or integrations of external deliveries were requested by Texas Instruments. If the request cannot be handled in the estimated T&M budget, an estimate will provided by SDL.

* Disable assigning of “cid” attributes, remove Tridion Docs Collaborative Review Output format and disable plugin to sync with Tridion Docs Collaborative Review.
* Hide “Product Family” and “Product Release” Also remove the out of the box output format.
* Hide “Candidate for Baseline” field

SDL to remove Learning and training. TI only wants the Technical Content edition of dita 1.3.

SDL to add pivot language to support authoring in simplified Chinese.

SDL to configure for MATHML support.

Show user name instead of user id.

SDL to add one role based in box for draft images. Name = Draft Illustrations. Objects = Image. User Roles = Technical Illustrator. Current User identified as = Technical Illustrator. Status filter = Draft. Target Status = To be reviewed, Released. All users with Technical Illustrator role can see this in box. Purpose of this in box is for all Technical Illustrators to be able to view or modify any Image in Draft state.

TI to facilitate requirements gathering for PDF availability during topic translation. Collaboration between TI, WS, and Tridion implementation teams. Abbie, Nigel, Pam?

# Appendix A: Translation Organizer

The translation organizer feature is built on top of the baseline and workflow driven translation management functionality that is available out of the box.

Translation Organizer runs as a service on the Tridion Docs CM server and manages translations through translation jobs.

It is possible to create a translation job in the web client starting from a publication or a single map, topic or library.

To manage the status and content of a translation job go to the Repository section in the web client and select Translation jobs at the bottom of the folder tree view.

A translation job can handle translations in an integrated way:

* Via an integration with SDL WorldServer (this is an optional extension)
* Via the filesystem (this is a standard feature for exporting files only)

## General configuration aspects

Texas Instruments will / will not use the translation organizer feature.

Texas Instruments requires / does not require changes to the translation organizer feature.

### Metadata Setting during Generate Target Languages

By default this will be the same as specified in 11.3. If different specify below:

| Metadata Field | Internal Name | Implications |
| --- | --- | --- |
|  |  |  |
|  |  |  |

### Other changes to the translation job interface

The translation job UI behavior can be modified to a limited extent. The PM or Consultant can discuss the possibilities if changes are required.

The following changes will be foreseen:

## Filesystem specific – if applicable

The filesystem option will be / will not be switched on.

### General settings

| Name | Value | Comments |
| --- | --- | --- |
| Alias | FileSystem | In the translation job interface, the alias is shown behind the instance name, e.g. ‘FS: FileSystem’ |
| Export Folder | <Data>\TranslationOrganizer\Export | <Data> points to the installation specific data folder on the server. |
| Max job file size | 5242880 | This is the uncompressed max size. If the total file size of exported files exceeds this value, then the files will be divided over several jobs. |

### Retrieve additional metadata

The following metadata should be retrieved and included as .met files into the translation job zip file:

| Metadata Field | Internal Name | Implications |
| --- | --- | --- |
|  |  |  |
|  |  |  |

This is optional.

## SDL WorldServer specific

All languages configured in Tridion Docs CM and WorldServer must be mapped uniquely. Add a column to the list of languages in 3.7 as reference for the mapping between Tridion Docs CM language codes and WorldServer numerical local ID’s. Remark that on creation of a translation job the system will dynamically calculate the possible target languages for a source language depending on the possible language pairs in WorldServer and the configuration of language pairs as specified in 11.4.

### General settings

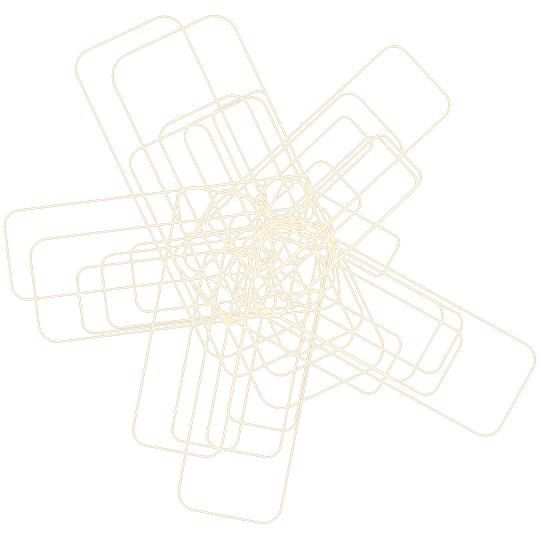
| Name | Value | Comments |
| --- | --- | --- |
| Alias | WorldServer | This is just an internal name. |
| Max job file size | 5242880 | This is the uncompressed max size. If the total file size of exported files exceeds this value, then the files will be divided over several jobs. |
| Uri | TO BE PROVIDED | The WorldServer URL |
| Username | TO BE PROVIDED | Used to connect to WorldServer |
| Password | TO BE PROVIDED | Used to connect to WorldServer. Only provide this in the workbook if it does not violate security guidelines! |

# Image Rendition

Image rendition will not be implemented in the initial implementation phase. If image rendition is needed, a separate discussion is needed.

# About **SDL**

SDL (LSE: SDL) is the global innovator in language translation technology, services and content management. For more than 20 years, SDL has transformed business results by enabling nuanced digital experiences with customers across the globe so they can create personalized connections anywhere and on any device. Are you in the know? Find out more at SDL.com.



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