Tridion Docs 15.1.1 Bootcamp Metrics

Andriy Zhidko, Product Owner

30 September 2024

Agenda

- Bootcamps, blog posts for Tridion Docs 15.1
- Metrics
  - Solution architecture
  - Enablers and Configuration
  - Initial data synchronization
  - Reuse calculation
  - User experience
  - Explaining demo data
  - Demo

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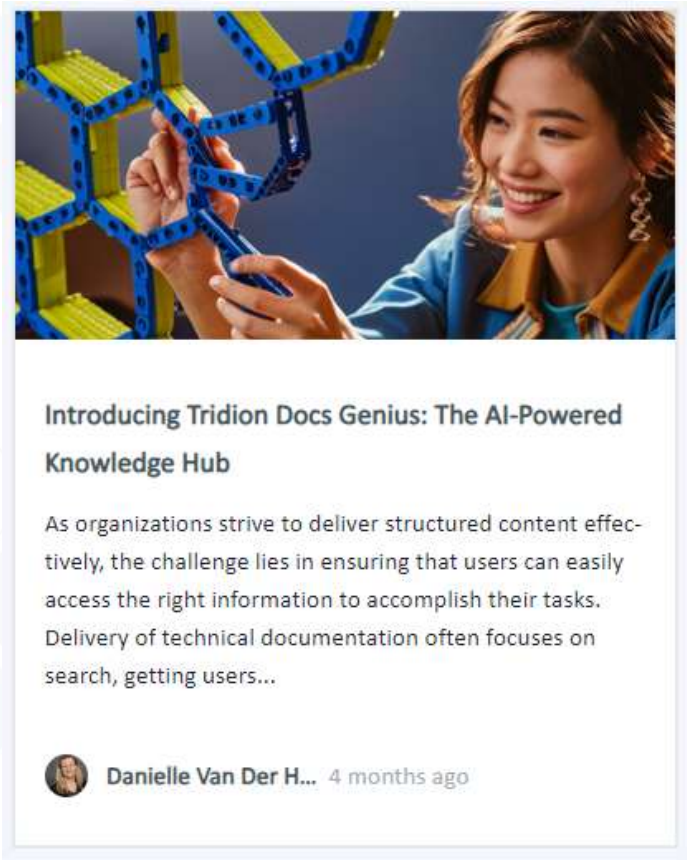
Bootcamps, blog posts for Tridion Docs 15.1

Introducing Tridion Docs Genius: The AI-Powered Knowledge Hub

- https://community.rws.com/product-groups/tridion/tridion-docs/b/weblog/posts/introducing-tridion-docs-genius-the-ai-powered-knowledge-hub



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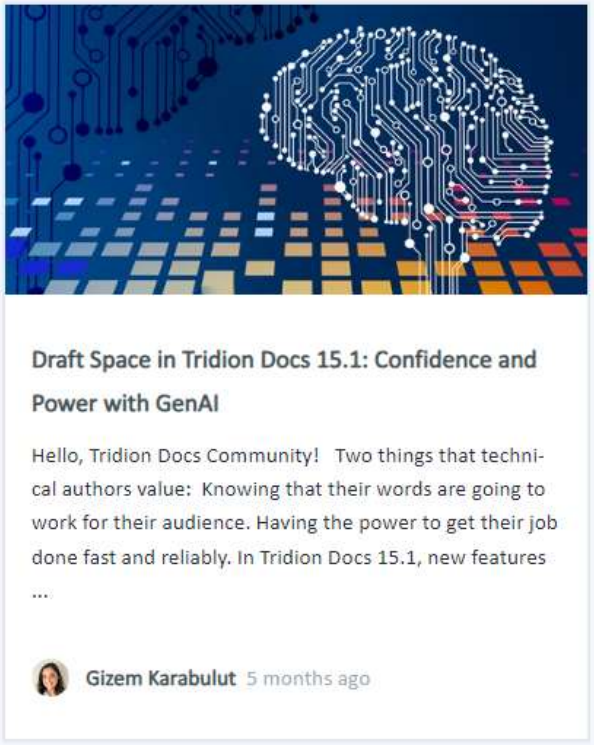
Draft Space in Tridion Docs 15.1: Confidence and Power with GenAI

- https://community.rws.com/product-groups/tridion/tridion-docs/b/weblog/posts/discover-what-s-new-in-collective-spaces-15-1



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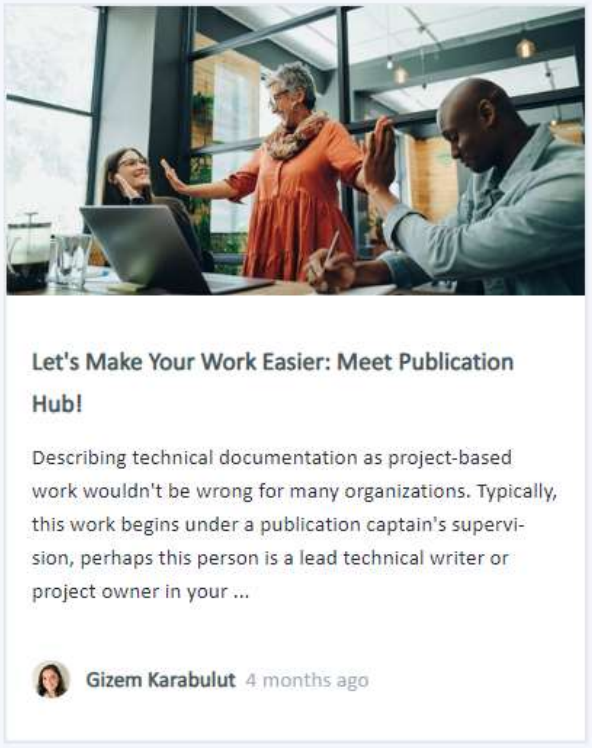
Let's Make Your Work Easier: Meet Publication Hub!

- https://community.rws.com/product-groups/tridion/tridion-docs/b/weblog/posts/let-s-make-your-work-easier-meet-publication-hub



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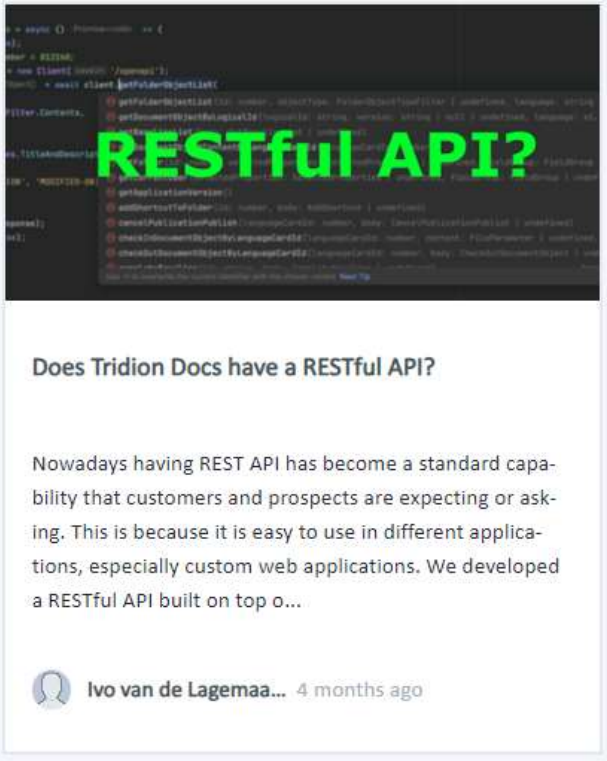
Does Tridion Docs have a RESTful API?

- https://community.rws.com/product-groups/tridion/tridion-docs/b/weblog/posts/does-tridion-docs-have-a-restful-api



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Client Tools, Generative AI architecture, Metrics and Platform Support

- https://community.rws.com/product-groups/tridion/tridion-docs/b/weblog/posts/client-tools-generative-ai-architecture-metrics-and-platform-support

Client Tools, Generative AI architecture, Metrics and Platform Support

Technical documentation leads and information architects, content authors and writers, SMEs, integrators, and administrators do you want to make your lives easier with the new features of Tridion Docs 15.1? In an extensive bootcamp session (see below...

Andriy Zhidko 3 months ago

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Metrics

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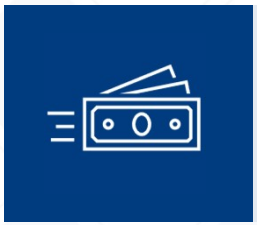
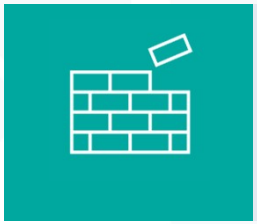
Customer benefits



Return on investment (ROI)

As a Head of Department or Tridion Docs suite owner, I would like to see ROI of using Tridion Docs product so I can protect/justify usage of a system with an upper management/budgeting team.



Content re-use level

As a Head of Department or Tridion Docs suite owner, I would like to see content re-use status system-wide, per department, so I can decide where to improve to increase ROI.

Productivity

As a Head of Department or Tridion Docs suite owner, I would like to see productivity (system-wide, department) to decide on timelines, resourcing, etc

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Solution Architecture

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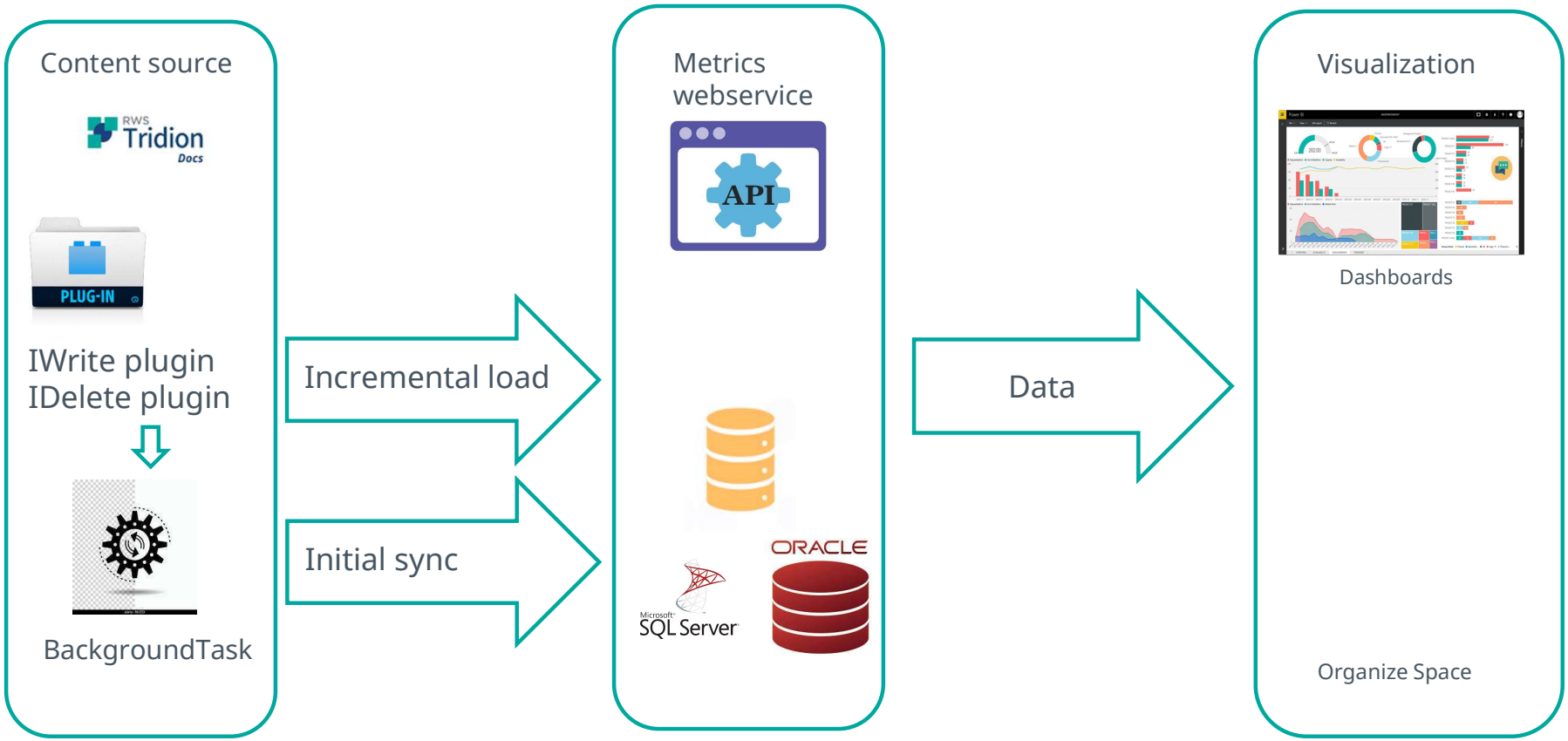
Most optimal technical solution



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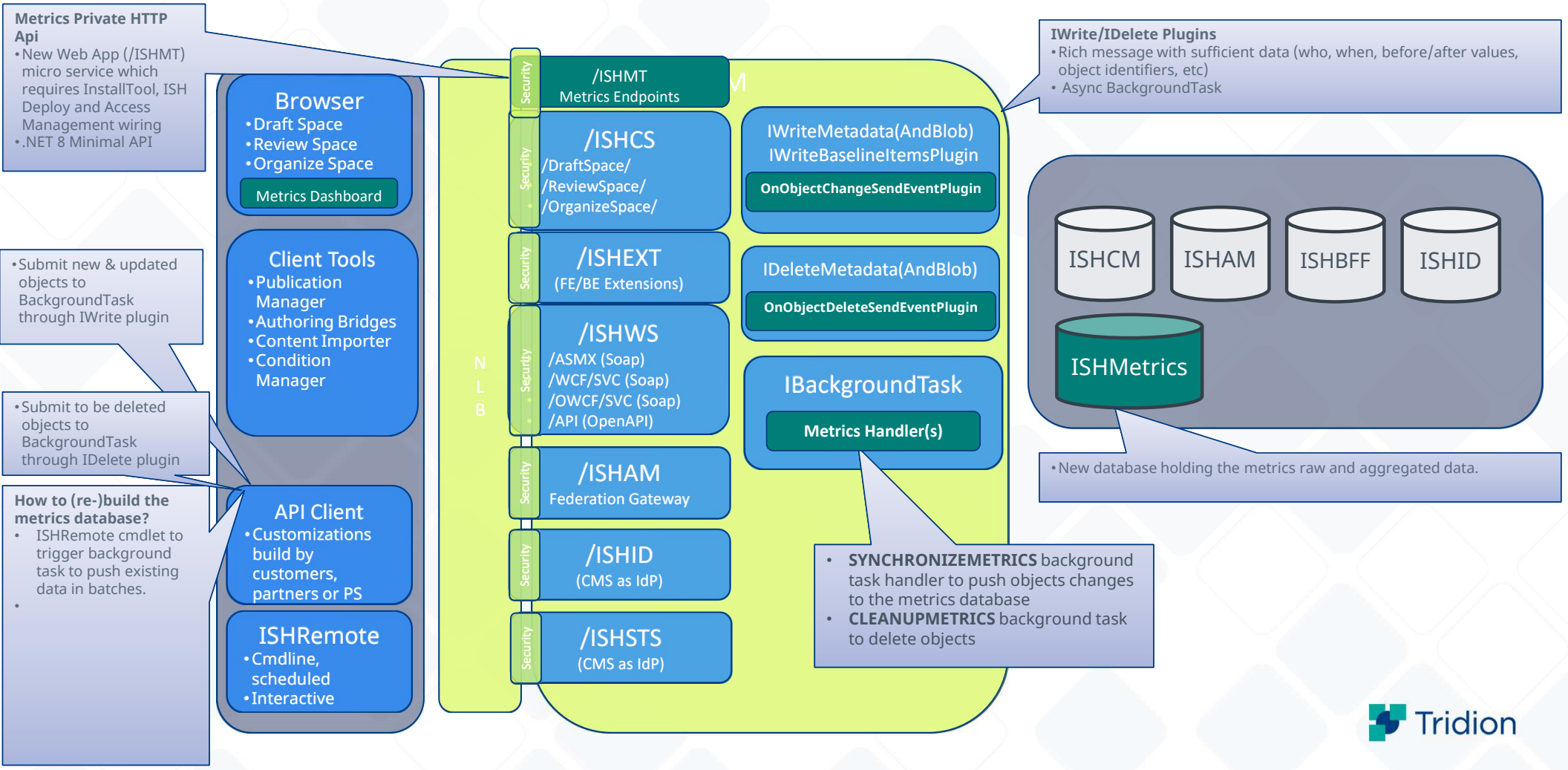
Solution Architecture



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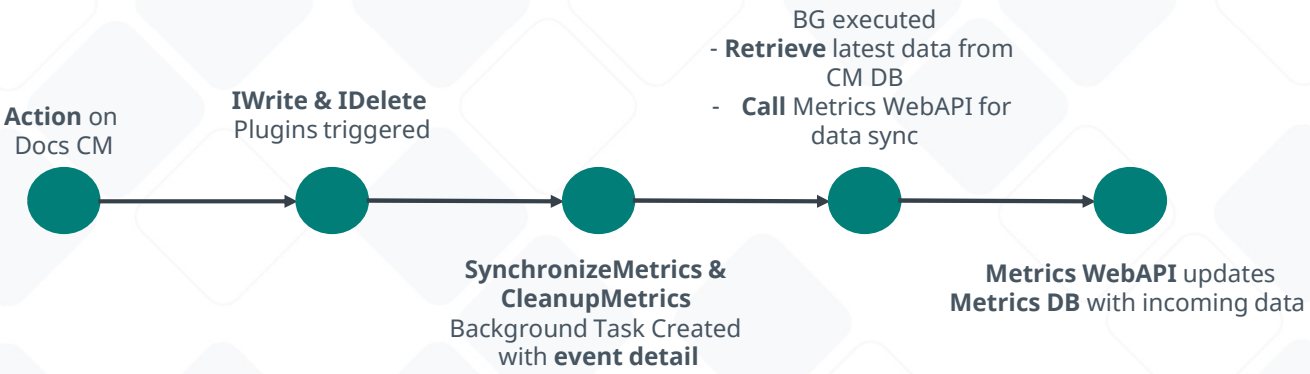
Metrics data flow live updates



Metrics Database job runs on **scheduled interval** to do the following
- Calculate **reuse status** for document objects
- Clean up **expired** items from metrics database

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Enablers and Configuration

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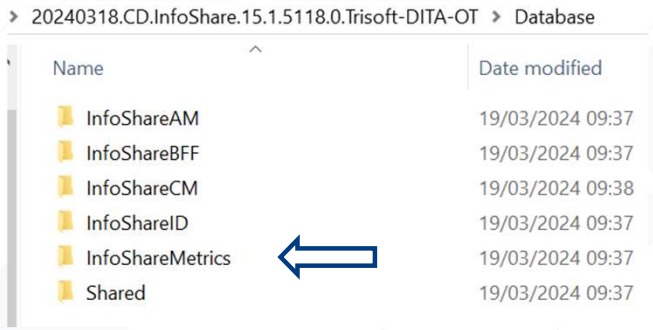
Metrics Database is required

Since 15.1.0

- New required Metrics Database
  - New Metrics folder on the CD
- New Database job for Metrics
  - Calculate reuse status for document objects
  - Clean up expired items from metrics storage



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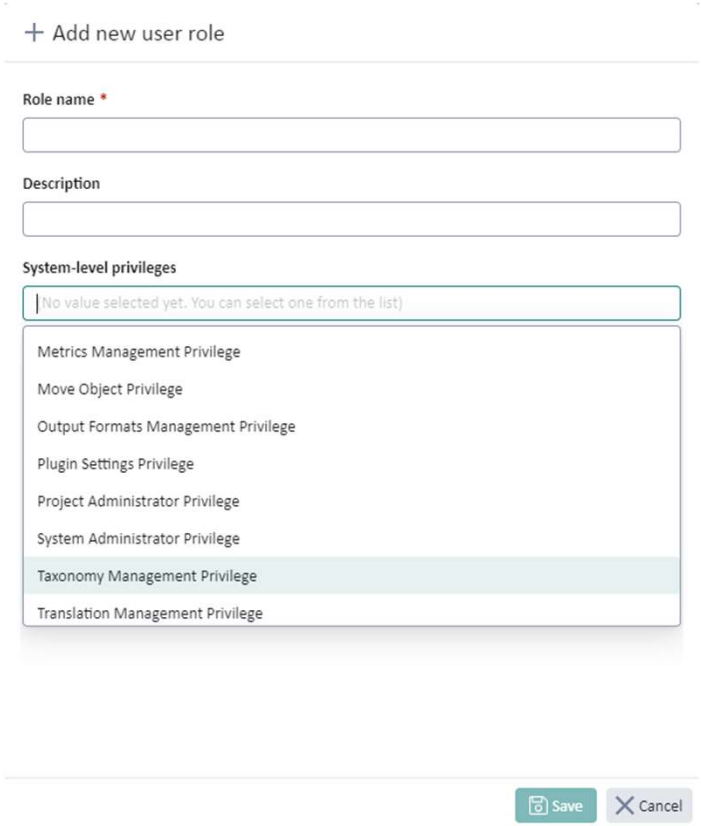
Privilege

Since 15.1.0

- VPRIVILEGEMETRICSMANAGEMENT
  - Metrics management privilege determines whether a user is allowed to view and manage metrics



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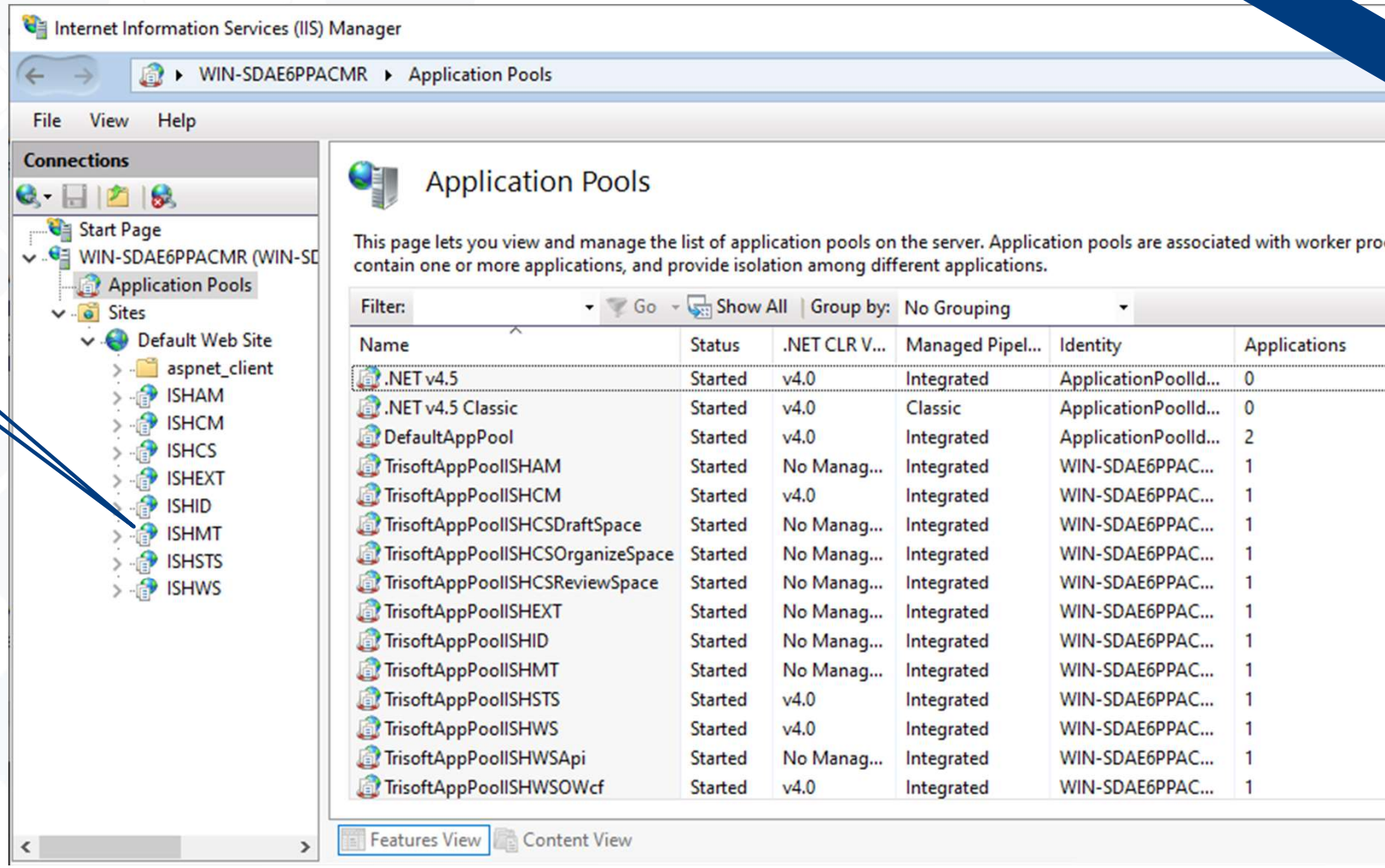
Metrics webservice

Since 15.1.0



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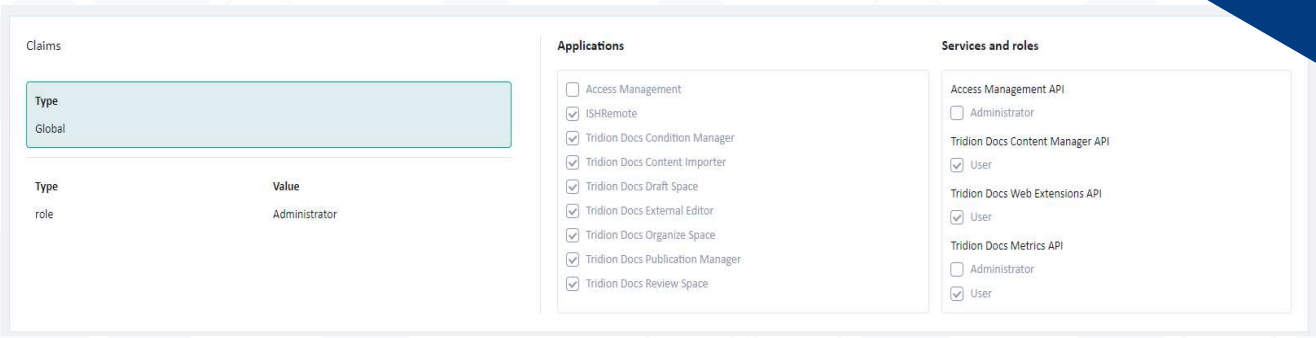
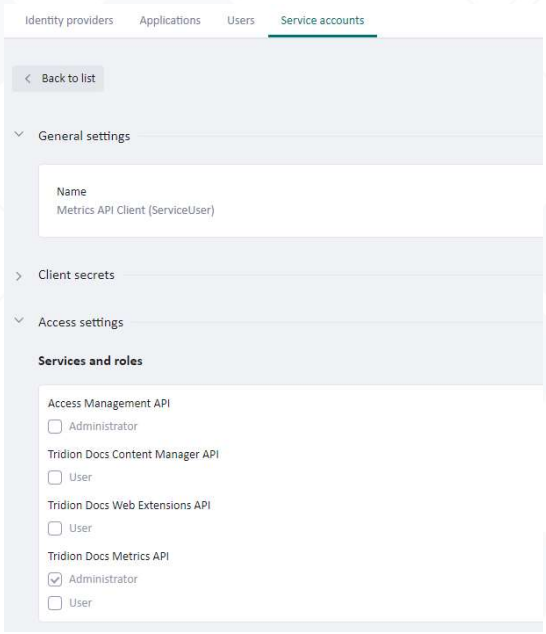
Integration with Access Management

Since 15.1.0

- New service and roles
  - Service: Tridion Docs Metrics API
  - Roles: User and Administrator
  - authorization in a new Metrics webservice
- New Service account: Metrics API Client
  - service to service communication (background task with Metrics webservice)





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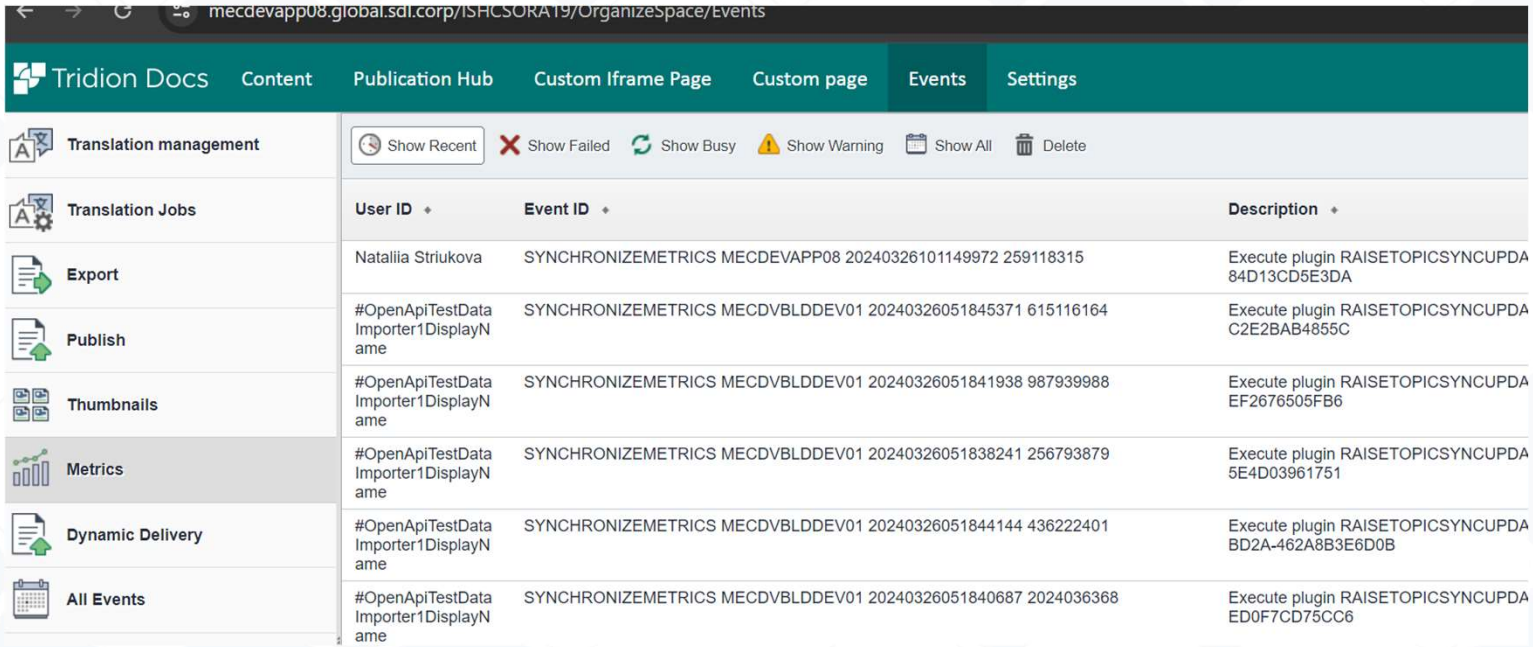
Logging

Since 15.1.0

- New Events menu item in Organize Space



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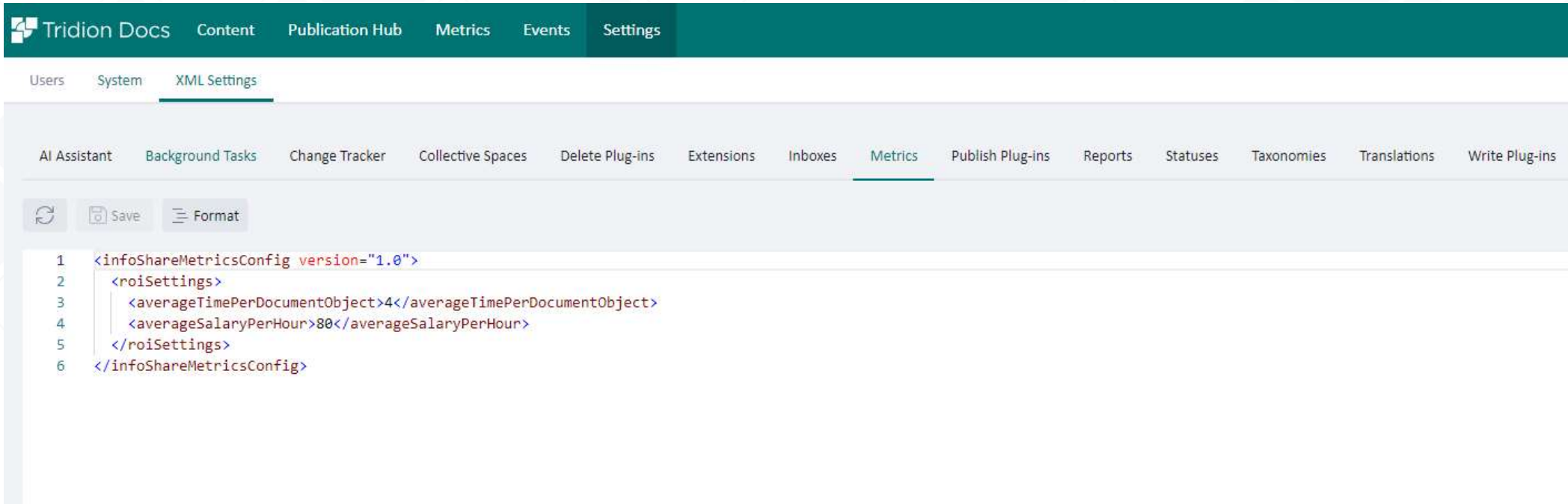
Settings for Metrics

- New Metrics settings area in Organize Space
- Configuration is used for Return on Investment chart



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IDelete next to IWrite plugins

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The need

Under Community Review — over 2 years ago — More

Delete plugins similar to Write plugins

+3

Proposed interface:

Current access model allows read or write access only on the folders. Child folders get the same access similar to the parent folder. In this way, we do not have the complete control on the child folder's objects like graphics or topics. If we have the Delete plugins with the help of metadata on the items, delete action can be controlled more precisely.

Plugin · delete · Metadata · Access

Muralikrishna Prodduturi

Under Community Review — over 2 years ago — More

Allow delete only if an Item is not published to Dynamic Delivery

+3

In SDL Docs CMS, users can delete a publication, even after it has been published to Dynamic Delivery and has a "Draft" status. This results in entries in the broker database that cannot be removed because they are no longer associated with any item in the CM database. Over time the orphan items keep increasing in the broker database and could be part of the content returned from the PCA service. This could result in unexpected content to different clients consuming content from PCA.

I suggest forcing the condition "allow delete only if not published" when deleting an item from CMS.

Tridion Docs · UI · Dynamic Delivery · Content Manager · delete · web client

Saurabh Gangwar

Undelete?

Kendall Shaw *over 2 years ago*

I think the answer is no. But, is there a way to protect against someone accidentally deleting an ob

If not, has anyone dealt with this issue. For example, a service could imitate backup software, craw

TD14SP1: Undelete content

Neman Syed *over 3 years ago*

Hi all. A user deleted the language-level object that contains the actual content of a topic. What are our options to undelete? Is there any well-hidden recycle bin?

If not, why not? If yes, why is it hidden/how do we reveal it?

Thanks!

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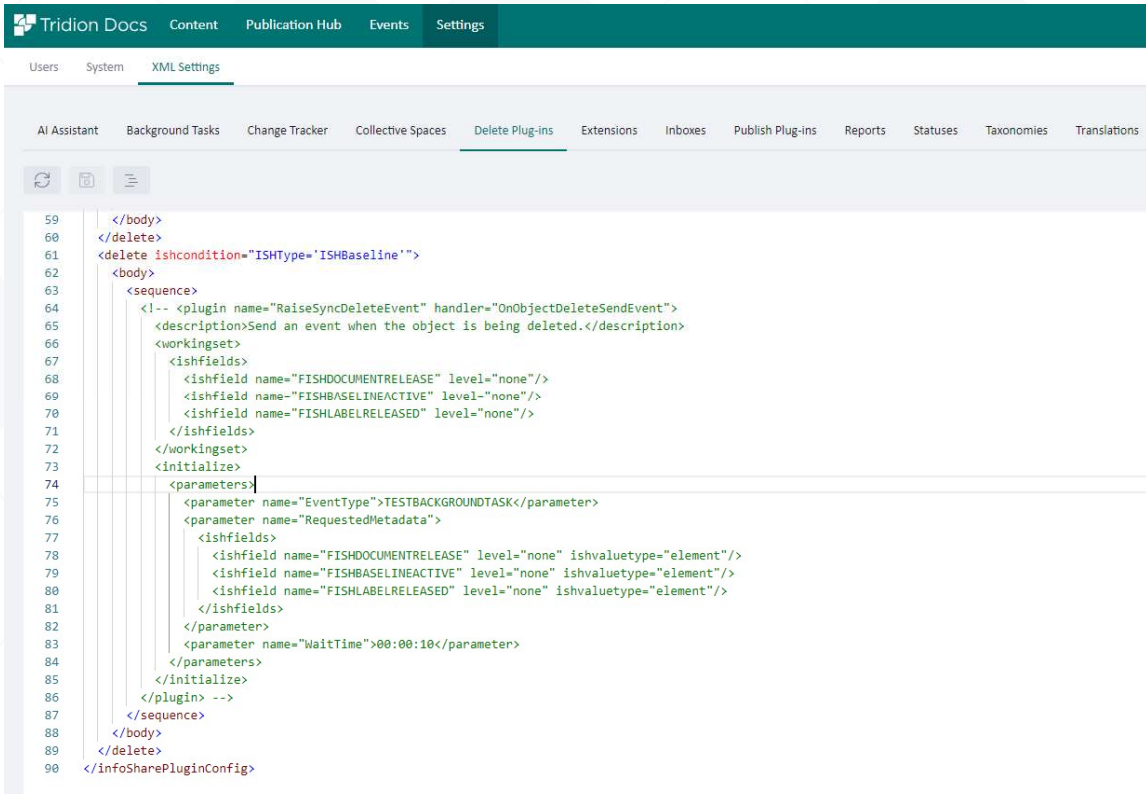
IDeleteMetadata Plugin

- An extension point to extend the functionality of Tridion Docs
- Supported for objects
  - ISHMasterDoc, ISHModule, ISHIllustration, ISHTemplate, ISHLibrary, ISHPublication, ISHBaseline



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Metrics IDelete plugins

Since 15.1.0

- Keep in sync Metrics storage and Tridion Docs Content Manager
- RaiseSyncDeleteDocumentObjectEvent
  - Clean up Metrics storage once document object or its version is deleted in Tridion Docs Content Manager
- RaiseSyncDeletePublicationEvent
  - Clean up Metrics storage once publication or its version is deleted in Tridion Docs Content Manager
- ~~Both are enabled out of the box but not doing a synchronization~~
  - ~~Require Tridion Docs 15.1 Update 1~~

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IWrite plugins

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IWrite Plugins

- An extension point to extend the functionality of Tridion Docs.
- Currently we have two kinds of IWrite plugins
  - IWriteMetadataAndBlobPlugin
  - IWriteMetadataPlugin
- Supported for objects
  - ISHMasterDoc, ISHModule, ISHIllustration, ISHTemplate, ISHLibrary, ISHPublication, ISHProject and ISHAnnotation

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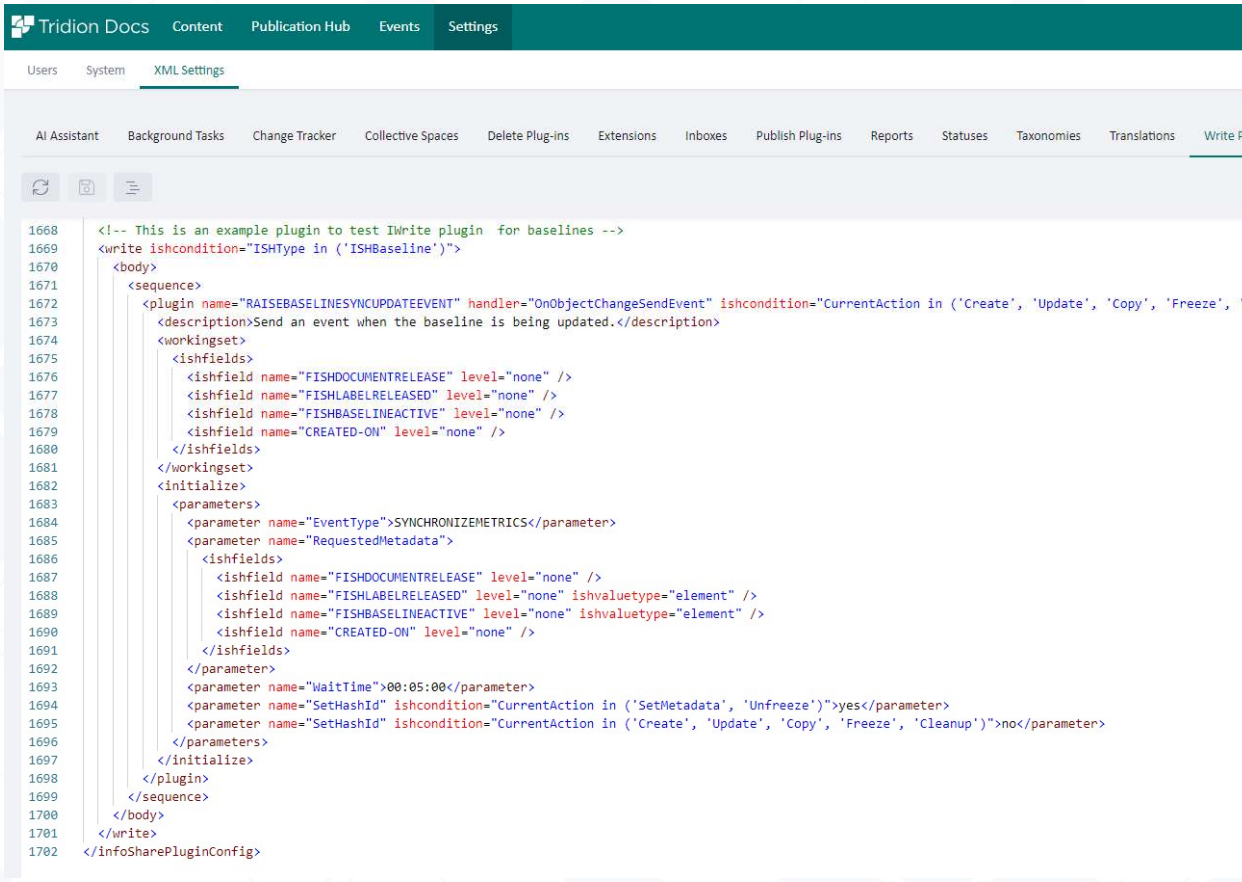
IWrite Plugins for baseline

- Supporting
  - Existing IWriteMetadataPlugin
- New IWrite plugin
  - IWriteBaselineItemsPlugin
- New supported objects
  - ISHBaseline




```
<!-- This is an example plugin to test IWrite plugin  for baselines -->
<write ishcondition="ISHType in ('ISHBaseline')">
  <body>
    <sequence>
      <plugin name="RAISEBASELINESYNCUPDATEEVENT" handler="OnObjectChangeSendEvent" ishcondition="CurrentAction in ('Create', 'Update', 'Copy', 'Freeze',
        <description>Send an event when the baseline is being updated.</description>
        <workingset>
          <ishfields>
            <ishfield name="FISHDOCUMENTRELEASE" level="none" />
            <ishfield name="FISHLABELRELEASED" level="none" />
            <ishfield name="FISHBASELINEACTIVE" level="none" />
            <ishfield name="CREATED-ON" level="none" />
          </ishfields>
        </workingset>
        <initialize>
          <parameters>
            <parameter name="EventType">SYNCHRONIZEMETRICS</parameter>
            <parameter name="RequestedMetadata">
              <ishfields>
                <ishfield name="FISHDOCUMENTRELEASE" level="none" />
                <ishfield name="FISHLABELRELEASED" level="none" ishvaluetype="element" />
                <ishfield name="FISHBASELINEACTIVE" level="none" ishvaluetype="element" />
                <ishfield name="CREATED-ON" level="none" />
              </ishfields>
            </parameter>
            <parameter name="WaitTime">00:05:00</parameter>
            <parameter name="SetHashId" ishcondition="CurrentAction in ('SetMetadata', 'Unfreeze')">yes</parameter>
            <parameter name="SetHashId" ishcondition="CurrentAction in ('Create', 'Update', 'Copy', 'Freeze', 'Cleanup')">no</parameter>
          </parameters>
        </initialize>
      </plugin>
    </sequence>
  </body>
</write>
</infoSharePluginConfig>
```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Metrics IWrite plugins

Since 15.1.0

- Keep in sync Metrics storage and Tridion Docs Content Manager
- Set of plugins for topic, illustratrion, publication, publication output, baseline:
  - RAISETOPICSYNCUPDATEEVENT
  - RAISEILLUSTRATIONSYNCUPDATEEVENT
  - RAISEPUBLICATIONSYNCUPDATEEVENT
  - RAISEPUBLICATIONOUTPUTUPDATESYNCEVENT
  - RAISEBASELINESYNCUPDATEEVENT
- ~~All are enabled out of the box but not doing a synchronization~~
  - ~~Require Tridion Docs 15.1 Update 1~~

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IBackgroundTask plugins

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Metrics IBackgroundtask plugins

Since 15.1.0

- Keep in sync Metrics storage and Tridion Docs Content Manager
- Use events from IWrite and IDelete plugins
- Background tasks:
  - SYNCHRONIZEMETRICS – update events
  - CLEANUPMETRICS – delete events
- ~~Both are enabled out of the box but not doing a synchronization~~
  - ~~Require Tridion Docs 15.1 Update 1~~

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CM – IWrite, IDelete and IMove object plugins

Since 15.1.0

Object Types	Type	Level	IWrite (Create, Update, Set, Checkin..)	IDelete (Delete, Remove, ..)	IMove (Change Security, Taxonomy Move)	Remarks
Content Objects (DocumentObjs like topic, map, lib, image, other)	Card	Logical, Version, Lng	Since 2014/11.0.0	**Since 15.1/15.1.0**		Multi-level card with before/after field values
PublicationOutput (inc publications and publication versions)	Card	Logical, Version, Lng	Since 2014/11.0.0	**Since 15.1/15.1.0**		Multi-level card with before/after field values
Annotation	Card	Annotation	Since 14SP2/14.0.2		n/a	Single-level card with before/after field values
	Card	Reply	Since 15.0/15.0.0		n/a	Single-level card with before/after field values
Project	Card	Project	**Since 15.1/15.1.0**		n/a	Multi-level card with before/after field values
	Card	Assignee	-		n/a	At best derive from parent Project
Baseline	Card	None	**Since 15.1/15.1.0**	**Since 15.1/15.1.0**	n/a	Single-level card with before/after field values
	Table	BaselineItems	**Since 15.1/15.1.0**		n/a	Table before/after entries
TranslationJob	Card	None			n/a	Single-level card with before/after field values
	Table	TranslationJobItems			n/a	Table before/after entries
Configuration	Card	None			n/a	Single-level card with before/after field values
EDT (aka Electronic Document Type)	Card	None			n/a	Single-level card with before/after field values
Folder	Card	None				Single-level card with before/after field values
OutputFormat	Card	None			n/a	Single-level card with before/after field values
User	Card	None			n/a	Single-level card with before/after field values
UserGroup	Card	None			n/a	Single-level card with before/after field values
UserRole	Card	None			n/a	Single-level card with before/after field values
BackgroundTask	Table	Task, History	n/a	n/a	n/a	Table before/after entries
Event	Table	Progress, Detail	n/a	n/a	n/a	Table before/after entries

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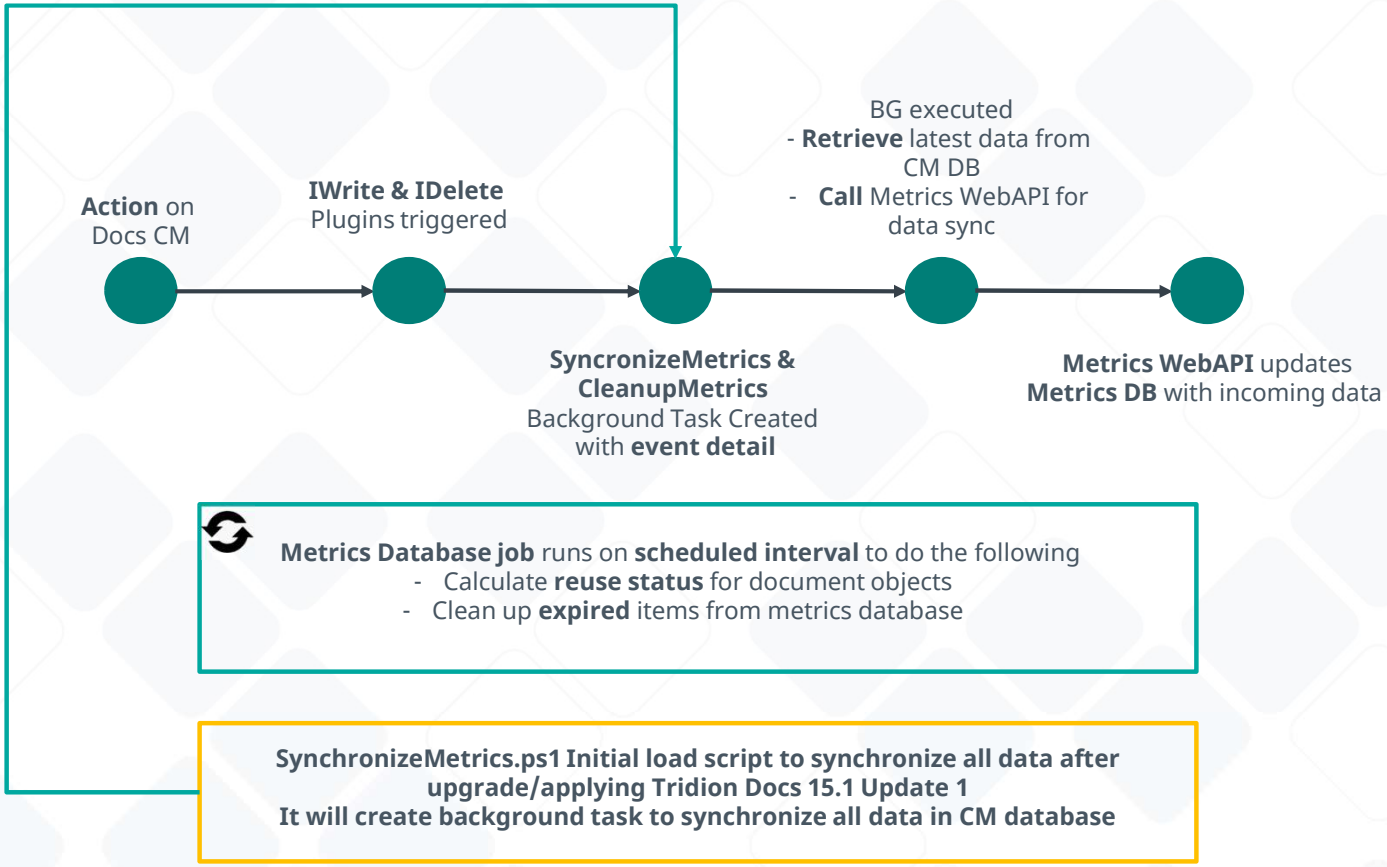
Metrics data flow legacy import



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Initial data synchronization

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Location on ISHCD, requirements, execution details

- \Common\DatabaseIndependent\Examples\Metrics\SynchronizeMetrics.ps1
- Requires min version ISHRemote 8.1.0
- Creating of ishSession object is not part of the script, run "Get-Help New-IshSession –Full" for options

Automating on Tridion Docs - ISHRemote v8.1 holding performance boost is now...

What happened Full release notes are on https://github.com/sdl/ISHRemote/blob/master/Doc/ReleaseNotes-ISHRemote-8.1.md and https://github.com/RWS/ISHRemote/releases/tag/v8.1 Before I forget, all people with a Github account, could you ...

Dave De Meyer 11 days ago

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SynchronizeMetrics.ps1 script for the initial load of Metrics storage

SynchronizeMetrics.ps1 -ishSession $ishSession

- Iterates Data folder (General folder) recursively. This option should be used during initial data synchronization

Parameters

- *-folderPath*
  - Iterate specific folder. Use this example to re-synchronize specific folders.
- *-ishFolderTypesToSync*
  - Iterate a specific folder with custom ishFolderTypesToSync filter. Use this example to re-synchronize specific folder types.
- *–Transcript*
  - Run with Transcript logging enabled, use-*TranscriptFilePath* to use a custom file path
- *–WhatIf*
  - “WhatIf” provides a list of folders that will be synchronized including a number of objects to be synchronized. With “WhatIf“ specified background tasks for synchronization are not created

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Initial migration does not require maintenance window

- Initial migration does not block current system activities (does not require maintenance window)
- Default configuration for Metrics background tasks is set to 2 threads

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Reuse Calculation

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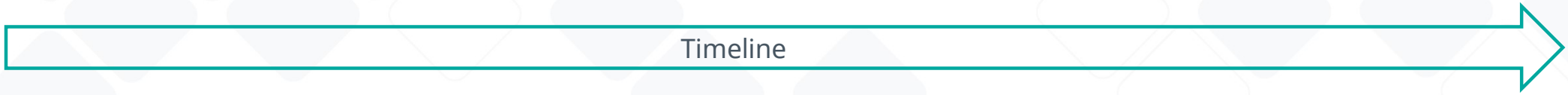
Reuse calculation: horizontal reuse

Document Object 1
ID: **Doc1**

Document Object 2
ID: **Doc2**

Document Object 3
ID: **Doc3**

Document Object 4
ID: **Doc4**



Publication A		Publication B		Publication C	
Version 1		Version 1		Version 1	
Doc 1	New	Doc 1	Reused	Doc 1	Reused
Doc 2	New	Doc 3	New	Doc 4	Reused
		Doc 4	New		

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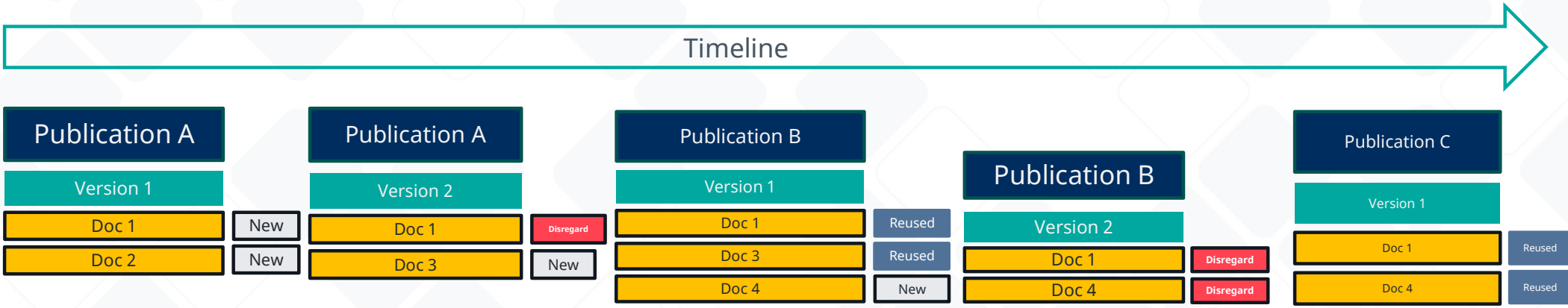
Reuse calculation: horizontal and vertical reuse

Document Object 1
ID: **Doc1**

Document Object 2
ID: **Doc2**

Document Object 3
ID: **Doc3**

Document Object 4
ID: **Doc4**



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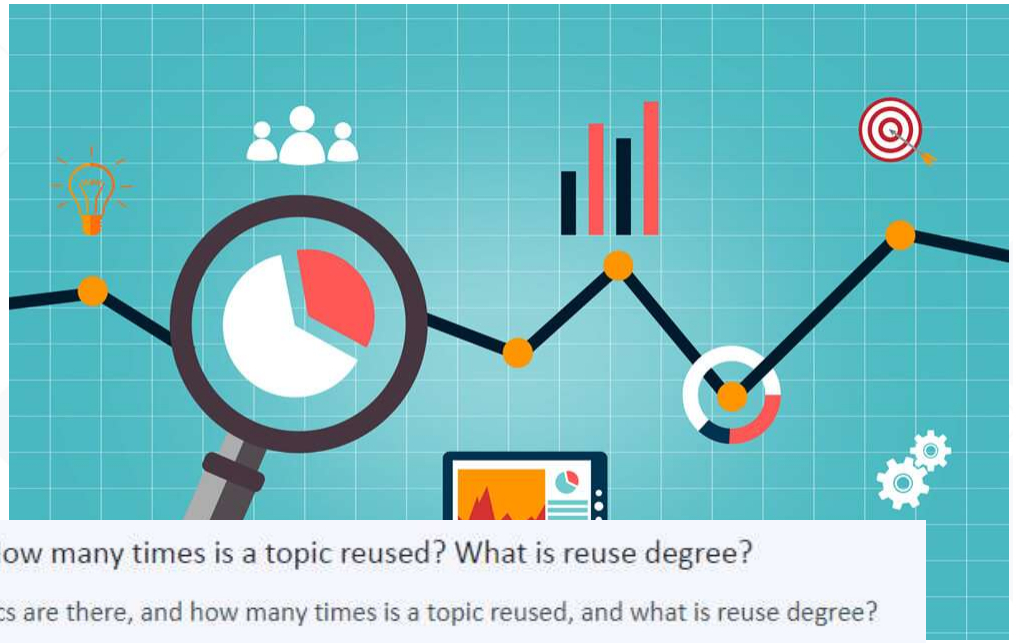
How to understand new reuse Metrics?

Community blog:
https://community.rws.com/product-groups/tridion/tridion-docs/b/weblog/posts/a-guide-how-to-understand-tridion-docs-new-reuse-metrics



How many times topics were used overall? How many new topics are there? How many times is a topic reused? What is reuse degree?

Over these four publications, how many times topics were used overall, how many new topics are there, and how many times is a topic reused, and what is reuse degree?

- All 14; new 7; reuse 7; degree 50%
- All 7; new 3; reuse 4; degree 57%
- All 7; new 3; reuse 4; degree 42%
- All 14; new 3; reuse 4; degree 28%
- All 14; new 3; reuse 11; degree 78%

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User Experience

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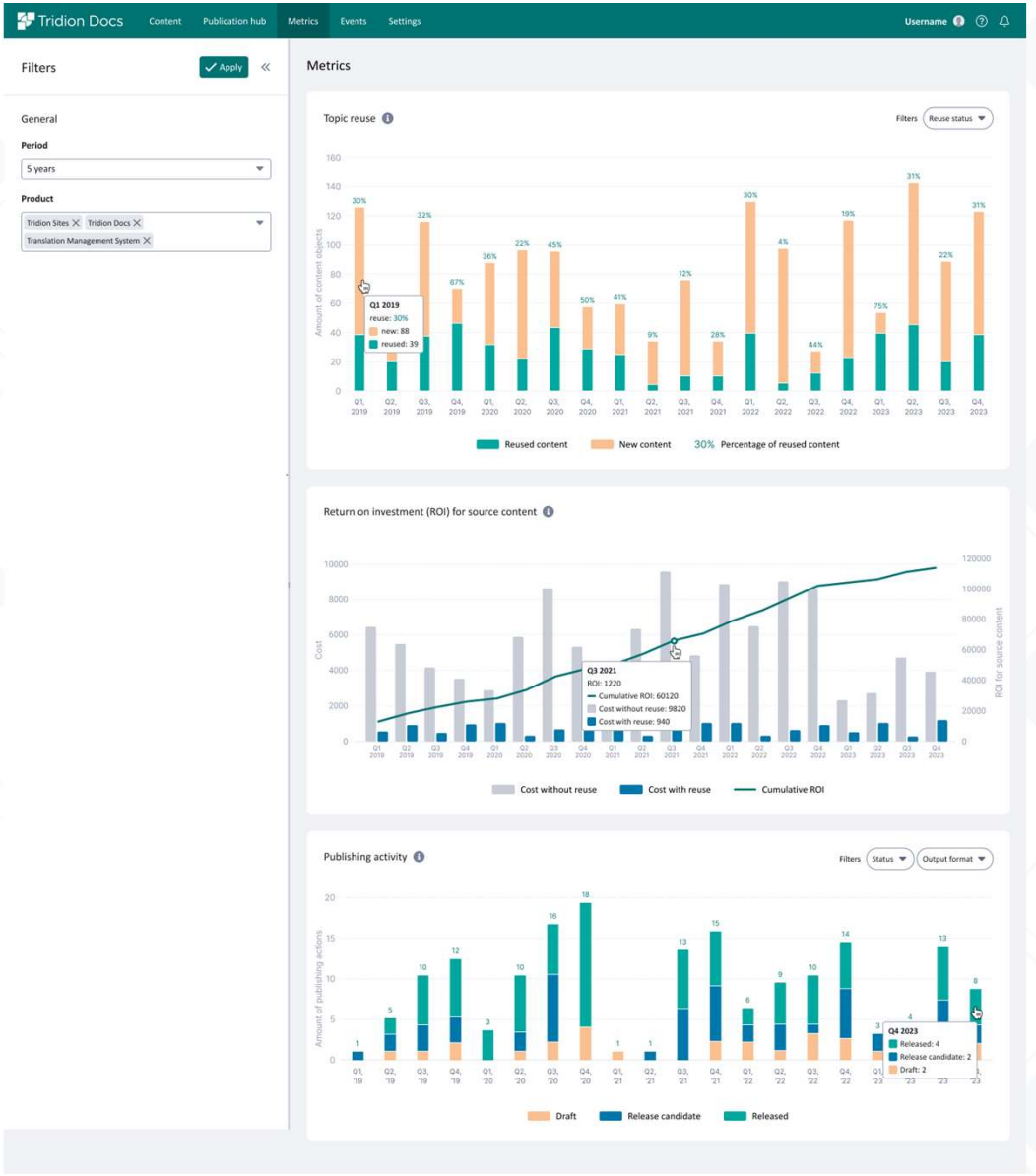
Panel filters

Period:
- Quarter (aggregated by month)
- Half a year (aggregated by month)
- Year (aggregated by month)
- 5 years (aggregated by quarter)
- All time (aggregated by year)

Product:
- Allows to zoom in data
- FISHMBPRODUCT metadata field on a Publication logical level – Product family name for publication
- Multi value field
- Taxonomy concepts can be used
- Not a mandatory field
- Product undefined – used for Publications without Product being set



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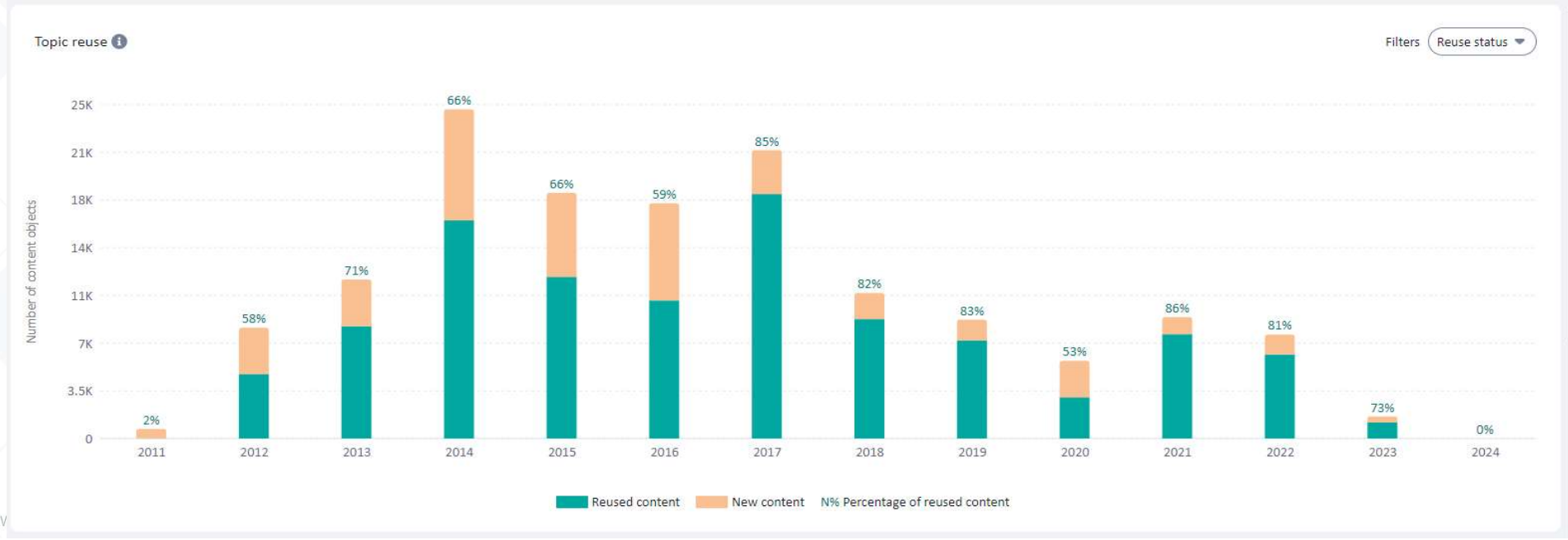
Topic reuse chart

- Topic reuse chart shows you reuse level for selected period highlighting amount of new content comparing to the one that was reused and reuse level
- Filtering on reuse status: new or reused
- Data helps to drive customers content reuse programs



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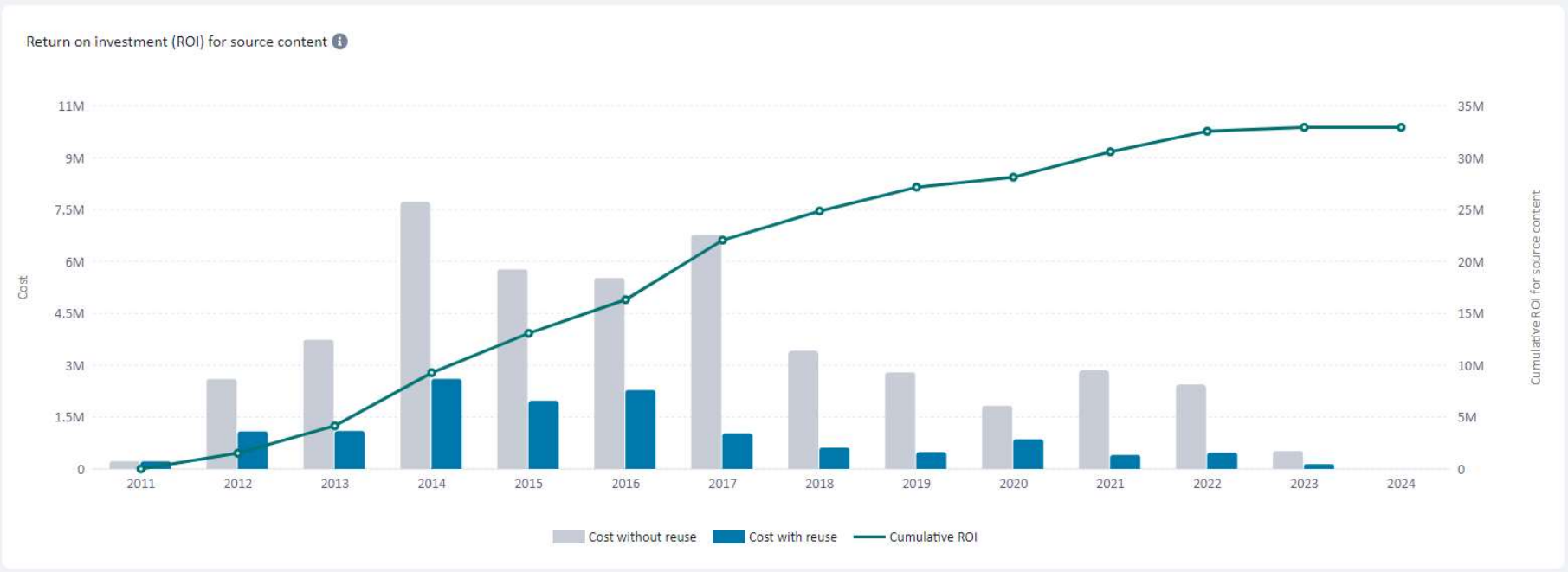
Return on investment (ROI) for source content

- Return on Investment chart shows value of using Tridion Docs for selected period based on customer's reuse level versus creating content from the scratch
- Shows a trend over a specified period to see how much you are saving with Tridion Docs



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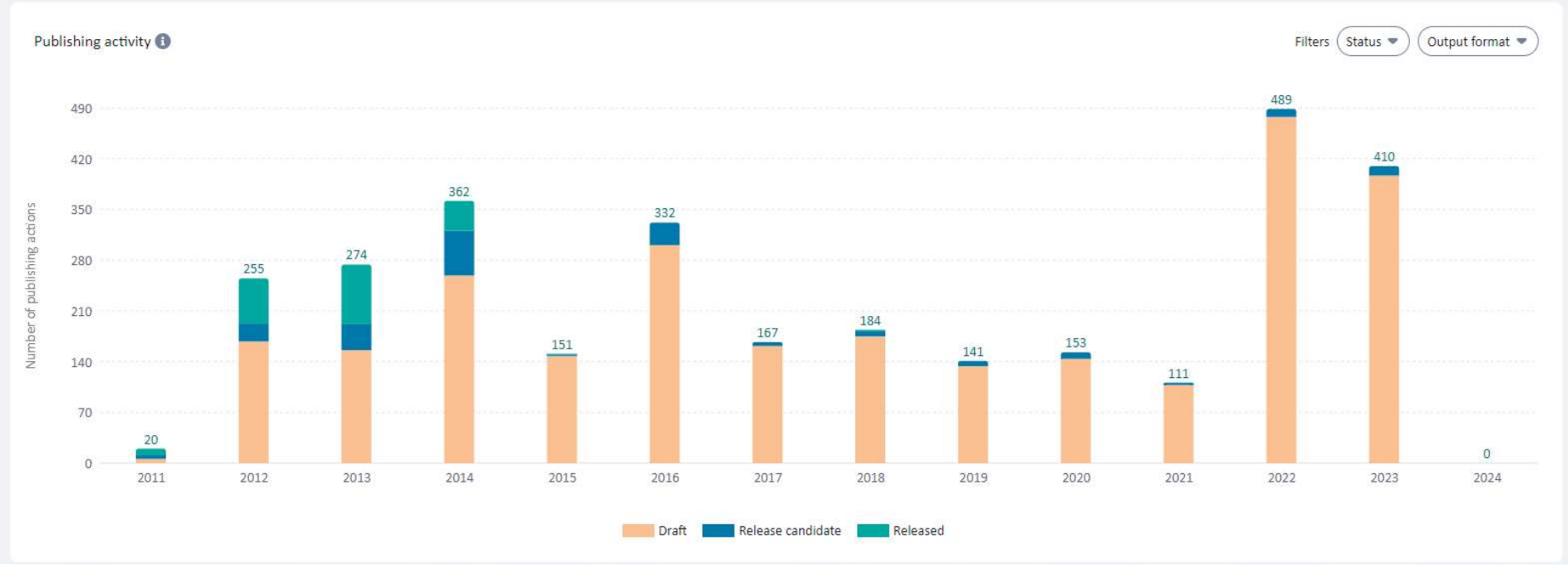
Publishing activity as a measure of productivity

- Publishing activity chart shows publishing activity for selected period indicating status of published outputs
- Filtering options
  - Status: Draft, Release candidate, Released
  - Output format
- Productivity over publishing activity helps to validate team's efficiency on a delivery



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Demo data

Tridion

Topic reuse calculation

Document Object 1
ID: **The history of mobile phones**

Document Object 2
ID: **The main components of a mobile phone**

Document Object 3
ID: **Operating systems of mobile phones**

Document Object 4
ID: **Mobile phones cameras**

Document Object 5
ID: **Wireless technologies**

Document Object 6
ID: **Mobile phones processors**

Document Object 7
ID: **Mobile phones displays**

New Topic References : 7
Reused Topic References : 5
All Topic References : 12
Reuse degree: 5/12= 42%

Timeline

Mobile Phone Basics	
Version 1	
The history of mobile phones	New
The main components of a mobile phone	New

Functions and capabilities of mobile phones	
Version 1	
The main components of a mobile phone	Reused
Operating systems of mobile phones	New
Mobile phones cameras	New
Wireless technologies	New

Technical characteristics and their comparison for mobile phones	
Version 1	
The history of mobile phones	Reused
The main components of a mobile phone	Reused
Operating systems of mobile phones	Reused
Mobile phones processors	New
Mobile phones displays	New
Wireless technologies	Reused

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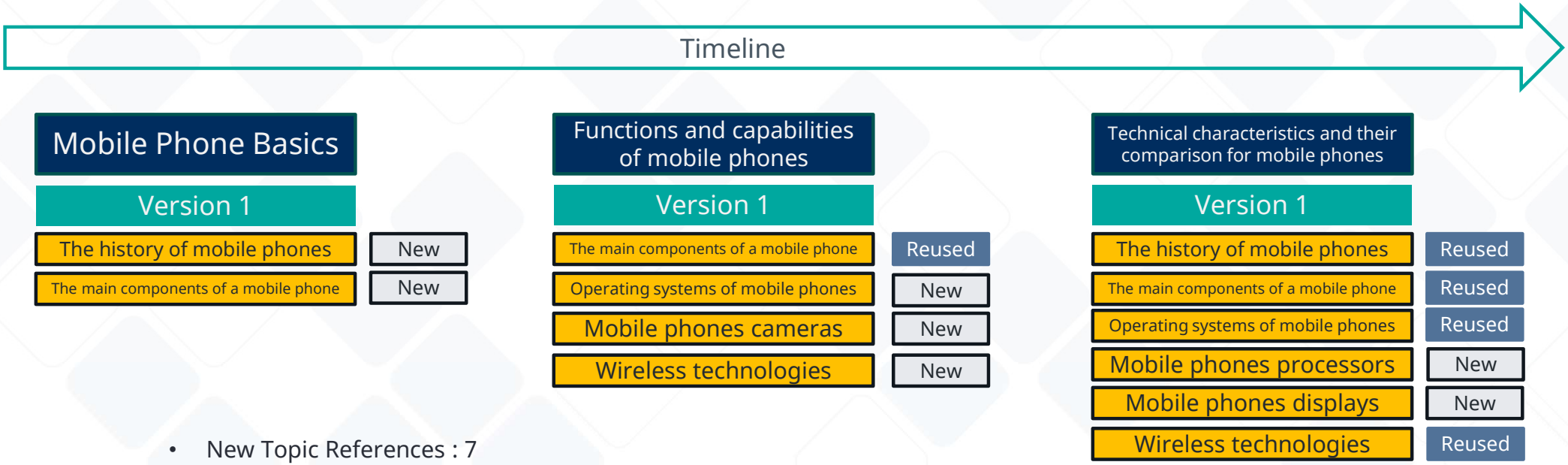
Return on Investment explanation

- Cumulative ROI Formula
  - ROI for previous periods + (Cost without Reuse - Cost with Reuse)



- New Topic References : 7
- Reused Topic References : 5
- All Topic References : 12

Tridion

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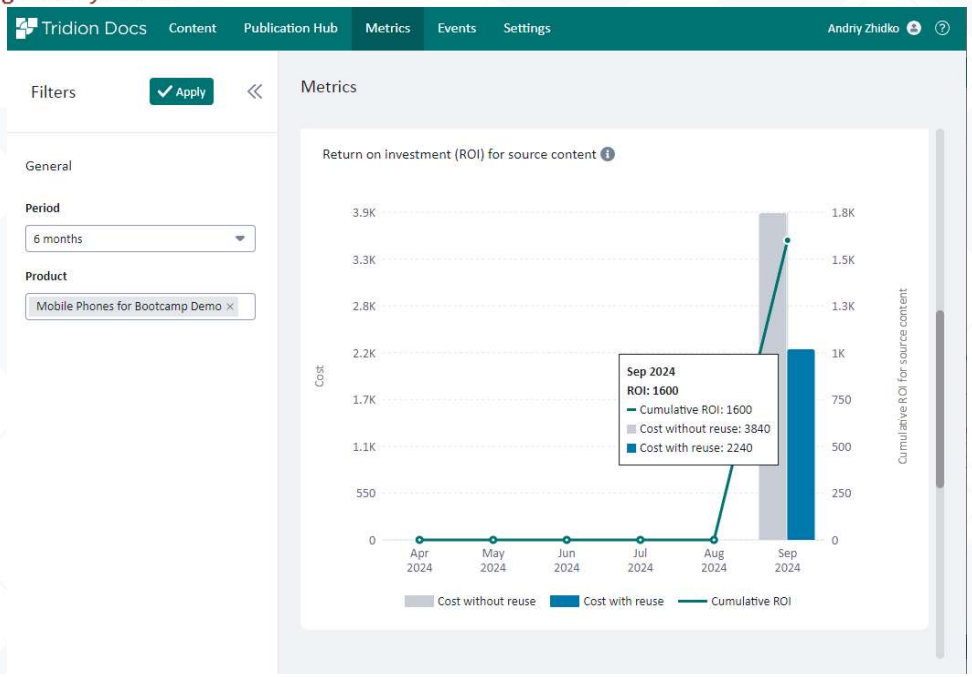
Return on Investment calculation

- Cumulative ROI Formula
  - The cost of creating content : Count * AverageSalaryPerHour * AverageTimePerDocumentObject

```
<infoShareMetricsConfig version="1.0">
  <roiSettings>
    <averageTimePerDocumentObject>4</averageTimePerDocumentObject>
    <averageSalaryPerHour>80</averageSalaryPerHour>
  </roiSettings>
</infoShareMetricsConfig>
```

  - New Topic References : 7
  - Reused Topic References : 5
  - All Topic References : 12
  - Total Cost of Content Without Reuse : 12 * 80 * 4 = 3,840
  - Total Cost of Content With Reuse : 7 * 80 * 4 = 2,240
  - ROI = 3,840 - 2,240 = 1,600
  - Cumulative ROI: 0 + 1600 = 1600



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DEMO

Tridion Docs 15.1.1: What is in?

Tridion

List of release features for Tridion Docs 15.1 Update 1

- **Tridion Docs Genius**
  - Guiding users across resources to complete their goals with navigons
  - Trustable chats
  - Extensibility
  - Brandability
  - Secured Content
- **Organize Space**
  - Publication Hub
  - Renewed UX for Settings pages
  - Add / Delete publication and output
  - Display name for users *
  - Open Publication in Publication Manager
  - Grid View
  - Accessibility improvements *
- **Collective Spaces**
  - Draft Companion
  - Friendly condition builder *
  - Display name for users *
  - Fonto upgrades – security and minor UX fixes
  - Review resolution
- **Metrics**
  - Enablers
  - Reuse and Return On Investment
  - Publishing activity
- **Client tools**
  - Where Used dialog
  - Sign out
  - Selection focus on newly created item in list *
  - Publication Manager
    - Sorting resources alphabetically *
    - Selecting output format dialog – list view *
    - Enabling Draft / Review Space copy link
    - Smart Tagging
    - Not changing value in list with mouse wheel when scrolling! *
  - Condition building finding conditions and values *
  - Display name everywhere *
- **Platform and backend**
  - Supporting experiments with OpenApiWithOpenIdConnect
  - Easier upgrade through auto upgrade of XML Settings
  - More application in .NET Core
  - .NET 8, Java 21 and Solr 9.4.1
  - XMetaL 18, oXygen Author/Editor 28 (though other versions are possible to use too)
  - Clean up and updates for Database indexes with a performance fix for Cloud Deployments where we do have shared table across all cloud DBs
  - Also, all application layers were aligned to use datetime in UTC format
  - IWrite plugins support for Baseline and BaselineItems
  - IDelete plugins support *

Tridion

* asterisk means a specific request from a customer

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