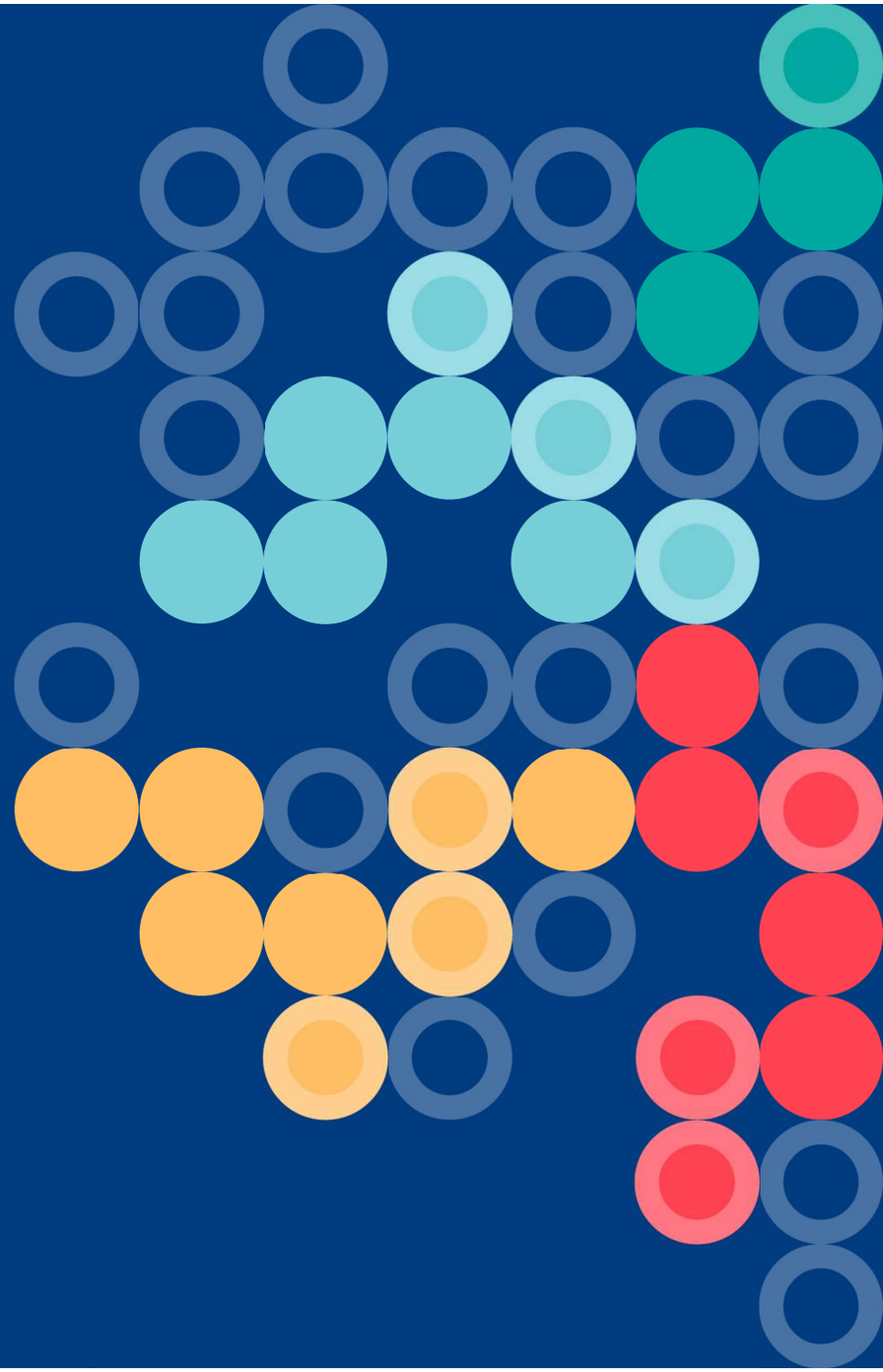
RWS Tridion

Tridion Docs 15.1 Bootcamp Publication Hub and Organize Space

Andriy Zhidko and Gizem Karabulut

17 April 2024



Agenda

- Publication Hub
- Organize Space Settings Pages
- Organize Space Improvements

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Publication Hub

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Insights Driving the Publication Hub Concept

From different perspectives

Organizations

- *We have project way of working and we have been seeking the representation of this at Tridion Docs*
- *We want to have visibility into publication version progress*
- *Capturing and storing the key contributors' sign offs is important for us*

Writers and reviewers

- *I want to quickly find what I need to work on and then easily jump to the required tools to get the job done*
- *I just don't want to hassle with bookmarks or keep going back to old emails to open up the publication at Collective Spaces*
- *When I have a lot of things to review, I would like to know which one is more urgent*
- *I want to reach out to my previous works easily to use them as reference if needed*

Publication captains

- *I need visibility into publication version progress*
- *I want to know who has finished their tasks and who hasn't yet*
- *I don't want to deal with external tools to keep approvals for the audit*
- *I want to keep content and the sign offs within the same system. Otherwise, having possibility to integrate Docs with the external systems*

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We began with core requirements that address many of our customers' needs

Publication Hub streamlines the works on new publication versions. It enables easy access to publication versions, lets people see how the publication version is going, and allows contributors to signoff their work.

Design principle: Our goal was to provide a flexible functionality that can support the end-to-end process of publication version generation, starting with authoring. Additionally, we aimed to give a project sense with by introducing key project management elements.

The first version is not…

- It is not a micro-management tool for managers or publication captains
- It is not going to replace human interaction
- We don't want to increase the complexity of the content structure by introducing project notion on the top of publication layer yet

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First, the basics...

Personas

Publication captain:

- The user who manages the publication version and coordinates writers, reviewers and other key contributors. The user needs to have Project Management or System Administrator privilege to act as a publication captain in the Hub.

Assignee:

- The user who is linked to a publication version in the Hub. Any user can be an assignee, no privilege is required. Organize Space folder security structure is valid, read access to publication folder is controlled.

Project & Assignment Details

- A publication version can be added as a project to the Hub
  - Review due date, due date, description are optional properties
  - It must have at least one assignee
- Project's state can be Ongoing or Closed and managed by the publication captain
- Work status, which is managed by assignees, can be Pending or Done

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Publication captain/ Project owner

Authors

Reviewers, SMEs

Publication Hub enables:

Adding a publication to Hub

+ Assignees
+ Due dates
+ Description

Working on the content

Landing page -> What's next?
Jump to Draft Space,
Publication Manager

Reviews

Landing page -> What is urgent?
Jump to Review Space

Signing off the content

My job is Done!

Closing the project

Sign offs are collected
Final checks
Project is closed!

Change requests

Turning project to Ongoing

Updating assignments

+ Add new assignees
- Remove assigness
Update project info

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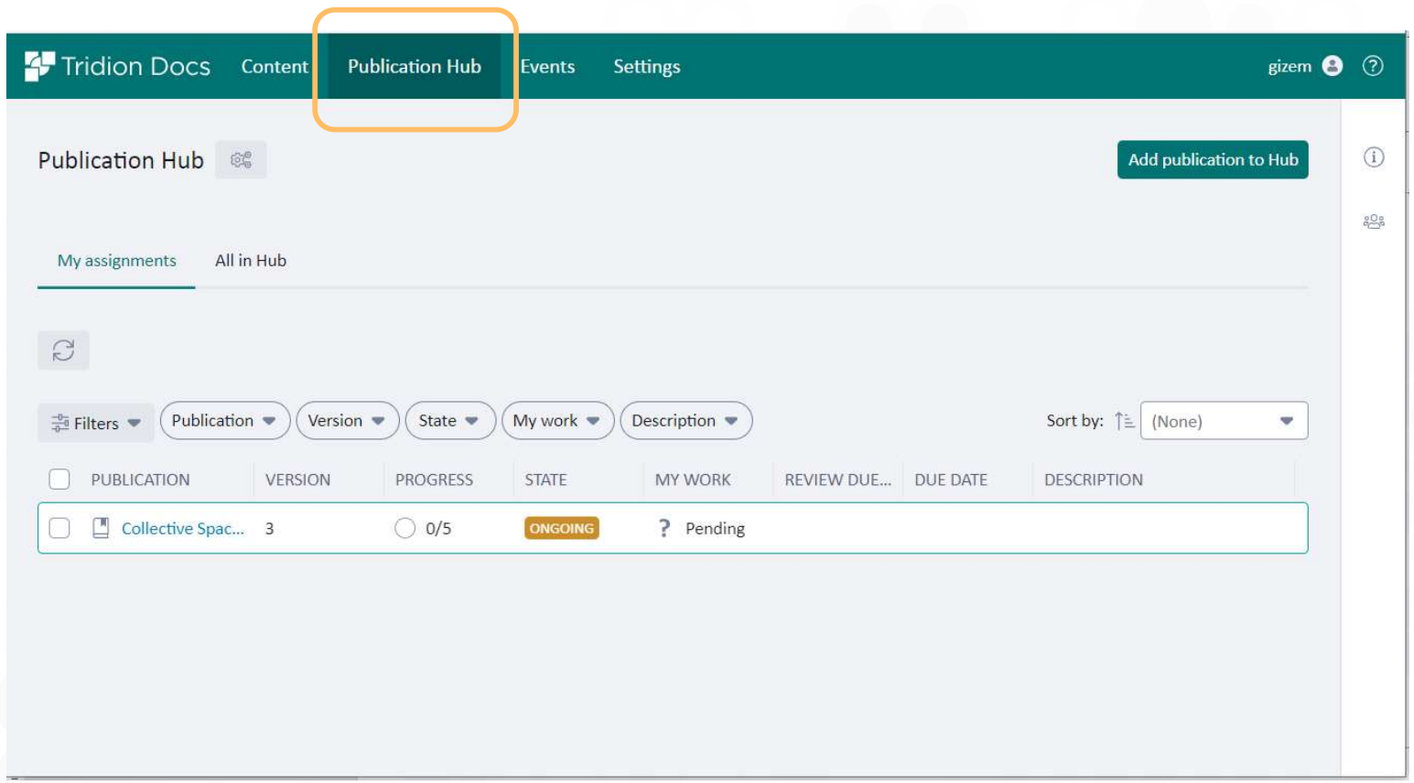
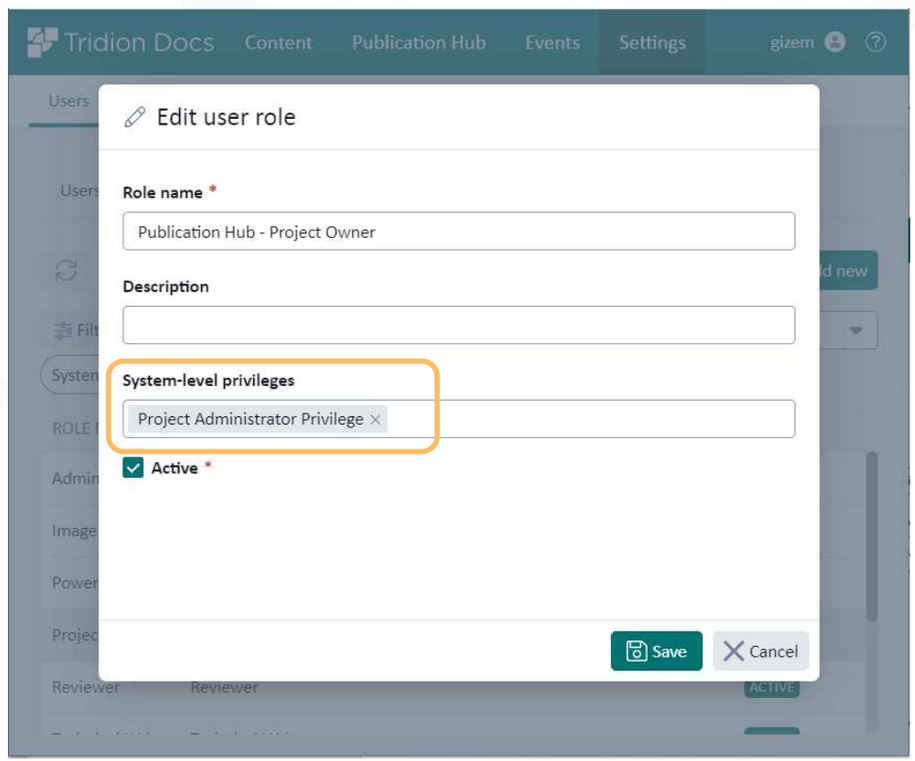
Publication Hub in Organize Space

- It was added to primary navigation area as the second tab
- “Project Management Privilege” was added to system-level privileges





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Publication Captain / Project Owner's Journeys

- Adding a publication version to Hub
- Viewing the publication versions' progress
- Managing assignments
- Managing the project states

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Adding a publication version to Hub

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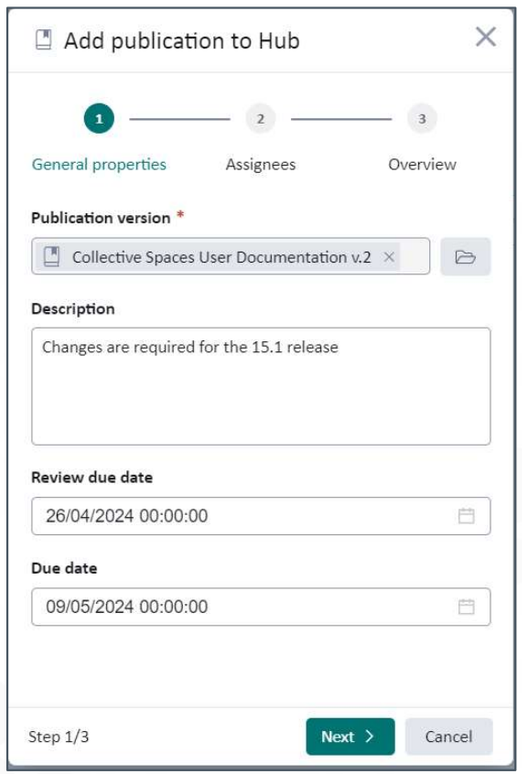
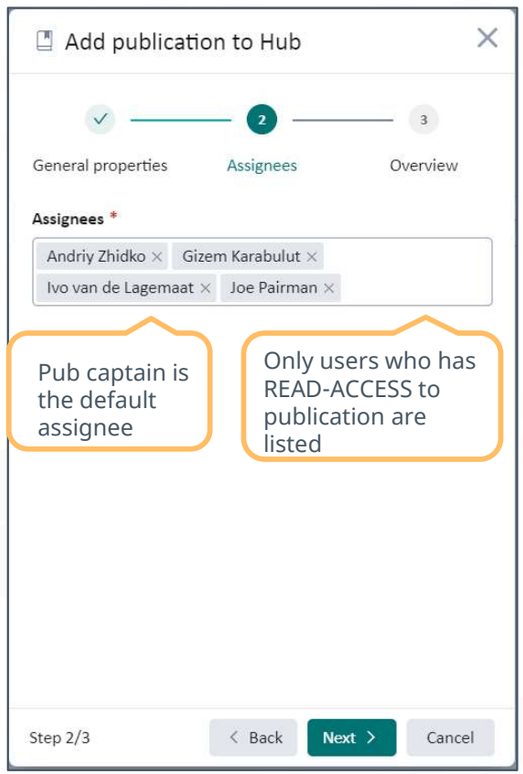
Add Publication to Hub Wizard

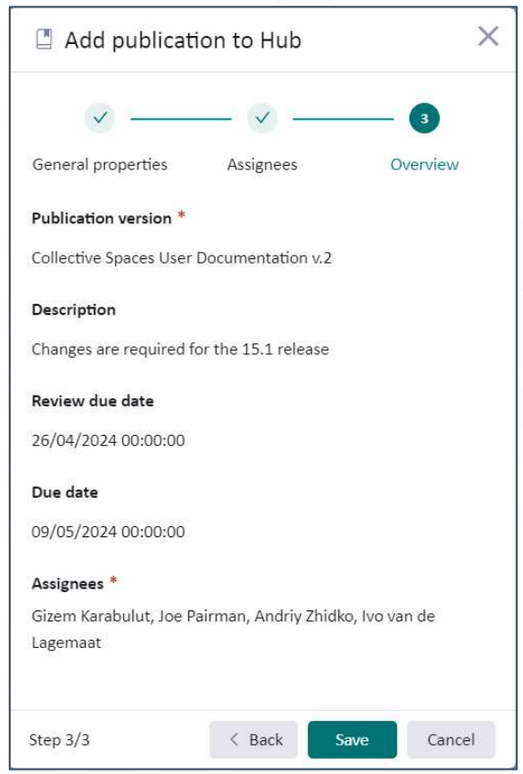
Step 1
Select a publication version
Fill the general properties



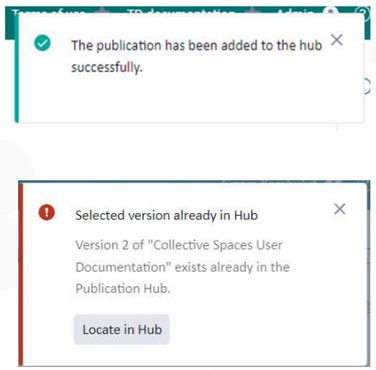
Step 2
Select assignees
The current user is listed as default assignee



Step 3
Overview of the project details



Result message



A publication version can be added to the Hub once!

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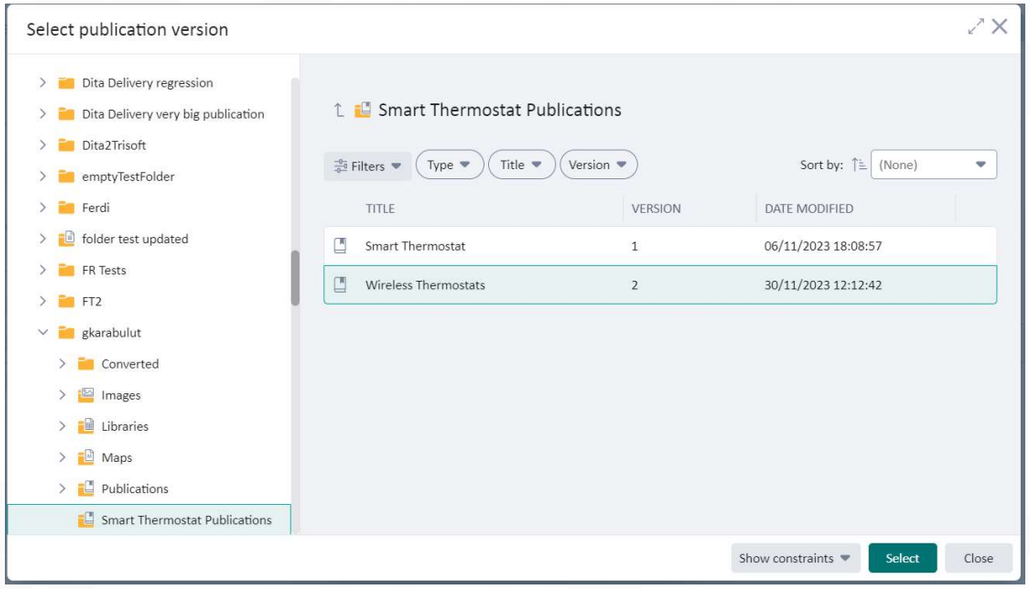
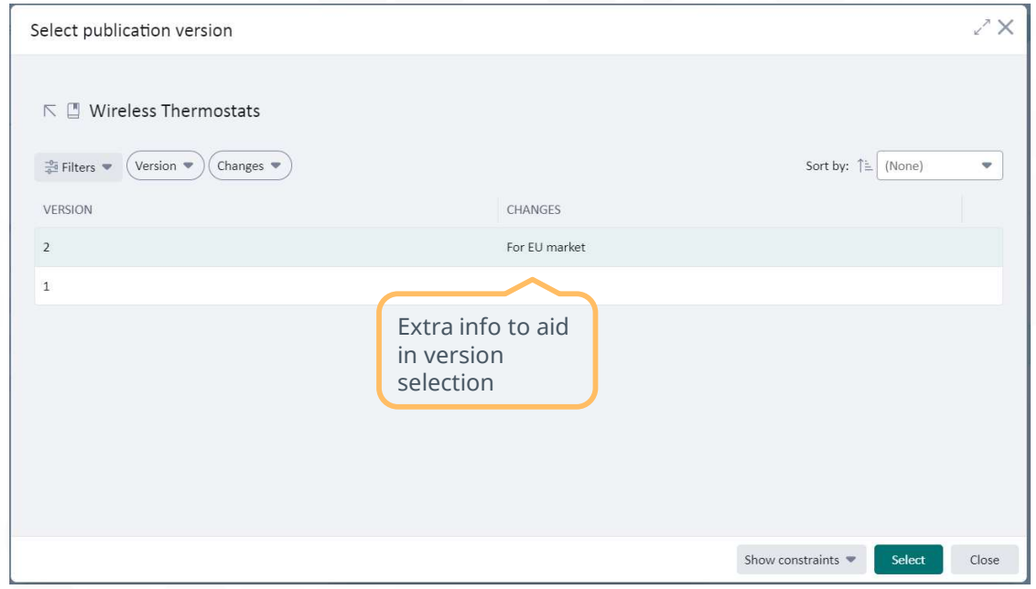
Selecting publication version with Item Selector

- Double clicking a publication will take you to Details View in Item Selector to see versions
- Item Selector is extended to select a version of an object

  *** This functionality will not be available for Tridion Docs extensions





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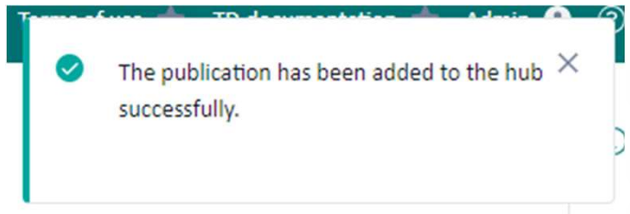
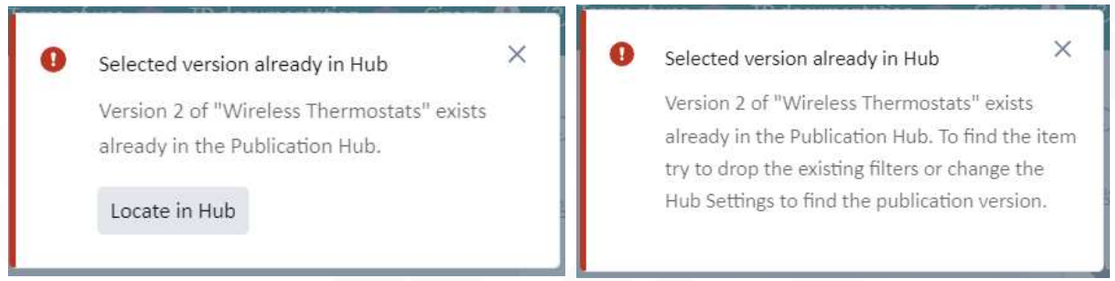
Result messages

Success case



- Publication version is added to Hub
- Publication Hub tables are refreshed
- Properties on the side panel are refreshed
- The newly added item is selected in the table (if it is not filtered out)

Error case



- If the selected publication is already existed

  If locatable error message with button "Locate in Hub

  If not locatable error toast message highlighting that it can be due to filters or current tab
- Other reasons: Error toast message

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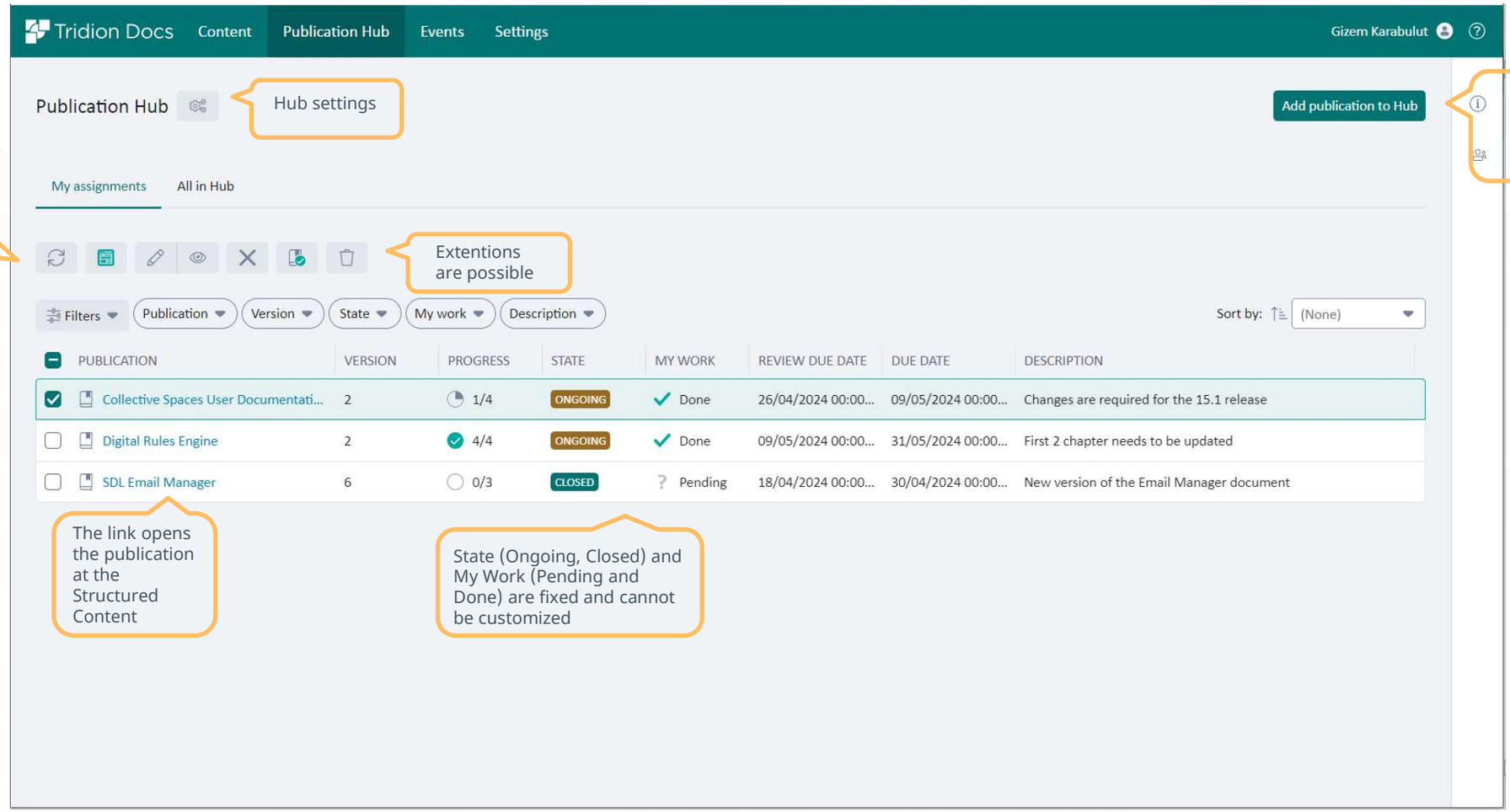
List View

My assignments tab



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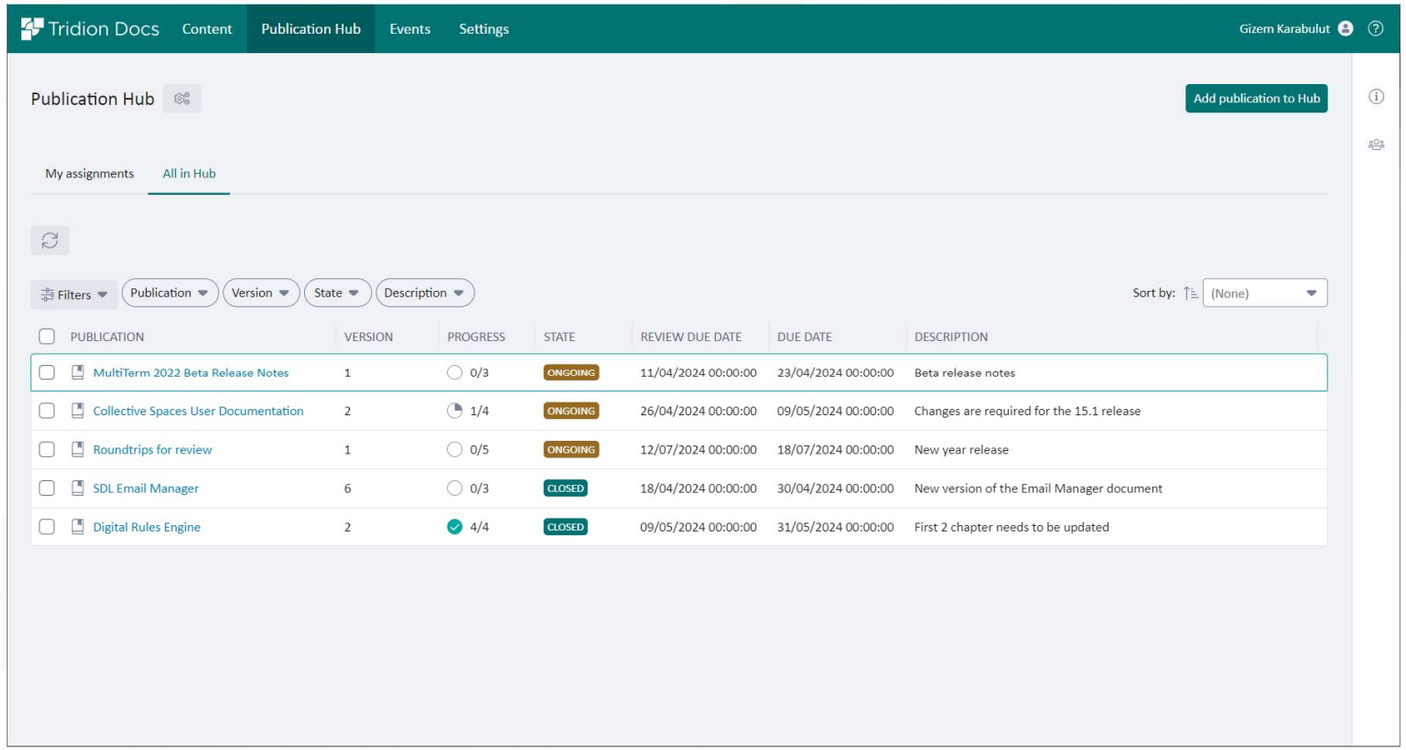
List View

All in Hub tab

Users can see publications added to the Hub even though they are not assigned to them

Filtering & Sorting

- The default sorting is based on the "State" column:
  - Ongoing statuses appearing first
  - Followed by the "Review Due Date" in ascending order
- Users can organize and refine data using sorting and filtering options
- Data can’t be filtered based on "Progress" or any "Date" columns. Also, it's not possible to sort by the "Progress" column



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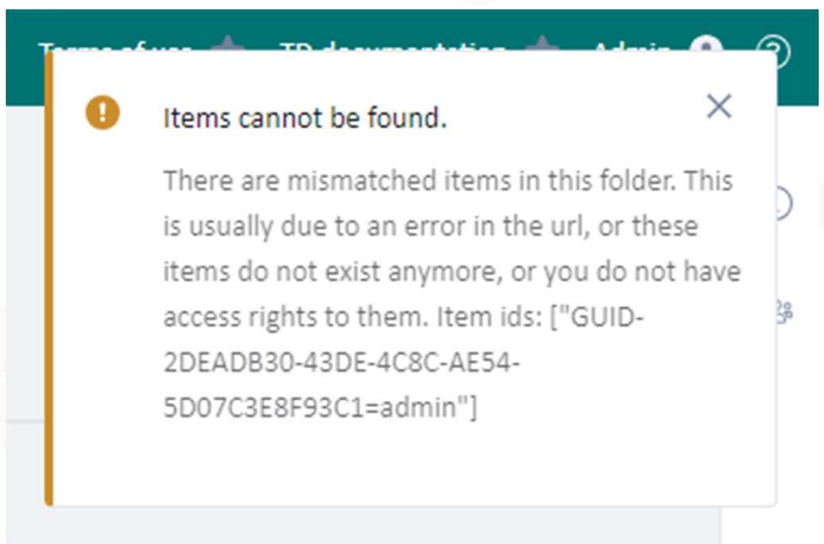
Deep-link

- It is possible to bookmark a link to selected publication(s) or share them with other people
- If a user doesn’t have access to the publication, or publication is not in the Hub anymore a toast message will inform the user about that.



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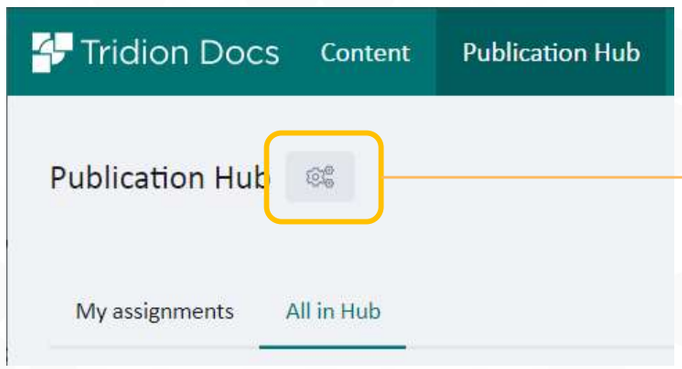
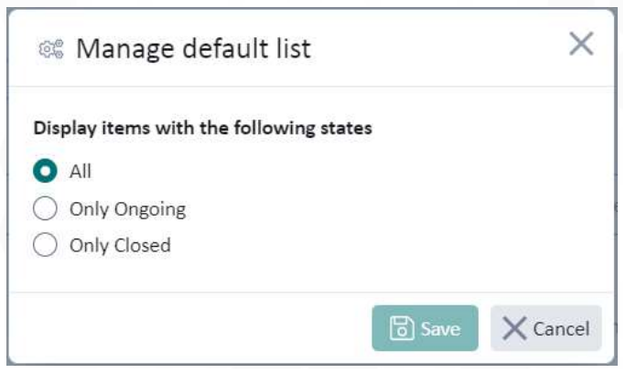
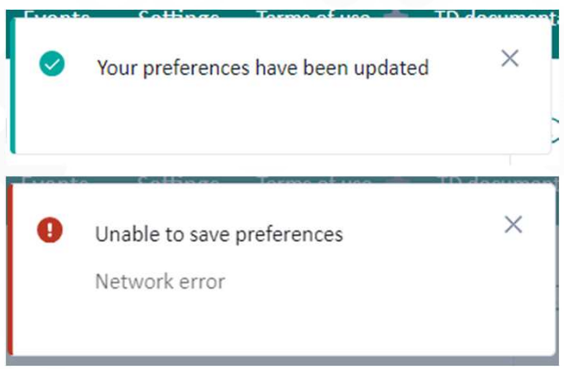
Managing list view via the hub settings

Users can set project states to be listed at the Hub via Hub Settings

- "Hub settings" button is available to all users
- The default setting is "Only Ongoing"
- Hub setting is applied to both "My assignments" and "All in Hub" tabs
- It is possible to display a list of projects with the following statuses
    - All
    - Only Ongoing
    - Only Closed







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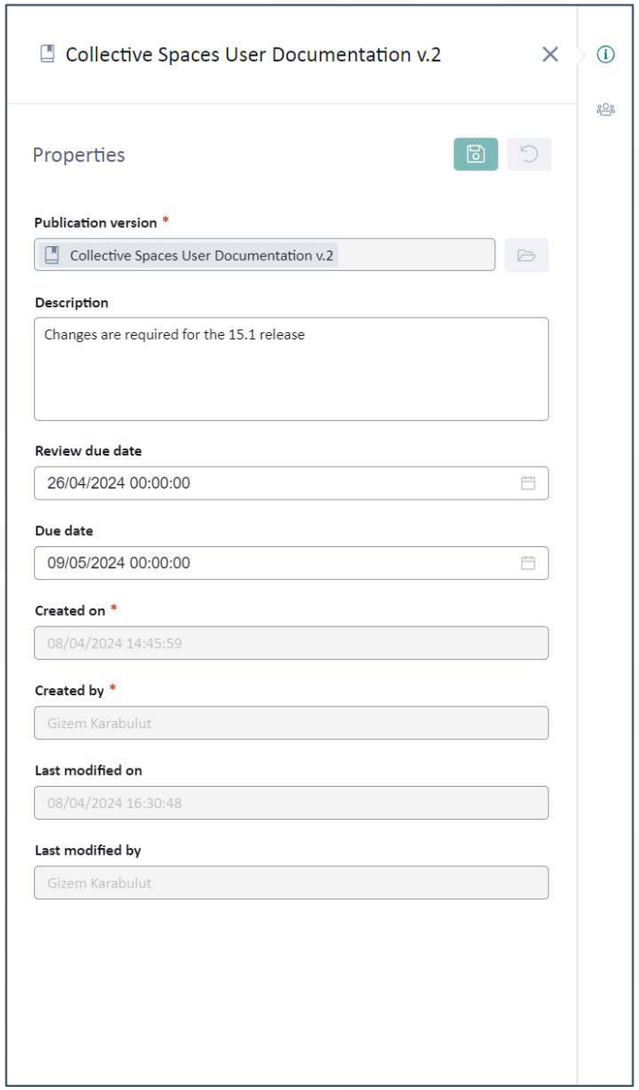
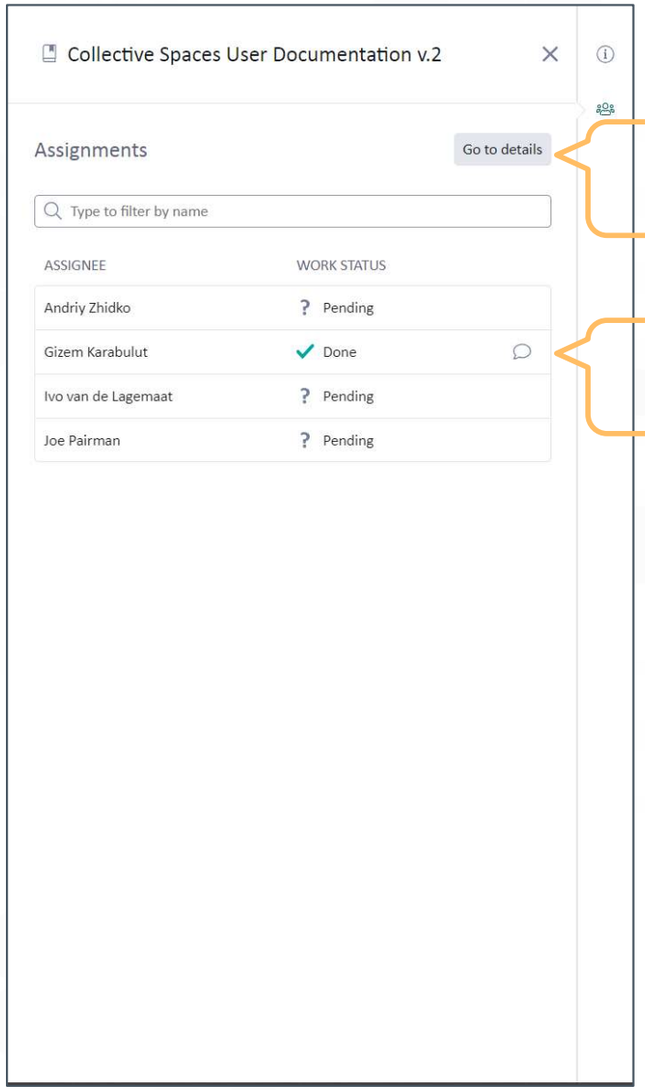
Insight panel



Properties can be updated for projects at "Ongoing" state For Closed project, properties are displayed read only.



Opens Assignments page

Comments are displayed as a tooltip

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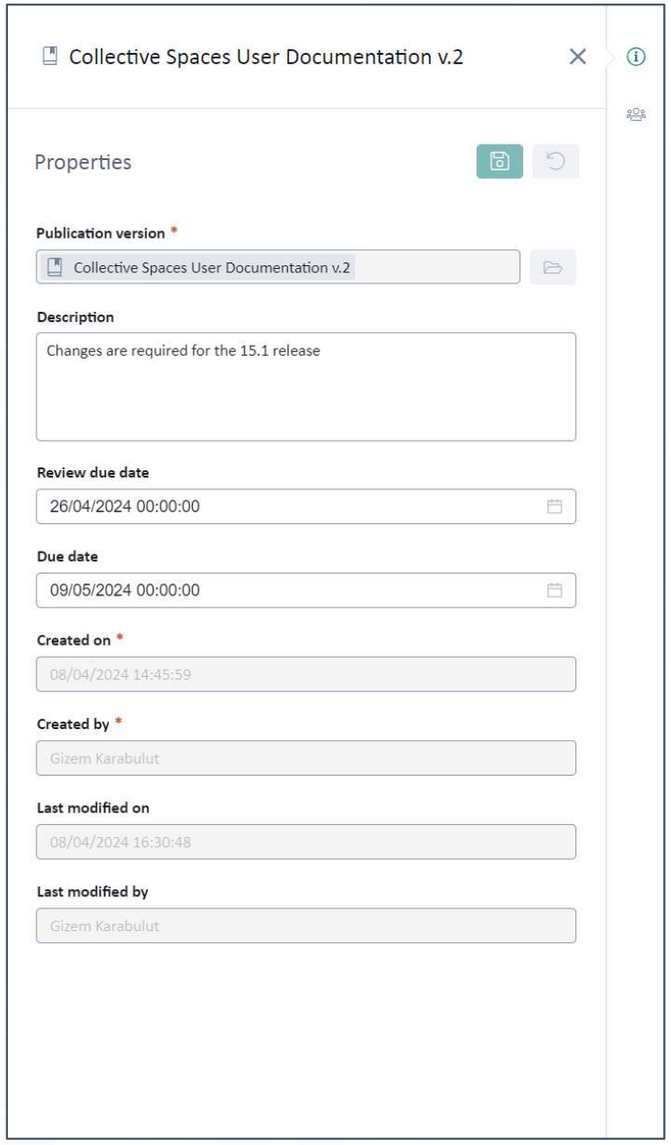
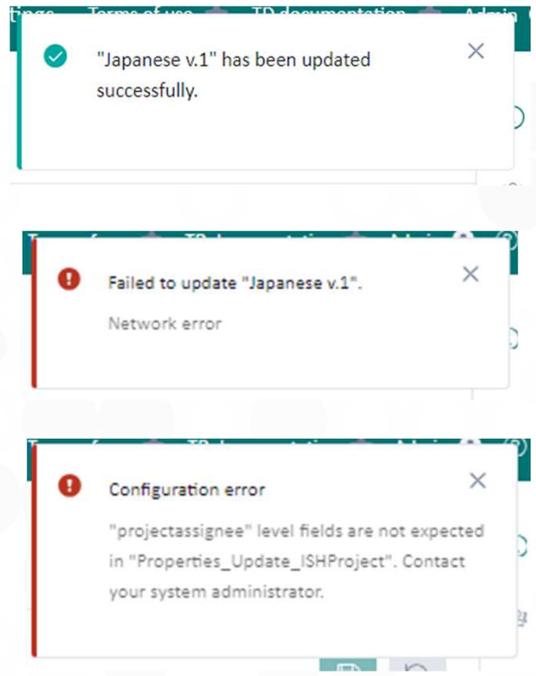
Updating project properties

- Only the project at “Ongoing” state can be updated
- Assignees cannot update the project properties. Insight panel is always in read-only for these users
- In the properties panel, we do **NOT** support the **"projectassignee"** level field

*** For this action, Project Management or System Administrator privilege is required





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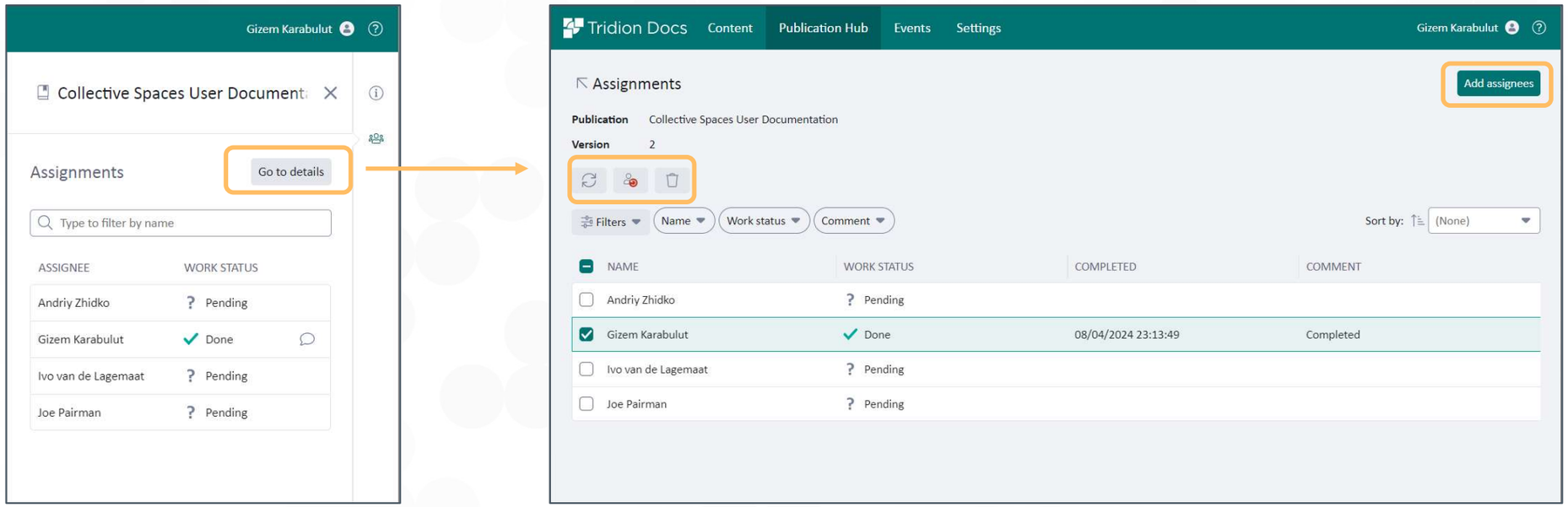
Assignment view

- Only Ongoing projects' assignments can be updated
- Following actions are available:
  - Add assignees
  - Remove assignee
  - Reset work statuses from Done to Pending



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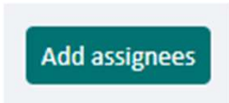
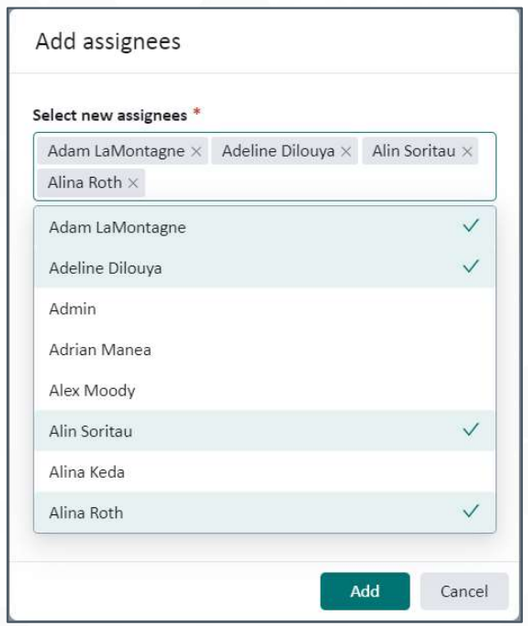
Adding assignees

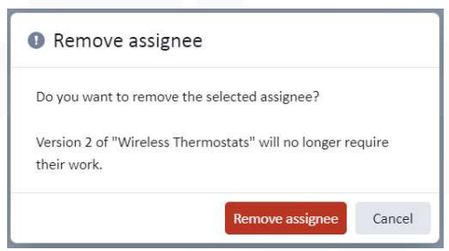


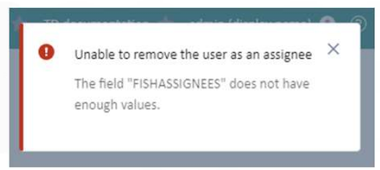
- The user list for assignments is limited to those with publication read access
- Users already in the assignment list are excluded from the user list



Removing assignees

- One assignee can be removed at a time
- Publication captain must confirm:
  - If the assignee's work status is Done, this status will not be stored
  - The existing work status comment will be lost
- This action can not be reverted. Assignees must be re-added if removed mistakenly
- There should be at least one assignee, the last one cannot be removed

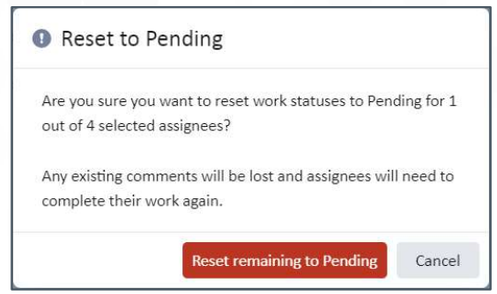




Resetting work status

Done to Pending

- Publication captain needs to confirm:
  - Existing work status comment will be lost
  - Assignees must redo their work
- The operation can be performed in a batch



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Assignee’s Journeys

- Viewing the assignments & Direction to Collective Spaces and Publication Manager
- Updating the Work Status: Mark as Done & Return to Pending
- Tracking the publication version’s progress

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Working on the content

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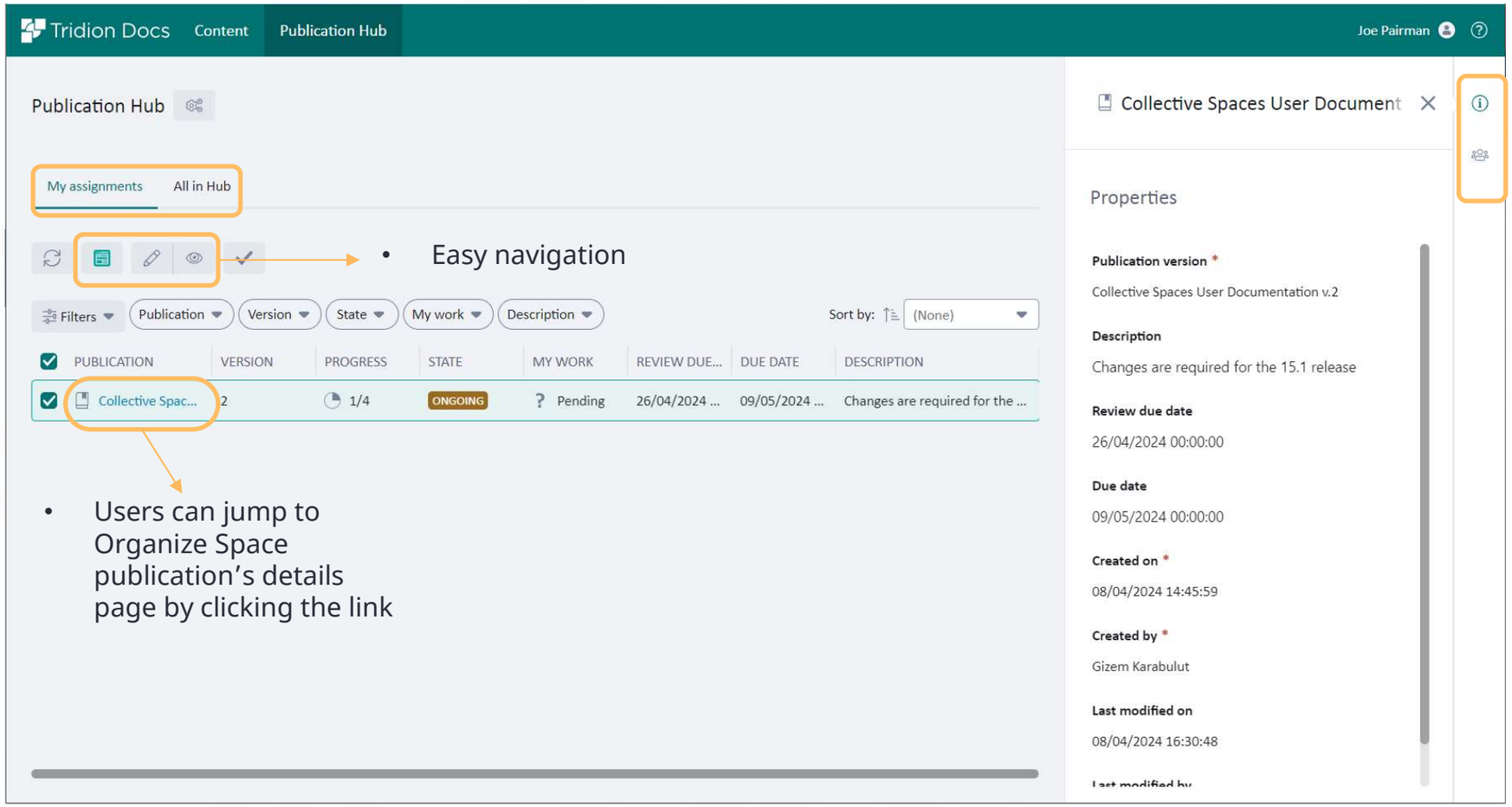
Viewing the assignments & navigation to respective applications

- Users can view their assignments at My assignment tab
- All other assignments managed by others can be viewed at All in Hub tab



- Publication and assignment details can be viewed at Properties tab at insight panel.
- Assignees can not update these properties

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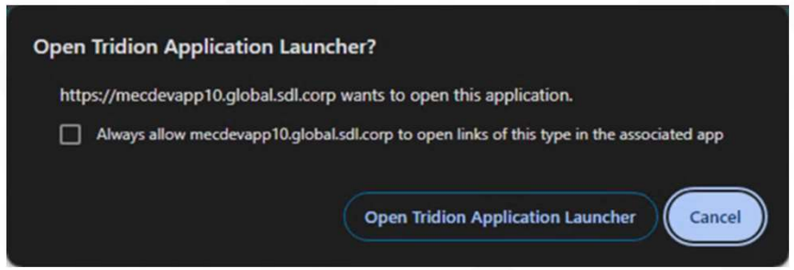
Easy navigation to respective applications

Behavior is the same as for other views:

a. Open in Draft Space and Review Space buttons are displayed at the action toolbar only if the applications are enabled at the Default Settings page.

- User needs to select a language when opening the publication version in Review Space
- If required error messages are displayed in case of information is missing, e.g. a root map etc.

b. Open in Publication Manager button is displayed at list pages. After clicking, the user needs to approve the intermediate dialog.



c. Locate functionality available by clicking on the publication title, that navigates the user to the Details view of the publication at Organize Space

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Signing off the content

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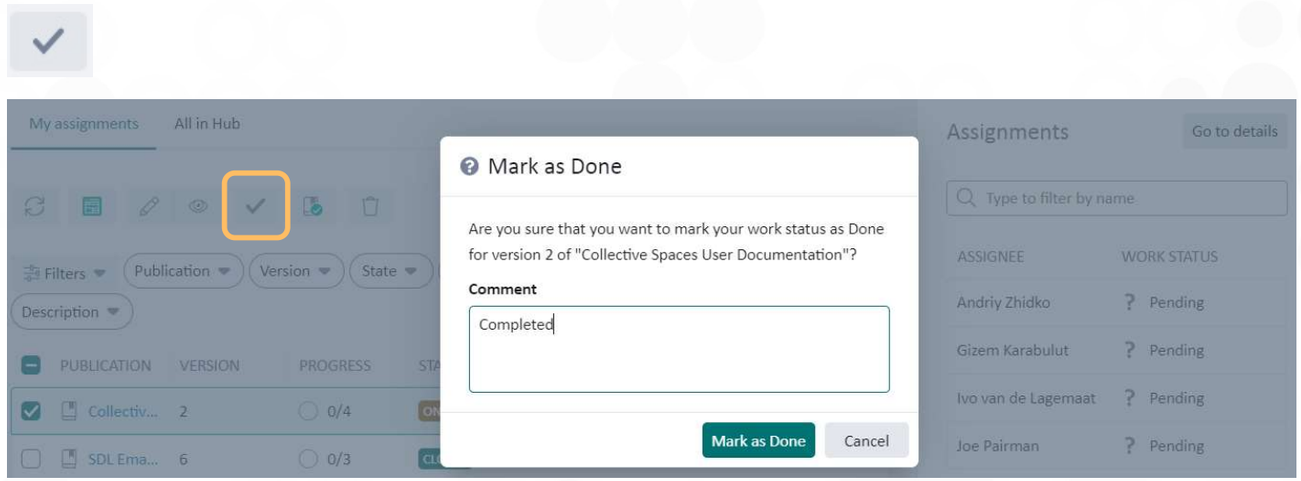
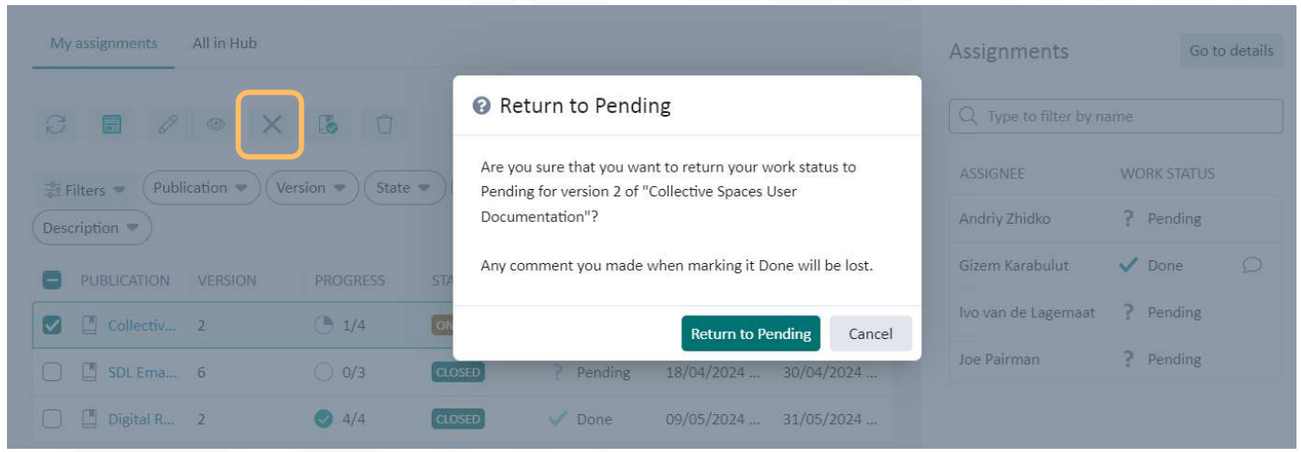
Updating the work status from Pending to Done

- Actions are displayed in My assignments view
- Both operations require a confirmation
- When marking a publication version as done, the user may provide a comment (optional)
- Upon returning the pending status, all information about previous work is deleted (Mark as Done date and comment)
- Neither operation can be performed in a batch (single-select operation only) to prevent mistakes





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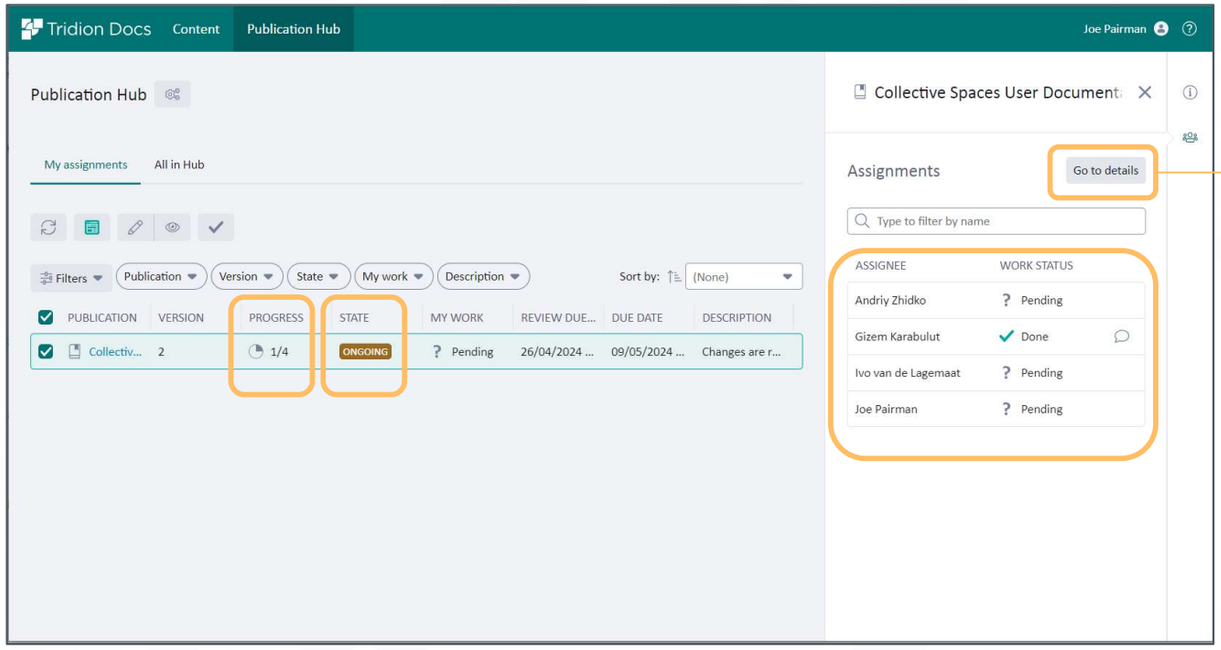
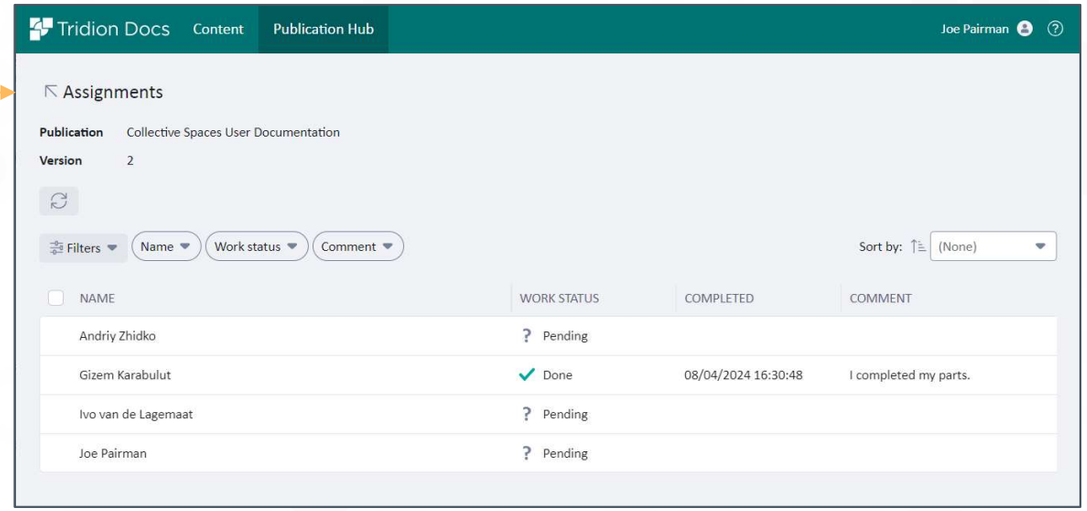
Tracking the publication version's progress





At the list view:

- Progress represents the number of completed assignments
- State represents the project states which can be Ongoing or Closed

At the insights panel:

- Assignee names and their work statuses are listed with the work status comments

At the Assignments view:

- Work status displays which assignee completed his task
- Work status, work completion date & time and comment can be viewed

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Closing the project

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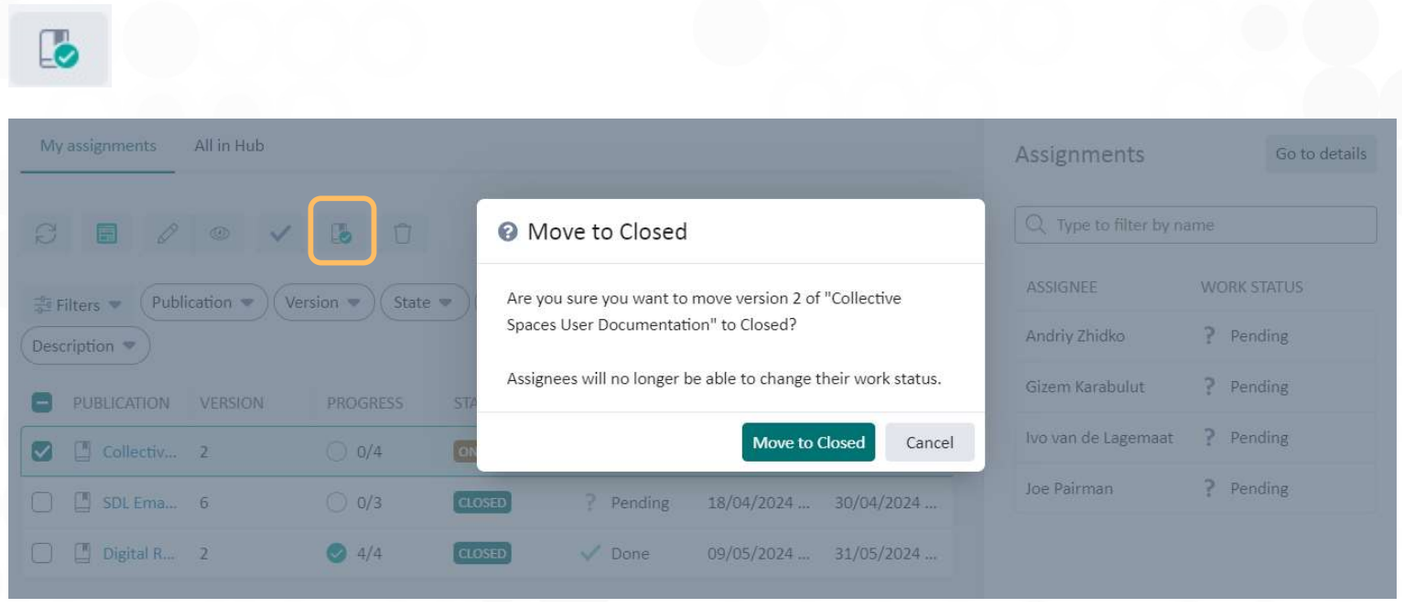
Closing the project

- An Ongoing project state can be Moved to Closed from the List View
  - **Project state can be Moved to Closed in anytime, even though there is no progress (all assignees' work statuses are Pending)**
  - Assignments and the project properties cannot be updated at Closed state
- This action can be performed in a batch
  - If there is a mix of states in the selection, only the eligible states are changed

*** Be mindful of the Hub Settings! By default, the Closed state is **not** shown in the list view.



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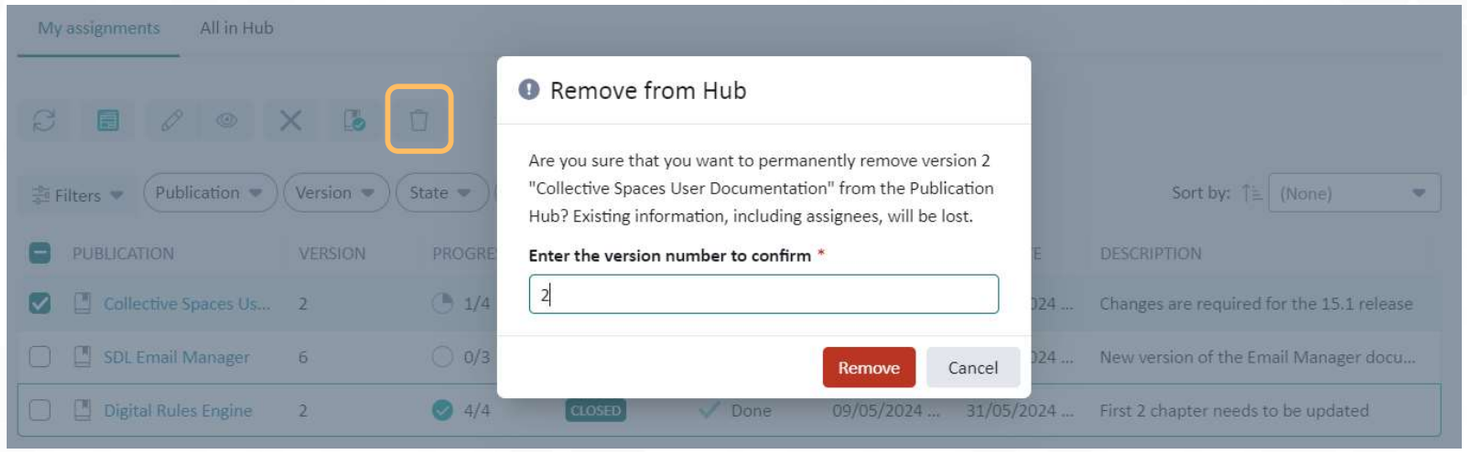
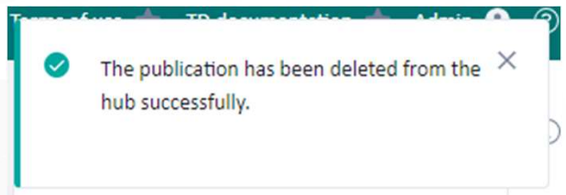
Removing a publication version from the Hub

- Removing a publication from the Hub requires extra confirmation:
  - The user must type the publication's version number and click Remove to complete the action
- Project history is deleted with this action. Assignees' work statuses and comments are deleted
- Batch operation to remove publication versions is NOT supported to prevent accidental deletions





Publications removed from the Hub are retained in the repository!

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Returning to Ongoing & Updating the assignments

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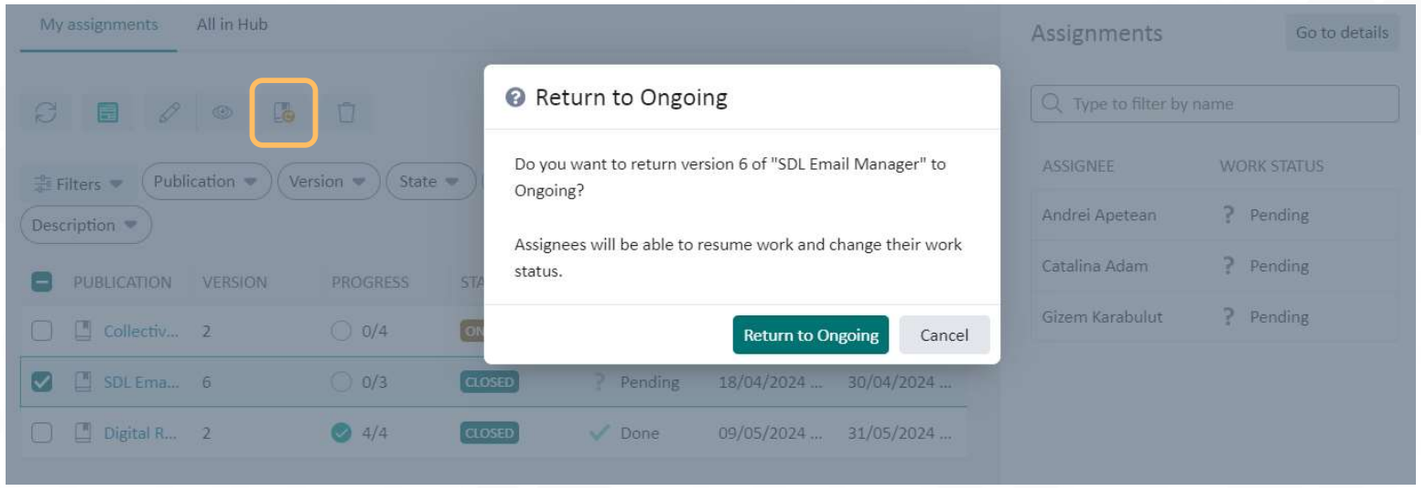
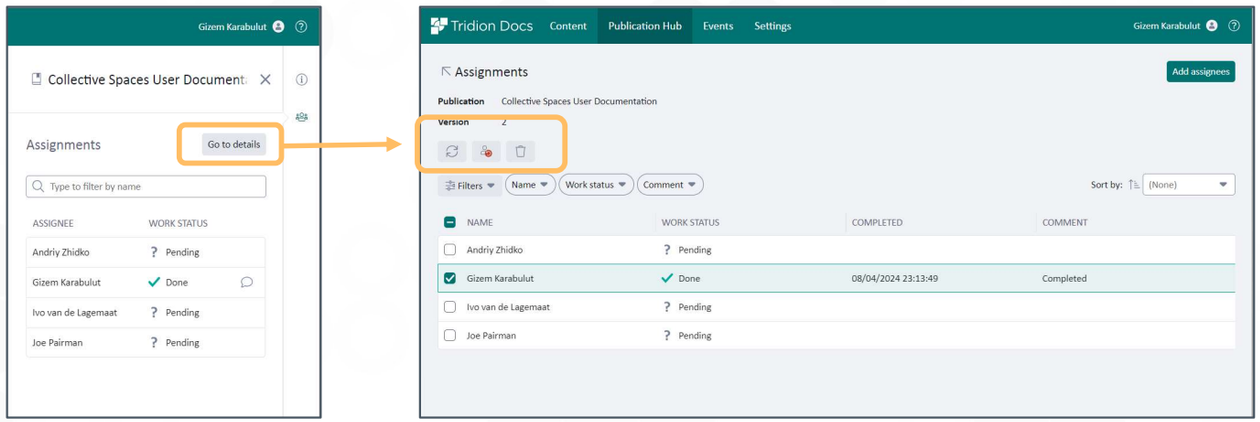
Changing the project's state to Ongoing

- The publication captain can change the state of a Closed project to Ongoing
- This action can be performed in a batch





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DEMO

Configuration for Project

Tridion

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Technical details underneath the OpenAPI

- New card types
- New list of values (LOVs)
- New privilege

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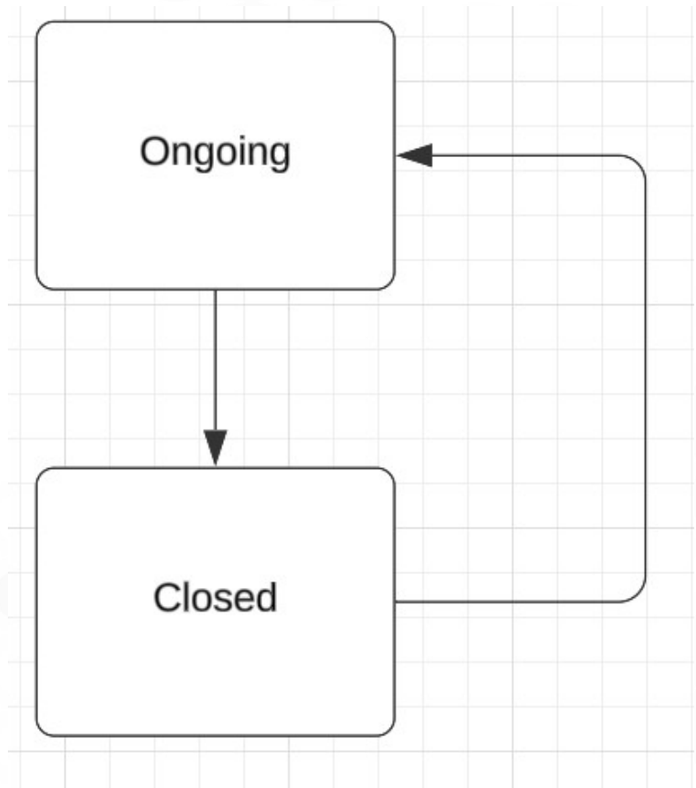
Card Types and LOVs

- New card types
  - CTPROJECT
  - CTPROJECTASSIGNEE
- New system List of Values "LOVs" and workflow controlled by engineering
  - DPROJECTSTATUS
    - Ongoing
    - Closed
  - DSIGNOFFSTATUS
    - Pending
    - Done



Tridion

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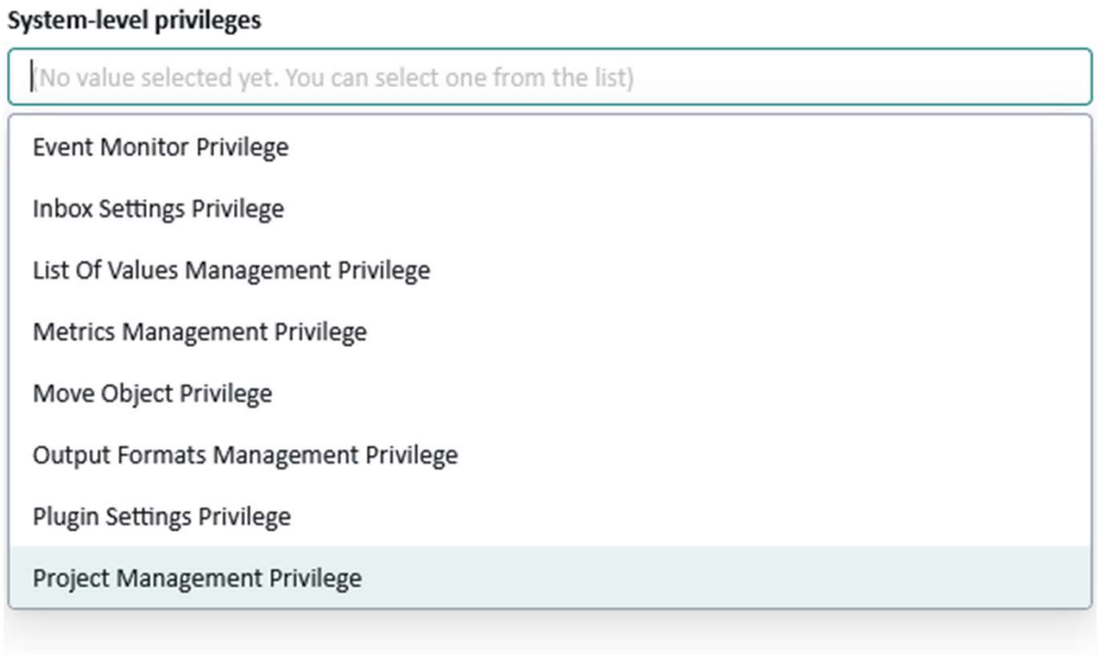
Privileges

- New Privilege VPRIVILEGEPROJECTMANAGEMENT
  - Project management privilege determines whether a user is allowed to manage Publication Hub projects



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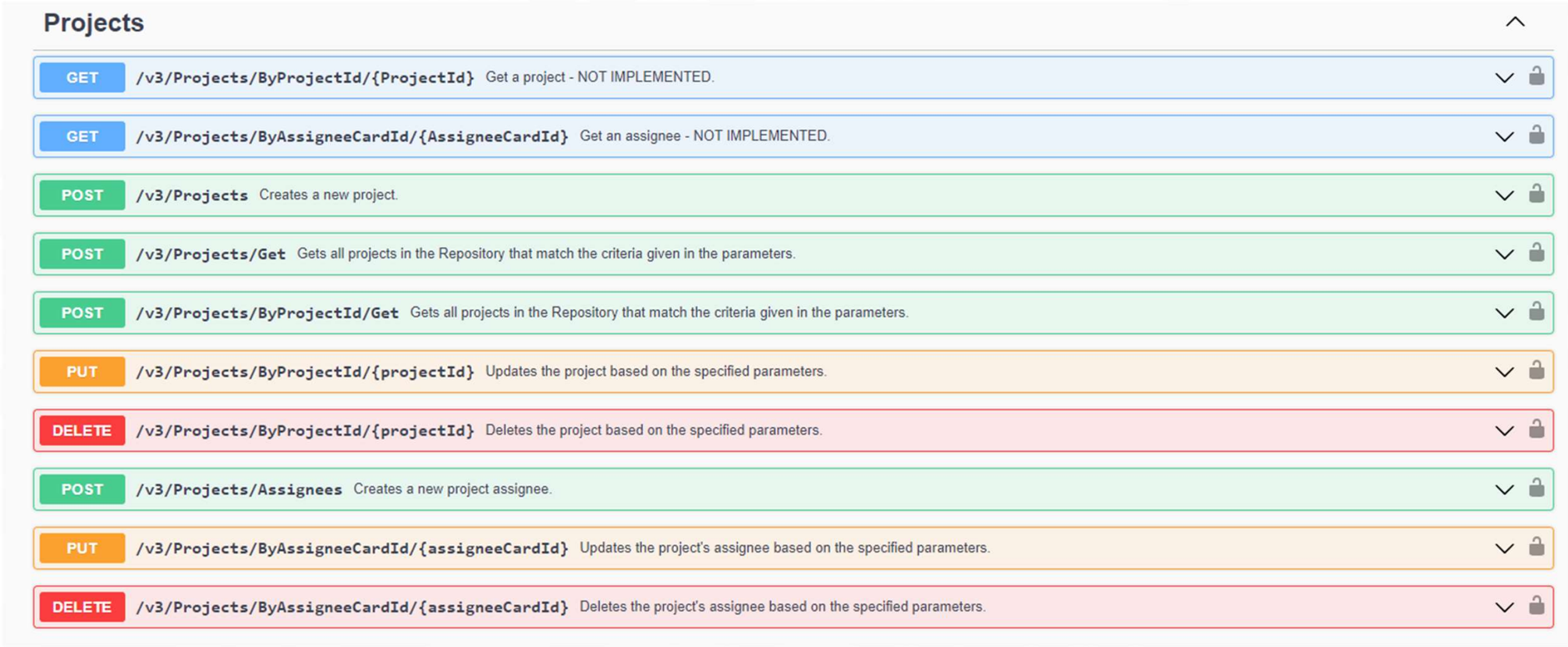
API coverage for Projects

- OpenAPI only



Tridion

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Extensibility for Project

Tridion

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IWrite plug-in support for Project

Tridion

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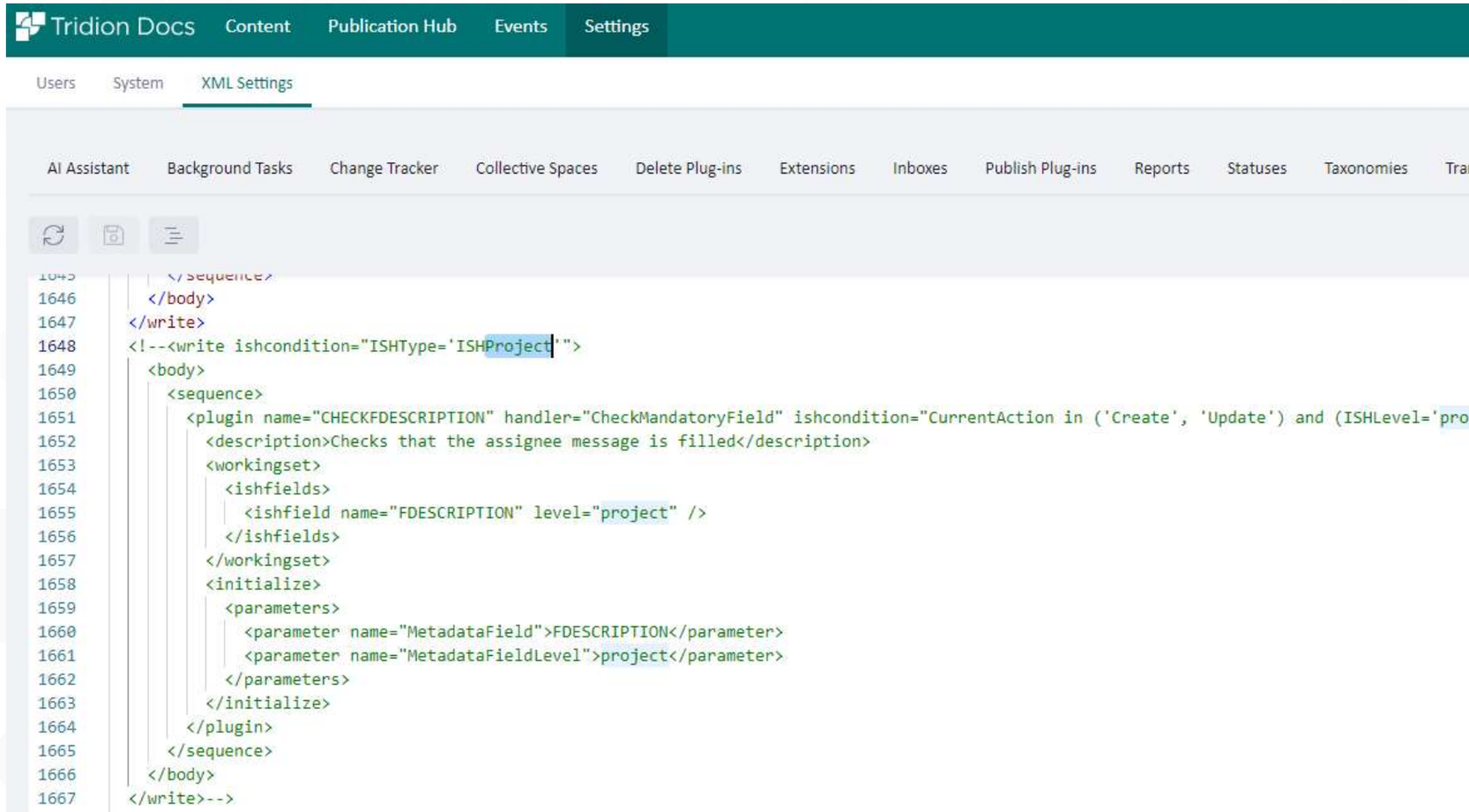
Example Configuration

- Allow extensibility on the project Create or Update
- Out of the box example configuration




```
    </body>
  </write>
  <!--<write ishcondition="ISHType='ISHProject'">
    <body>
      <sequence>
        <plugin name="CHECKFDESCRIPTION" handler="CheckMandatoryField" ishcondition="CurrentAction in ('Create', 'Update') and (ISHLevel='pro
          <description>Checks that the assignee message is filled</description>
          <workingset>
            <ishfields>
              <ishfield name="FDESCRIPTION" level="project" />
            </ishfields>
          </workingset>
          <initialize>
            <parameters>
              <parameter name="MetadataField">FDESCRIPTION</parameter>
              <parameter name="MetadataFieldLevel">project</parameter>
            </parameters>
          </initialize>
        </plugin>
      </sequence>
    </body>
  </write>-->
```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Organize Space extensions

Tridion

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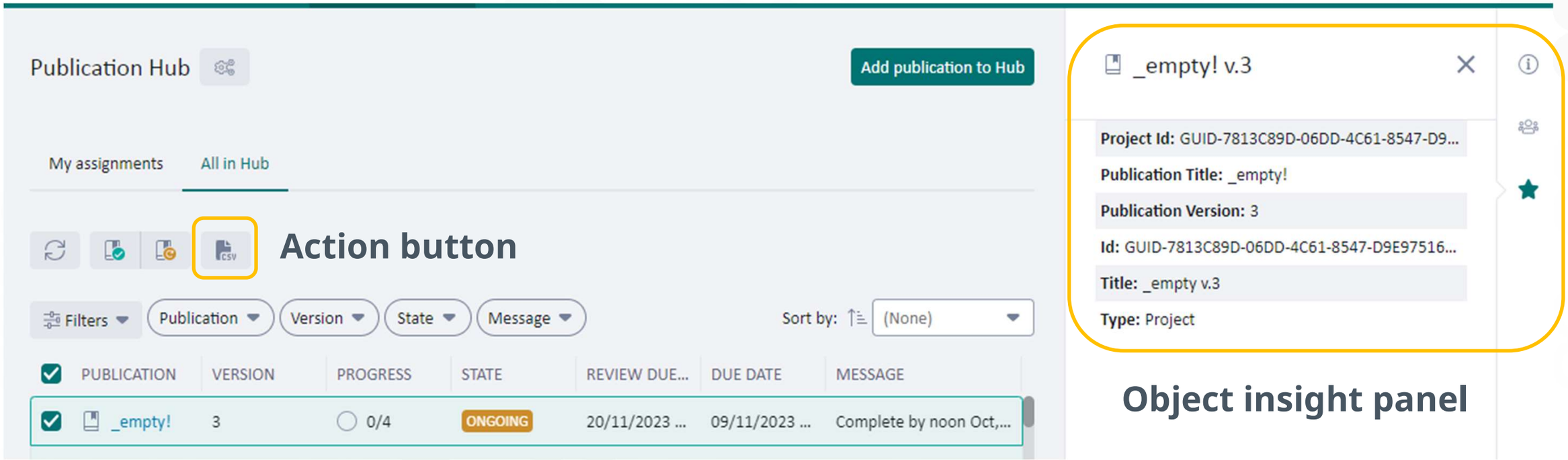
Extensions at List View

- Developing extensions for action toolbar and object insight panel are possible



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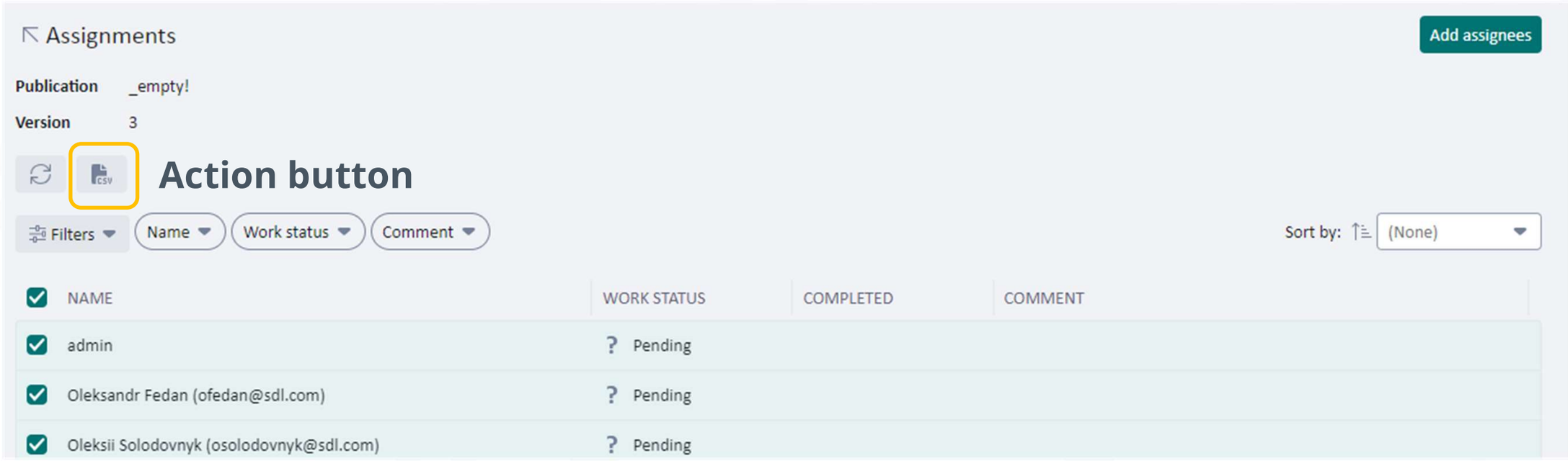
Extensions at Assignments View

- Action button for assignees list



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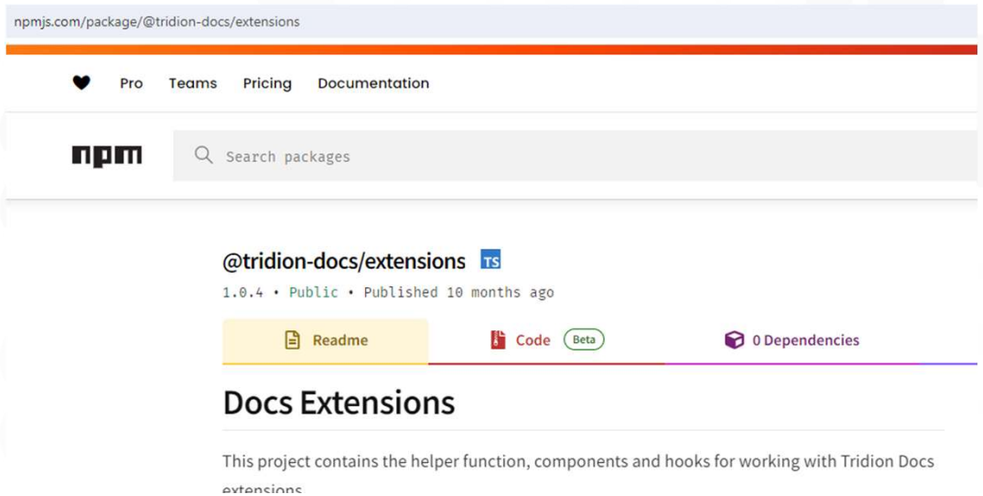
Extensions’ documentation

- tridion-docs 1.0.x is for Tridion Docs 15.0/15.0.0, first introduction of Organize Space extensibility
- Extension example application and documentation was updated according to the latest changes
  - New extension package will be available at https://www.npmjs.com/package/@tridion-docs/extensions
- tridion-docs 2.0.x is for Tridion Docs 15.1/15.1.0
  - Major version forces a recompile of your extensions because we switched to more widely supported NSwag OpenAPI generated client and added Project extension support



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Organize Space Settings

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Settings – Users, User groups and User roles

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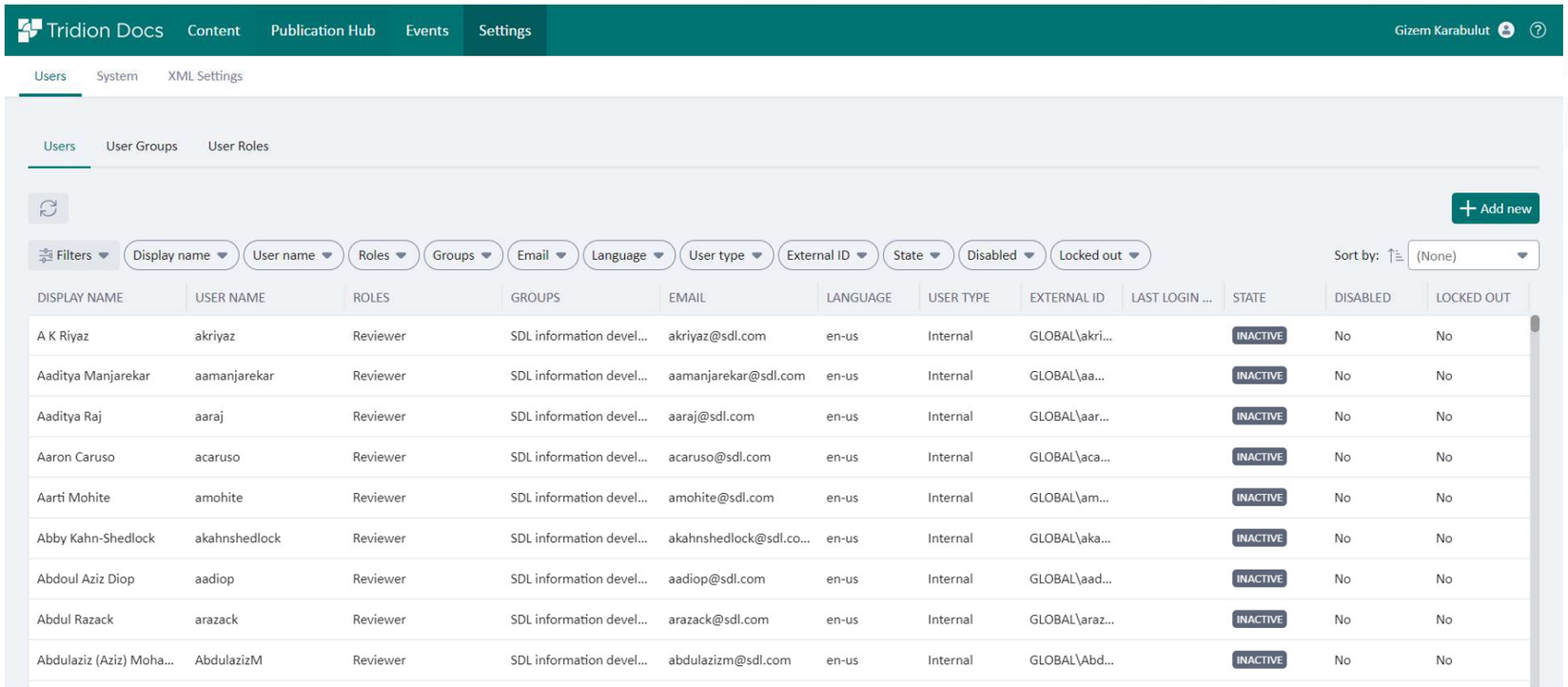
Users

- Users list, add, edit and delete user are ported to React
  - Concepts and business rules are unchanged, however, a big step forward in user experience, performance, and security
- Creating a user with the same "Username" or deleting a user that is still used will result in an error
- Accessible with User Management or System administrator privileges



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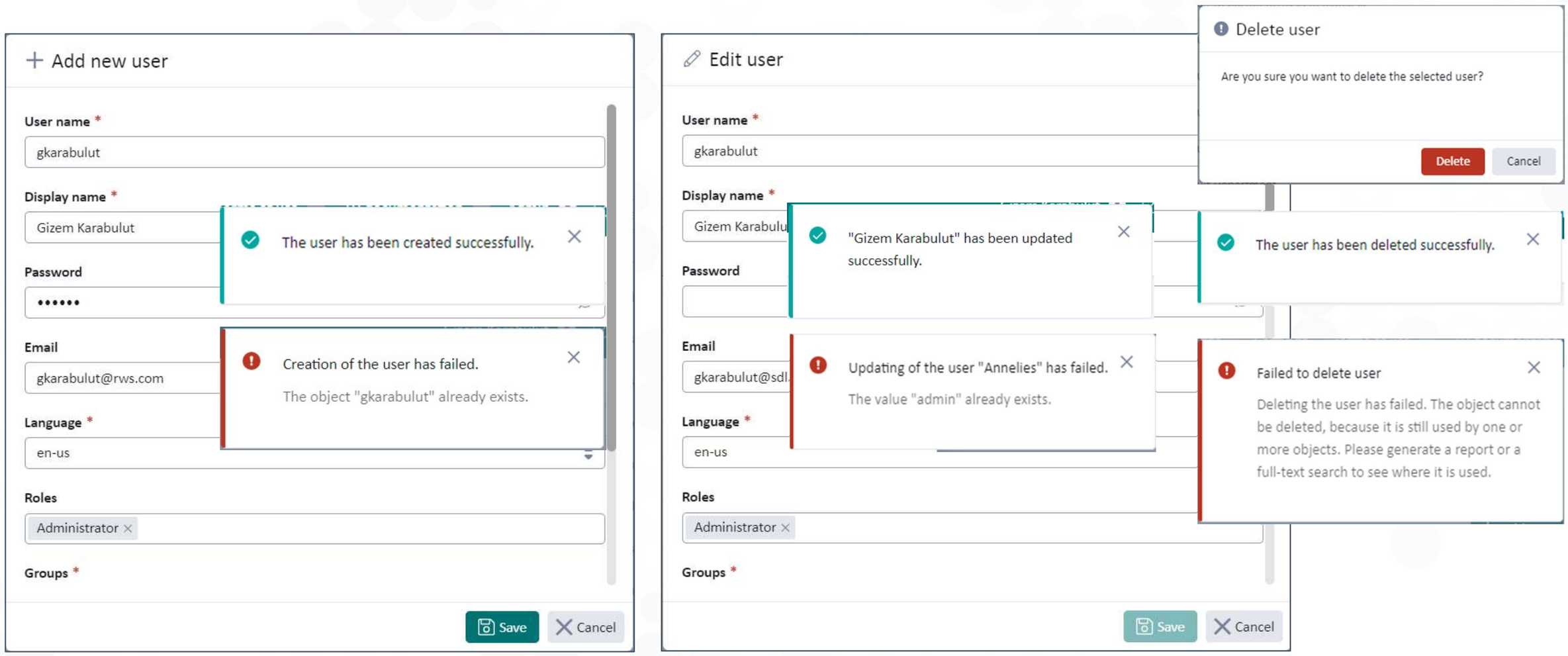
Add, Edit and Delete user



Tridion

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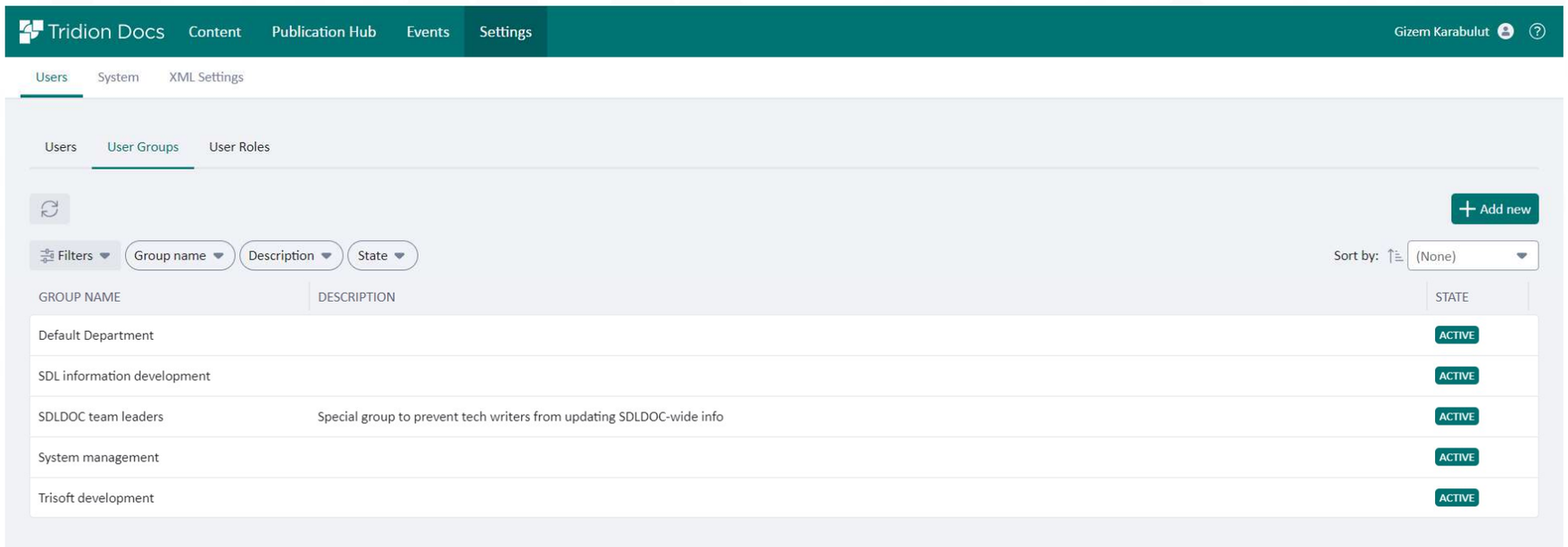
User Groups

- User group list, add, edit and delete is ported to React
  - Concepts and business rules are unchanged, however, a big step forward in user experience, performance, and security
- Accessible with User Management or System administrator privileges



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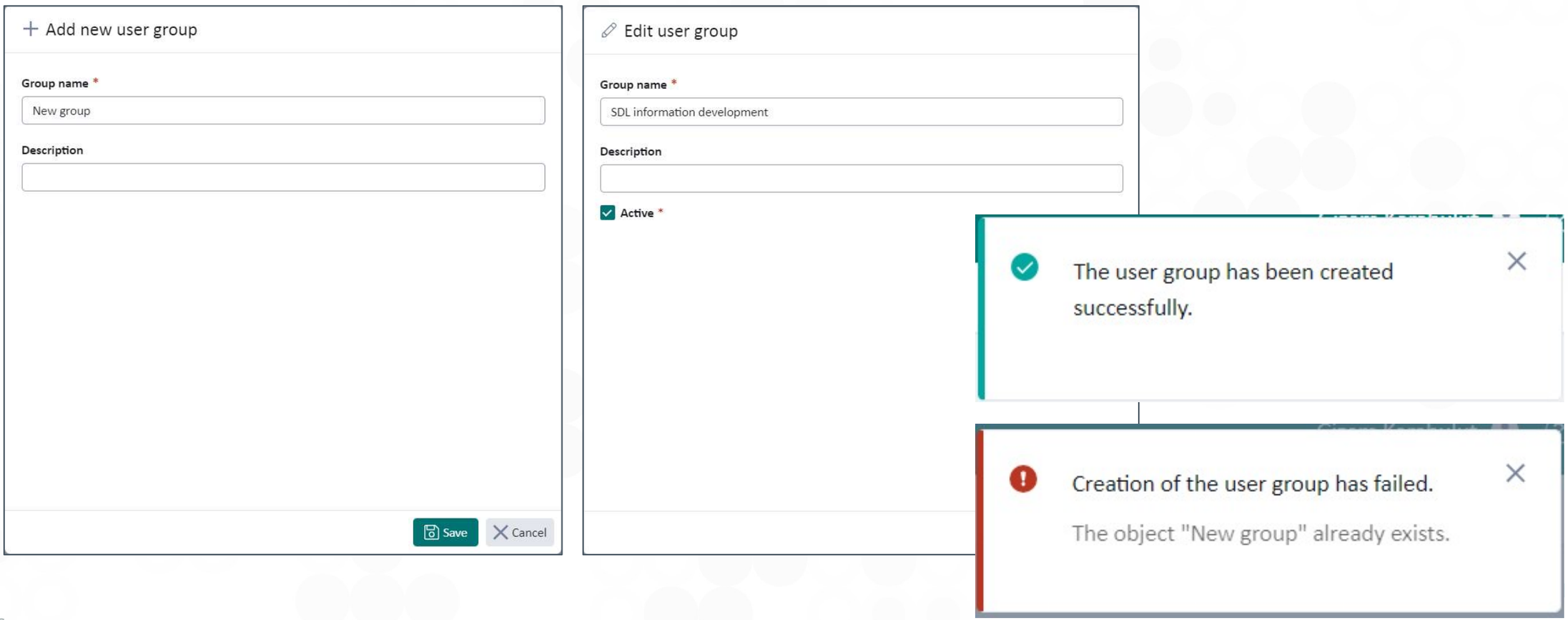
Add & Edit User Group

- State is always **active** when creating a new group
- State can be set to **inactive**, by editing the group



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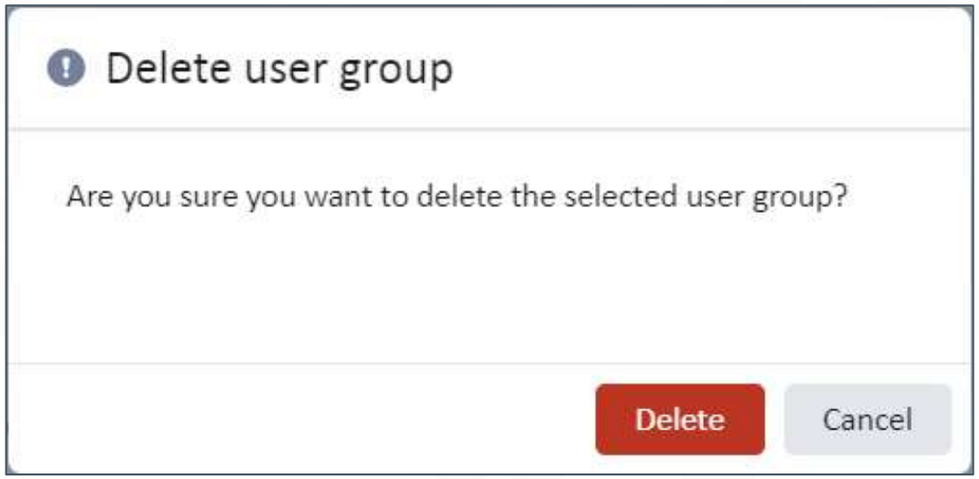
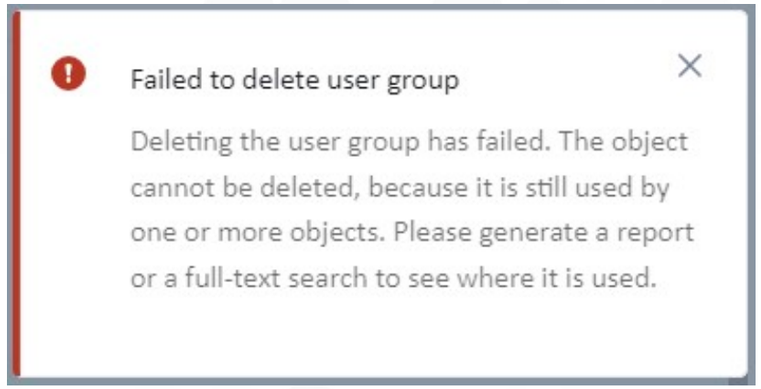
Delete User Group

- Only one group can be deleted at a time
- We show a confirmation modal before deleting the User Group
- Groups that are **used** cannot be deleted





Tridion

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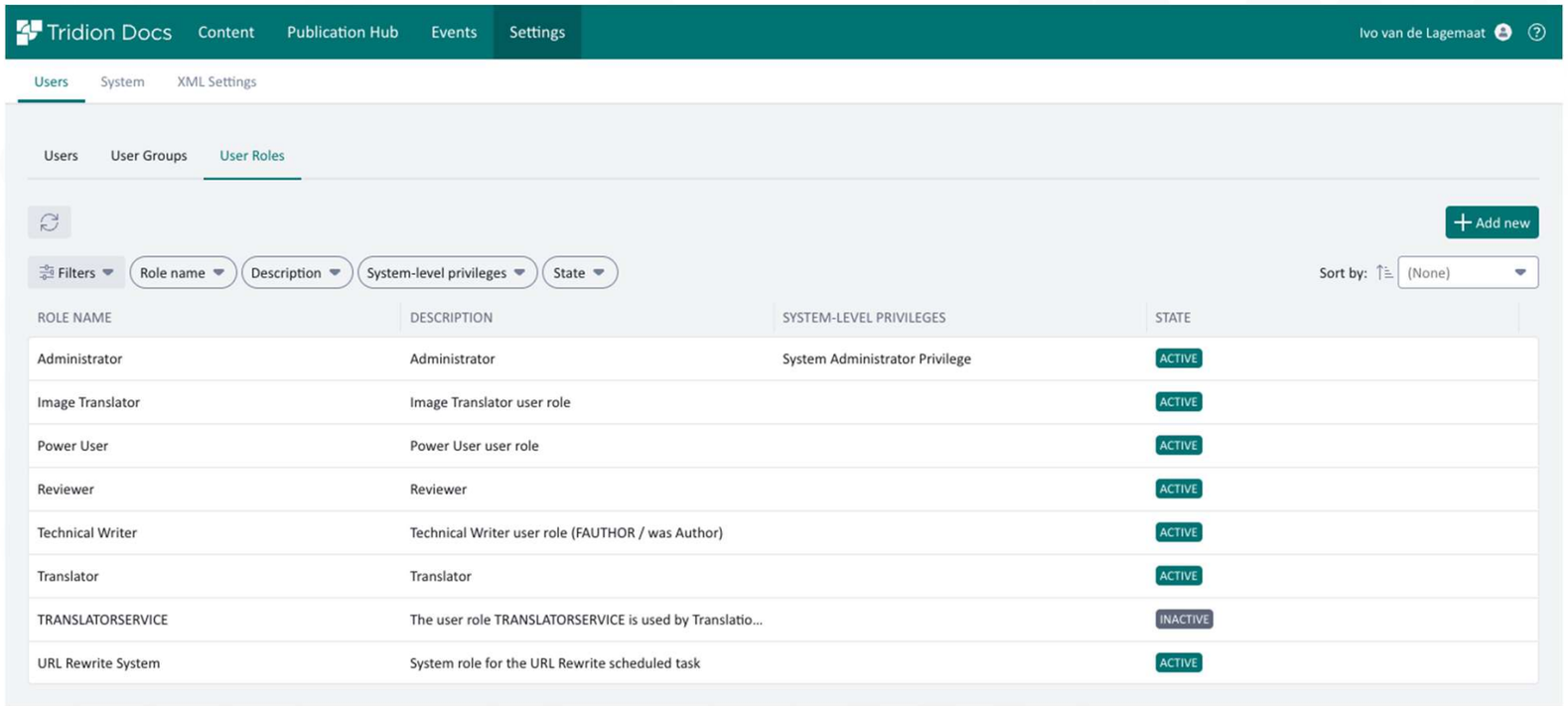
User Roles

- User Roles list, add, edit and delete is ported to React
  - Concepts and business rules are unchanged, however, a big step forward in user experience, performance, and security
- Accessible with User Management or System administrator privileges



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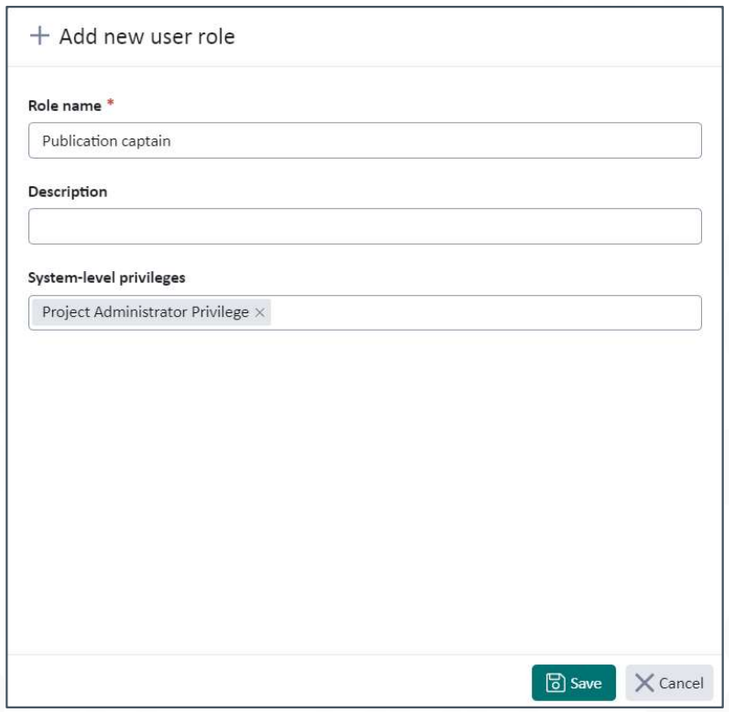
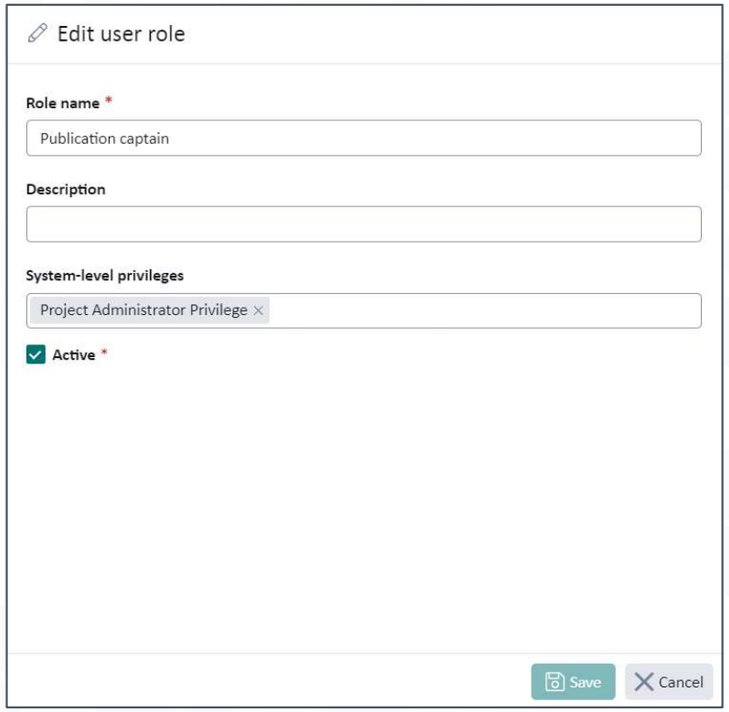
Add & Edit a User Role

- State is always **active** when creating a new role
- State can be set to **inactive**, by editing the role





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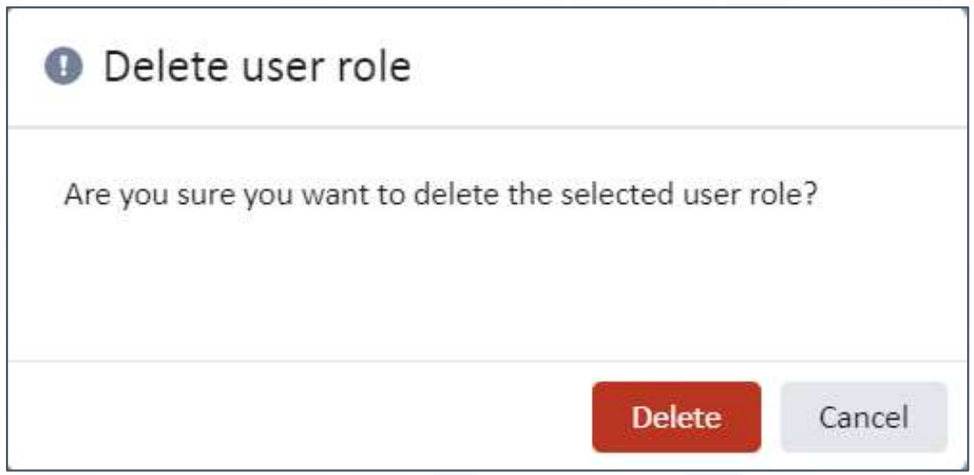
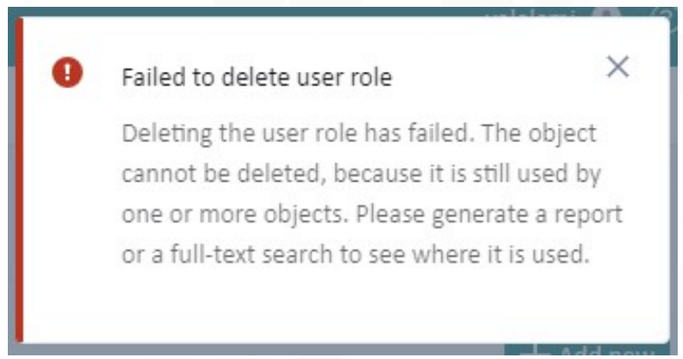
Delete a User Role

- Only one role can be deleted at a time
- We show a confirmation modal before deleting the User Role
- Roles that are **used** cannot be deleted





Tridion

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Settings - System

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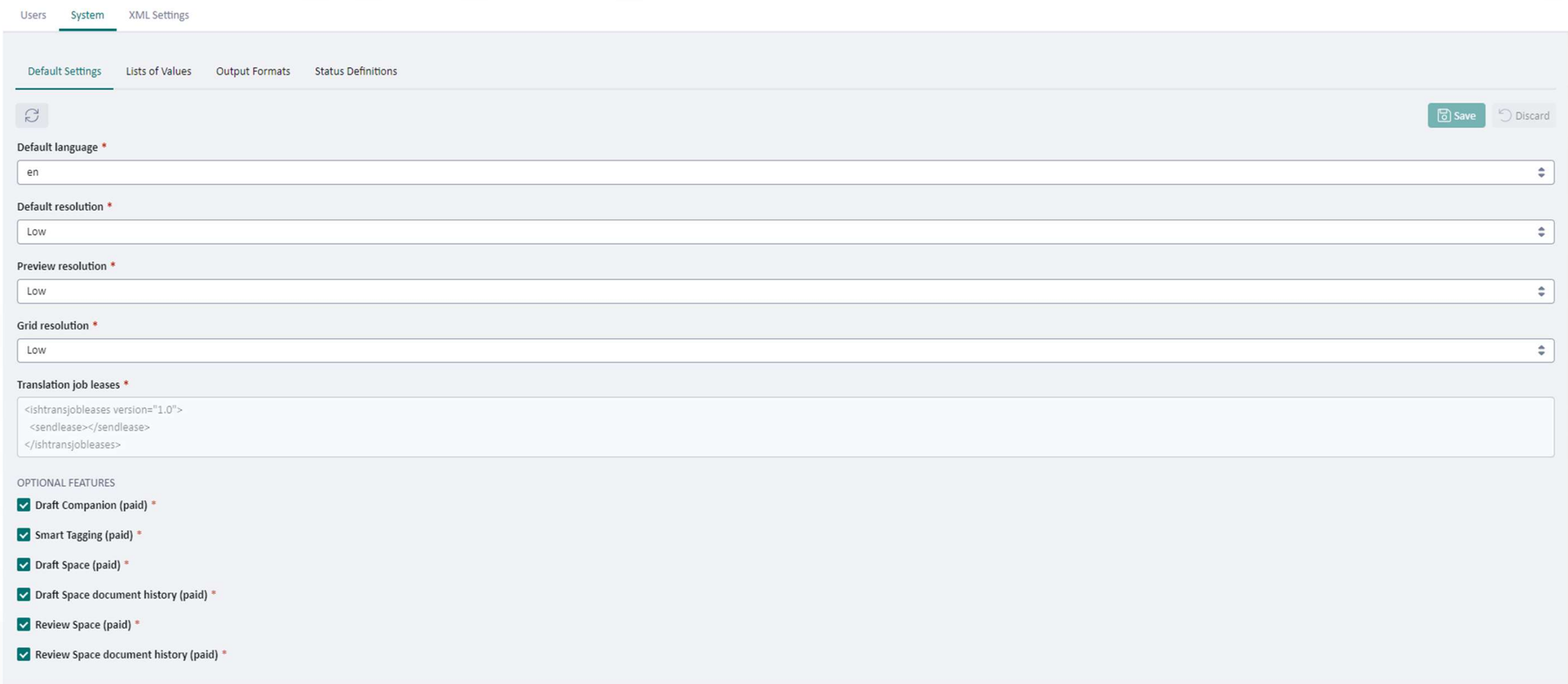
Default Settings



- Organize Space app is reloaded to use latest system settings after saving

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Managing Output Formats

Tridion

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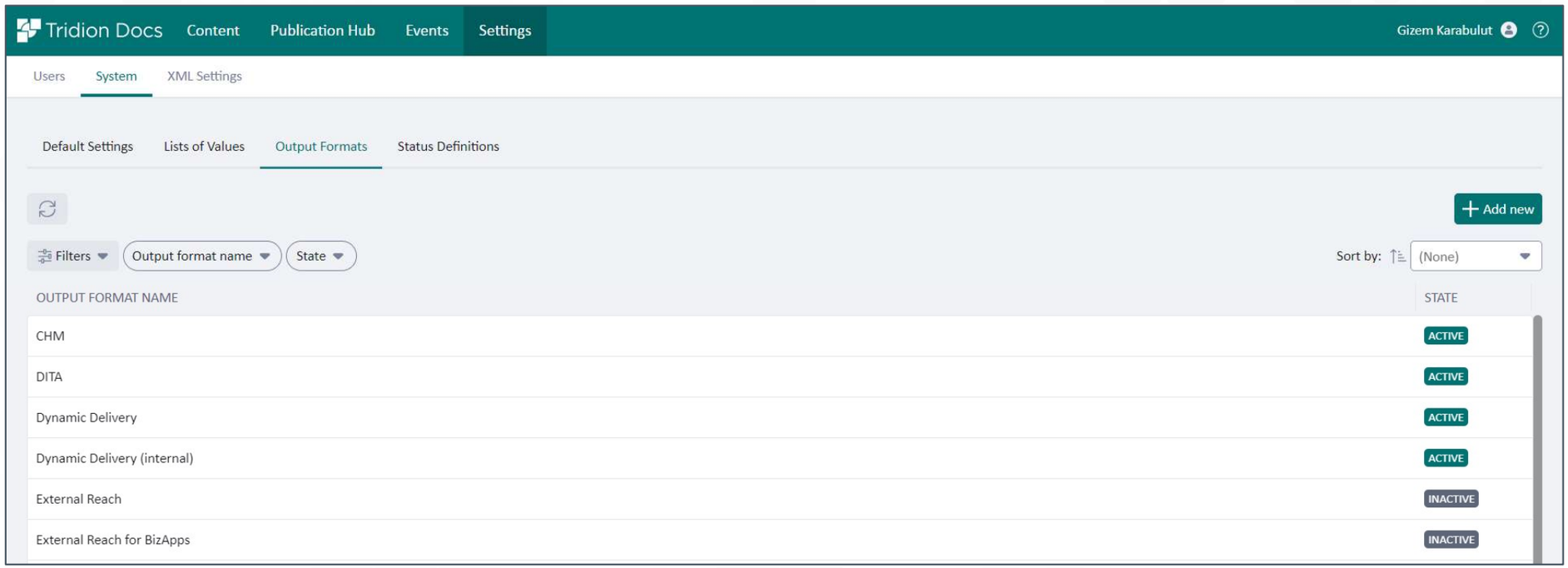
Output Format

- Output Format list, add, edit and delete is ported to React
  - Concepts and business rules are unchanged, however, a big step forward in user experience, performance, and security
- Accessible with Output Format Management or System administrator privileges



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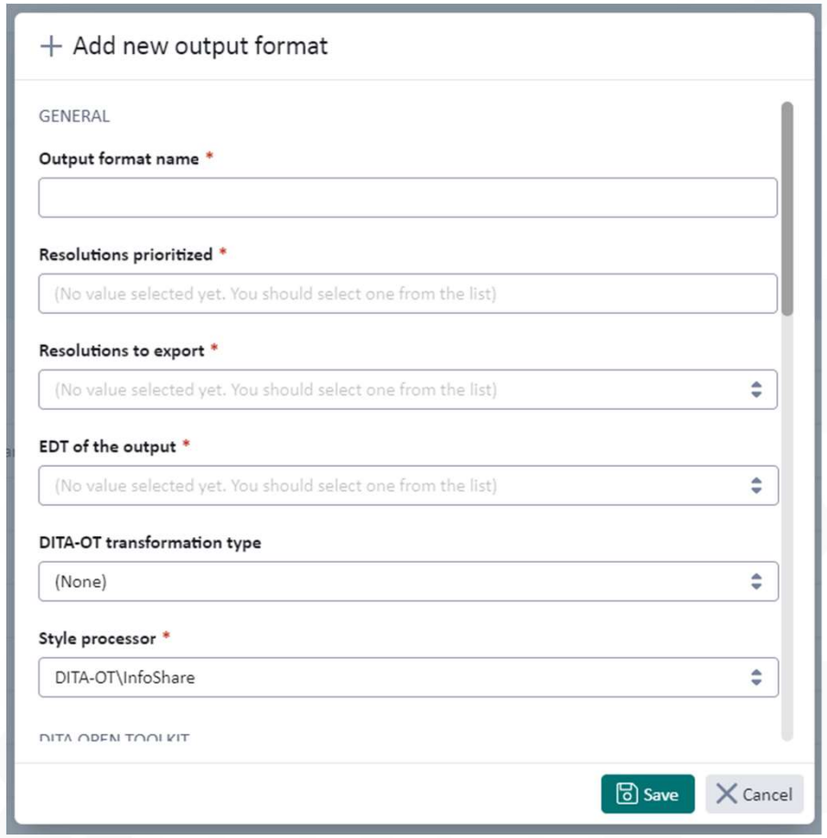
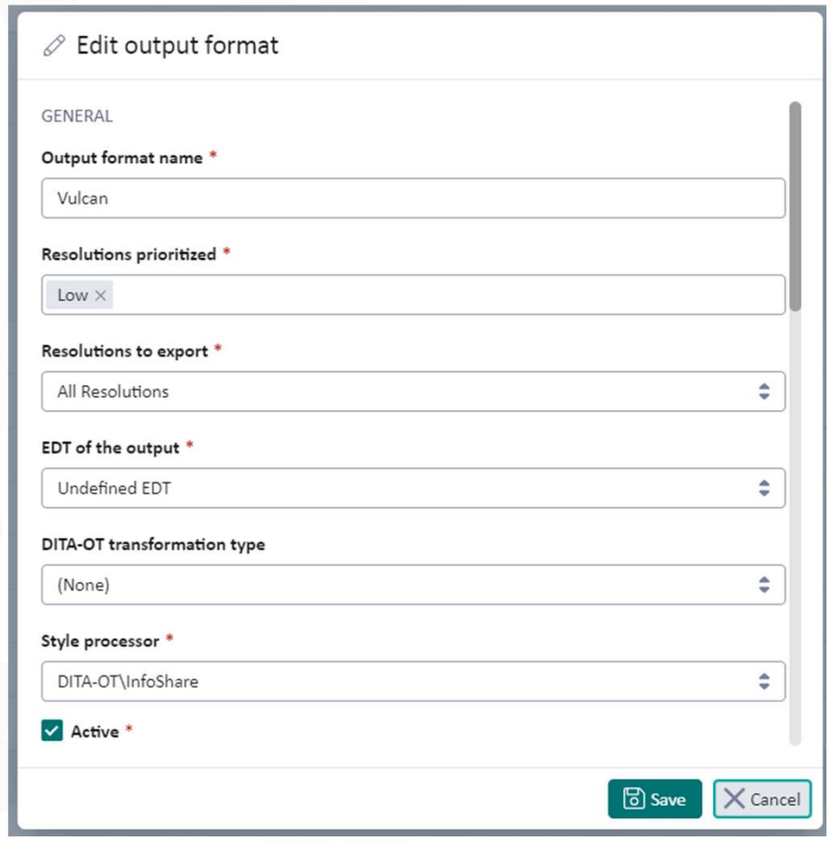
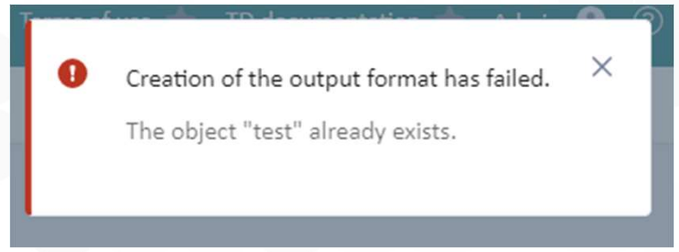
Create & Edit Output Format

- New output format is created as active, the state can be set to inactive by editing







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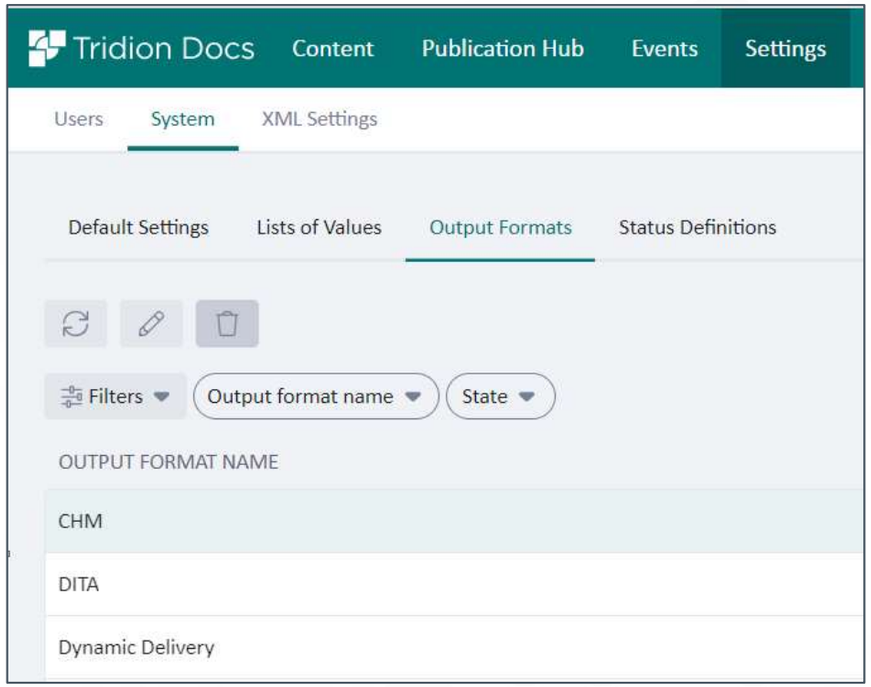
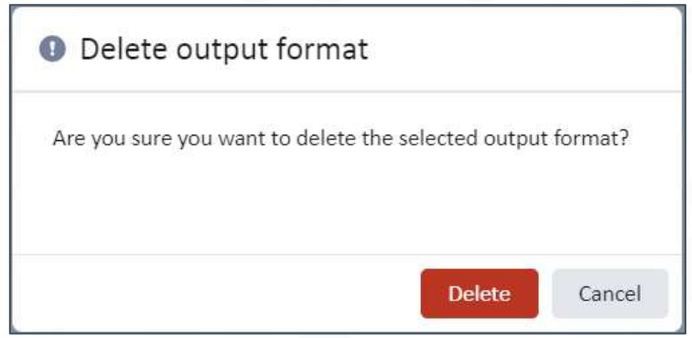
Delete Output Format

- Output formats can be deleted one by one
- Delete action results in error only if the output format is used by an object





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Updates for Status Definition view

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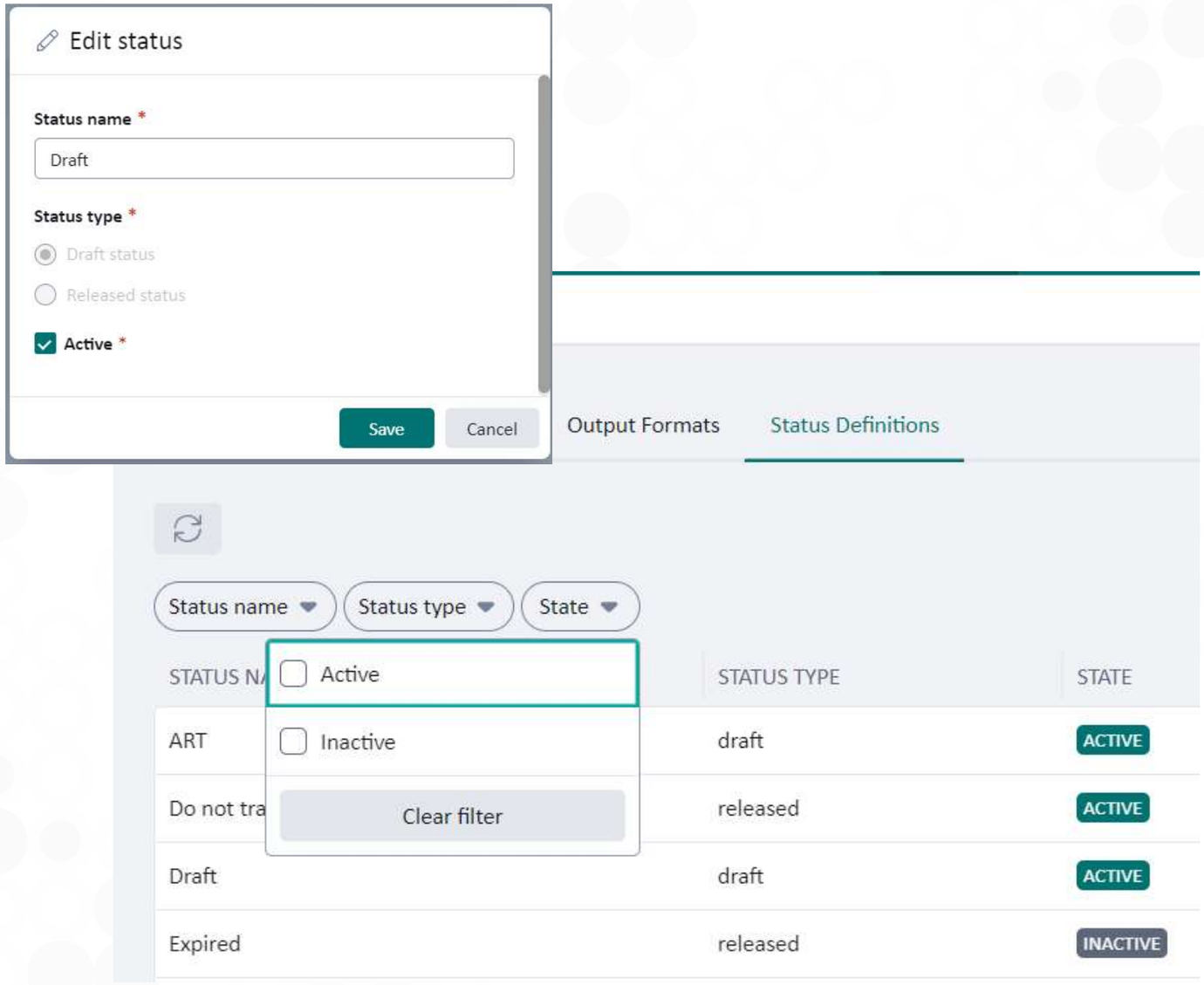
Status Definitions – Active & Inactive states

- Status Definitions now have an Active or Inactive state
- Upon creating a new status definition its state is set to Active by default
- It is possible to edit a status definition and set its state to inactive
- Statuses with Inactive state are filtered from the drop down of possible statuses to transit to



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Organize Space Improvements

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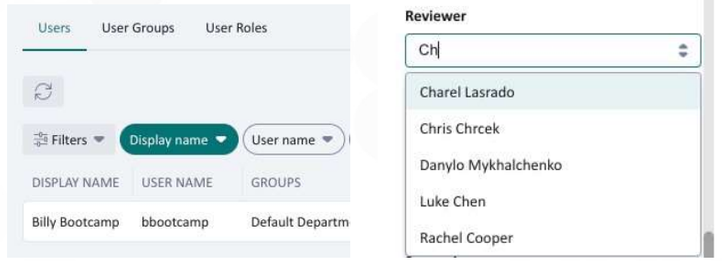
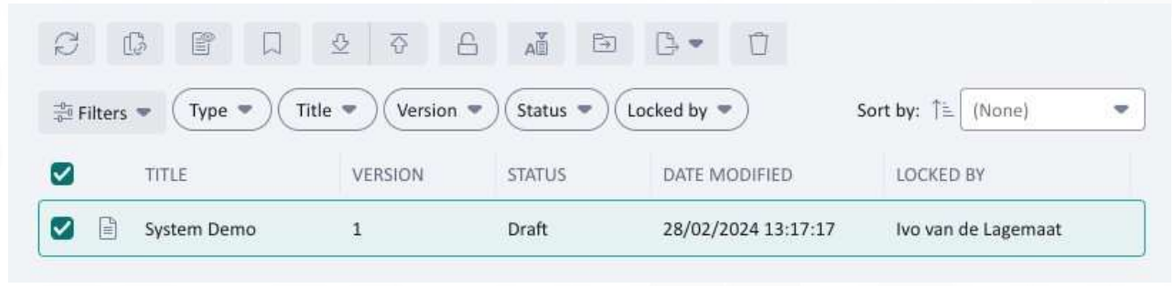
Display Name

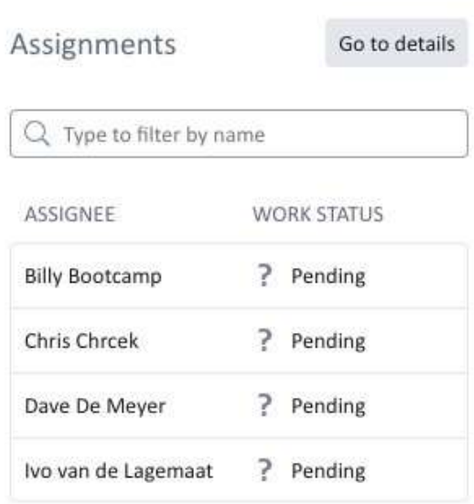
- Organize Space now displays a user's Display Name instead of their User Name
- This change is effective everywhere users are identified in relation to various actions they have performed in the system.

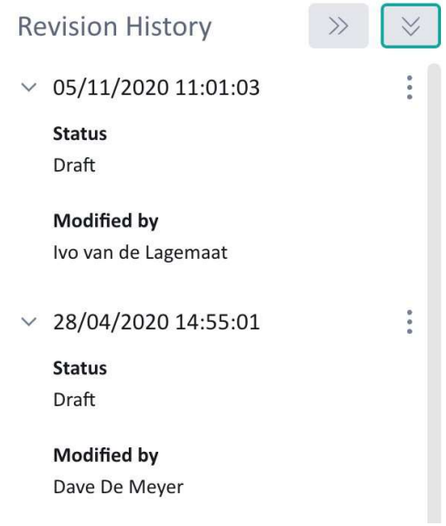
  Some of the places are:

  - Options for search or filtering a list
  - Properties panel for objects and folders
  - Revision history for objects
  - Translation job properties
  - Publication Hub assignments
  - Inbox list









Tridion

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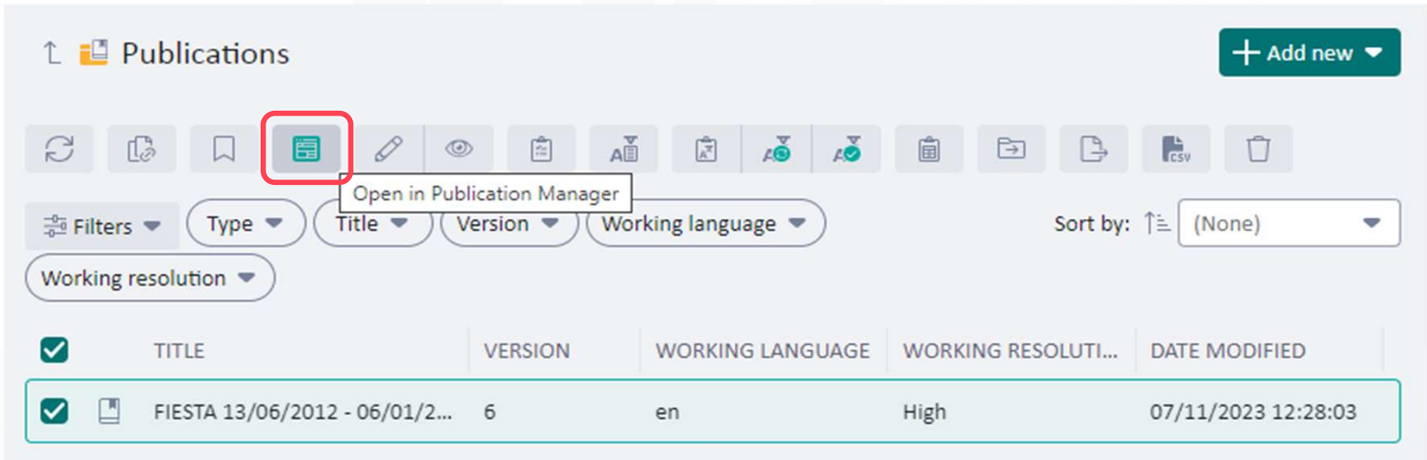
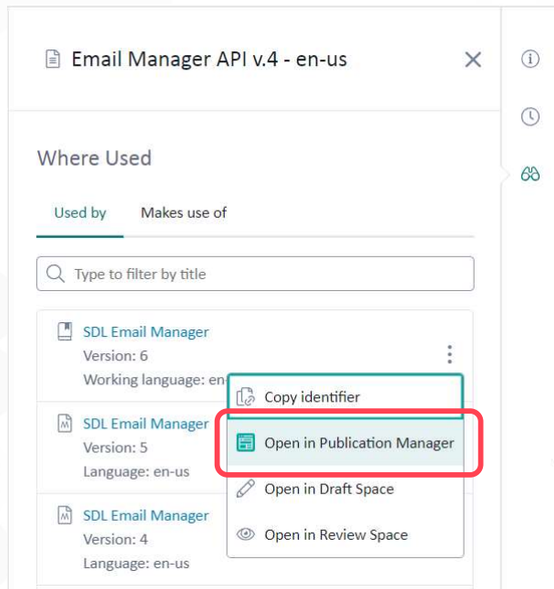
New action: Open in Publication Manager

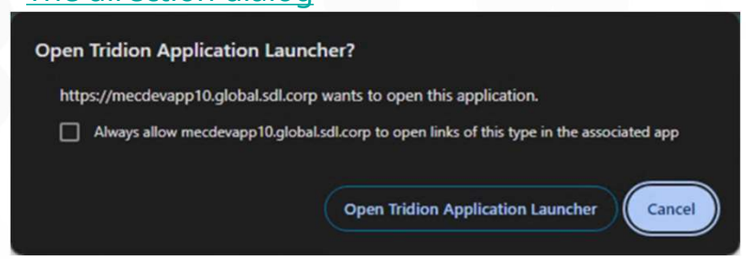




Prerequisites:

- Minimum Publication Manager 15.1 version should be installed
- An account should be available in PM that matches the repository and has Authentication "Access Management"
  - If not, you might need to recreate the account as advised when upgrading to Tridion Docs 15 with Modern Authentication
- If the prerequisites aren't met, then clicking the action button will not do anything

The direction dialog



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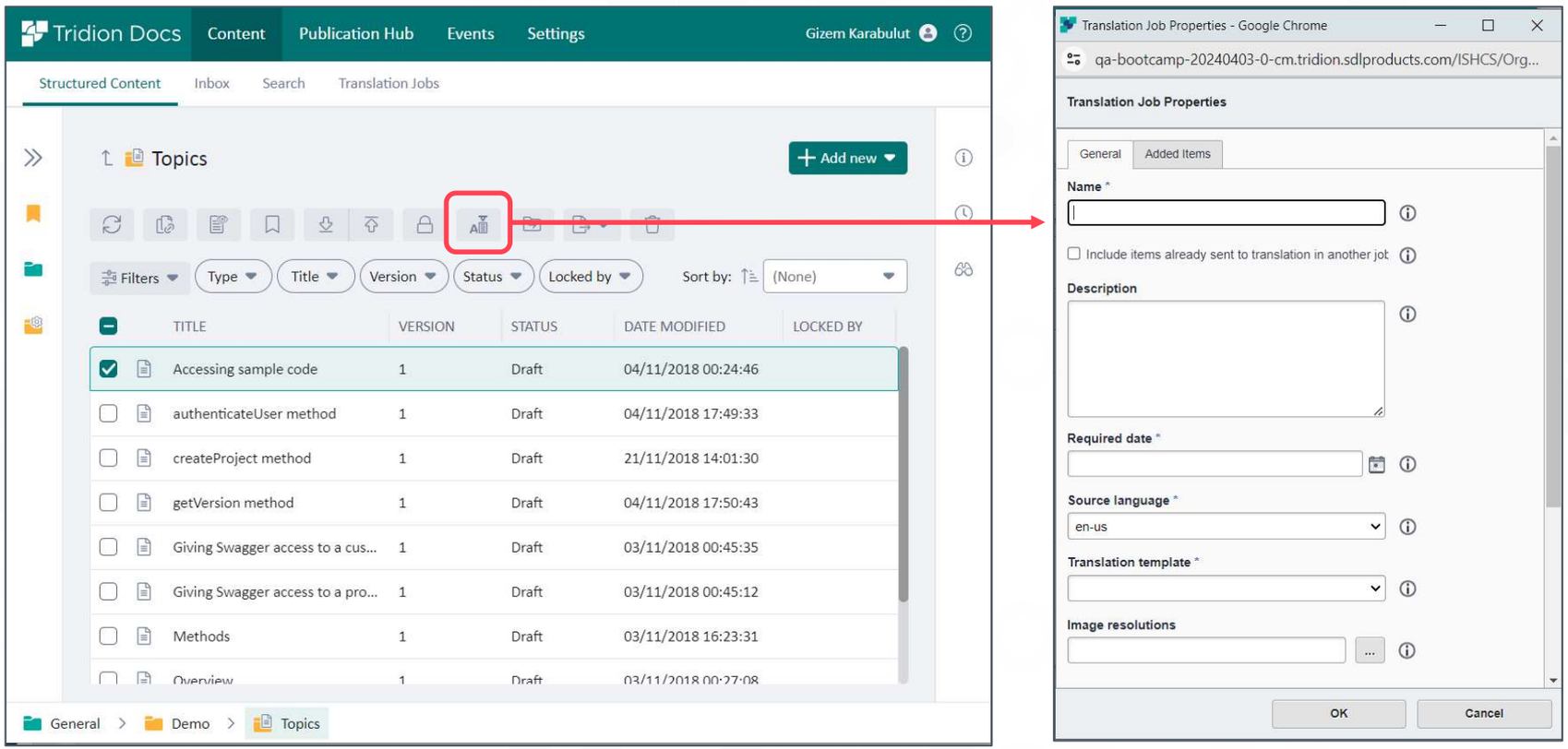
Create translation jobs directly from topics, maps or images



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Add new publication, version, branch or output

Tridion

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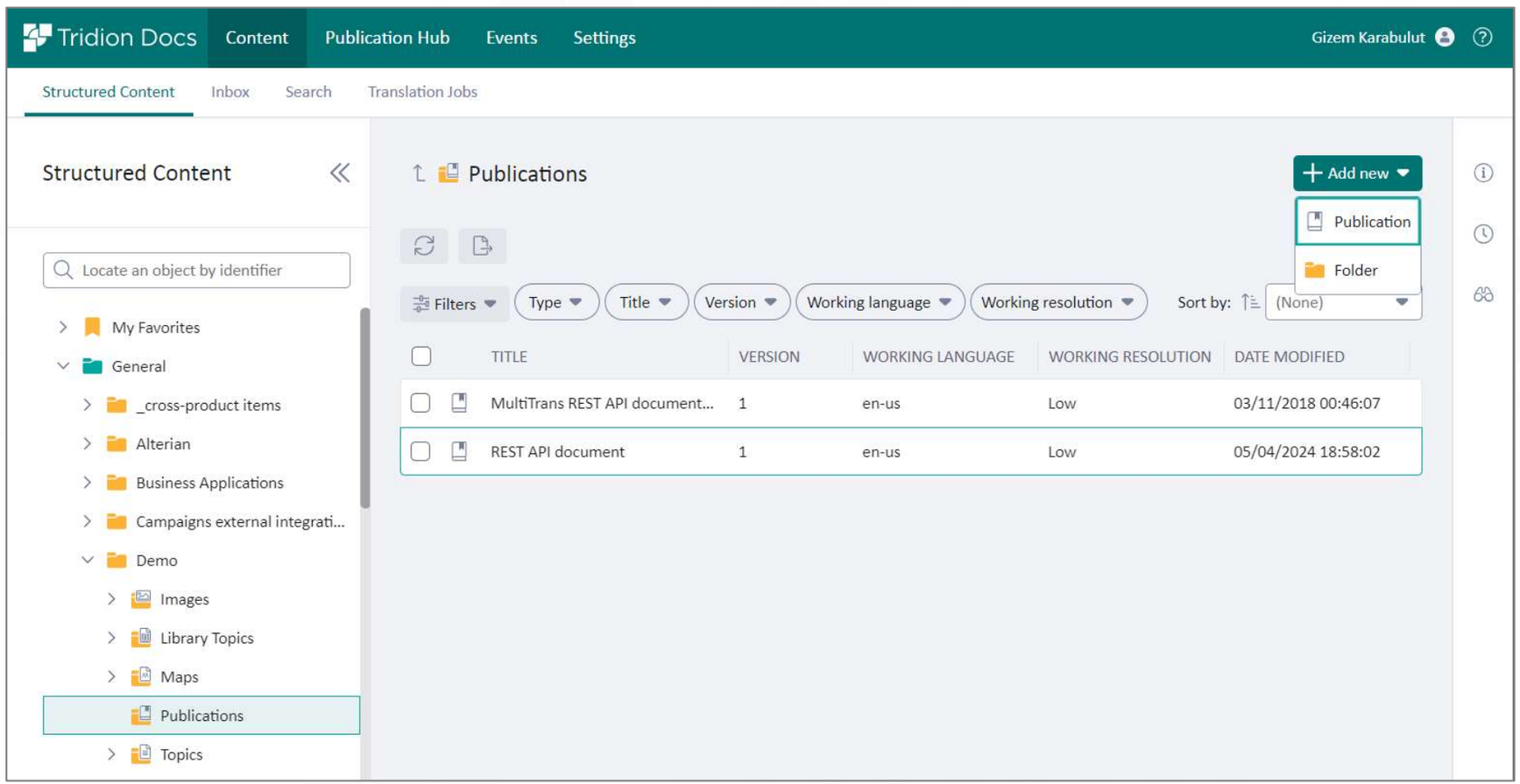
Add New Publication

- A publication can be created via the "Add New" flow



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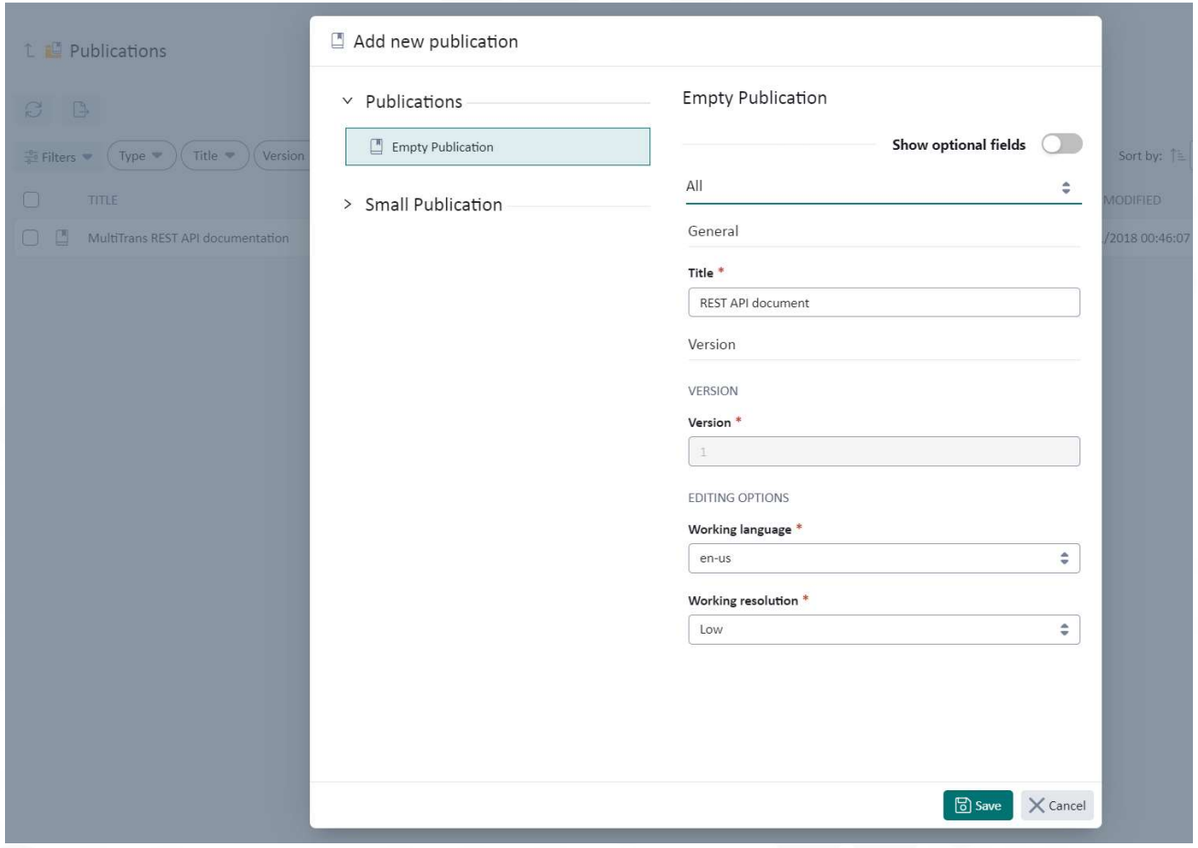
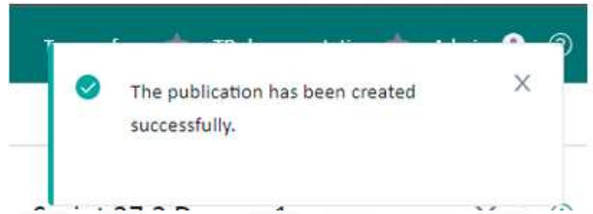
Add new publication modal



Result messages



*** Only the latest versions of the publication templates are displayed at the modal. (System Folder -> Editor Template -> Publications)

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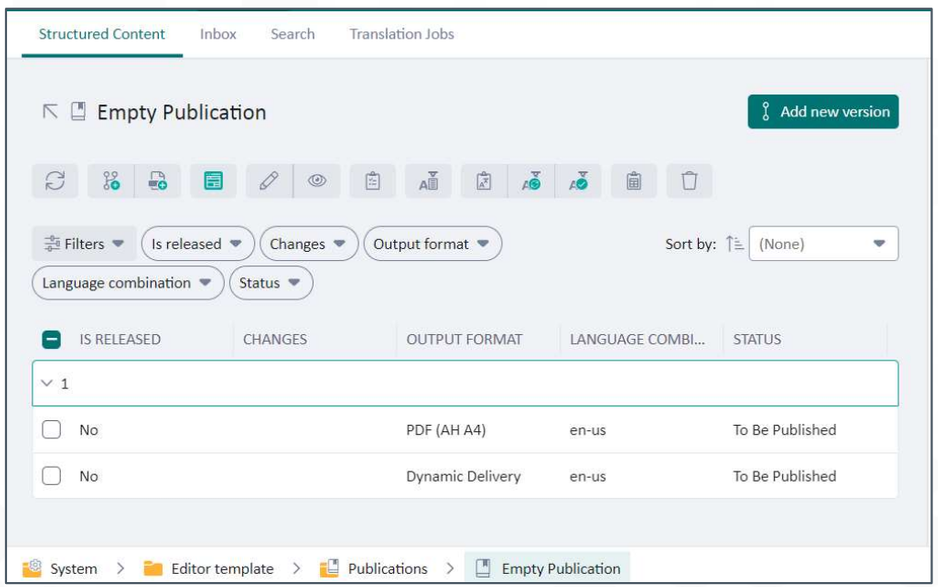
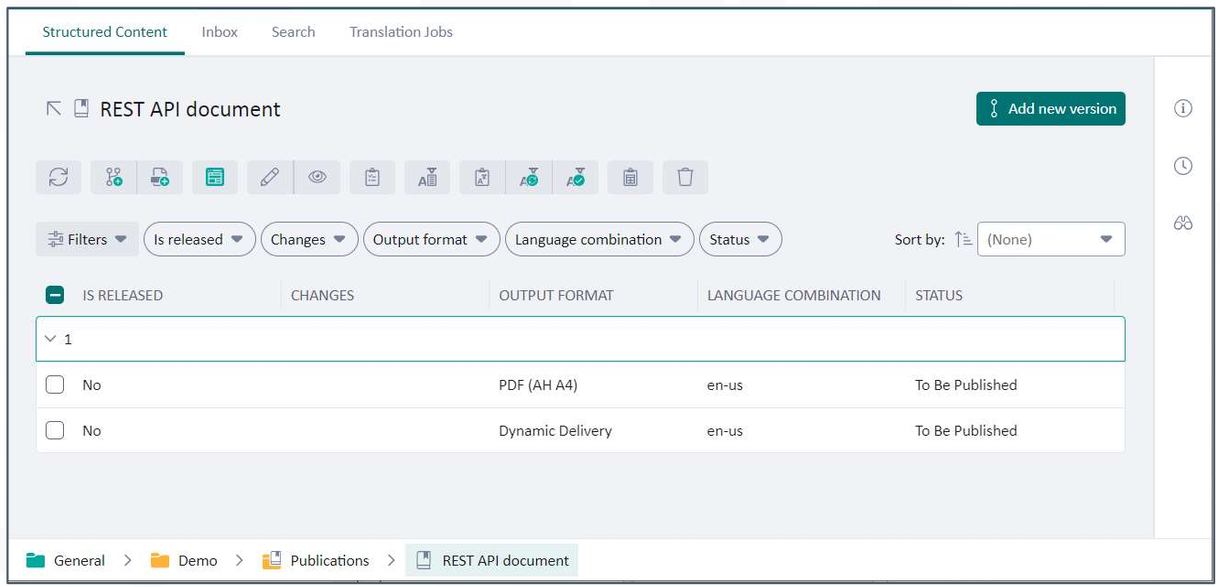
Outputs are created while adding a new publication

- Outputs are automatically copied from the selected publication template
- If copying any of the output formats fails, the remaining ones are copied, and a warning message is shown

Template's outputs



Publication's outputs



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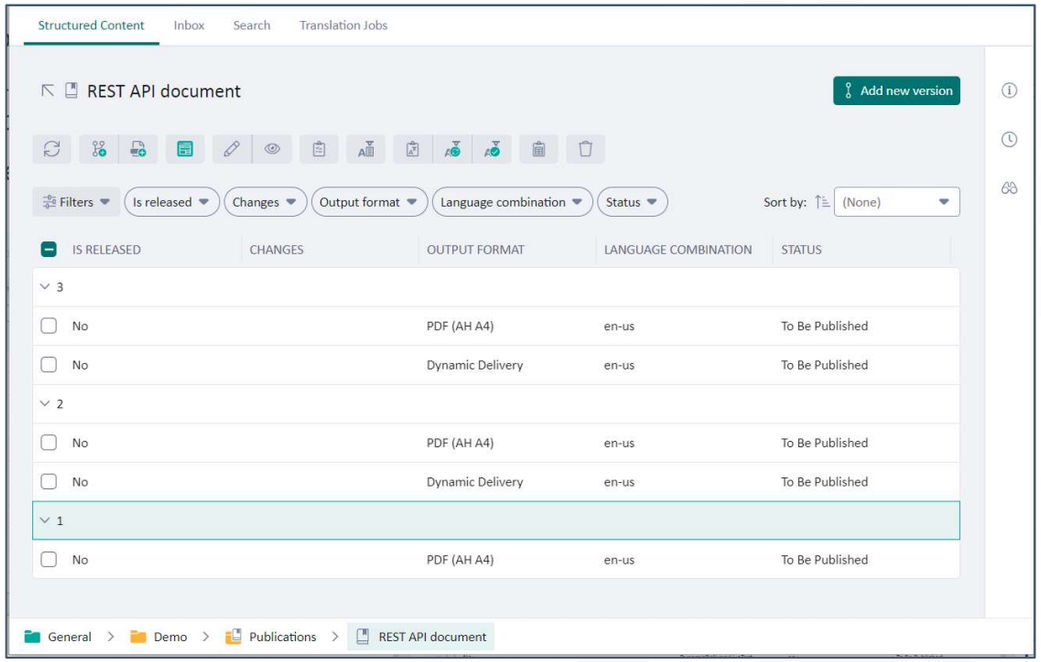
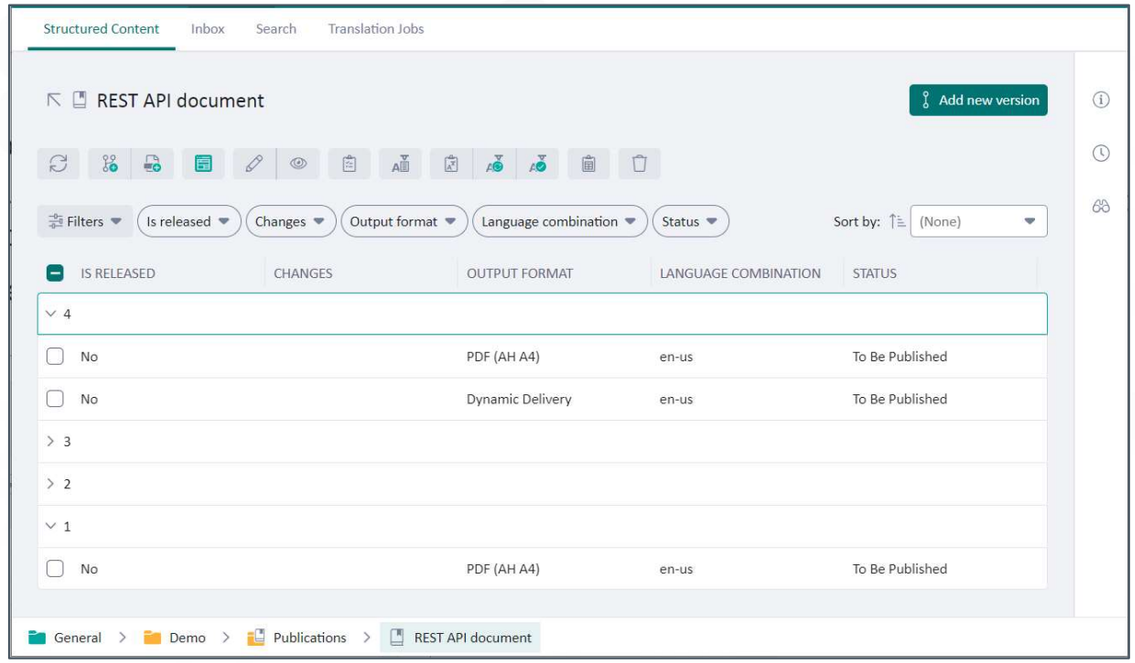
Add new version

- Outputs are copied from the latest version to the new version
- In the example below, although version 1 is selected, the outputs are copied from latest, version 3





*** When the Out-Of-The-Box metadataConfig.xml is used, the version is immediately created without showing an intermediate dialog screen.

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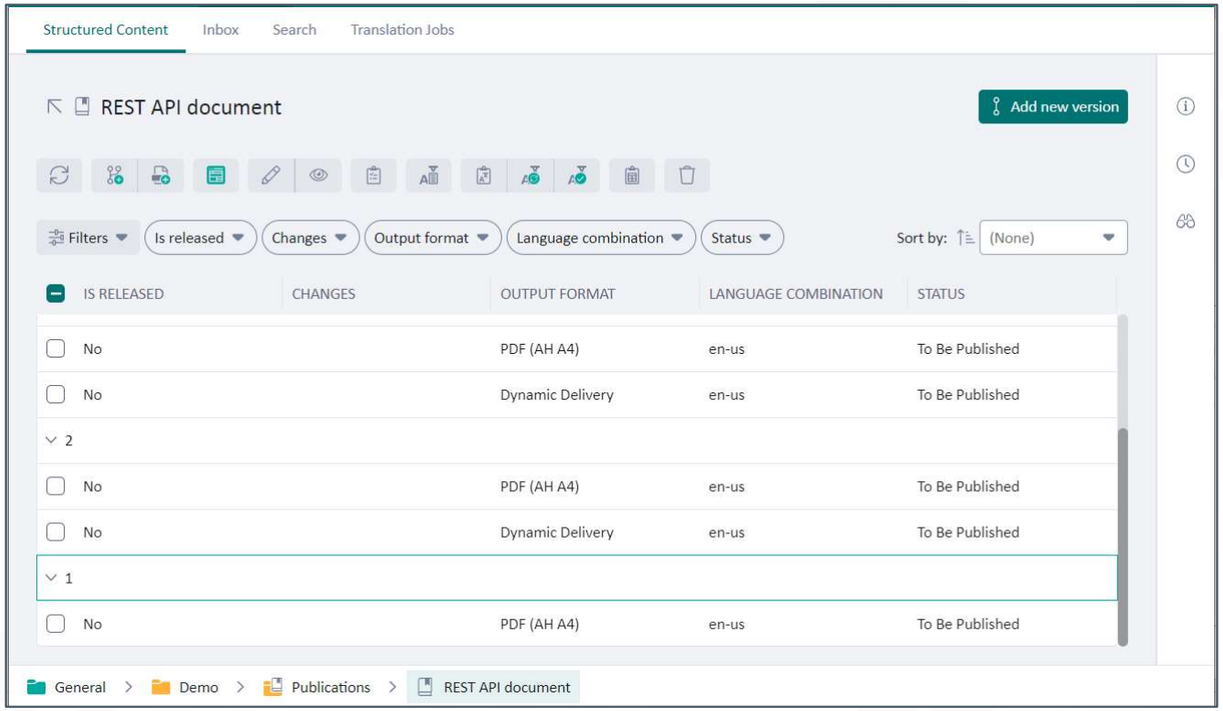
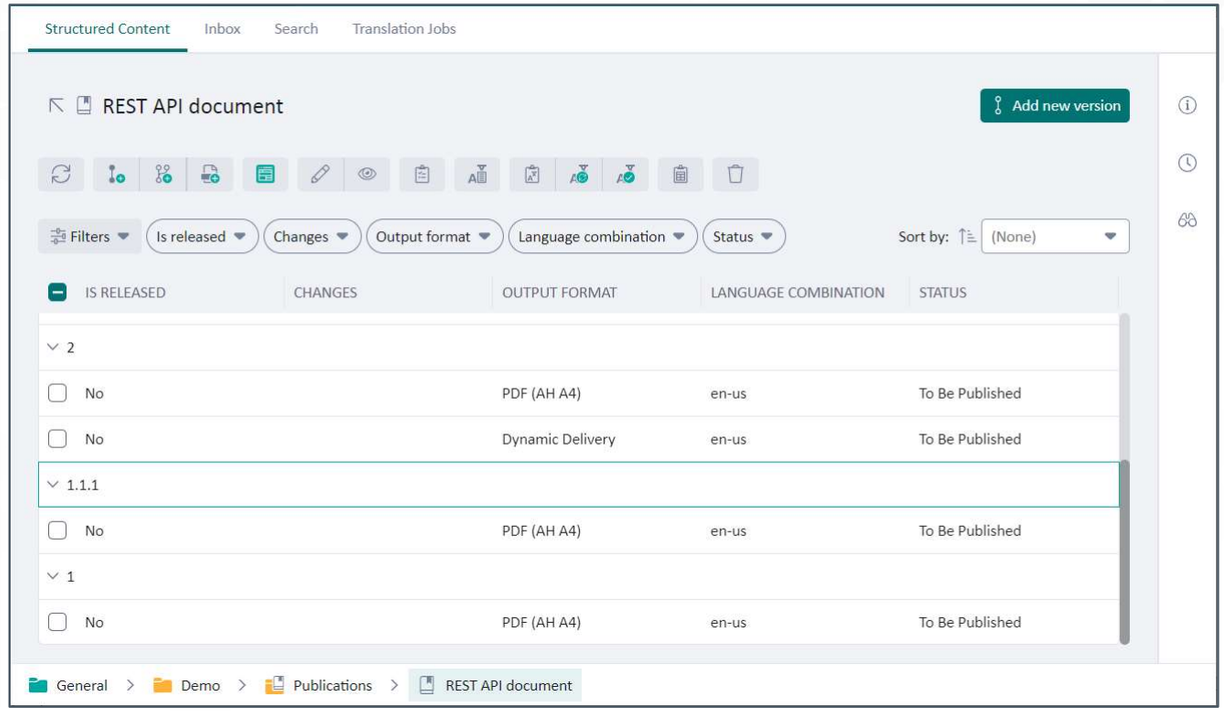
Add new branch

- Outputs are copied from the selected version of the publication to the new branch
- In the example below, the version 1 is selected, and output of the version 1 is copied to branch 1.1.1





*** When the Out-Of-The-Box metadataConfig.xml is used, the branch is immediately created without showing an intermediate dialog screen

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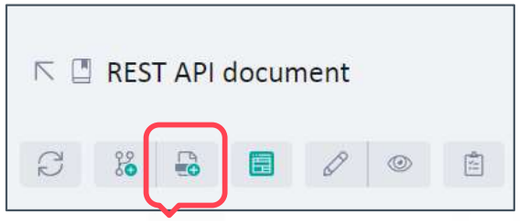
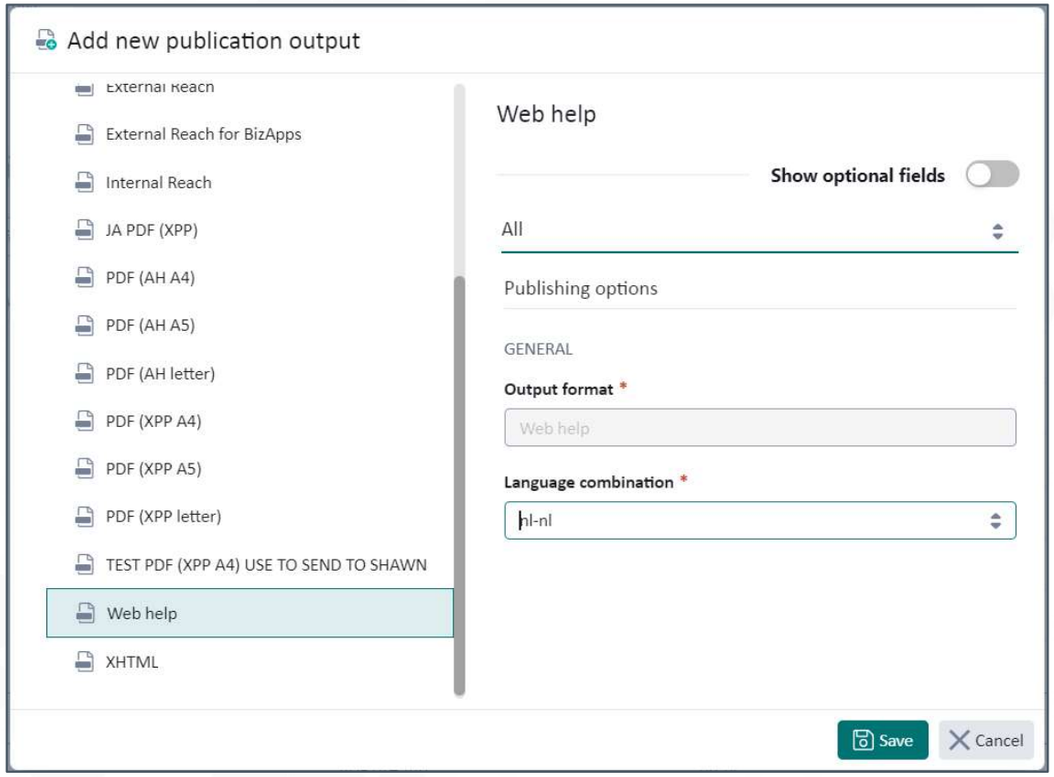
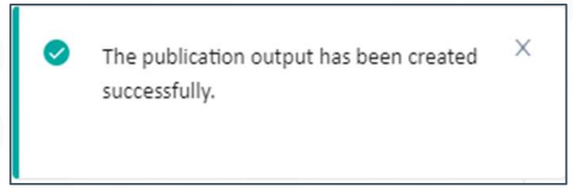
Add new publication output

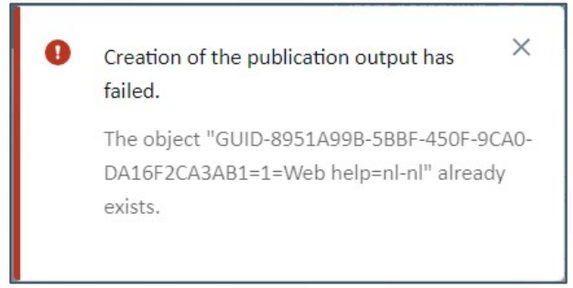


Add new publication output



Result messages





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Delete publication, version, branch or output

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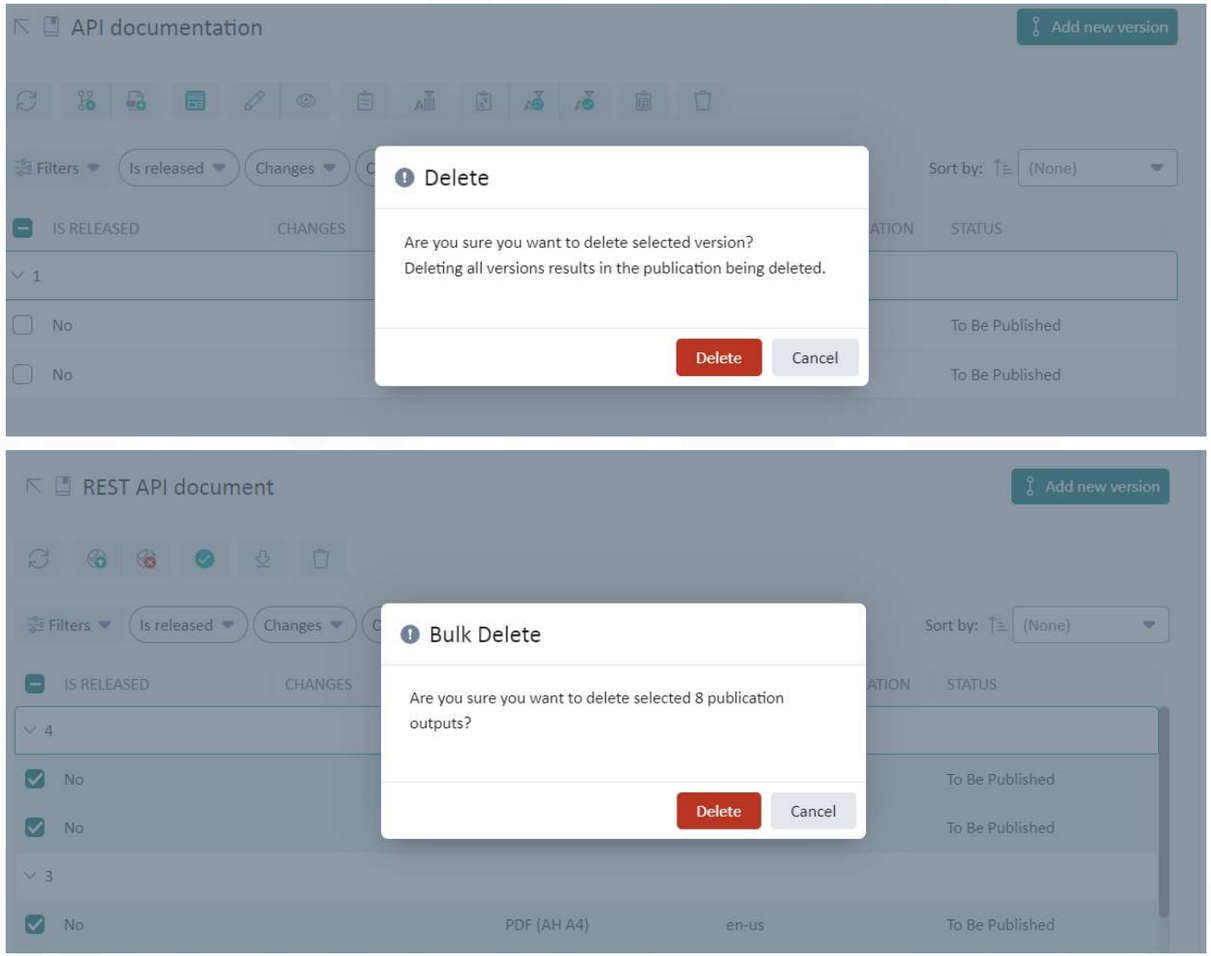
Publication’s Details View – Delete version / Delete output



- Deleting the last version also results in the deletion of the publication itself
- Deleting the last publication output does not affect the publication version, which will remain
- If the publication is released, outputs and versions cannot be deleted

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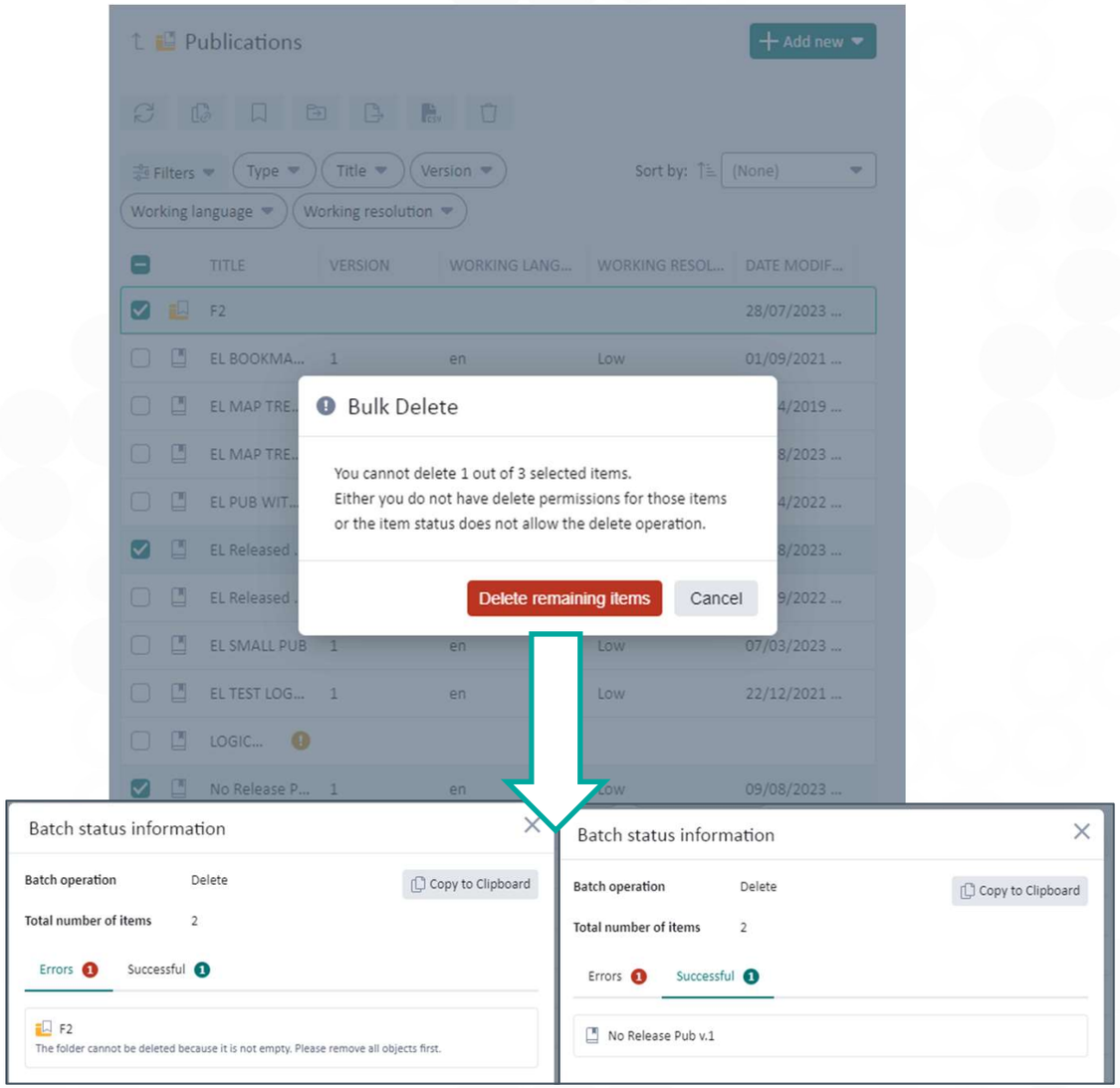
List View – Bulk delete publications



- Multi select possible
- Partial success is possible: In this example; a released pub, an unreleased pub and a folder with an object are selected

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Insights Area “Where Used” tab improvements

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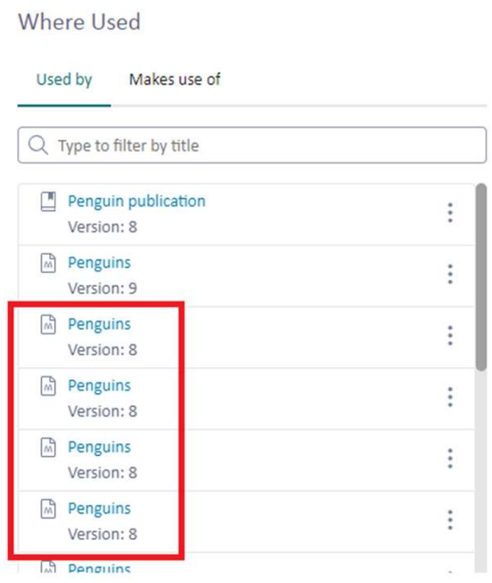
Community idea: Displaying language info

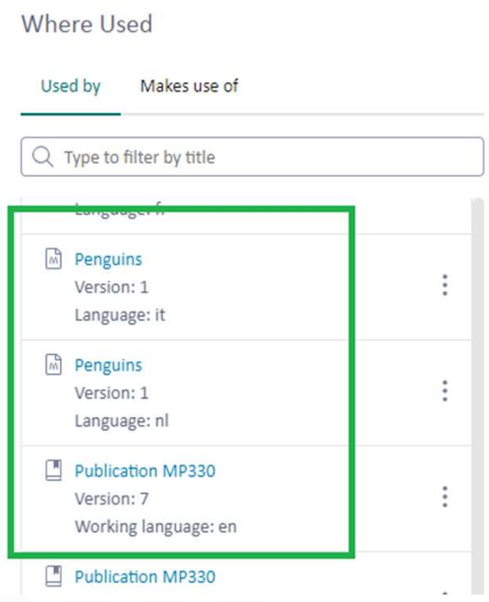
- **Before:** "Used by" tab of Where used panel only showed a version of an object / publication that selected object is used in
- **Now:** A language of an object or Working language of a publication is also shown to help users differentiate the items in the list

  ***Note: "Makes use of" tab still only shows a title because the references are made by GUID and are not bound to a specific version / language of the referenced object

Tridion Docs 15.0



Tridion Docs 15.1



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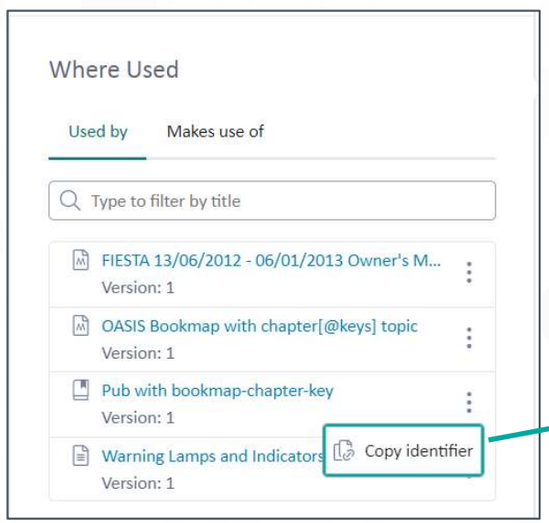
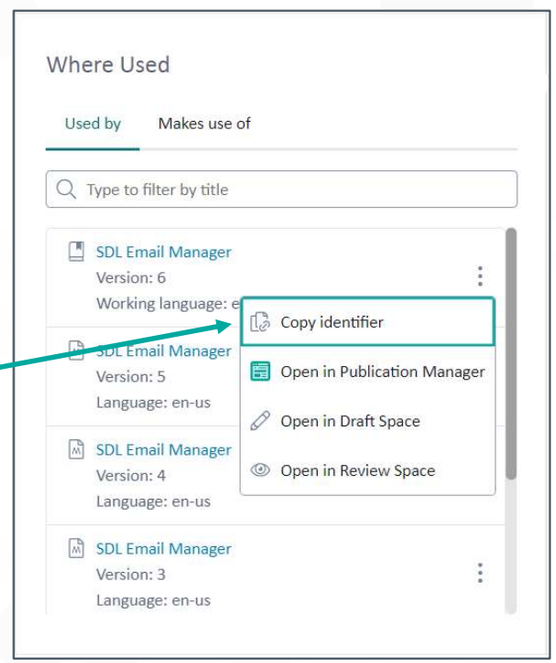
Community idea: Open in Draft / Review Space and Publication Manager buttons

- **Before:** At Where Used, only Copy identifier action was possible for publications
- **Now:** Opened in Draft Space, Review Space (if corresponding application is enabled on the system) and Publication Manager actions are available for easy navigation
    - For the "used by" on topics, maps and libraries it will open the publication at Collective Spaces and navigate to the item (navigationId is added in the url)

Tridion Docs 15.0



Tridion Docs 15.1



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Improvements in Workflow, Translation and Publication Reports

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Tridion Docs 15.0 – Warnings for missing resolutions

- Reports respect baselineResolution configuration which are defined system-wide
- At the reports, if a resolution is missing, it is displayed with a warning icon
  - This results in complicated view, with a lot of warning icons, especially for the user groups who use single resolution

TITLE	VERSION	STATUS	LANGUAGE	RESOLUTION
Five_Concepts_WithImages	1	Released	en	
Atlantic Puffin	2	Draft	en	
Puffin	1	Released	en	Low
Puffin	1	⚠		
Puffin	1	⚠		
Lesser Scaup	2	Draft	en	
LesserScaup	1	Released	en	Low
LesserScaup	1	⚠		
LesserScaup	1	⚠		

Resolution not shown for missing, so not filterable

Report XML Settings holds 3 resolutions: Low, High, Thumbnail

All missing resolutions indicated as warning

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Changes at the reports

- System-wide Xml Settings resolution are promoted to the generate report dialog
  - XML Settings > Reports > baselineResolutions field became obsolete
  - Generate report dialogs have resolution(s) selection
  - By default, the working resolution of the publication is selected at the dialog
- Reports display selected resolutions, distinguishing between working resolutions and extras
  - Rows for all selected but missing image resolutions are shown
  - Orange exclamation icon is used for the missing working resolution since it is required for any pub version
  - Gray exclamation icon and gray text font are used for missing other resolutions
- “Show missing resolutions” toggle is added as a short cut to the table filters
  - Toggle enables showing or hiding all missing resolutions’ rows at the report
  - Resolutions filter enables filtering the report based on the selected resolutions.
    - The filter is shown by default when the report was requested with more than one resolutions

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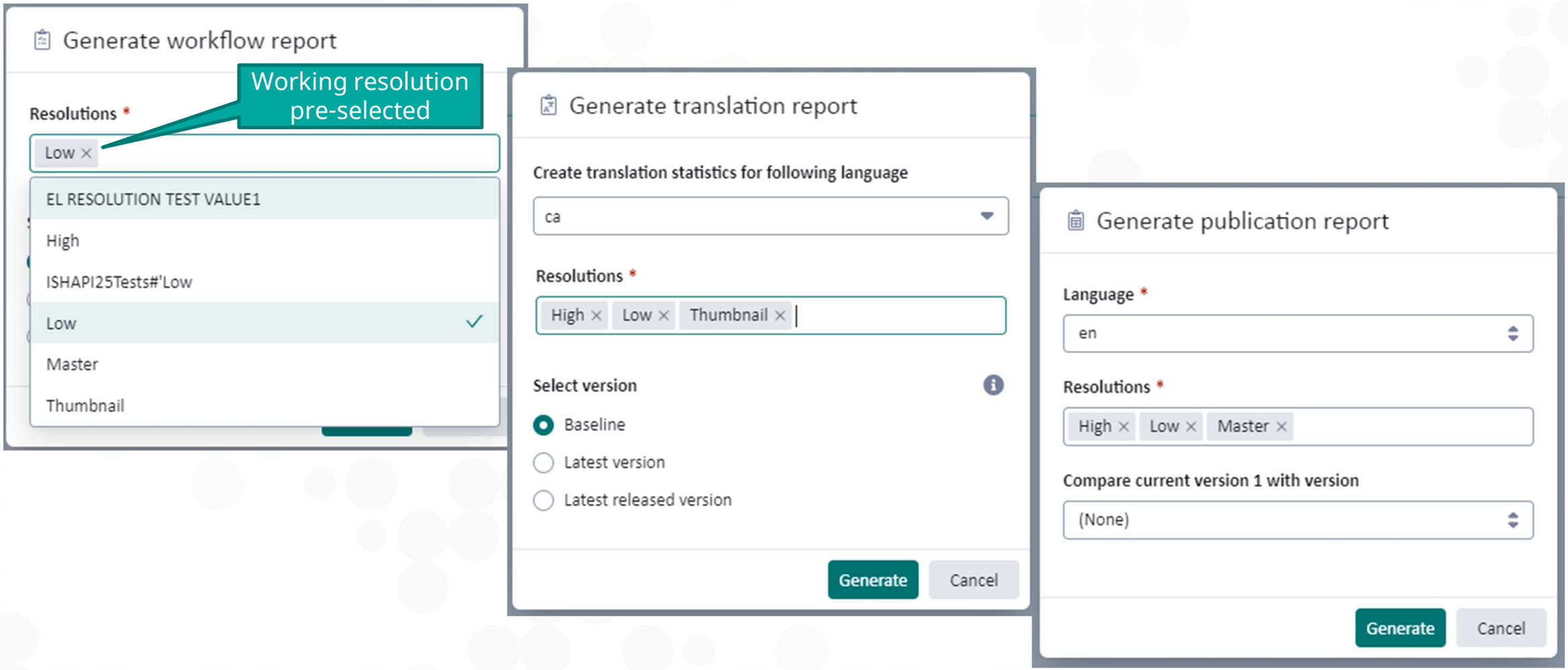
Generate report dialogs - Select resolutions



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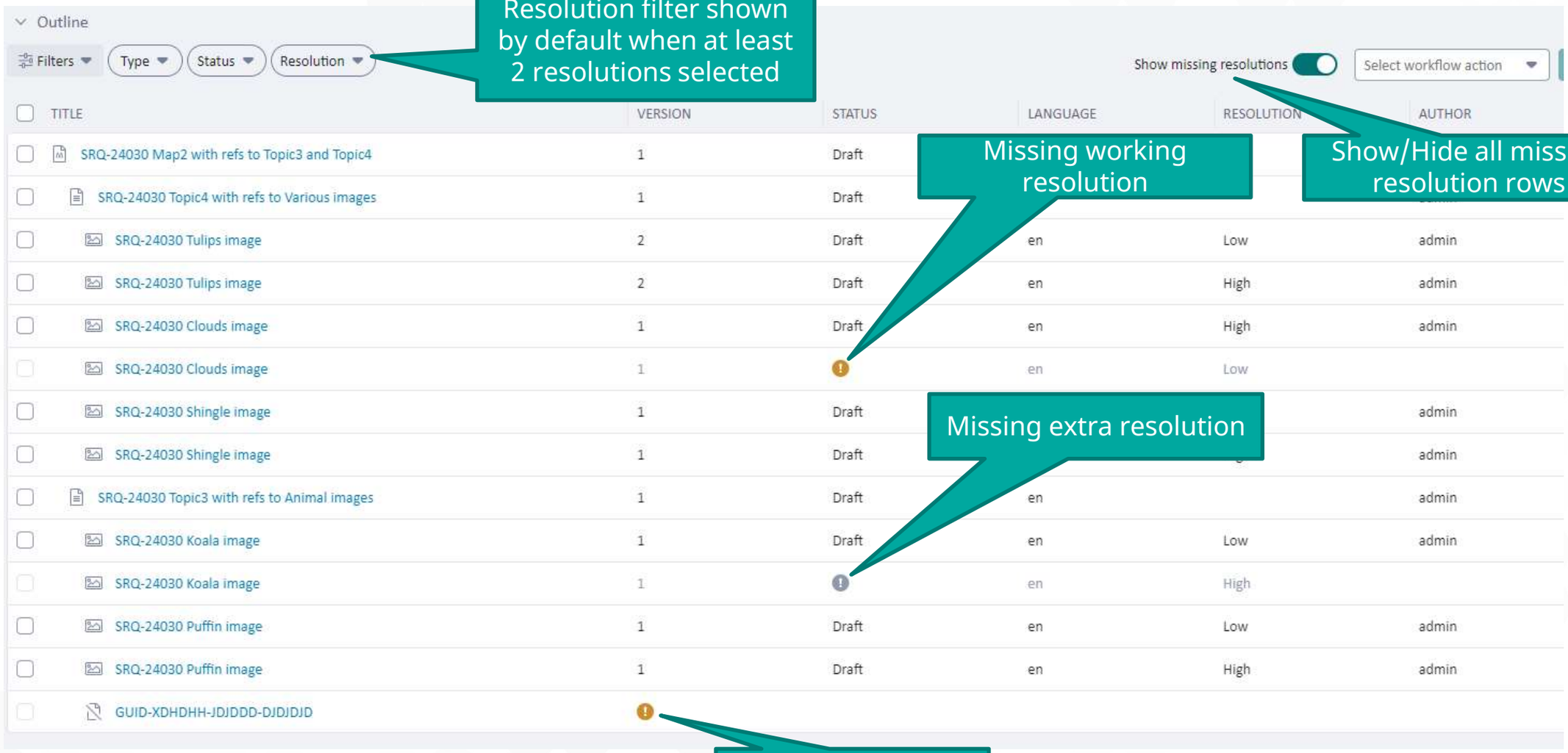
Tridion Docs 15.1 Workflow report with toggle on



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Update on Extension API

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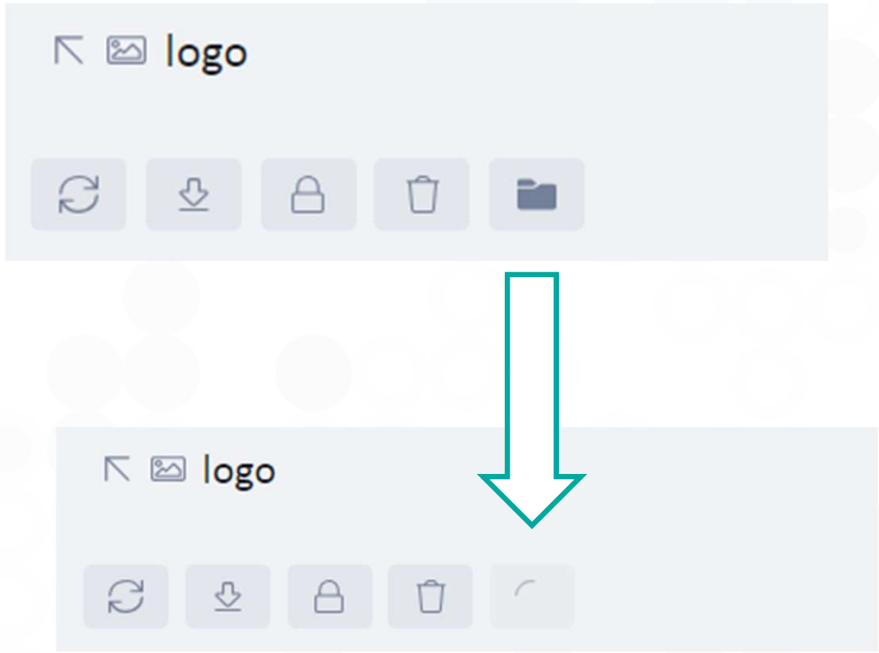
Loading status of action button extension



- ExplorerActionHookResult interface has changed
- The extensions created at version 15 will work in 15.1

```
.addExplorerAction(() => ({
    id: 'selectFolder',
    tooltip: t(TranslatableTerms.SelectFolderTooltip),
    label: t(TranslatableTerms.SelectFolderLabel),
    icon: SelectFolderIcon,
    isVisible: (props: ExplorerActionExtensionVisibilityConfiguration): boolean => {
        return props.activeView === ViewType.details;
    },
    hook: useSelectFolder,
}));
```

```
export type ExplorerActionExtensionHookResults = {
    /**
     * Return true is the action should be available
     *
     * @type {boolean}
     * @memberof ExplorerActionExtensionHookResults
     */
    readonly isAvailable: boolean;

    /**
     * Return true if you want to switch the button to the loading state.
     * Loading state changing icon to the spinner and disables the button
     *
     * @type {boolean}
     * @memberof ExplorerActionExtensionHookResults
     */
    readonly isLoading?: boolean;

    /**
     * Method that is called when the action is clicked
     *
     * @type {execute: () => void | Promise<void>}
     * @memberof ExplorerActionExtensionHookResults
     */
    readonly execute: () => void | Promise<void>;
};
```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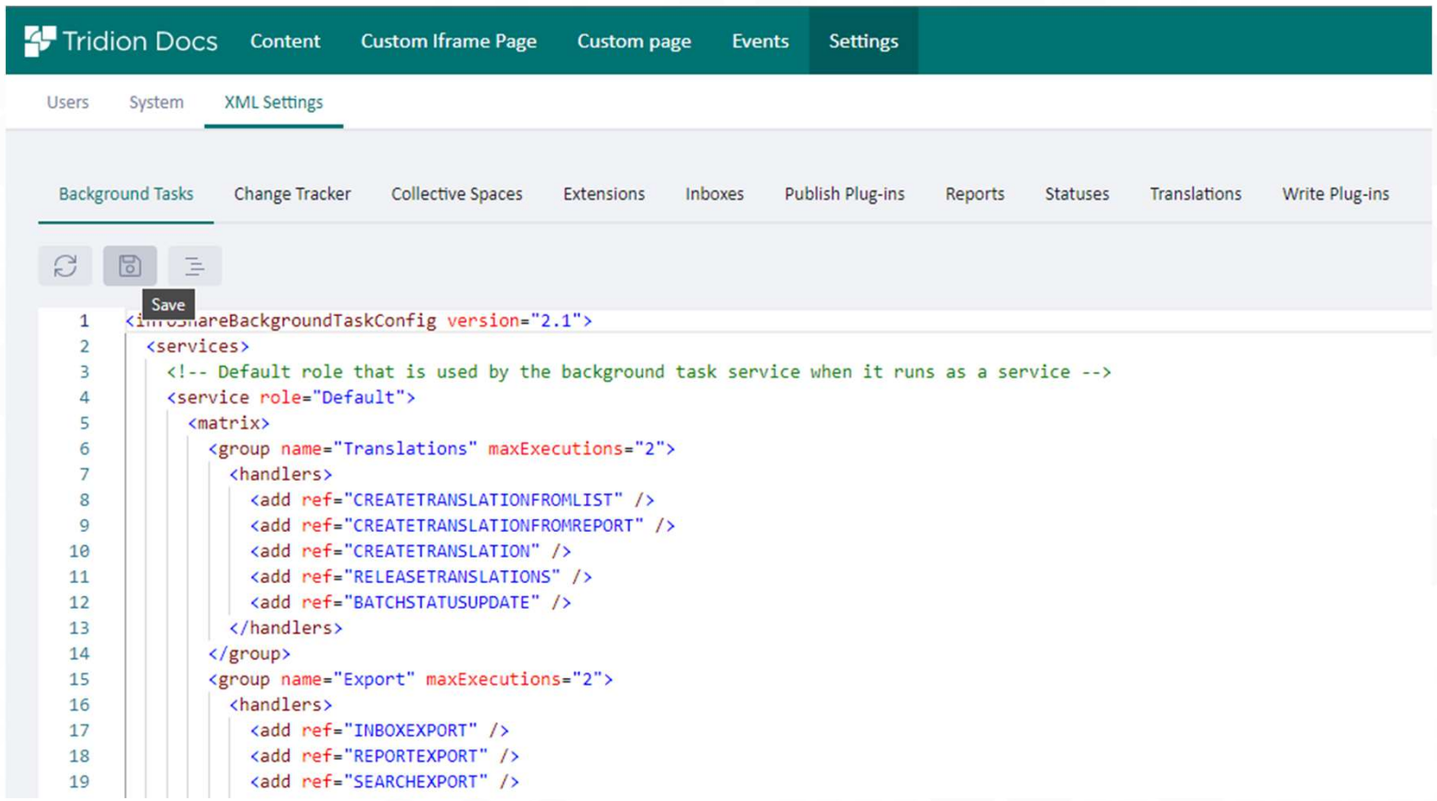
XML Settings – Saving with Ctrl+S

- Previously the changes made to XML settings could only be saved via Save button
- Now you can **also press Ctrl+S** to save them



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