Internal Job Aids

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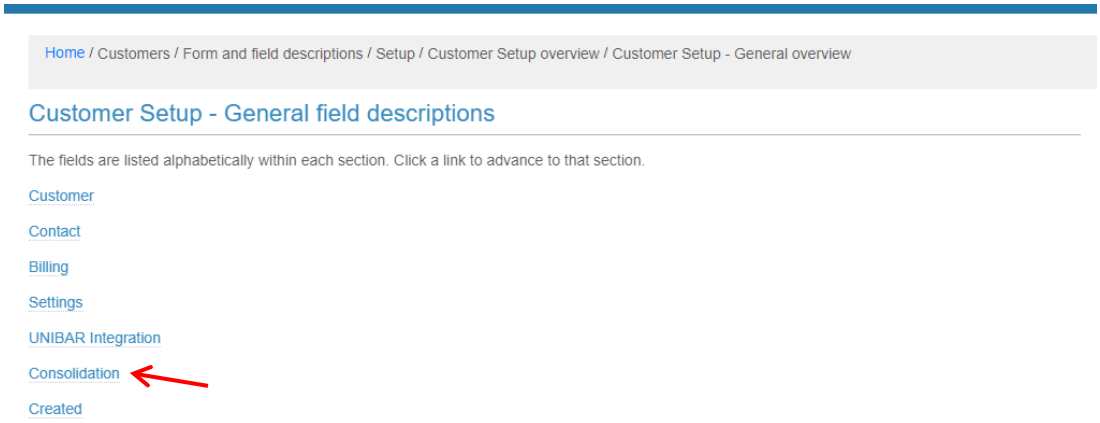
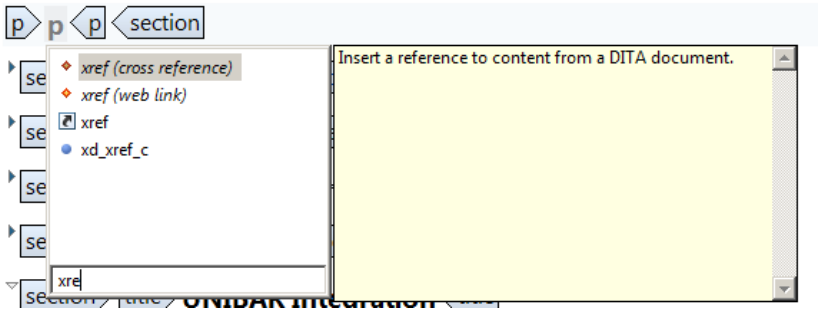
Creating a link to a section within a field description topic

To prevent excessive scrolling in lengthy field description topics, you can add a link for each section at the beginning of the topic. If the topic includes only one section or minimal content, do not add links.

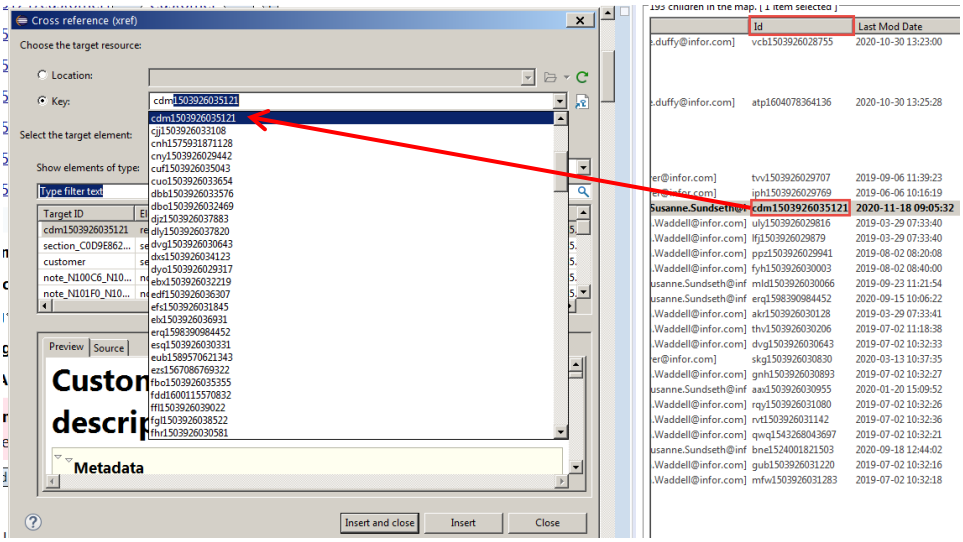
In the example, I am adding the Consolidation section.



1. Place your cursor in the p tag where you want to add the link.
2. Press **Enter** and select **xref (cross reference).**

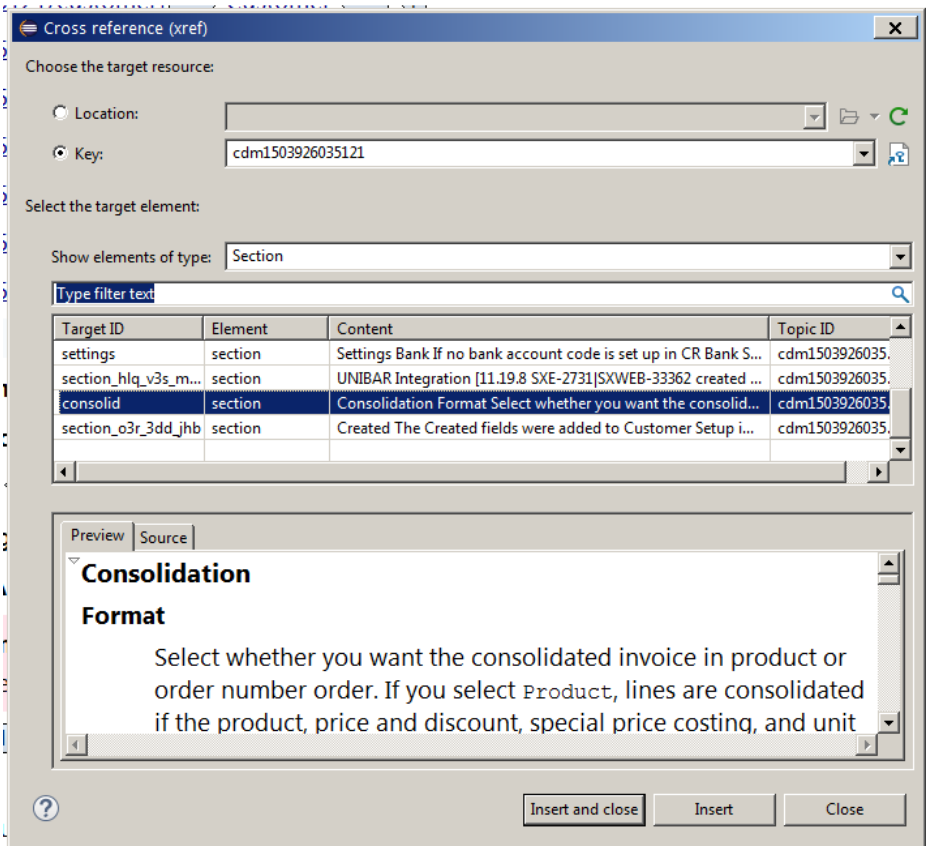


3. In the **Key** field of the Cross reference (xref) pop-up, select the Id for the topic.



4. Select **Section** in the **Show elements of type** field, double click the section to link to, and then click **Insert and close**.

   Note: Some of the target IDs include ID-type values that are not descriptive/helpful (i.e., section_o3r_3dd_jhb). The values are data that was migrated from our previous help system. Use the Content column and the preview to ensure that you are selecting the correct section.



5. Check the name of the section in the xref tags where you inserted the link. Add it manually if it did not automatically populate. In the example below, the link is valid, but the name is missing.

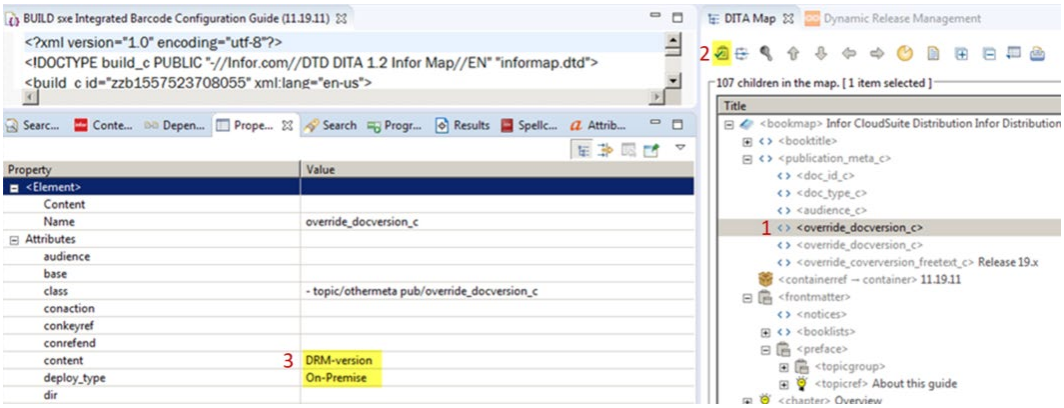
Setting up the release metadata for on-premises and cloud output

Use these instructions to set up the metadata that is required to display the appropriate release on the cover and copyright page for on-prem and cloud documents.

On-premises output

For on-prem documents, the release on the cover and copyright page is based on the DRM version (i.e., 11.19.11).

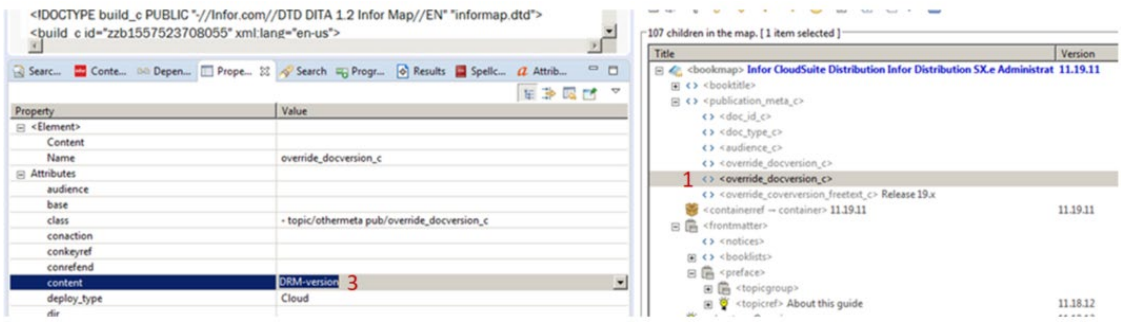
1. Add the **override_docversion_c** element under the publication_meta_c element in the DITA map.
2. Click **Set Conditions** in the DITA Map view, and then select **On-Premise** in the Deployment Type section.
3. In the Properties tab, select **DRM-version** for the content property.
   Note the deploy_type is On-Premise.



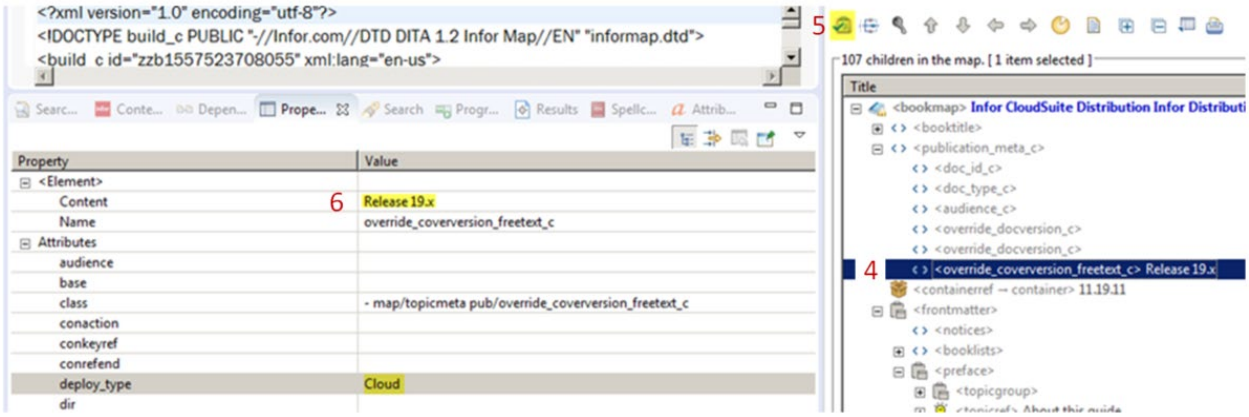
Cloud output

For cloud documents, the release on the copyright page is also based on the DRM version (i.e., 11.19.11). The release on the cover is based on the standard release format for Infor Cloud products, which is currently *Release year.x* (i.e., Release 19.x).

1. Add the **override_docversion_c** element under the publication_meta_c element in the DITA map.
2. Click **Set Conditions** in the DITA Map view, and then select **Cloud** in the Deployment Type section.
3. In the Properties tab, select **DRM-version** for the content property.

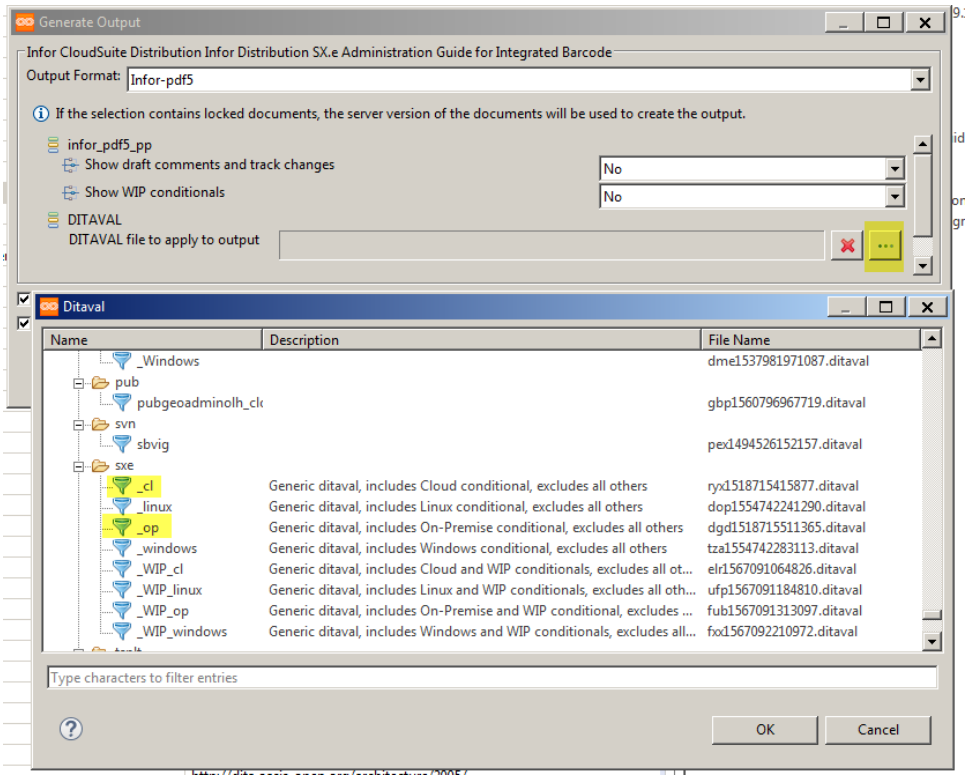


4. Add the **override_coverversion_freetext_c** element under the publication_meta_c element.
5. Click **Set Conditions** in the DITA Map view, and then select **Cloud** in the Deployment Type section.
6. In the Properties tab, specify **Release 19.x** for the content property.
   Note the deploy_type is Cloud.



Output generation

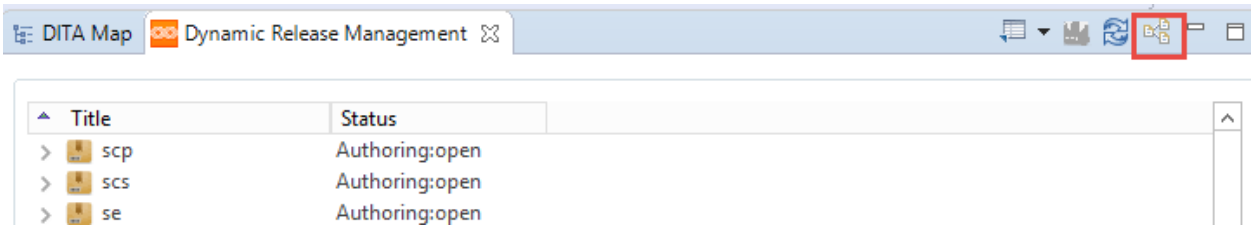
If you generate output from a book map, you can only generate one type of document—cloud or on-prem—at a time. Select the appropriate ditaval during output generation as shown below. If you use a build map, you are not required to specify ditavals during output generation.



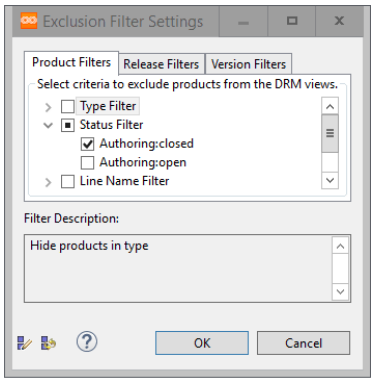
Hiding closed DRM versions in the CMS

DRM versions 11.0 and 11.18.x-11.20.x of sxe are now closed. Follow these instructions, which are based on the *Filtering by products, releases, and versions* topic in the online standards library, to hide the closed versions in your CMS work space.

1. On the Dynamic Release Management view, click **Filters Setting**.



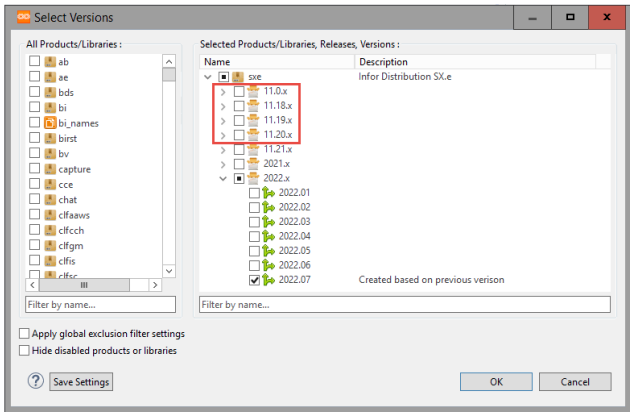
2. On the Product Filters tab, expand the Status Filter, select **Authoring: closed**, and then click **OK**.



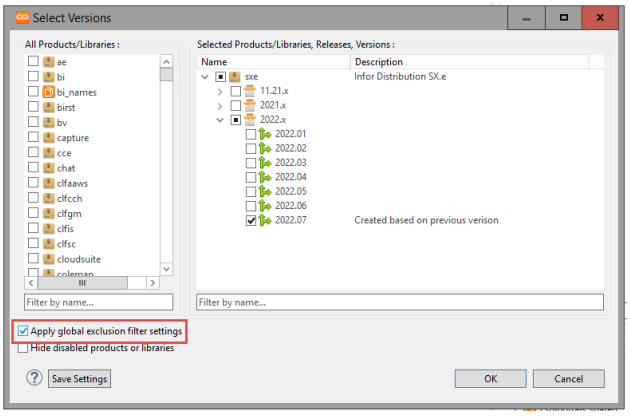
3. Open the Select Versions dialog box and select **Apply global exclusion filter settings**.

   The screen shots below show the versions displayed before and after the filter is applied.

Before: Shows closed (in red) and active versions



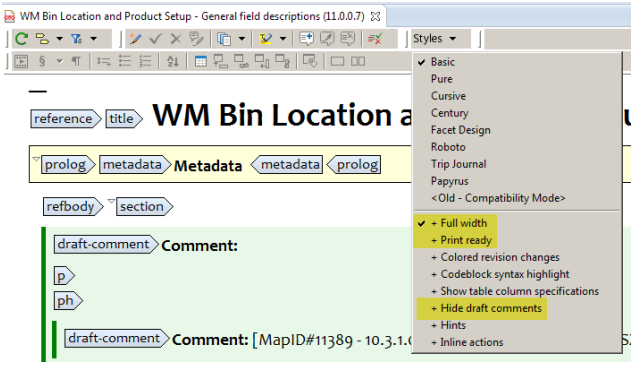
After: Shows only active versions



Tips for reviewing OLH topics in the CCMS

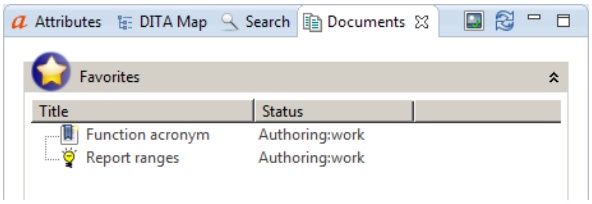
Consider the following items when reviewing online help topics that have been migrated to the CCMS.

1. Use the options in the Styles menu to make your work space more conducive to reviewing topics in Author mode. If you are focusing on content, these options are helpful:
   - **Full width** expands the area in which the content is shown.
   - **Print ready** hides the tags.
   - **Hide draft comments** hides the draft comments.

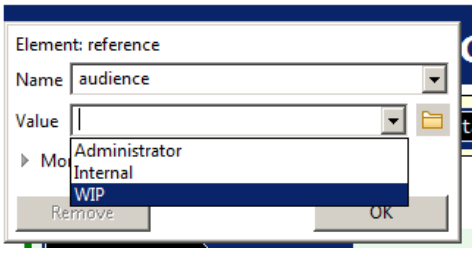


2. To generate a pdf for a single topic without using the Generate Output option:
   a. Optionally, select **Print Ready** and/or **Hide draft comments** in the Styles menu.
   b. Select **File > Print**, and then select any pdf print option.
   The pdf will use the font and size that you selected for the Oxygen XML Editor.

3. Add the Function acronym and Report ranges topics to your Favorites so you can easily access them to create the required cross-references on Page overviews and Report ranges/options topics.



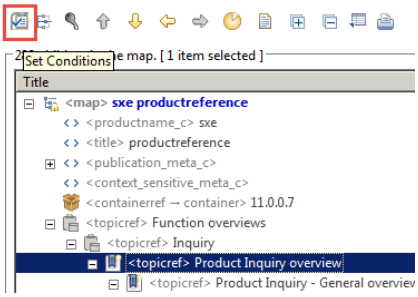
4. To exclude a topic from a map or exclude information from a topic, select **WIP** as the audience attribute for the element. You can apply WIP to the root element, such as a reference, concept, or task. You can also apply WIP to an element within a topic, such as a paragraph or note.



To exclude a topic from output, you must apply WIP to the root element in the topic and identify the topic as WIP in the map. If you do not do both, an error will occur when output is generated.

To apply WIP at the map level:

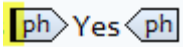
a. Lock the map, and select the topic.
b. Click **Set Conditions**, and then select the **WIP** checkbox.



To view topics in WIP at the map level:

a. Click **Show Conditions,** which is to the right of the **Set Conditions** button.
b. Select the **WIP** checkbox to highlight the WIP topics in the map.
   If you show the Audience column in the DITA Map view, the WIP value in that column pertains to the topic level only. WIP displays in this column no matter what type of element is WIP (root or otherwise).

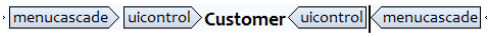
5. To delete tag without deleting the contents, click the beginning tag element towards the left of the tag. When a black line appears, press **Delete**.



6. To count words in a sentence, highlight the sentence, right-click, and then select **Text > Count Words**.

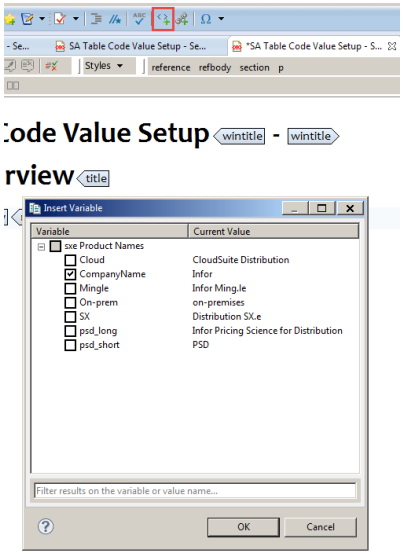
7. If a key definition is not found in a topic, verify that the map for the topic is open in the DITA Map view. You don't have to lock the map.

8. When you specify a Menu Cascade, you don't have to add the uicontrol with the menu attribute for each element. Place your cursor after the ending uicontrol element (which is added automatically when you add the menu cascade element) and start typing. The arrow and the next uicontrol tag is automatically added.



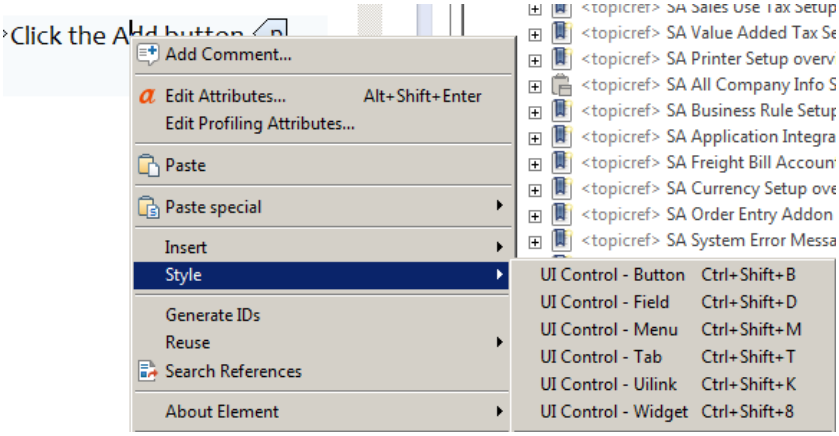
9. Use the topichead and topicgroup elements to create category headings in the map that are not associated with a topic (XML file.
   - Use topichead to include the heading in the TOC. Specify the name of the heading in the **navtitle** field in the Properties view.
   - Use topicgroup to exclude the heading from the TOC. The value in the **toc** field in the Properties view should be no. Use topicgroup to organize topics that aren't included in the TOC, such as concept topics pertaining to a particular feature.

10. To add a variable to a topic, click the **< >+** button in the toolbar.



11. To apply an element to a single word, place your cursor in the word and apply the element. You don't have to highlight the whole word.

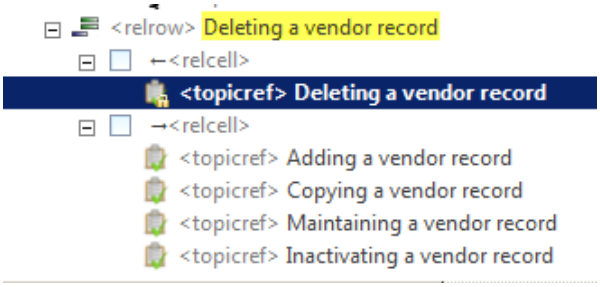
12. To use the shortcut menu to apply or change a UI control with an outputclass, right-click the selected word or phrase, and then select **Style**.



13. Use the <topichead> and <topicgroup> elements to create category headings that are not associated with a topic (XML file) in the map.
    - Use <topichead> to include the heading in the TOC. Specify the name of the heading in the **navtitle** field in the Properties view. The first topic listed under the <topichead> will display when the <topichead> is selected in the published online help. For example,
    - Use <topicgroup> to exclude the heading from the TOC. The value in the **toc** field in the Properties view should be no. Use <topicgroup> to organize topics that aren't included in the TOC, such as concept topics pertaining to a particular feature.

14. To verify that Related topics have been created for a topic without accessing the RelTable Editing perspective:
    a. Right-click the topic in the DITA Map view, and select **Select In Map**.
    b. In the reltable in the map, check for the highlighted topic and then look at the relrow name.

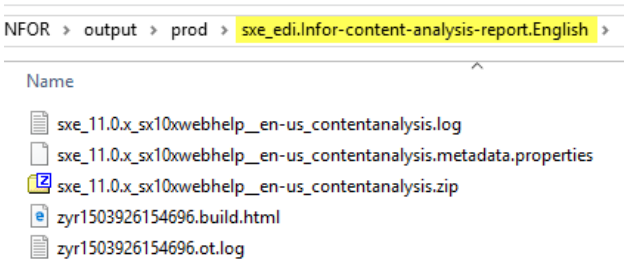
If the relrow name and the source topic (under ← <relcell>) are the same as the topic selected in the map, a relrow has already been created.



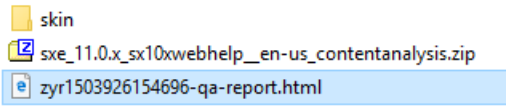
See the *Adding Links in a Relationship table* job aid for more info about creating Related topic links.

15. To refresh the Content Analyst view, save the topic and then click the **Refresh** button on the Content Analyst view. You don't have to release topic to refresh.

16. To run the content analysis report:
    a. Right-click on a map, and select **Generate Output > infor-content-analysis-report**.
    b. Select **Unzip** when done, and then click **Create**.
    c. Open the highlighted file and then copy the zip file to a local drive.

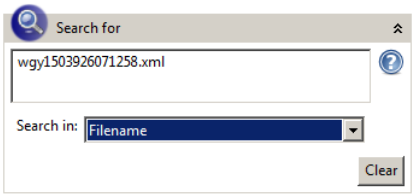


    d. Extract the zip file and then open the report.html file to view the report.

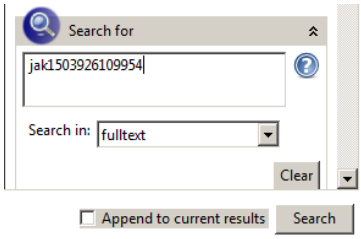


17. To locate a file that is included in the content analysis report:
    a. Copy the xml file name from the report.

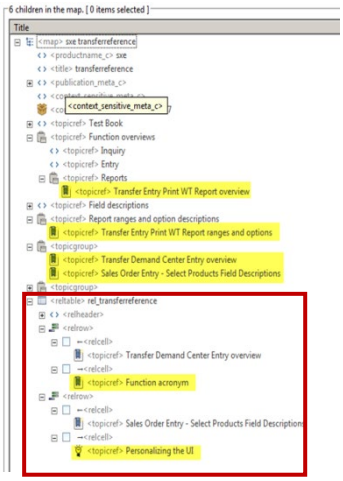
    b. Conduct a filename search in the CCMS using the file name with the .xml extension.



Alternatively, conduct a fulltext search using the file name without the extension.

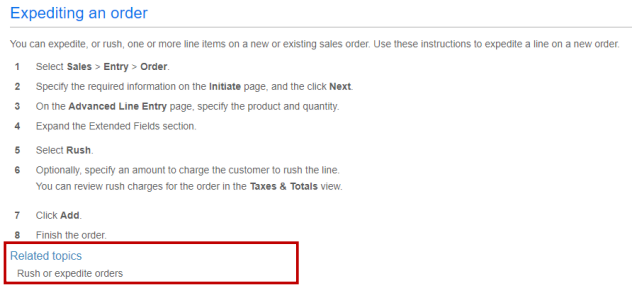


18. The Content Analysis report includes topics from other maps that are linked through relationship tables. For example, the Function Acronym and Personalizing the UI topics, which are part of the SXe Main map, are found in the Transfer Reference map. You can ignore linked topics when you cleaning up a map. The topics will be reviewed when the map they are in is reviewed.

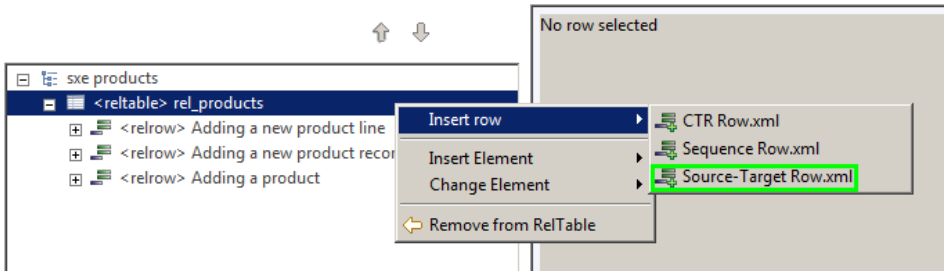


Adding links in a Relationship table

Use these instructions to create Related topic links for an online help topic using a relationship table. (View an example of a RelTable perspective setup.)



1. Lock the DITA map in which the topic is located.
2. Locate the topic, and then copy the topic title.
   a. Right-click the topic.
   b. Select **Copy** > **Copy title**.
3. In the Relationship Table Editor view, right-click the reltable, and then select **Insert row** > **Source-Target Row.xml**.

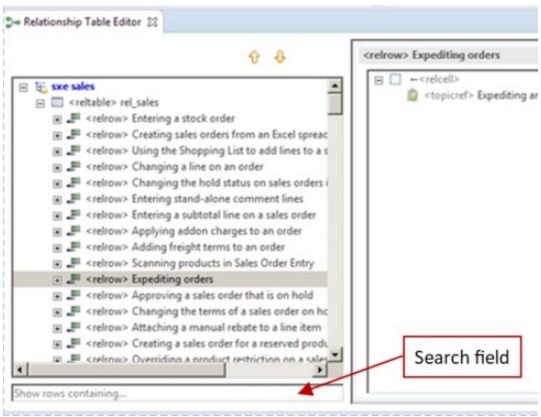


4. Paste the topic title in the field to name the relrow, and then click **OK**.

   The relrow name is typically the name of the source topic.

5. Click the relrow in the reltable.

   You can paste the topic title in the search field to locate relrow.

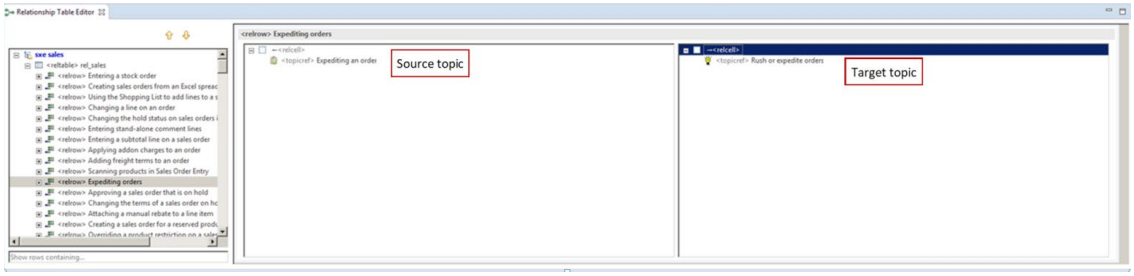


6. Select the source topic and the target topics from any view on your RelTable perspective.

   a. Drag the topic for which you named the relrow into the left relcell area. This is the source topic.

   b. Drag the topic that will appear as a related topic on the source topic into the right relcell area. This topic is the target topic.

      Note: You can select multiple target topics. You can select a target topic from any map in the sxe_main map. See Online help mega map.

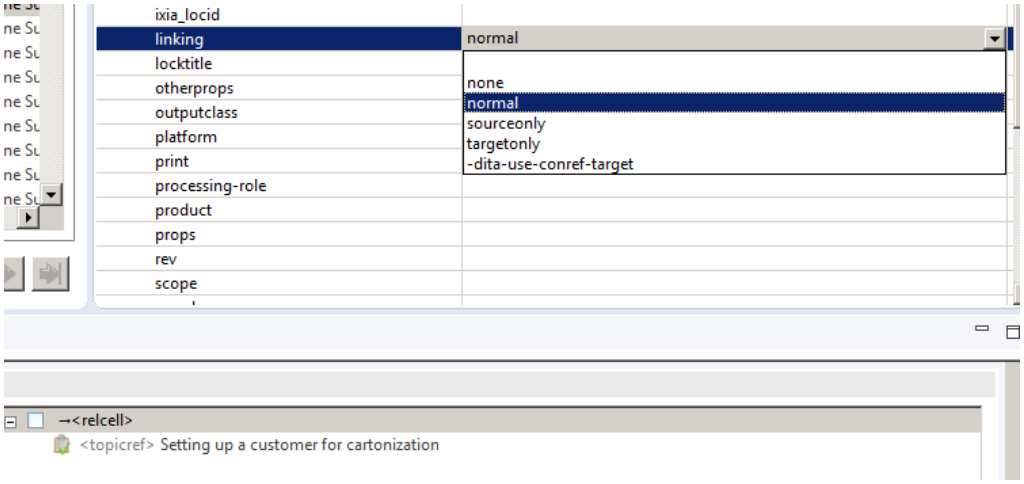


7. Optionally, change the linking property of the relcells.

   By default, the source topic includes a link to the target topic, but the target topic does not include a link to the source topic. To link both topics, change the linking property to make the link bi-directional:

   a. In the left cell, click **<— <relcell>** and then change the linking property to **normal**.

   b. In the right cell, click **—> <relcell>** and then change the linking property to **normal**.



   After you apply normal linking, a double arrow is displayed by the relcell in the Relationship table and the DITA map.

Additional info

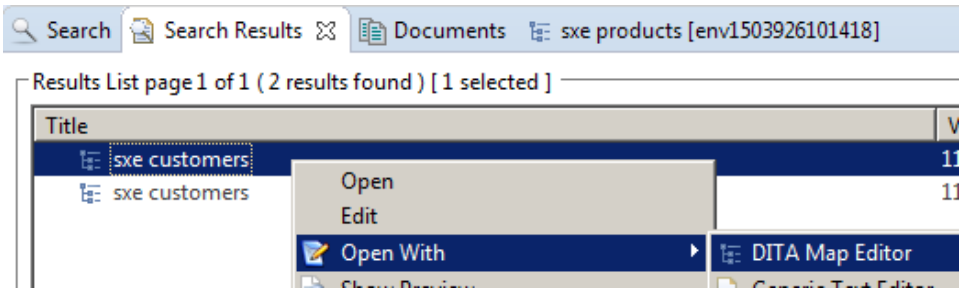
Locating topics

Use the search feature to locate topics instead of scrolling through the DITA Map view. For example, if you are documenting a new enhancement, you can search for the Jira number. You can also use the Documents view to access topics that you recently worked on. Dragging topics from a view other than the DITA Map view is often quicker because the map tends to reload when you select a topic.

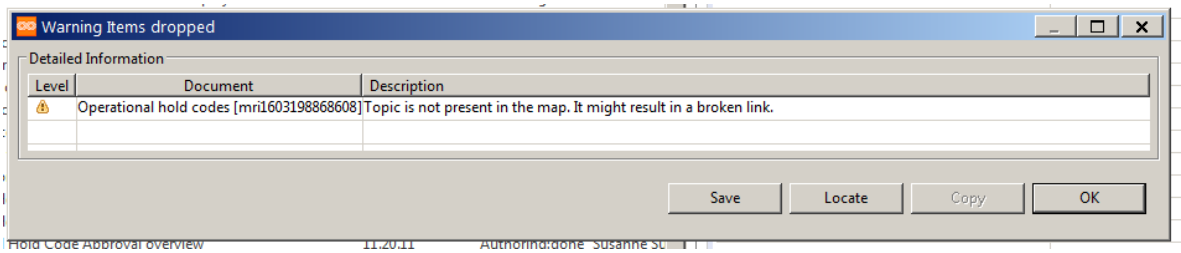
Online help mega map (sxe_main map)

The sxe_main map is the online help (OLH) mega map that contains numerous OLH sub-maps. You can add a topic from one OLH sub-map as a target topic for a relrow in another OLH sub-map. For example, you can add a topic from the sxe customers map to a relrow in the sxe sales map. You must find the topic in the other map without loading the other map in the DITA Map view (because if you load the other map, the Relationship Table Editor view will load the reltable for the other map). You can find the topic from the other map through these methods in either the RelTable or DITA perspective:

- If you recently worked on the topic, check the Documents view
- Conduct a search for the topic
- Conduct a search for the other map and then open the map with the DITA Map Editor

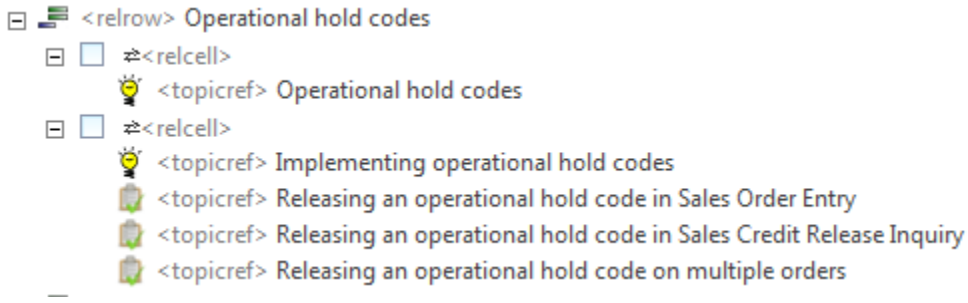


When you add a topic from another OLH sub-map, you can ignore the warning that is displayed. The link will work when OLH output is generated via the sxe_main map.



Multiple source topics

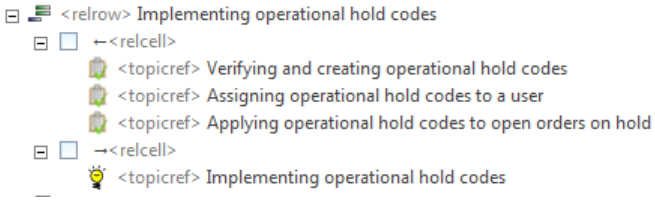
The instructions above explain how to link one source topic to multiple target topics. That is the most common linking strategy.



In some situations, you might want to link several source topics to one target topic.

For example, the *Implementing operational hold code* topic includes a table with links to the task topics. Since the links are listed in the table, Related topic links are not needed. The task topics do require a Related topics link back to the Implementing topic. Instead of creating three separate relrows to create links for those topics, a relrow with three source topics and one target topic was created.

Note that the name of the relrow is the name of the target topic.

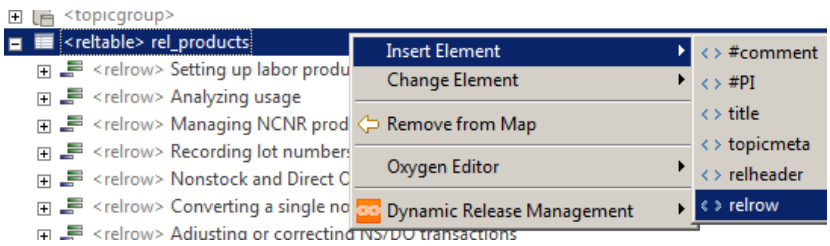


Adding links in the DITA Map view

You can edit an existing relrow and its relcells in the DITA Map view instead of using the RelTable perspective. You can delete or rename a relrow. You can also delete or add a relcell topic. To add relcell topic, drag it from any view to the relcell.

You can also add a relrow in the DITA Map view, but it is less efficient than using the RelTable perspective.

1. Add the relrow to the reltable.
    a. Right-click the reltable and then select **Insert Element > relrow**.

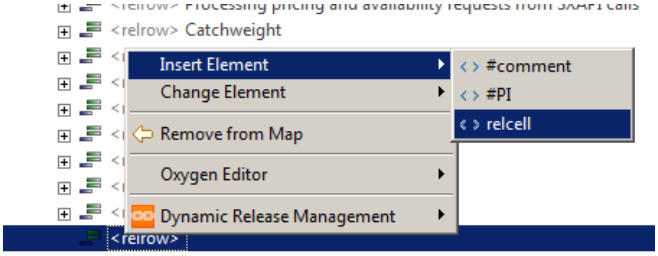


    b. Name the relrow.

2. Add each relcell.

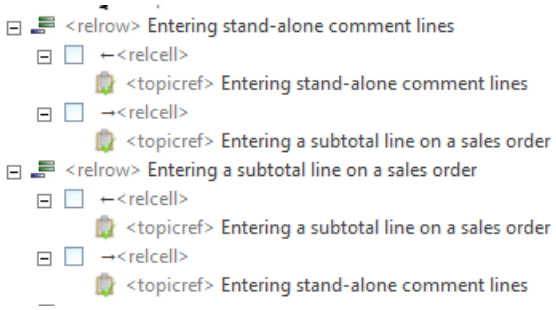
    a. Right-click the reltable and then select **Insert Element > relrow**.

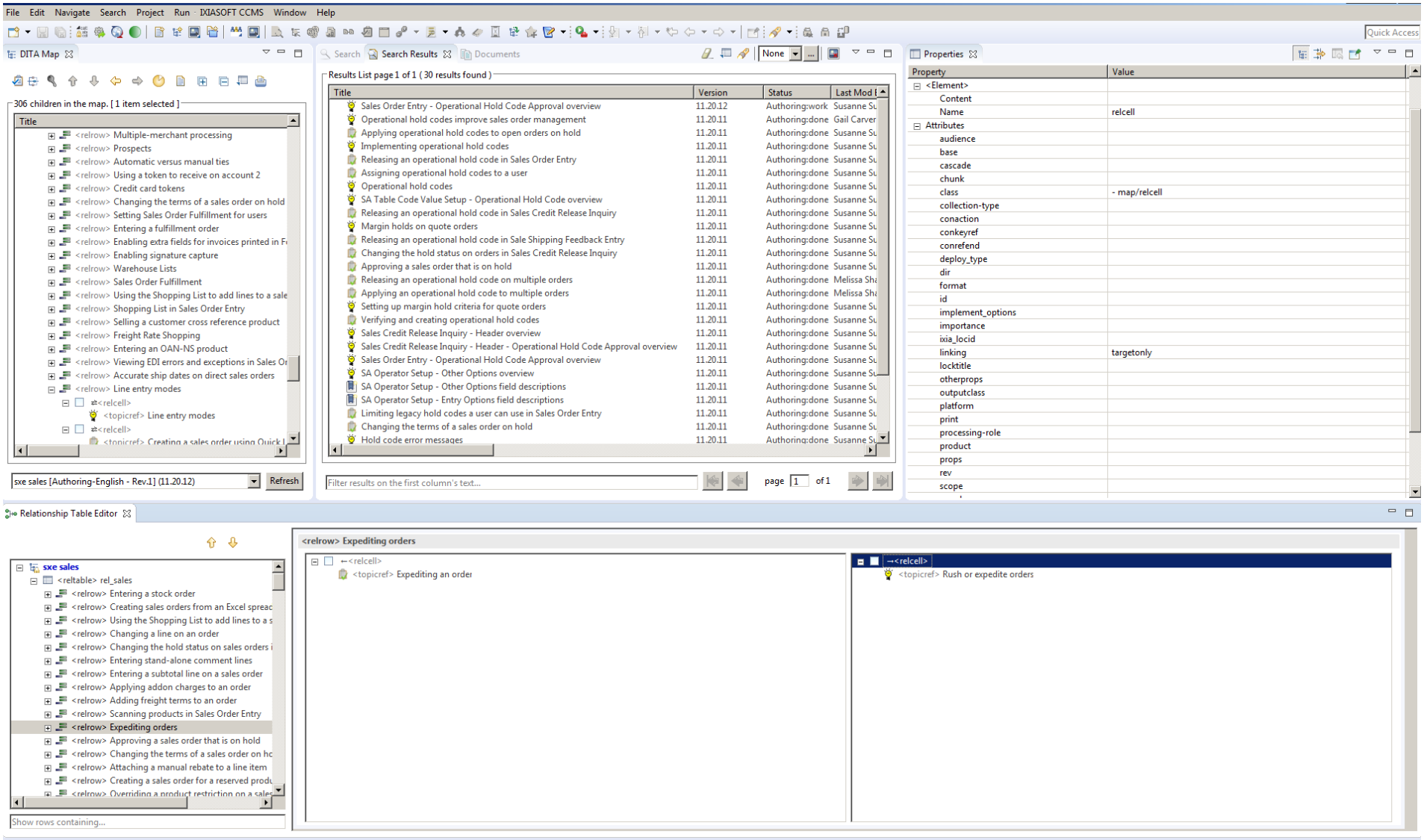
    b. Use the Properties view to specify a linking value for each relcell.



Miscellaneous

- When Distribution SX.e OLH was first migrated to the CMS, we used source-target linking exclusively. This is the type of linking you are likely to see. We created two relrows to create a bi-directional link instead of changing the linking property.



- Limit the number of links to 5-7 topics. Any more can be overwhelming to the user. Develop a linking strategy when documenting new features.
- To view links for a particular topic within a DITA map, right-click the topic anywhere in the map and then select **Select**. The topic will be highlighted in every location in the map.
- You can move relrows up or down to organize them within the reltable.
- Reference topics (page overviews, field description, and report examples) are not linked using reltables. We use parent-child relationships in DITA maps to create the links.
- Do not include links to concept or task topics on reference topics.

Example of RelTable perspective setup