

# FUNCTIONAL BEST PRACTICES

## ORACLE USER PRODUCTIVITY KIT 3.1

### Purpose

Oracle's User Productivity Kit (UPK) 3.1 provides new functionality not available in prior releases that will enable content authors, subject matter experts, and other project members to improve efficiency, streamline processes, and reduce time and labor costs. Users can work in a truly collaborative multi-user environment, from disparate locations, sharing and re-using content. All content assets are stored in the Library where they can be checked in and out by content authors (preserving document integrity), organized within a folder structure, and tracked using robust properties such as last modified date, author, document state, etc.. You can also translate content into any language.

When implementing new technology it is beneficial to maintain a set of standards and best practices geared at preserving existing content investments, improving content development efficiency, and minimizing re-work. This document summarizes many of the functional best practices discovered during the design and testing of the software as well as during use in real live customer environments building production content.

Note: There are two deployment methods of UPK, multi-user and single user. Highlighted sections of this document refer to multi-user only considerations.

### Content Conversion

The 3.1 converter takes selected pre-existing 2.X content and migrates it to 3.1. For detailed instructions and guidelines for converting your content, please see the *Content Development* manual in the documentation. You should also refer to the *3.1 Conversion Overview* and *3.1 Conversion Checklist* for additional information.

Once your content is converted you should immediately do a "Check in All" to check in the content. This ensures that the content is stored in the database and not in your local cache and can be retrieved if necessary. Content not checked in at least once cannot be restored (after a delete) or rolled back (after a change). It also ensures that all of the related documents (including the System folder documents) are checked in and available for checkout by other content authors as required.

Content that is converted from an older version of Oracle's UPK will contain duplicate Web Pages or Packages if those documents were used in more than one module of content. Content integrity and linkages will be preserved during the conversion however some authors may find it distracting to have duplicates of the same documents in the Library. If you want to clean up the duplicates you should delete all but one from the Library and then link the remaining document to the appropriate documents. This will simplify the process when these documents need to be updated or used in other places.

Note: If you do not plan to continue to update and maintain your content for reuse after conversion you may not want to spend the time and effort to remove duplicates and re-link content.

When converting content from the same title description in 2.x (for example from multiple single-user instances) to a multi-user environment, rename the title in 2.x to something more descriptive than the default name. This will ensure that when the titles are converted to 3.x they will not all have the same name in the Library (for example Oracle R\_3, Oracle R\_3\_1, Oracle R\_3\_2, etc.)

## Working in the Library

The Library is central repository of all your documents (or content). Similar to organizing files in Windows Explorer, you can organize documents in the Library in a number different ways. It is best to organize your Library in a way that best meets your content creation standards. In a collaborative development environment it is best to design your Library structure at the beginning of the project and communicate to the team the structure and authoring standards that should be used. This should be a team discussion with a single person taking ownership of the Library structure. Also, it is best to keep your structure as simple as possible (probably no more than 3 levels) to avoid overly complex and confusing structures.

The following are some possible ways of organizing documents in the library:

### Organize by Project

Create folders for each project (for example project “Alpha” is a massive CRM implementation). Within that project you can create sub folders for each application within that project. You can further organize within each application by the various document types (Modules, Sections, Topics, Packages, Web Pages, etc.)

### Organize by Application (Title)

This is the default organization when content is converted from version 2.x. Folders are created for each Title and within each title folder are folders for each Module. Within each Module are the documents associated with that Module. You may want to create additional sub folders by document type or move your documents into one of the other Library organization structures.

### Organize by Author or Team

If you normally divide workload by content author or teams of content authors, organizing your Library documents by team may be your best approach. This allows multiple authors to quickly see who owns a particular set of content and makes it easy to locate your documents. To organize by Author or Team create a folder for each content author or groups of authors. Within these folders you can employ one of the other organization methods above to further organize your documents. You may even want to organize by locations if you have different groups in different locations working on content.

### Organize by Document Type

If you are doing a lot of content sharing you may find it beneficial to organize the Library by document type. This allows content authors to focus on specific types of content. For example you may want specific authors creating all of your glossary terms or creating packages that will be used by other content authors. Organizing by type may make more sense as a second layer of organization.

### Translations

If you are planning to localize your content you will want to make a copy of the source content before it is translated into the target language. To keep all of the different languages organized you might want to create sub folders within your high level hierarchy for each language in the Library.

### Document Naming Conventions

Employing document naming conventions and standards is a good way to organize documents in the Library and can make it easier to locate documents using the Library and Outline detail views. Version 3.1 supports longer document names than in previous versions. If you have Infoblocks that were converted from 2.x you may want to rename those using longer descriptive names.

### Views

When setting up views in the Library you should customize the Details View to match your authoring role. For example, if you are responsible for translating content from one language to another, you should add the Language column to the view to be able to quickly differentiate content that may be named the same but be in different languages.

Similar to the Library organization discussion, you may also want to make a team decision regarding the best configuration of views prior to starting the project.

You should also set all columns to “best fit” prior to working with views.

## Working in the Outline Editor

The Outline Editor is a valuable tool for working on smaller subsets of content (like a section) or to view the relationship between modules, sections, and topics. The collection of module, section, and topic documents is called the “outline”. The outline displays the links between the documents in the Library. No content is actually created or stored in the outline. If you have ever used music software (like Apple iTunes for example) you know about the Library and playlists. This relationship is very similar to the Library and Outline Editor relationship in the Developer. The outline is very much like a playlist in iTunes. It is a grouping of links to modules, sections, topics, etc. in the Library. Just like in iTunes where a song in the Library can be added to many different playlists a Topic in the Library can be used in multiple outlines. If the topic (or song) is deleted from the Library, it also breaks the link to the topic in the outlines (or Playlists) where it is linked. Conversely, deleting a topic from the outline does not delete it from the Library; rather it only removes the link to the topic. This holds true for any documents that are deleted from the outline.

The first node of the Outline Editor is not published in the Player (however it will appear in the title bar). Given this fact you may not want to attach a Concept URL or document to the first node in an outline (unless the outline will ultimately be combined with other outlines) as it will not be displayed in the Player.

When setting up views in the Outline Editor you should customize the Details View to match your content author responsibility. For example, if you are translating content from one language to another, you should add the Language column to the view to be able to quickly differentiate content that may be named the same but be in different languages.

Structure the content outline based on how you want to deliver the content to your users. This could vary by publishing style, end user population, locations, workgroups, job role, language, etc.

## Content and System Default Options

We strongly suggest you set your content defaults and other options, using agreed upon settings, **prior** to recording any content. If you are upgrading from 2.x the content default settings do not convert and must be configured in the Developer. If you have multiple authors following the same standards you can export the default settings as a file that can be imported into other author workstations (see the Content Default Options section of the *Content Development* manual).

## Collaboration

Create rules for working in a collaborative environment. For example do not check out a document unless you truly plan to update it or want to prevent others from making changes. Don’t reorganize content in the Library without first consulting the team. Do not check out large blocks of content or related documents unless you plan to make changes or you could be inadvertently affecting someone else’s ability to modify content. When checking out related documents it’s always a good idea to review the related document list to see if you really need to check them out.

If you want to lock specific documents from being checked out and modified, for example icons in the System folder, you can create an Administrator account and check them out. See the section called Restricting Content Access in this document.

## Content State

State is an editable property for communicating the status of a document. This is particularly helpful when working with other authors in a development team. Authors can assign a state to any document using the values that are defined in the master list. The default master list of State values includes Not Started, Draft, In Review, and Final (in the

language installed on the server). Administrators can customize the list by adding, deleting, or renaming the values as well as sequencing the values as they will appear on the assignment list from the Properties pane.

## Get vs. Checkout

If you plan to explicitly work offline, you should always check out documents that you need to edit before going offline. You may also want to use the Get command from the Document menu to ensure that you have local copies of the most recent documents that you want to view in addition to those that you want to edit. If you go offline and do not have copies of some documents in your local cache, those documents will be unavailable to you. To remedy this, you will need to go back online and "get" the documents that you need.

If you are working online you do not need to perform a "get" operation.

## When to Create in the Library vs. the Outline and Vice Versa

Sometimes it can be difficult to determine when it is best to create new content in the Library vs. the Outline Editor. The Outline Editor is a valuable tool for working on smaller subsets of content (like a Section) or to view the relationship between modules, sections, and topics. If you want to create content while preserving this relationship you should use the New Module, New Section and New Topic commands from the Link menu in the Outline Editor. This process creates the document in the Library and links it to the appropriate module or section in the Outline. If you have used previous versions of Oracle's User Productivity Kit this approach may be a more familiar process.

If you create new modules, sections and topics from the Library, you will need to link them into the appropriate section or module. This may be desirable, especially if you plan to create documents first and then link them to one or more documents at a later time.

## Restricting Content Access

In Version 3.1 there are two user types, Administrator and Author. Since all authors have access to all content in the Library you may want to prevent authors from modifying specific content such as Icons and Templates in the System folder. It is possible to lock these documents by logging in as the Administrator and checking them out to prevent modification. You may also want to create a special Administrator user named LOCKED so that authors know when they see documents that are checked out to the LOCKED user they should not be modified.

## Content Reuse

One of the powerful features of Version 3.1 is its ability to support the re-use of existing content. By authoring content once and linking it to other documents you are able to keep content updated and maintained in one location and have the changes immediately updated in other locations where the content may be used. For example you may have a basic navigation section that starts off every module. Instead of creating this section each time (or even making a copy) you can author once and then link it to wherever you may need it. This way the content remains centralized and any changes you make to this document are immediately updated wherever it is used.

Similarly you may determine that a document is very close to what you need but requires some changes to make it applicable for use in another area. In this case, you may want to make a derivative work making a copy or duplicate. A copy creates a new copy of the selection only and maintains any links to the original related documents. A duplicate creates a new copy of the selection and its related documents and creates links among the copies. For example, assume that you have a topic that has a link to a package in the Concept pane. You want to modify the topic by recording new frames at the end but at the same time you want to preserve the links to the linked package in the Concept pane. In this example you would want to create a copy of the original.

Duplicates are similar to copies except that they make copies of all related documents and create links among all the copies. Duplicates are often used when you need to replicate all of the source documents, for example when you are translating content into other languages. Let's say you are creating the same content for both English and French. You would create your English content first and then make a duplicate of the English content that you will then translate to French by using the translation and re-recording features of 3.1 (see *Translation* section).

As you are building your content (or better yet before) you should identify the scope of content that can be leveraged for reuse and then determine how it will be used within the rest of your content, and which method of linking, copying, or duplicating is most appropriate. This may affect how your content is stored in the Library or how you might divide up the workload across your team. You may want to designate one person who is responsible for developing content that gets reused by other authors and make them responsible for any updates or changes.

### Infoblocks (Packages and Web Pages)

When linking to multimedia packages (like Presenter, Flash, Audio Files, etc.) in the Concept pane content will in most cases play automatically once the Module, Section, or Topic is displayed. If this is not desirable and you want your users to manually invoke the playback of the multimedia you should edit the object or embed tags within the HTML page in the package to turn off the auto play of the media.

When linking to Presenter packages in the Concept pane you can suppress the auto-play of the presentation when a user selects a topic, section, or module. In Presenter add a blank slide as slide 1 to the beginning of the presentation. Insert a graphic image of a play button, hyperlink, etc. and set the hyperlink to "Next Slide". In Presenter set the Presentation Properties for Slide 1 and uncheck the box "Advance slides automatically". Now when the presentation launches it will stop on Slide 1 and wait for the user to click the button to continue.

Also see the Content Conversion section.

### Undo (When is it available?)

Undo and Redo is a powerful editing tool that can save you valuable time if you make mistakes or have repeatable actions to perform. There are, however, situations when Undo and Redo are not available. The following list summarizes the situations when Undo/Redo may not be available:

- Undo/Redo is not available from the Library.
- Undo/Redo is not available from the Package Editor.
- You can not undo glossary term links that were created using the Update Glossary Links command.
- Any actions that involve document versioning and history (check in, check out, delete, restore, and rollback) cannot be undone.
- Replace operations (as part of Find/Replace) cannot be undone.
- Undo cannot be performed to any changes made during a spell check.
- Undo can be performed in a web page but only before you save the document. Once saved changes cannot be undone.
- Most document property changes can be undone except when in the Library, Package Editor, and Web Page Editor.
- Undo is not available in the Recorder during the re-record process.
- Frames or paths that are deleted in the Topic Editor cannot be undone. Note: You may be able to exit the topic without saving changes however this will result in all work lost prior to exiting the topic.

## Publishing to the Player

ContentSetup.exe is not available in Version 3.1. If you have content from multiple outlines that you would like to merge together in the Player, you should combine all content into a single outline and then publish. After the initial publishing, incremental publishing picks up the changes to reduce subsequent publishing times. The outline in the player will match the outline in the developer (including any moved or deleted modules, sections, and topics).

## Working Offline

See Get vs. Checkout section.

## Firefox Browser

Oracle's User Productivity Kit 3.1 supports playback in the Firefox browser however there are a few limitations. There is no DoIt mode support. The DoIt mode icon will be hidden in the Player. Sound is also not supported in Firefox. You should take both of these into consideration when developing your content if you plan to deploy to Firefox users.

# TECHNICAL BEST PRACTICES ORACLE USER PRODUCTIVITY KIT 3.1

## Purpose

UPK 3.1 provides new functionality not available in prior releases that will enable content authors, subject matter experts, and other project members to improve efficiency, streamline processes, and reduce time and labor costs. Users can work in a truly collaborative multi-user environment, from disparate locations, sharing and re-using content. All content assets are stored in the Library where they can be checked in and out by content authors (preserving document integrity), organized within a file structure, and tracked using robust metadata. Additional functionality has also been added to support the translation of content into multiple languages.

To support this functionality, the multi-user installation of UPK 3.1 requires a SQL database and Microsoft Web server infrastructure. This document summarizes many of the technical best practices discovered during the implementation and testing of the software as well as during use in live customer environments building production content.

## Installation and Configuration

During a multi-user installation, you might want to use a Windows User other than the one currently logged in to install the SQL database. To do this you will need to install the database separately after you login as the desired user.

Essentially, the steps become:

1. Install server component. De-select 'Install database' option and complete installation wizard.
2. Login as the Windows User that will have access to the SQL server. (More likely, the SQL database administrator will be provided with the UPK installation files.)
3. Install database component with desired Windows User logged in.

## Backup

Backing up your content is probably the single most important thing you can do to protect your investment. It cannot be stressed enough the importance of maintaining regularly schedule SQL database backups (multi-user) to protect your content investment. When determining your backup policy you should consider the following questions:

- How much development work can you afford to lose between backups? This will help determine if you need to back up your content weekly, daily, or multiple times a day.
- How many versions of database backups will you need to maintain?
- How will backups be archived and stored?

For Single User installations you should use the export/import functionality on a regular basis to backup your content. Move the backed up archive files to a file server directory that is being backed up on a regular basis.

You may want to consult with your IT department for their policies regarding database administration and backup.

## Player Deployment

When deploying content for the Player, you may want to create a master outline in the developer that matches how you want your outline to look in the published Player. The Developer takes advantage of incremental publishing (publishing only the changes); this helps keep publishing times short. If you have the ability to map a network drive to the appropriate virtual directory on your deployment server you can publish directly to that location. If not you will need to publish to a staging folder and then move your content from there to the production server either through file management or FTP.

The ContentSetup.exe utility used to merge titles and content in the player no longer exists in 3.1. Content from any application can now be combined into an outline in the Developer and published for the Player. The resulting outline in the Player will match the outline in the Developer (including any deleted Topics, Sections, etc). Publishing times are also minimized due to incremental publishing.

### **Standalone Topic File Deployment**

Standalone Topic files (or .ODTPC files) can be published and distributed for playback by users. An .ODTPC file is a single file that can be easily distributed as an email attachment or download from a file server or Web server. To view the Topic, end users must have the Topic Player installed on their local machine. During publishing there is an option to include the Topic Player Setup program in the published output. The Topic Player Setup program can be distributed to your end users and only need be installed once in order to view .ODTPC files. Note: If you have the Developer installed you do not need to install the Topic Player to view .ODTPC files.

Standalone Topic files cannot be imported into the Developer. To share content between developers use the Import/Export Document functionality in the Developer.