

# **GENESYS**

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Writer's Guide

Genesys Internal Resources 1.0

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# Genesys Documentation Writer's Guide

Welcome to the Genesys Documentation Writer's Guide. This guide describes how to create and edit content on the docs.genesys.com (aka PonyDocs) website.

#### Important

For information on creating and editing content on the all.docs.genesys.com (aka MintyDocs) website, see the IX Writer's Guide.

If you're new to Genesys, please take a look at this Welcome video created a few years ago when IX was called Tech Pubs:

#### Welcome to Technical Publications

#### Link to video

This website is powered by Ponydocs, an open-source MediaWiki platform provided by Splunk. It has been heavily modified by Genesys to produce this website. For general information from Splunk on how Ponydocs works, click here.

#### **Intended Audience**

This document is intended primarily for members of the Information Experience (IX) department who work on Genesys Multicloud content, especially content for on-premises releases. However, the wider Genesys community is also invited to share this resource and help us to improve it.

#### **Comments and Updates**

Comments are welcome. Please use the comments section on each page to suggest your own tips and tricks for each topic.

If you are an IX Multicloud CX member, feel free to edit each page to correct inaccuracies or suggest your own workflows. **However**, if you update a process (not tips and such), please send an email to **Pubs Editors** and mark the text with change bars and as draft. We want to encourage crowd-sourcing for this document by new and established writers, especially given the continuous changing nature of this place. However, you may make a decision about how to handle something without knowing all the ramifications. Please alert us so we can verify that the change makes sense/is correct.

#### Important

A number of these Writers Guide pages leverage library pages. If want to update a page and when you click Edit Source, the page only includes a reference, for example, something like Documentation:Ponydocs:Library:..page name...-lib:1.0, you edit the

page using the library page. To do so, copy the page name per the reference, go to Library TOC1.0, search for the file, open the page, and make your edits there.

If you are a member of the wider Genesys community and wish to help contribute to this site, please email the Wiki IA email list and a member of the Wiki Information Architecture team will respond.

## In This Document

The following is a general list of topics that are covered on the following pages. For general information on how to create a manual and start writing, see the Getting Started page.

General Information	Hot/Trending Processes
This chapter provides general information about the Genesys Documentation	
website.	FedRAMP security features versus security features
	Responding to Customers
Accessing the Genesys Doc website Documentation on the vanilla version of	Online Language Pack RNs - Translation Support
Ponydocs, provided by Splunk	When a product name is changing
	Farly Adopter Program
Catting Startad	
Getting Started	Creating Content
This section applies to docs.genesys.com only.	Creating Content This chapter provides in-depth explanations of how to create content.
This section applies to docs.genesys.com only.	Creating Content This chapter provides in-depth explanations of how to create content.
This section applies to docs.genesys.com only. Start creating content.	Creating Content This chapter provides in-depth explanations of how to create content. Using map boxes and verttabbers
Start creating content.         Creating products, versions, and manuals	Creating Content This chapter provides in-depth explanations of how to create content. Using map boxes and verttabbers Creating products and manuals
Started         This section applies to docs.genesys.com         only.         Start creating content.         Creating products, versions, and manuals         Creating a Table of Contents	Creating Content This chapter provides in-depth explanations of how to create content. Using map boxes and verttabbers Creating products and manuals Working with images and tables

#### **Publishing Content**

This chapter explains how to publish content.

Sending your document to reviewers

Using the production checklist

Changing the version status to released

Handling special-case scenarios

#### Troubleshooting

This chapter explains how to troubleshoot common problems.

Recovering a lost page

Known Issues

## Recently Edited Pages

- Working with Usabilla Feedback
- Unusual Release Note Scenarios
- What Documents Go Where and Release Types
- DR0 to DR1 (Waterfall)
- Converting FrameMaker files to the Genesys Docs Wiki Format
- Alfresco to Box Instructions
- Legacy
- General Tips and Tricks for Writers
- Watch Pages
- Updating Documents Outside of a Project Release

#### Subsequent Releases

This chapter explains how to work with subsequent releases of your document.

Using the DRAFT version

Generating a Change History page

# Uploading files to the Production Server via the Repository Utilities tool

Our IX Developers created the Repository Utilities tool for the relatively small group of Genesys Multicloud writers who are still updating HTML release notes, and for those writers who are posting non-wiki documents for their products.

Access for this tool is located on docs.genesys.com under **Helpful links for writers/MediaWiki** tools/Special pages/Other special pages/Utils to upload and manage repository files or on all.docs.genesys.com. Once you have accessed the tool, bookmark the page for future use.

In addition to posting your non-wiki files to the Production Server Repository, you must also upload a copy of the file to the Global IX SharePoint site. This step is for internal IX (Tech Pubs) archival purposes only.

### Who can do what

Pubs Editors and writers (ie: docteam group members) have slightly different permissions within the Repository Utilities tool.

wiki group name	add new file	update file	rename file/folder	delete file/folder	download file	add folder	reinstate backup
pubs- editors	yes	yes	yes	yes	yes	yes	yes
docteam	yes	yes	no	no	yes	no	yes

There are three main directories in the repository:

- endofsupport
- public
- restricted

#### NOTE:

#### Important

- Writers should only upload files to the associated product folders in the **public** directory.
- Only certain members of Pubs Editors are designated to place files in the **endofsupport**

directory. ALERT: Writers may take on this responsibility starting in 2022.

• The **restricted** directory was maintained for one specific product (SpeechMiner) and Pubs Editors are responsible for uploading files to those folders. However, in early 2021, SpeechMiner documentation is no longer Closed. As such, all of the associated documentation was moved to the public directory.

## Updating an existing file in the Repository

Note: Here's a link to the demo (stored in SharePoint) that Kate gave at the IX Global Office Hour on July 9, 2020: Repository Utility demo.

- 1. Access the Repository Utilities tool.
- 2. Under Browse Repository Content/Cache/Public, choose the appropriate product directory and release sub-directory. If you are unsure what directory the file resides in, use the "Search for" tool located at the top of the Browse Repository Content box.
- 3. Confirm that the directory selected is the one in which you want to update the file. When you scroll down to the Draft and drop area, it should display the path to the directory you selected.
- 4. Drag and drop the file into the "Drag and drop files in /public" box. NOTE: The file should be located on your computer, not on a network drive.
- If you are updating an existing file, a dialog box appears stating that the file already exists and asking if you want to update it. Click OK. If it uploads successfully, a check mark will briefly display across the file icon. If unsuccessful, an X will display.
- 6. Upload the file to the appropriate product directory and release sub-directory in SharePoint > Genesys Public.

## Adding a new file to the Repository

#### Important

- Files are not limited to documentation; they can include almost any file type. That being said, we should offer executable files with some caution as they might be blocked on the client side if considered an untrusted/dangerous download.
- Although the Repository does have a file size limit, it's configurable on our end so we can expand it if there is a valid reason.
- If a large file fails to upload, contact the Tech Pubs Support email alias to help you with a resolution.

- 1. Check with Pubs Editors first to confirm that the file name meets standards and isn't already in use. If a file already exists in another folder with the same name, the Repository tool will reject it.
- 2. Access the Repository Utilities tool.
- 3. Under Browse Repository Content/Cache/Public, choose the appropriate product directory and release sub-directory.
- 4. Confirm that the directory selected is the one in which you want to add the file. When you scroll down to the Draft and drop area, it should display the path to the directory you selected.
- 5. Drag and drop the file into the "Drag and drop files in /public" box. NOTE: A dialog box will appear in the upper right providing you with the details of the upload and the appropriate wiki coding for the document: {{Repository|filename|| displaytext}}
- 6. Go to the top of the Repository Utils page (just below the title) and click on "(force) Refresh the map ".
- 7. Take a look at the Journal box to confirm that the operation has completed successfully.
- 8. Upload the file to the appropriate product directory and release sub-directory in SharePoint > Genesys Public.

## Adding a new directory to the Repository and SharePoint

Contact Pubs Editors to request the creation of a new directory.

## Moving a subfolder to another folder in the Repository

The structure of the repository is based on product > version. As such, it is a rare thing that a subfolder would need to be moved to another folder. However, if there is a legitimate reason for doing so, the repository tool allows you to do this.

Only Pubs Editors can perform this action. So, contact them to explain the situation and request it. To move a subfolder:

- 1. In the repository, select the folder you want to move.
- 2. On the right side of the screen, click the Pencil icon (called Rename or Move). The Rename to dialog box appears.
- 3. Change the path in the dialog box to move the subfolder and click Rename.
- 4. Refresh the Map.
- 5. Move the folder in Global IX SharePoint as well.

## Microservices

#### Important

Genesys' strategy changed in 2020 and the Common Cloud has been replaced by Genesys Multicloud Hosted (formerly Genesys Engage cloud hosted) and Genesys Multicloud Private Edition. Some of the definitions still apply.

As Genesys' primary focus is Cloud and in particular development for Common Cloud, we're in the process of developing processes that support that.

So, far we have the following topics:

- Cloud services definitions
- Documenting Docker Guidelines

# Cloud services definitions

#### Important

Some of these definitions still apply in 2021 even though the focus now is on Genesys Multicloud Hosted (formerly Genesys Engage cloud hosted) and Genesys Multicloud Private Edition.

Here are some definitions that Michael Katten provided:

- Genesys Engage cloud: An umbrella term to use in customer documentation for Common Microservices without referring to backend Cloud architecture. Generally, we want customers to simply be able to implement their business logic via the interfaces they use, and don't want to confuse them with language or visuals about the backend Cloud architecture. However, there are a number of cases where this need to talk about the Cloud might apply, including things like:
  - "Once you save your Designer routing strategy, it becomes available in the Genesys Engage cloud to guide interactions to the best resource." There's no need to go into details in a case like this.
  - "You can set the cm-xyz-abc option value to any integer from 0 to 32468. Once you do so, the Genesys Engage cloud uses that value to calculate wait time."
  - "All the work for the configuration you perform is carried out in the Genesys Engage cloud. There is no need for further changes to your Genesys system."
  - Generally, anywhere that you feel a reference to some Genesys Engage cloud magic is being performed, you can reference the Genesys Engage cloud. As the number of common microservices grows, and as we document them more thoroughly, it is possible we'll make more reference to details in the Common Microservices. But for now, let's stick to the Genesys Engage cloud.
- **CMC:** This was internal acronym meaning Common Microservices Cloud, and also refers to the platform on which the microservice had to be supported. As of February 2019, we no longer support this. We still support Common Microservices but these are being developed on the Genesys Cloud platform.
- Cloud (service): any Genesys-hosted service. It could be Genesys Engage only, Genesys Cloud only, or PureConnect only, or some combination of all three. (And, if all three, it would be a "common microservice.")
- **Private cloud:** a situation where a customer sets up their own data center and loads our software into it (via Docker and Kubernetes), such that their employees experience it as a cloud/web service. In this case it is not being monitored by us; it is not a Genesys-hosted service. It is a customer-hosted service, one over which they have full control. In this scenario, only Genesys Engage and, potentially, PureConnect are available. Genesys Engage needs to make this an important part of its offering since it will play into the vision for current on-prem customers who don't want to move fully to the cloud, but who do want our newer features and services.
- Cloud First: a service which Genesys hosts will also be available via ftp download (as a Docker image) for those customers who want the newer features that the Cloud first services offers, in addition to their existing Genesys deployment. They will host the software on their own servers, presumably as a mix of their current on prem system and those newer features that Genesys provides. This is a nod to older/ current customers who are not interested moving completely to the Cloud, but who still want to take advantage of new features and capabilities, or even fixes to some of our software. Genesys Engage and PureConnect offer this.

- **Hybrid:** a situation where a customer has the on-prem Genesys deployment, or perhaps a private cloud, but who also wants to take advantage of Genesys-hosted "cloud only" microservices. These customers would connect to the Genesys Engage cloud to add that feature's capabilities to their implementation.
- **Common Cloud:** a Genesys-hosted set of services available to all three platforms.
- **On Prem:** a customer is downloading our software by ftp and loading it into their own servers in a very traditional way. Not all features will be available to customers who retain this architecture going forward. Genesys Engage and PureConnect both offer this.

# Common Microservices Cloud (CMC) and documentation

### Important

This topic no longer applies with Genesys' strategies in 2021.

This topic is still in progress.

While the intention is to develop microservices that can be implemented across all platforms, Genesys Cloud, PureConnect, and Genesys Engage. There might be a few services are would only be specific to a particular platform. For example, most of Management Framework would not be a common microservice. As such, if your team is developing a microservice, check with your Product Manager to find out whether this service is will be a common microservice sometime in the near or farther future.

If your service will be one that is shared, that impacts where you develop content, release note format, and potentially others.

## New Products

If you're developing documentation for a new product, be aware of the following:

- You develop content on all.docs.genesys.com (A.K.A. MintyDocs.).
- Like docs.genesys.com, you'll need a documentation space created. Then, like docs.genesys.com, you'll need to create versions and manuals.
- You'll need to create an account on all.docs.genesys.com because your docs.genesys account is a separate account.
- Release Notes on this site are modeled on the Genesys Cloud design. Take a look at the Genesys Altocloud Release Notes.
- If it's a new product, it's likely that the first release or two is restricted. As Restricted IPs require a HTML RN included in it, rather than creating an HTML RN in addition to an online RN, a stub RN needs to be created. This stub RN only includes a link to the online RN and product documentation landing page in all.docs.genesys.com. Currently, Joe creates those.

For creating on the documentation space and Release Note pages, contact Barry Grenon.

## Existing Products

TBD

## Documenting Docker - Guidelines

The Docker Deployment Guide (DDG) is a generic guide that can be used by the product teams for Docker deployment.

- 1. Writers must check with their product teams to determine if the corresponding product uses Docker. If yes, they must provide a link to the DDG or specific sections of the DDG, as applicable, from the corresponding product deployment guide.
- 2. Writers need to include information specific to their products. For this, writers need to interact with their product teams to gather requirements, and then contact the Genesys Engage Architecture team for more details.

For example, the CX Contact deployment guide required **Job Schedules** information, which is product-specific. Hence, the writer for CX Contact reached out to the member of the Genesys Engage Architecture team to acquire the necessary information.

- 3. Writers need to inform the project teams about the availability of the DDG and its guidelines. The product teams need to follow the instructions provided in this guide as mentioned in each of the chapters. The gist of the instructions is summarized below.
  - 1. Install the Docker Engine CE. For details, refer to Installing Docker Engine CE.
  - 2. Deploy Docker containers in High Availability (HA) models. For details, refer to High Availability.

Important The product team decides the HA approach and the orchestration platform to be used.

3. Implement the Blue-Green deployment model. For details, refer to Blue-Green Deployment Model. This topic explains about Blue-Green deployment with Kubernetes.

For more details, please contact Jabashree Amudha.

## Contacts

This page contains information on who to contact within Tech Pubs if you have questions.

## Wiki Platform

The release note for the docs.genesys.com documentation platform is here: Docs Platform Release Note.

In case of emergency (for example, if the website becomes inaccessible) that requires immediate support from admins, please use the contact information provided below to find available Wiki Admin team members to help get things back on track.

<b>Contact Details</b>	Notes/Availability
Phone:	
• 905-499-2259 (preferred)	
Email:	
<ul> <li>ed.jamer@genesys.com</li> </ul>	
<ul> <li>edward.jamer@gmail.com</li> </ul>	
	Contact Details Phone: • 905-499-2259 (preferred) Email: • ed.jamer@genesys.com • edward.jamer@gmail.com

## Questions?

- Technical questions, issues, feature requests, and requests for new online product pages: Tech Pubs Support or IX Help Desk.
- Process questions and submissions for third-party editing: Pubs Editors: See below.
- Questions to other IX writers and Localization group: IX and L10N Global
- Questions to other Multicloud writers: Multicloud writers.
- Questions to Chennai writers: IX India
- Questions to Video team: IX Global Video
- Your Manager: She or he is always a source for information.

## Pubs Editors and Processes

Before you contact Pubs Editors, please first check to see if a process already exists that might be able to answer your question. Use Pubs Editors for questions about:

- Processes: please first check elsewhere in this Writer's Guide to see if a process already exists that might answer your question.
- Unusual RN requests, not covered in the Release Note processes.
- Unusual release scenarios (for example, the project will be General (PA) but some documents should have limited accessibility).
- Readmes (online or html).
- Repository issues.

## Other

- Questions to the combined Information Experience and Localization organization (that includes Genesys Multicloud IX, Genesys Cloud IX, and Localiztion team) for people from within the IX team, customers, or Genesys employees use the following alias: IX and L10N Global
- Questions to Tech Pubs from customers or Genesys employees outside of Tech Pubs: Technical Publications Administrator
- This table identifies products/components and their respective Product Manager, Project Manager, and writer: Who's Who for PMs, PjMs, and Writers
- ClearCase issues: Contact ClearCase Request if you have issues with getting ClearCase to work on your computer. ALERT: This alias may no longer work. Even if it does, very few writers continue to use ClearCase.

## Useful Genesys Links

- Project Document site This site contains the project collateral for each project. In the Projects folder are folders for the various products. Inside that you'll find folder for various documents including the Packaging Specification.
- G360
- XING
- One Genesys Portal
- Human Resources
- JIRA
- Release Note XING freeze forms
- Release Note HTML validator
- The Conversations How We Manage Performance. Note: The actual tool can be accessed via the OKTA

home page under Oracle HCM, Performance Goals.

- OKTA home page
- Quality and Process Documents

#### **Old/Retired Links**

• Retired Digital Library

## Some External Links

- HTML reference site
- Edward Tufte Blog
- SIP according to Microsoft

## Quickstart Guide for New Hires

Welcome to the Information Experience team! We're excited to have you. If you have not done so already, check out our welcome video:

## Welcome to Genesys Information Experience (formerly Tech Pubs)

Note: The video is a little dated, from 5+ years ago, reflecting our old department name, Technical Publications, and personnel at the time.

#### Link to video

This Writer's Guide is a collaborative exercise in having a consistent approach to writing documentation here at Genesys. A good part of it's focus is content development on docs.genesys.com. It also includes instructions for creating your timecards in Tempo, uploading files to the repository, and various processes. If you're looking for information on contact creation on all.docs.genesys.com, see the IX Writers Guide.

If you're ready to dive in, before getting into the details of writing at Genesys (those links on the left), you might want to check out the resources available from the pages below. Happy onboarding!

## People

People you should follow in Confluence (our intranet tool):

- Information Experience: Our department falls under the Business Operations Organization.
- Michael Katten Senior Director, IX
- Barry Grenon Director IX Platforms
- Tanya Ivanova Director IX Genesys Engage
- Kevin Kuhns Director IX Genesys Cloud
- Tony Bates Chief Executive Officer
- Global IX SharePoint site This is a private site for the department. If you don't have access, contact your manager.
- Need to know the details of a project? Take a look at the Who's Who for PMs, PjMs and Writers On-Premises and Cloud. This page lists the Product Managers (PMs) and Project Managers (PjMs) who are partnered with us on various projects. It's updated by our writers when they remember to do it.
- Still need help? Our contacts page has a list of who you need, when you need it.

## Writing

writersdocdevprocessoverview

- Some writer guidelines to help you get started.
- Trying to keep up with all our Genesys terminology shouldn't feel frustrating; turn to our Terminology page to alleviate your confusion. Also see the Glossary.
- Information on customer documentation development and review:
  - Writers Document development overview
  - Documentation review process
- Writing with JIRA
- When using SnagIt to create graphics:
  - Here are some important visual guidelines to keep in mind. Follow the instructions to download the necessary stamps and callouts for your visuals.
  - Ask your manager for a Snaglt license and download it here.
- This Glossary, available to customers and Genesys folks, provides definitions for acronyms and terms. This Writer's Guide also included a terminology page with definitions. Finally, Genesys also created a Contact Center Definitions page.

## Working with the wiki on docs.genesys.com

- Watch and read through the following training materials provided to Customer Care in 2016/2017: Note: Clicking the link takes you to the location in which it is stored in the Box Technical Publications site.
  - Part 1 training conducted on 08/25/16 video length: 1 hr 13 minutes. This is an overview of working with the Docs wiki, including getting into the wiki, user accounts and permissions, information on how content is structured (books, manual, version) making changes to a page, media wiki syntax, adding a page, publishing content, and how to get help. (Old Alfresco link)
  - Part 2 training conducted on 12/13/16 video length: 1 hour 18 minutes. This covers creating new content (manuals and versions), how to work with different versions, handling review comments, and archiving and managing older content. (Old Alfresco link)
  - Part 3 training conducted on 4/27/17 video length: 58 minutes. This training is more of a working session that covers working with the product landing page, and making changes to a specific guide, like editing existing pages, adding a new chapter, and so forth. (Old Alfresco link)
  - Doc Wiki Helpful Links: Created by Ed Jamer as part of Part 1 training.(Old Alfresco link)
  - Pubs Wiki Author Training Notes: Supplement created by Customer Care person (likely Debbie Prevost Brooks) (Old Alfresco link)
- Navigate through the Wiki Structure help section to see how you should be putting your content together.
- What's the wiki approval process? Find out here.

- Wondering how to format text? Take a look at our Typography page.
- So you already published your content but now you need to change it? No worries, we've got you covered: Updating Published Content.
- Learn how to publish your content.
- Need help with wiki markup? See this URL: Wiki Format

#### Genesys Engage cloud content

- What should a Genesys Engage cloud page look like? See an example here.
- What does cloud-style writing look like?
- How do you handle on-premises features pushed to the Genesys Engage cloud and the RN? See Genesys Engage cloud Release Note.

### Releases

• You might be thinking, but what documents go where?! Don't worry, we've got you covered and we even talk about release types!

#### **Release Notes**

- Release Note Process
- Create an RN dashboard in JIRA.
- What about Genesys Engage cloud hosted Release Notes? Take a look here. Note: If you're looking for Genesys Engage cloud RN information for Private Edition, contact Tanya Ivanova.

## JIRA

- To help us work more closely with our engineering team and track our progress during efficiently, our teams use JIRA. JIRA is a issue tracking product that, like Confluence, has been developed by Atlassian. It provides bug tracking, issue tracking, and project management functions.
- Here's are an JIRA FAQ created by Project Management Office (PMO) and geared towards them.
- Guidelines for Completing Tempo Timecards in IX
- Writing with JIRA
- Creating a JIRA filter
- Using JIRA to publish an online Release Note? Watch the video below. Click the lower right corner to see it in full screen. Link to video
- Create an RN dashboard in JIRA.

## Other software, tools, and applications

- Confluence:
  - Follow our IX Home page: This Confluence page is our content management page.
  - Every month Michael Katten organizes a IX and Localizatoin group WorldWide meeting to update the team on developments not just in IX and Localization but Genesys as a whole. Take a look at his Monthly IX WorldWide Meeting Powerpoints.
  - Instructions on using Confluence: Confluence Server documentation
- Other software
  - For Canadian writers, look to :\\absolut\techpubs\software.
  - For U.S. writers, look to \\galaxy\genesys\Techpubs7\G\Acrobat\_9 for Adobe Acrobat 9 Pro Extended.
  - For Chennai writers, check with Jaba or the manager to whom you report.
  - For France, UK, and Israel writers, check with the manager to whom you report.

## How to Work with Subject Matter Experts

Subject Matter Experts can be anyone in Genesys, including Developers, QA people, Product Managers, Project Managers, Customer Care people, Offer Leads (Cloud offerings), Operations people (Cloud offerings) and others. On a daily basis, you will work most regularly with Developers, QA people, and Product Managers. In any release (whether using Waterfall, Agile, or Continuous Delivery/ Continuous Integration models), you especially rely on them to create your product content, including release notes.

Here are some guidelines or tips in working with SMEs.

- Learn your product by using the user interface, accessing a version of it on a demo image, reading product documentation, and the like. This not only helps you write product content but enables you to make the best use of the time you have with subject matter experts.
- Create a relationship with them by learning about their work, their day-to-day tasks, challenges and needs, and sharing with them the same. This builds an understanding between you and creates empathy, especially when workloads are high and schedules are tight.
- Ask them what the best way is to communicate with them: by email, phone call, JIRA comment, TOI, or a face-to-face meeting if you are co-located. This shows them that you are willing to work with them.
- When you interact with them, be prepared with the questions or issues prior to that interaction to make best use of your time and theirs.
- Interact professionally with them. Express appreciation for their work and their responses.
- When creating document review schedules, take into account their personal work schedule. For example, is it possible to schedule reviews during a period when their workload is lightest? Admittedly, that may be challenging, especially for Continuous Delivery projects. So, do your best.
- If you know that giving a little more will result in them making more time for you, do it as long as it's reasonable. In the past, when our output files were PDF or CHMs (before online), reviewers occasionally asked to be provided with documents in Word. Since there was no easy way to do that, we usually declined because we didn't want to set a precedent and add overhead. So, use common sense.

- Be willing to help them when they need help, if that's possible. That will make them more willing to help you.
- Remember that you all belong to a team that is working towards the same goal. Documentation is part of the product, not an add on. Sometimes new employees, even those from a recently acquired company, don't understand the role of customer documentation, the needs of an IX writer, and the requirements of SMEs with respect to documentation reviews and content information. It's up to you to train them about it.
- Be a QA person in the way you investigate how to document a feature or issue. As writers, you know that we don't just take text that a Developer, QA or another person provides, not only because they may or may not be a good writer but because they don't always understand the nuance of saying something one way versus another. For example some text provided may be ambiguous. You'll need to dig a little to find out exactly what the situation is so that you can clearly explain it to customers.

## Tips for Dealing with Time Zones

Genesys is a global company. As such, you may be working with Genesys folks situated in time zones different from the one in which you are located. Here are some tips for handling this.

- If the people are part of your product team:
  - Consider whether you can change your working hours to better overlap their working hours. For example, if they are 4 hours earlier or 3 hours later, can you shift your working schedule to have some overlap? You are *not* expected to work longer hours to accommodate their time zone or their schedule. Granted, there may be emergencies that require that but it should not be a regular occurrence. If it is, work with your manager to determine how best to handle the situation and present it to your team.
  - For team meetings, make sure they are scheduled during a period when you are working. If the time difference makes that almost impossible, consider only occasionally attending and inform your team accordingly.
  - For one-on-one meetings, like TOIs, phone calls, and so forth, just compare schedules and come up with a mutual day and time that will work for all participants.
  - For meetings you can't attend, ask the person who set up the meeting to record the call so you can listen to it when you are available.
- If the people are not part of your product team but are people from whom you do need answers, expect that responses from them may be delayed. So, plan accordingly.

And remember if you have any questions, feel free to email any of your new teammates! We're here to help and would be happy to do so. Welcome to Genesys!

# Getting Started

Writing a document on the Genesys Documentation platform is almost as easy as working with any MediaWiki-based page and many of the same rules and syntax apply. You can read more about general wiki topics at the MediaWiki website.

However, while this website uses MediaWiki as its foundation, there are some important differences to note, such as the use of docset permissions, product codes, manual names, TOC topics, and more.

Also, with our move from docs.genesys.com to all.docs.genesys.com and the release of Genesys Multicloud Private Edition, most documents leverage MediaWiki forms and templates. You'll find some information about that in the IX Writer's Guide.

# Guidelines for completing Tempo timecards

## Updates

#### 2021

#### [+] Show 2021 updates

#### November 22

• Added in INT-42 and INT-43 values to the "Non-project specific work" table.

#### **November 19**

- Updated section, "Project Work during an iteration" regarding having to manually type in the **Epic** in the new Cloud JIRA.
- Updated "Non-project specific work" table to include a new "Epic" column and a "Tip" about the new Cloud JIRA.

#### May 19

• New Tempo Keys were introduced, effective May 24, 2021

#### 2018

#### [+] Show 2018 updates

#### May 15

• Please note that INT-20: Outside US work week is removed. All Canadian employees should have a Canadian workload scheme applied to his/her profile.

## Guidelines for completing timecards

#### For Special Events

Use INT-44 Special Event. (Old value: INT-33)

#### Project Work during an iteration

Follow the guidelines from the training.

- For non-Continuous Delivery projects:
  - Use the Project-Level JIRA item rather than tasks or subtasks within that. Confirm the specific entry with your project manager.
  - Use the iteration project value. Confirm the specific entry with your project manager.
  - When filling out a timecard entry for work for a particular iteration, manually type "**Release Activity**" in the **Epic** field to track documentation work for that iteration. Writers do not have to track work done for each Epic in an iteration. This is per Tanya Andrushchenko's guidance following the Tempo change.

#### Tip

See the "Non-project specific work" table below for a list of other Epics you can use in the **Epic** field in Cloud JIRA.

#### Tempo writers working on Genesys Engage cloud documentation

You may have to account for time in two time-tracking systems. Confer with your Project Manager to determine that. Per Nadhima's training slides, do the following:

- 1. **XPROJ-96.** (Old Value: XPROJ-68) In Tempo, use XPROJ-96 Common Infrastructure and in the description specify <product> Customer documentation.
- 2. Log into the Genesys Engage cloud Time Tracking App (https://timetracking.inin.com/sessions/new), and enter your Genesys Network credentials and password.
- 3. Select the Epic(s) for the activity that you are working on from the list and apply your percent allocation for the month.

**RDTC-52.** Writers working on Genesys Engage or Genesys Engage cloud documentation, use RDTC-52 Time in Genesys Engage Tempo.

Genesys Engage cloud writers do not charge time in Tempo. They should keep using their current time tracking app.

#### API work

For API work, do the following:

- Tempo writers:
  - **XPROJ-90 PEC Operation: non-project related.** (Old Value: XPROJ-62) For Genesys Engage cloud work use "XPROJ-90 PEC Operation: non-project related."
  - **XPROJ-96 Common Infrastructure.** (Old Value: XPROJ-68)For Genesys Engage cloud API work, use XPROJ-96. If this is the only Genesys Engage cloud work, enter the hours in the Worked field for XPROJ-96, as usual, and in the Description section, write API.
  - If you do other Genesys Engage cloud work, besides Genesys Engage cloud API work, create a separate XPROJ-96 card, and enter those hours in the Worked field. It's optional if you want to write anything in the Description field.
  - For API work associated with an Engage project in which you also do other non-API work, create one

entry for API work and another for your other work.

- For the API work, add API in the Description field. In the Worked field, enter the hours that you worked on the API.
- For the other project work, enter the hours in the Worked field. Adding a Description is optional.

**Note:** It might seem odd to create two entries for the same timecard project. It actually will help us run reports that can distinguish between API and non-API work. When you create a second entry for the same item, when you save the card, Tempo adds the hours together. However, when we run a report, it shows them as two entries under the item.

- Time Tracking App writers:
  - Allocate time to any/all epics or SCRs that show up in the Time Tracking app list.
  - **RDTC-63.** Use RDTC-63 for any work you do on API content whether on an integrations project or the API/developer portal or internal API-related work.
  - Use the Technical Management or Technical Debt RDTC categories for other work.

#### Post PA or Hot Fix/Patch requests

Select the project JIRA number for the issue and select Maintenance from the List of Epics list.

#### Non-project specific work

#### Important

New Tempo Keys were introduced, effective May 24, 2021

Tempo code and description	Work context	Epic
INT-39 Open Time Off/PTO (Old Value: INT-27)	Vacation, etc.	Internal
INT-40 Sick Leave (Old Value: INT-28)	Sick leave	Internal
INT-41 Holiday (Old Value: INT-29)	Holiday	Internal
INT-42 Bereavement leave	Bereavement leave	Internal
INT-43	Jury duty	Internal

Tempo code and description	Work context	Epic
Jury duty		
INT-44 Special Event (Old value: INT-33)	Special event	Internal
INT-45		
Training (Old Value: INT-34)	Training	Internal
<b>INT-46</b> Meal Break (Old Value: INT-35)	<ul> <li>Lunch, dinner, breakfast, etc.</li> <li>California non-exempt Tech Pubs employees:</li> <li>For meal breaks, you need to add one hour for each day. (Note: If you take an entire sick day, you don't include a meal break in your timecard. If you take half a day or less, include a meal break.)</li> </ul>	Internal
<b>XPROJ-78</b> Localization (Old Value: XPROJ-50)	<ul> <li>For non-project work like meetings, processes, and the like use XPROJ-78 Localization.</li> <li>Before translation: Writers charge localization work that takes place before translation, like creating English Localization Kits for DR4 (and setting up one vendor wiki), against the English JIRA issue for the project. Make sure you log the work at the English project level rather than at a localization task or sub-task level. Note: Your Project Manager will open a JIRA ticket for the eLK (English Localization Kit) for the Help during the course of your English project. Be aware that this English JIRA ticket may be closed before translation (and your subsequent post-</li> </ul>	Cross-Project

Tempo code and description	Work context	Epic
	translation work) begins. Ask your Project Manager.	
	<ul> <li>After translation: Writers charge localization work that takes place after translation, like testing on the vendor wikis and publishing translated content on the customer-facing wikis, to the LOCAL sub-task ticket associated with the localization project. Ask your Project Manager.</li> </ul>	
	<ul> <li>Pubs-Localization group to use XPROJ-78 Localization for project- specific work, instead of the individual JIRA projects, because currently there is no quick way for them to identify the higher-level project to use in Tempo. This is per agreement with Inga, Joe, and Pubs- Localization, on 4/21/15 (email stream)</li> </ul>	
<b>XPROJ-79</b> System Level Documentation (Old Value: XPROJ-51)	System-Level Guide work	Cross-Project
XPROJ-80 Administration (Old Value: XPROJ-52)	<ul> <li>Writers: Tech Pubs WW meetings, PonyDocs sessions, and miscellaneous non- project work.</li> <li>Managers: Management work (one-on-ones, status meetings, etc.)</li> </ul>	Cross-Project
XPROJ-84 Tech Pub - Doc Wiki (Old Value: XPROJ-56)	Wiki work, Wiki Admin work. Any work on the platform proper. CSS work, AWS plumbing, network setup, etc.	Cross-Project
XPROJ-85	Tech Pubs Production work	Cross-Project
Tech Pub - Editing		

Tempo code and description	Work context	Epic
(Old Value: XPROJ-57)		
XPROJ-86 Tech Pubs - 3rd Party Docs (Old Value: XPROJ-58)	Third-party documentation work	Cross-Project
XPROJ-96 Common Infrastructure (Old Value: XPROJ-68)	Any work you do that supports Genesys Cloud or PureConnect Resource Centers.	Cross-Project
<b>XPROJ-99</b> Tech Pubs - Operations (Old Value: XPROJ-71)	<ul> <li>For work that's not product specific and is either:</li> <li>Work that supports other groups outside of IX (for example, Program Management, Product Management, Customer Care, and the like).</li> <li>"Platform"-type work for content projects that enable us to deliver content more efficiently, including automation. One example is the work on the RN tool.</li> <li>Using this code, we will be able track effort the support nature of the Business Operation group of which IX is a part. Some examples include:</li> <li>Setting up the EOL online document and providing support to Chris Lee who updates it. It also includes updates to our doc site for EOL announcements.</li> <li>Setting up an internal AWS/Azure differences page on behalf of Product Management that PS, SEs, and Customer Care will use.</li> <li>Setting up the platform to support the Use Cases capability that enables various output types.</li> <li>Creating a Legal page and posting new agreements on their</li> </ul>	Cross-Project

Tempo code and description	Work context	Epic
	<ul> <li>behalf.</li> <li>Creating Customer Care pages and training them to add content. It also includes time spent being a liaison with Customer Care in various capacities, like Mary for example.</li> <li>Develop and maintain the RN generation tool to enable more efficient creation of Release Notes.</li> </ul>	
<project code="" iteration="" product=""></project>	For content projects that apply to a particular capitalized project, you can get the required Tempo code from the product PjM. • Example project: data structure for Genesys Info Mart	Release Activity
Tip Other Epics that were previously available in the old Genesys JIRA that you may have used include " <b>Maintenance</b> " or " <b>Research</b> ". If you used either of these before, please continue to use them in the new Cloud JIRA by manually typing them in the <b>Epic</b> field.		

## View timecard reports

If you want to view a timecard report, do the following:

- 1. Display a timecard for a week.
- 2. Towards the top of the timecard, select the down arrow to the right of Timecard and select Report. A report displays for the week with the umbrella project, description, and so on.
- 3. If you want to see the Epics specified for each entry, towards the top of the report, select the down arrow to the right of Column and then select List of Epics. You can also select or clear other check boxes as desired, depending on what you want to see in the report.

**Note:** If you want to view a report for an entire month, click the Current week and use the dialog box to specify the month you want to review. You can also use Custom to specify any other time period. Once you apply the changes, the report updates.

## Remote Writers

## For Documents associated with General (PA) Releases

- Remote writers, including those who work in locations with a 3 or 4-hour time difference from Daly City, can publish RNs and docs when they see the internal announcement from the Project Manager; because, at that point, everything is ready, with the exception of Software Delivery doing their processing.
- If the internal announcement (and thus the software announcement) falls outside the working hours of the remote writer, the remote writer can publish RNs and docs for a General (PA) release first thing the next Genesys working day (up to 13 1/2 hours after the release) to take into account their time zone, unless a customer is waiting. Prior to the release, the remote writer must consult with their PM and PjM to find out if a customer waiting.
- To support the scenario where a customer might be a waiting:
  - The remote writer should find someone in the department who can be their designated backup. Ideally, the remote writer should have one regular backup so the publisher will become familiar with the list of docs and RNs in the doc set for the product.
  - A few days before the release, the remote writer lets his or her designated backup know about the possible need to publish the RNs and docs if the internal announcement (and thus the software announcement) is published outside the remote writer's working hours.

A few final things:

- This remote exception does **not** apply to hot fixes.
  - For products/components *not* part of v9.0 (formerly G-NINE), the IP availability depends on the RN freeze form being published. Remote writers, please let your teams know. See the section below.
  - For v9.0 (formerly G-NINE) products/components, although you do not need to publish an RN freeze form, you should publish the RN close to the time that the IP Test form is published as passed. See the note in the section below.
- The RN date should be the agreed upon General (PA) date.
- This policy is effective immediately, 2/08/17.
- We'll be listening carefully for any negative impact to customers.

# Hot Fix RN Publishing for Products/Components not part of v9.0 (formerly G-NINE)

For hot fixes, remote writers do need to find a backup so the RN can be published when the IP Test Form passes. That's a less onerous task than publishing docs associated with General (PA) releases. We do regularly have customers waiting for a hot fix. In this case, ask your QA teams to publish IP test forms within your time zone, if that is possible. For remote writers who work in time zones that don't overlap the PST time zone, this is especially important. Please talk with your Tech Pubs Manager to determine what makes sense for you and perhaps identify possible backups who can publish the Hot Fix RN for you.

# Hot Fix RN Publishing for Products/Components that **are** part of v9.0 (previously called G-NINE)

For v9.0 (formerly G-NINE) releases, the IP was decoupled from the RN. Consequently, writers do *not* publish RN freeze forms for products/components that are part of v9.0 (formerly G-NINE). For hot fixes (where the IP is decoupled from the RN) the software is immediately available to customers for download when the IP Test Report is published. So, it's important that you publish the RN soon after.

If you are located remotely from QA, and may not be available when the IP Test form is published, find a backup to handle publishing the RN. This also means you need to remind your team that comments and approvals of for RNs have to be more timely and ideally prior to publishing the IP Test Report.
# Accessing the Genesys Documentation website and related resources

Anyone can access our docs.genesys.com website. Some content is restricted and is only accessible by those, like customers, who are provided user credentials.

Only authorized users have access to create new content or edit existing content. See Doc Access to determine the various access roles to do so.

# Doc Access

#### Important

This information is solely for accessing content on docs.genesys.com. If you're looking for access information for all.docs.genesys.com, see all.docs Doc Access.

Users access docs.genesys.com by using one of two methods:

- *External users* can access content on docs.genesys.com. If the content is restricted, customers should have been provided with login credentials via a Restricted RN embedded in the Restricted IP. Partners can go through the Partner portal.
- Internal users must be on VPN, be behind the firewall, or have previously established an active session on the server.

#### Important

If you get a cookie disabled error, ensure you use a "https://" type of connection. Confirm you type "https://" in your browser. Also, you might want to add "https://docs.genesys.com" as your trusted site.

Access to restricted content, as well as write privileges, requires a unique docs.genesys.com account and membership in one of the following user groups:

User group	<b>Content access</b>	Rights	User types
Docteam	All release statuses, all products	Read + Write	Tech Pubs only
Employees	All release statuses, all products	Read only	Genesys employees only (grant only to genesys.com email addresses)
Product-docteam	All release statuses, single product (such as SIPS-docteam)	Read + Write	Carefully selected product team members
Preview	Preview and Released statuses only, all products	Read only	Genesys employees and, very rarely, authorized customers
Product-preview	Preview and Released statuses only, single product (such as SIPS- preview)	Read only	Authorized customers and Genesys employees

#### Important

The preview user groups require a version status of *preview*, **not** *unreleased*.

#### Access guidelines

Obviously, we want to take great care in granting access, or we risk the "public access" model we've negotiated with the PM and Sales organizations. The guidelines are:

- Never grant docteam access to anyone outside the company.
- Grant employee access to Genesys employees only.
- Be stingy in granting docteam access to those outside of IX (what they write, you must edit!).
- Check with your PM before granting any level of access to customers.

# Granting access

Anyone in IX (and anyone in the Bureaucrat user group) can add users to any of the above user groups.

#### Important

As of 2021, some of this information may no longer apply. Check with Barry Grenon.

- 1. When someone needs or requests access to restricted (preview or unreleased) documentation, determine the appropriate level of access (use the table and guidelines above). You can automatically grant employee access to any Genesys employee, but in other cases you might need to check with your PM or IX manager.
- 2. Ask the requester for their docs.genesys user name (single sign-on doesn't work, so this can be different from their standard Genesys login **ALERT:** As of 2021 single-sign-on works for all.docs. Check with Barry Grenon as to whether it works for docs.genesys.com). If they don't have an account, tell them to create an account using the following link and then to send you the user name once done:
  - for all.docs: https://all.docs.genesys.com/index.php?title=Special:UserLogin&type= signup&returnto=Documentation
  - for legacy docs: https://docs.genesys.com/index.php?title=Special:UserLogin&type= signup&returnto=Documentation

Before they can get to the docs account page, internal users must be inside the firewall; customers must log in with their Customer Care account.

3. Log in and navigate to Special pages > User rights management (if you can't view the page, you probably need to ask a Bureaucrat to grant you Bureaucrat rights). Enter the requester's user name and click **Edit user groups**.

- 4. Select the appropriate check box or boxes.
- 5. Click Save user groups.
- 6. Email the requester, including the specific rights you've granted them ("You can now view all unreleased and preview documentation", for example).

### Restricted release docs

- Restricted online:
  - Customers: access the restricted content on docs.genesys.com using specific login credentials for the product documentation, after they login through the Customer Care site using their customer credentials. These restricted content login credentials are either provided in the restricted CD Read Me or in the Release Note. Customer requests should be referred to those places to find the login credentials. If the customer cannot locate it, check with the Product Manager to verify the person is a customer and you can provide the credentials directly to him or her. Note: If the request comes through Customer Care, then Customer Care has already verified that the person is a customer. In that case, you can provide the credentials to the Customer Care representative to pass on to the customer.
  - Genesys employees: See employee account instructions above.
- FTP: Occasionally, Genesys software is delivered via FTP. For these releases, documentation is approved following normal department processes. Since the product software is not on a CD, a CD Readme file is not needed. The IP.html file, also called the IP readme file, will substitute for the CD Readme. If the documentation is online, the login credentials are provided in the restricted release note provided via FTP.

#### Docs that are not developed in the wiki

Starting with release 8.5, documentation is developed online, using MediaWiki coding, templates, and forms. However, for some documentation for supported releases prior to 8.4, documentation was developed using FrameMaker, RoboHelp, Excel, and an HTML Editor.

Documentation of this type is stored in our IX Repository. Links from our documentation sites to documents stored in the Repository pull the associated document from the repository, and downloads it to the users browser. Because the Repository does not support versions, if writers need to update a non-online document or add a new non-online document, in addition to adding it to the Repository, the writer adds it to the associated product folder in Global IX SharePoint > Genesys Public.

#### Important

Prior to 2019, IX created a Documentation Library DVD on which all non-online documents were located. As IX moved more and more content online, the DVD was less useful as the DVD only included links to the online documentation. For 2020 and 2021, the Documentation Library DVD was solely created for escrow purposes. Kate Breckenridge created that DVD. As Kate was let go in 2021, no one has training to create new DVDs.

#### Pre-release

In most cases, the only pre-release documentation delivered are pre-release notes. Pre-release notes are added to the IP of the associated pre-release software.

If documentation, other than the pre-release note are part of the delivery, pre-release documents that are not online are added to the IP.

Premier Edition Early Adopter Program

#### Important

Premier Edition reached end of support at the end of 2020. Retaining the information here for historical reasons.

Premier Edition Cloud (PEC) offers preview documentation to customers in the Early Adopter Program (EAP). These customers receive features before they are generally released. Thus, they need documentation for these features.

PEC products (including CX Builder and CX Analytics) have a version called **Preview** in preview status. Customers log in to docs.genesys.com with the following credentials to gain access:

- Username: premier\_preview
- Password: genesys

Each PEC doc has a separate page or chapter called **Early Adopter** in which EAP features are documented. When it is time to publish the doc, the writer publishes from Draft to Current first, ignoring the **Early Adopter** chapter. After the Current version is published, the writer publishes from Draft to Preview, this time including the **Early Adopter** chapter.

For the RN, a separate tab called **Early Adopter** holds all RN-related information for EAP customers (this includes corrections and known issues). The publication process is the same as for the PEC docs, in that one publication cycle is for the Current version (**Early Adopter** tab removed) and one publication cycle is for the Preview version (**Early Adopter** tab included).

# What Documents Go Where and Release Types

### Important

This information applies to content on docs.genesys.com.

This section provides information on where documents go/are delivered to customers based on the release type. This information impacts the Packaging Spec information for Excel versions of a Packaging Spec. (In May 2021, Packaging Specs are online and there is no Doc tab.) So, it's important that you are clear from the beginning of the project about how you are delivering documentation.

**Note:** If your scenario doesn't neatly fit into one of these areas, contact Pubs Editors and we'll work out together how to handle it.

#### General release (PA releases)

- Online Content access open; no login needed
- Readme content and Product Alerts on the Product Landing page
- Product Landing, open with links to any online documents and any non-online docs (located in our IX repository).
- PDFs, HTML RNs, HTML RAs, HTML WAs, HTML Deployment Procedures, HTML Readme PDF (if the Readme is not online) – in IX repository > public.

#### General release (PA) under shipping control

Some General (PA) releases are under shipping control. This means that the PM needs to approve the customers who can receive it. For product documentation, treat documents in the same way you would a General release. The release type for release notes should be General; however, you add "Under Shipping Control" next to associated 7-digit version. See the Under Shipping Control Scenarios section on the What's New tab of Release Note Content Details.

- Online Content access open; no login needed
- Readme content and Product Alerts on the Product Landing page
- Product Landing, open with links to any online documents and any non-online docs (stored in Genesys Public).
- PDFs, HTML RNs, HTML RAs, HTML WAs, HTML Deployment Procedures, HTML Readme PDF (if the Readme is not online) – in IX repository > public.

#### Restricted release (RA release)

See the Packaging Spec Review/Approval process (Restricted section on the Writer's Process tab).

For restricted releases we have a few scenarios to accommodate, as described below.

#### Long term restricted product

The covers the the following scenarios:

- When a product will be restricted for some time (a few releases, perhaps lasting for a couple years) and has never been released as general.
- When the product is restricted for a new major release but also for some time.
- When the product is part of the Early Adopter Program.

#### What you do with documentation:

- Online Content must require login to access. The versioning of content needs to be set to
   {{#version:Preview|preview}}. Content needs to be set to preview mode. Our Search engine does not
   index content set to preview mode (that is, {{#version:Preview|preview}}. It does index any content
   that's set to released, even if links to that content are on a restricted page that requires a login.
- PDFs, CHMs, HTML RAs, HTML WAs
  - On Product CD. Any such documents need to be signed-off by your team and approved by Pubs Editors prior to being placed on the Product CD and prior to the last request by your Product Manager/Project Manager for a build of the Product CD. Remember, QA needs to test the Product CD before its release. So, you need to account for that in your documentation schedule so they will be ready at least a week before the release date.
  - Not placed in the public folder of our IX repository but placed in Global IX SharePoint (for storage only and not linkable from the doc site) > Restricted Docs.
- Product landing page:
  - Add RESTRICTED in red to the product landing page title; for example SIP Cluster Solution <span STYLE="color:red;">RESTRICTED</span>
  - Add {{RestrictedProductNote}} below the product landing page. (As of 6/21/16, here's a link to one product: SIP Cluster. If the product goes GA though, this will no longer be an example.)
  - Not listed in the Browse All Products navigation widget.
  - Option 1: Product landing page can contain links to restricted content as long as login credentials are required to access that content.
  - Option 2: The "open" Product landing page does not include links to the specific login-required restricted content but does include links to another restricted page on which links are provided to the content for the restricted product. Going this route enables you to have the readme content online and restricted as well rather than in an html format.
- Readme: Be aware that for a restricted release that is being delivered by FTP or Software Download (with no physical CD/DVD or CD/DVD image involved) a Readme is not mandatory, as long as all needed information, including restricted login credentials, can be provided in the required restricted HTML release note. The PjM should confirm the delivery method. If it is determined by the PCT that a Readme really is needed, it can either be online or HTML. Make sure that this is reflected correctly on the CD\_DVD tab in the Packaging Spec spreadsheet. See the Packaging Spec Review/Approval process

(Restricted section on the Writer's Process tab).

- Option 1: Modified on Product CD with login credentials and link to the restricted content page. This approach better supports the last Product Landing page Option 2 described. If your team is not concerned about Readme content potentially being found using a Google search, then your readme content can work with Product Landing page Option 1. Contact Lynn in Pubs Editors for details about creating the modified "Readme."
- Option 2: Standard Readme on the Product CD with login credentials and link to the restricted content.
- Option 3: No Readme.
  - If you go this route, Pubs Editors does not generate a PDF of this Readme. So, nothing is placed in the public folder of the IX repository and it therefore does not get placed on the open product landing page. Warning: If it was placed in the public folder of our IX repository, the login credentials could be found by anyone, enabling anyone to access the restricted content.
- Release Notes
  - Restricted online RNs are not currently supported.
  - Restricted RNs must be in the HTML format and added to the IP prior to the release. These RNs can also include login credentials.
  - Restricted RNs are not placed in the IX respository. Pubs Editors places them in Global IX SharePoint > Restricted Docs.
  - Customers cannot access restricted release notes from the product page, only from the IP.

#### Short term restricted product

For products that are only restricted for a short while (weeks or a month or more), we also have a few scenarios to address.

#### Never been General (PA)

If your Product Manager does not want to reveal the restricted product yet on your product landing page:

- Create a restricted book and in that book create a landing page that would by default be restricted. On that landing page, add links to the restricted content.
- Provide login credentials to the restricted landing page in the html release note that's embedded in the IP.
- Be aware that for a restricted release that is being delivered by FTP or Software Download (with no
  physical CD/DVD or CD/DVD image involved) a Readme is not mandatory, as long as all needed
  information, including restricted login credentials, can be provided in the required restricted HTML
  release note. The PjM should confirm the delivery method. If it is determined by the PCT that a Readme
  really is needed, it can either be online or HTML. If HTML, credentials can be provided there. If online,
  the Readme content can appear on the restricted landing page. Consult your team in advance to
  determine what type of Readme (HTML or online) will be used. Make sure that this is reflected correctly
  on the CD\_DVD tab in the Packaging Spec spreadsheet. See the Packaging Spec Review/Approval
  process (Restricted section on the Writer's Process tab).

#### General (PA) but later version temporarily restricted

If you already had a generally available release (for example 8.5.0) and now you have a restricted release for 8.5.1

- RN in HTML format and include credentials. The RN is added to the IP.
- If the readme is already online, there is no need to create a new restricted HTML Readme. Given its temporary nature, a separate Readme section is not needed as the release note contains new in this release details. Readme links should point to the General readme section.
- Links to restricted content should be included in the restricted release note.

#### Restricted for a specific component version

Sometimes individual components are released as restricted prior to its release as a Hot Fix or General. For this, RNs must be in HTML format and any writer can sends them to Production Builds for inclusion in the IP.

# General (PA) but documents are only available to customers who buy the product

#### and not to all customers

- Online Content requires login to access. Content needs to be set to preview mode. Our search engine does not index content set to preview mode. It does index any content that's set to released, even if links to that content are on a restricted page that requires a login.
- PDFs, CHMs, HTML RAs, HTML WAs
  - On Product CD. Any such documents need to be signed-off by your team and approved by Pubs Editors prior to being placed on the Product CD and prior to the last request by your Product Manager/Project Manager for a build of the Product CD. Remember, QA needs to test the Product CD before its release. So, you need to account for that in your documentation schedule so they will be ready at least a week before the release date.
  - Not placed in the IX respository Genesys Public but placed in Global IX SharePoint site > Restricted Docs by Pubs Editors.
- Product Landing page:
  - Listed in the Browse All Products navigation widget.
  - Option 1: Product landing page can contain links to restricted content as long as login credentials are required to access that content.
  - Option 2: The "open" Product landing page does not include links to the specific login-required restricted content but to another restricted page on which links are provided to the content for the restricted product. Going this route enables you to have the readme content online and restricted as well rather than in an html format.
- Readme: Be aware that for a restricted release that is being delivered by FTP or Software Download (with no physical CD/DVD or CD/DVD image involved) a Readme is not mandatory, as long as all needed information, including restricted login credentials, can be provided in the required restricted HTML release note. The PjM should confirm the delivery method. If it is determined by the PCT that a Readme really is needed, it can either be online or HTML. If HTML, credentials can be provided there. If online, the Readme content can appear on the restricted landing page. Consult your team in advance to determine what type of Readme (HTML or online) will be used. Make sure that this is reflected

correctly on the CD\_DVD tab in the Packaging Spec spreadsheet. See the Packaging Spec Review/ Approval process (Restricted section on the Writer's Process tab).

- Option 1: Modified on Product CD with login credentials and link to the restricted content page. This approach better supports the last Product Landing page Option 2 described. If your team is not concerned about Readme content potentially being found using a Google search, then your readme content can work with Product Landing page Option 1.
- Option 2: Standard Readme on the Product CD with login credentials and link to the restricted content.
  - If you go this route, Pubs Editors does not generate a PDF of this Readme. So, nothing is placed in the IX repository and it therefore does not get placed on the open product landing page. Warning: If it was placed in the IX repository, the login credentials could be found by anyone, enabling anyone to access the restricted content.
- Option 3: No Readme.
- Release Notes
  - Restricted online RNs are not currently supported.
  - Restricted RNs must be in the HTML format and added to the IP prior to the release. These RNs can also include login credentials.
  - Restricted RNs are not placed in the IX Repository. Pubs Editors or the writer places them in Global IX SharePoint > Restricted Docs
  - Customers cannot access them from the product page, only from the IP.

**Note:** If the Product Manager is not concerned that anyone can potentially see the release notes from a Google search, then the release note can be online or in html format. If html format, the release note can be added to the public folder of the IX repository.

#### Pre-release

For pre-release notes and other pre-release documentation, see Pre-release Notes and pre-release documentation.

### Other release scenarios

#### When a Restricted release becomes General

When the team first starts talking about changing a release's type from Restricted to General, do the following:

- 1. Confirm with your Project Manager that the Packaging Specification is updated to reflect the correct release type.
  - The Doc tab should include definitions for any Release Notes and other documentation.

- If the RNs will be online, there's a specific way to indicate that in the Packaging Spec. See the Writers process tab on the Packaging Spec Review/Approval topic.
- If you're planning to have the Readme online too, that also impacts the Packaging Spec. See the same reference above.
- 2. For Release Notes:
  - If you're planning to have an online RN (preferred), email the Pubs RN Admin alias to create an RN manual for your product RNs.
  - If time or resources (yours or the Pubs RN Admins) prohibits creating an online RN, contact Pubs Editors for direction.
  - As for the RN content, see the associated section in the following Writers Guide topic Unusual Release Note Scenarios.
- 3. For Readmes, if you plan to have your Readme online, see the following process for doing so: Managing Online Readmes.
- 4. On your product pages, when the product is released as General (PA):
  - Remove the red "RESTRICTED" from the product landing page title.
  - Remove the {{RestrictedProductNote}} from the page.
  - Publish all restricted documents as released, per the usual PonyDocs process with respect to versioning and such.
  - After getting peer editing and format checking, publish the RN freeze forms in XING for any RNs that are not associated with v9.0.
  - Publish the RN on the documentation website.
  - Email your team, particularly your Project Manager, and inform them that you have published the RNs.

#### When the Project Core Team is considering making a General (PA)-planned

#### release Restricted

If your release was planned as a General (PA) release but your team is discussing making it restricted instead:

- 1. Inform your immediate manager of that discussion.
- 2. Make your team aware that it takes at least 3 days or longer for various people in IX, including yourself, to make that change. It may require more time if the release notes are online, as those release notes must be converted to HTML format and embedded in the IPs for the respective component.

What you need to do after that depends on whether the release is only going to be restricted for some months or whether it will remain restricted for at least a year or more and continue as restricted even through future releases for a while.

# Genesys Engage cloud

Questions? Email the Cloud core team.

#### Genesys Engage cloud doc

The following links are outdated:

- Cloud doc home page
- Product tracker
- Article tracker

As processes and best practices become solidified, the Cloud Core team will move them from the Cloud Doc Confluence pages to the Writer's Guide.

Articles in this section include:

- Cloud content and style
- Deprecations in Genesys Engage cloud
- Genesys Engage cloud example
- Genesys Engage cloud Release Notes

# Cloud content and style

Questions? Email the Cloud core team.

# When do we use Cloud style?

- When the audience is end-users (agents, supervisors, and even administrators)
- In overviews, top-level topics, and, ideally, every Cloud topic topic
- In anything that might end up in Genesys Engage cloud, except: APIs/SDKs, some reference topics, and apps that will likely never be brought to Cloud in their current format
- In other words, almost everywhere

# How is Cloud style different from all other styles?

Topics written for Cloud need to:

- include at least one instance of the Genesys Engage Cloud template
- use less formal language that directly addresses the user (you) in a specific role or roles: agent, supervisor, manager, or administrator
- use the specialized topic types where appropriate (overview, getting started)
- explicitly address the user's needs: not just *how*, but *why* and *what* as well
- establish context, including across products (where does this topic fit in?)
- observe IX visual standards

#### Simplify!

- Minimize text
- Let the UI do its work (don't cover every field)
- Focus more on gotchas, pain points, and UI that causes confusion or runs contrary to the user's expectation
- Hierarchize: promote core items while demoting the optional, corner cases

# Titles and headers

• Keep titles short and headers specific enough to be searchable

- Use sentence case (init cap on first word and lower case on everything else but proper nouns, as on this page)
- Questions are good for headers but not titles

# Stock phrases

Use whenever a page contains non-universal functionality: "Some features or settings might not apply to your contact center."

# Topic types

All topics should be articles, by which we mean that they need to exhibit the Cloud style. Beyond that, we have some specific topic types.

#### Overview topics

- Overviews address what the user can do and why they need to do it
- Overviews contain no how: no procedural information other than linking
- Each component product (or product area) and each main node under each product should contain an overview

Example: the Reporting overview introduces and explains the differences between the two main reporting products, Genesys Pulse and GCXI

#### Getting started topics

- Getting started topics (which replace Quick Start Guides) show *how*: the bare minimum someone has to do to get up and running; in some cases they include only a small fraction of the total available functionality. Think of them as "getting your feet wet" topics.
- Use the Cloud template throughout

Example: the Getting Started for Agents topic tells the agent how to log in and take a call and includes plenty of links

# Deprecations in Genesys Engage cloud

This article describes the process to follow when a feature, service, capability, or application is put on the deprecation track, so that it eventually becomes unavailable to Genesys Engage cloud (former PureEngage cloud or PEC) customers.

# Deprecations at a glance

The Deprecations process applies to the features, services, capabilities, or applications that Product Management decides to remove from the Genesys Engage cloud environment. Essentially, the Deprecations process is analogous to the processes that Genesys Engage follows for on-premises products: Discontinuation of Support (for features, capabilities, or 3rd party components) or End of Life (for services or products). In many cases, a replacement feature, service, capability, or application is offered to customers as part of the Deprecations process. (For simplicity, the terms *feature deprecation* or *deprecation* are used in this article to mean any feature, service, capability, or applications that falls under the Deprecations process.)

A given feature deprecation must be approved by Product Management and PM Operations and must be communicated internally before the deprecation announcement is published for customers on the documentation site. The Technical Writer for the relevant product/functional area is responsible for creating a customer-facing deprecation article and Release Note and publishing them on the announcement date. When the feature finally reaches the deprecation date, the Technical Writer publishes a subsequent update to the deprecation article and Release Note. A time window (usually, six months) between the announcement date and deprecation date allows Genesys Engage cloud customers to prepare for the change in their environment.

The complete process is outlined on the Release Management site:

#### https://genesyslab.sharepoint.com/sites/releasemgmt/SitePages/EOL-Preparation.aspx

In particular, refer to the slide deck named *Genesys Engage cloud Feature Deprecations* (by Product Management Operations), at the bottom of the referenced page.

# JIRA tracking

To keep track of the milestones and tasks associated with deprecations, the JIRA ticket template captures the workflow and responsibilities of different members of a product team:

 https://jira.genesys.com/browse/GCLOUD-16561 TEMPLATE: Cloud Feature Deprecation: <FEATURE/ SERVICE NAME>

The Product Manager who initiates the deprecation process uses the JIRA template to create a ticket and subtasks specific to a particular feature deprecation. While subtasks 1 and 2 are completed prior to and on the announcement date, the remaining subtasks are performed closer to and on the deprecation date. Because of the time gap of up to six months between these two dates, it is a good practice to keep any essential records and comments in the main ticket rather than in the subtasks.

**Subtask 1. Documentation Input:** Product Management input for the Deprecation article on the Genesys Engage documentation site

This task is for the Product Manager to provide documentation input for Deprecation article and Release Notes, in the main Deprecation ticket for <FEATURE/SERVICE NAME>.

#### Subtask 2. Deprecation article and Release Notes publication

- 1. The Technical Writer prepares a Deprecation article and Release Note entry based on the input in the main Deprecation ticket for <FEATURE/SERVICE NAME>.
- 2. The Technical Writer publishes the Deprecation article and Release Notes on the Announcement date.

If a separate ticket is necessary to track updates to product documentation, other than the Deprecation article and Release Notes, the Technical Writer uses the **Add Documentation** button in the main Deprecation ticket. This creates a Documentation task to track the work required to remove feature description and references.

**Subtask 3. Technical clearance:** This task is for Development and/or QA to verify that <FEATURE/ SERVICE NAME> has been removed/disabled.

**Subtask 4. Actual deprecation date confirmation:** This task is for the Product Manager to confirm the actual deprecation date for: <FEATURE/SERVICE NAME>.

The Product Manager must provide any updates regarding the date and final wording for the Deprecation article and Release Note, in the main Deprecation ticket for <FEATURE/SERVICE NAME>.

#### Subtask 5. Final publications:

- 1. The Technical Writer is to update the Deprecation article and create a new Release Note entry in preparation for the final Deprecation date for <FEATURE/SERVICE NAME>.
- 2. The Technical Writer is to re-publish the Deprecation article and publish the new Release Note entry on the final Deprecation date.

# Instructions for Technical Writer

A deprecation article and Release Note are the two deliverables that are required for a deprecated item, at a minimum. The Product Manager provides input for these two deliverables in the Deprecation JIRA ticket. The Technical Writer must ensure that the resulting article and Release Note entry comply with Cloud style, in particular in the use of imperative and active voice, and adhere to the rules of English grammar, spelling, and punctuation. In the majority of cases, updates to existing articles and documents for the related features, products, or functional areas are also necessary. It is the responsibility of the Technical Writer to assess the documentation needs and any cross-product dependencies around the announcement date and to complete documentation updates or article removal by the deprecation date. The **Add Documentation** button on the main Deprecation JIRA ticket can facilitate creation of a JIRA ticket to track additional documentation updates.

#### High-level writer's task summary

Before the Deprecation announcement date:

- 1. Create a Deprecation article (see how)
- 2. Create a Deprecations portal page for the product/functional area, if one does not exist (see how)
- 3. Prepare Release Note for the announcement date (see how)

On the Deprecation announcement date:

- 1. Publish the Deprecation article (see how)
- 2. Publish the Product-specific Deprecations portal page, if not published yet (contact the Doc Platform team for assistance)
- 3. Publish Release Note (see how)
- 4. (Optional) Tag existing feature documentation as To Be Deprecated

Before the final Deprecation date:

- 1. Update the Deprecation article (see how)
- 2. Prepare Release Note for the final deprecation date (see how)
- On the final Deprecation date:
- 1. Re-publish the Deprecation article (see how)
- 2. Publish Release Note (see how)
- 3. (Optional) Remove documentation for the deprecated feature

#### How to create a Deprecation article

The Deprecation article template simplifies creation of a new article. After you receive, through the Deprecation JIRA ticket, complete inputs about the planned deprecation from the Product Manager, create the Deprecation article:

- 1. Navigate to the Workspace Administration Dashboard for the respective product or functional area.
- 2. On the Workspace Administration Dashboard, find the **Manage Standalone articles** section.

#### 3. Click Add a Deprecation Notice.

4. Fill out the form:

4a. Enter the official name of the feature (service, capability, or application) that will be deprecated.

4b. Select **Genesys Engage** as the Platform.

4c. In the column for Release Notes, add a link to the Release Note page for the respective product in the draft version of PEC Release Note:

https://docs.genesys.com/Documentation/PSAAS/draft/RN/Welcome/<product\_page>

4d. Use Product Manager's input from the Deprecation JIRA ticket to populate sections of the article:

Announcement date: <Month DD, YEAR>

Deprecation date: <Month DD, YEAR>

Description: <Text of the deprecation description>

Recommended Alternative: <Suggestion of a new feature/functionality as successor, as applicable>

Explanation: <Rationale for the deprecation or retirement appropriate for the customer-facing document. Provides answers to potential customer questions:>

- Am I affected?
- How can I prepare for this deprecation?
- What if I need help or have questions? (Any guidance aside from contacting MySupport.)
- After you save the draft article, go to the draft version of the System-level Deprecations portal for Genesys Engage cloud: https://all.docs.genesys.com/Draft:System/AllDeprecations
- 6. Verify that the new deprecation item appears on the portal page with the correct name, dates, and links.
- Go to the draft version of the Product-specific Deprecations portal for the respective product/functional area and verify that the new deprecation item appears on the portal page with the correct name, dates, and links.

**Note:** If this is the first deprecation item within this particular product or functional area, you will need to create a Product-specific Deprecations portal page.

#### How to create a Deprecations portal page for a product/functional area

For the first deprecation within a particular product or functional area, you must create a Deprecations portal page under the respective Workspace. This and subsequent deprecations for the same product or functional area will automatically appear on the portal page.

Example: https://all.docs.genesys.com/PEC-REP/AllDeprecations

To create a draft of the Product-specific Deprecations portal:

- 1. On the Workspace Administration Dashboard, find the Manage Standalone articles section.
- 2. Click **Create Deprecation List** page. This button is not displayed if the Deprecations portal page already exists, even as a draft.
- 3. Follow the prompts.
- 4. Select **Genesys Engage** as the Platform.
- 5. On the draft portal page, verify the following:
  - The name and dates are correct for the new deprecation item.
  - The FAQ section is named "Genesys Engage Deprecations FAQs" (that is, specific to Genesys Engage as opposed to Genesys Engage cloud).

#### How to prepare the Release Note for the announcement date

• If the announcement date for a given deprecation item coincides with a Cloud release date for the respective product or service, add a section called Deprecations after the What's New section in the Release Note entry for the release. In the Deprecations section, describe the future deprecation item using the Release Note input from the Deprecation JIRA ticket. Use the following syntax:

```
<FEATURE/SERVICE NAME> - On <Deprecation date entered as Month DD, YEAR>, Genesys will
deprecate <FEATURE/SERVICE NAME>.
<br/><Deprecation details, anywhere from one sentence to two paragraphs, ideally including a
reference to the replacement feature/service>. For more information, see <Link to the
Deprecation article>.
```

 If the announcement date falls outside of the product release cycle, add a new Release Note entry titled with the announcement date, without including the release number. The Deprecations section will be the only section in the Release Note entry (because the What's New and Resolved Issues sections are not required).

#### Example

See the Genesys Interactive Insights (GI2) Deprecation announcement drafted in GCXI Release Note.

```
==April 30, 2020==
===Deprecations===
*'''Genesys Interactive Insights''' - On November 20, 2020, Genesys will deprecate the legacy
historical reporting product called Genesys Interactive Insights (GI2).
*:<br/>
*:Genesys Customer Experience Insights (Genesys CX Insights or GCXI) is offered in Genesys
Engage cloud (formerly known as PureEngage Cloud) as the new historical reporting tool that
replaces GI2. GCXI provides a presentation layer that extracts data from the Genesys Info
Mart database and presents it in readable historical reports, thereby enabling business and
contact center managers to make better business decisions for streamlining operations,
reducing costs, and providing better services. For more information, see
[https://all.docs.genesys.com/Draft:PEC-REP/Deprecation-Genesys_Interactive_Insights
Deprecation: Genesys Interactive Insights].
```

#### How to publish a Deprecation article on the announcement date

Prior to publication:

- The Product Manager, other members of PCT, and any members of the extended product team designated by the Product Manager must review and approve the article.
- Another Technical Writer has to peer-edit the text of the article.

To publish a Deprecation article:

- 1. Access the draft article.
- In the Edit mode, change the Release Note link to point to the product page in the Public version of PEC Release Note (rather than the draft version), and save the change: https://docs.genesys.com/Documentation/PSAAS/latest/RN/Welcome/<product\_page>

- 3. Click Page actions and select Publish page.
- 4. Wait until the public version of the page is created.
- 5. Verify that the new deprecation item appears on the published System-level Deprecations portal page: https://all.docs.genesys.com/System/AllDeprecations
- 6. Verify that the new deprecation item appears on the published Product-level Deprecations portal page for the respective Workspace.

**Note:** If this is the first deprecation within a given Workspace, the Product-specific Deprecations portal page for the product/functional area might not have been published yet. Contact the Doc Platform team for assistance with publishing the portal page.

#### How to publish the Release Note on the announcement date

Prior to publication:

- The Product Manager, other members of PCT, and any members of the extended product team designated by the Product Manager must review and approve the Release Note entry.
- Another Technical Writer has to peer-edit the text of the Release Note entry.
- Pubs Editors have to approve the Release Note format.

To publish the Release Note with the Deprecations section, use the regular process for publishing Release Notes for new releases to Genesys Engage cloud (former PEC).

#### How to update a previously published Deprecation article

Close to the final deprecation date, when the feature, service, capability, or application is confirmed to be ready for removal, update the draft version of the Deprecation article. At a minimum, change the verbs from future tense to past tense, where necessary. For instance, replace "will remove" or "will deprecate" with "removed" or "deprecated". Additionally, consult the Product Manager regarding changes to any other statements, references, or timelines in the Deprecation article.

#### How to prepare the Release Note for the final deprecation date

• If the final deprecation date for a given deprecation item coincides with a cloud release date for the respective product or service, add a section called Deprecations after the What's New section in the Release Note entry for the release. In the Deprecations section, describe the deprecation item using the updated Release Note input, if available, from the Deprecation JIRA ticket. Use the following syntax:

<FEATURE/SERVICE NAME> - On <Deprecation date entered as Month DD, YEAR>, Genesys deprecated
<FEATURE/SERVICE NAME>. <Short statement with a reference to the replacement feature/service,
if available>. For more information, see <Link to the Deprecation article>.

• If the announcement date falls outside of the product release cycle, add a new Release Note entry titled with the deprecation date, without including the release number. The Deprecations section will be the only section in the Release Note entry (because the What's New and Resolved Issues sections are not required).

How to re-publish the Deprecation article on the final deprecation date

Prior to publication:

- The Product Manager, other members of PCT, and any members of the extended product team designated by the Product Manager must review and approve the updates to the article.
- Another Technical Writer has to peer-edit the text of the article.

To re-publish the Deprecation article:

- 1. Access the updated draft article.
- 2. Click Page actions and select Publish page.
- 3. Wait until the public version of the page is updated.
- 4. Verify that the deprecation item appears correctly on the published System-level Deprecations portal page: https://all.docs.genesys.com/System/AllDeprecations
- 5. Verify that the deprecation item appears correctly on the published Product-level Deprecations portal page for the respective Workspace.

#### How to publish the Release Note on the final deprecation date

Prior to publication:

- The Product Manager, other members of PCT, and any members of the extended product team designated by the Product Manager must review and approve the Release Note entry.
- Another Technical Writer has to peer-edit the text of the Release Note entry.
- Pubs Editors have to approve the Release Note format.

To publish the Release Note with the Deprecations section, use the regular process for publishing Release Notes for new releases to Genesys Engage cloud (former PEC).

### Examples

Genesys Engage cloud Release Notes, GI2 entry in GCXI Release Note for April 30, 2020: https://docs.genesys.com/Documentation/PSAAS/Public/RN/CXI

System-level Deprecations portal page: https://all.docs.genesys.com/System/AllDeprecations

Reporting Deprecations portal page: https://all.docs.genesys.com/PEC-REP/AllDeprecations

Genesys Interactive Insights Deprecation article: https://all.docs.genesys.com/PEC-REP/Deprecation-Genesys\_Interactive\_Insights

# Cloud example

The latest version of the Agent Desktop Help serves as a good model for Cloud-based doc.

# Why revise?

#### **Customer issues**

- Unnecessary complexity
- Lack of "why"—what's the significance of feature x?
- Difficulty finding answers to specific questions/issues
- Jargon—"We're not in the telephony business!" said one of the customers

#### Single-sourcing

- Within product doc (links rather than repetition of big chunks of text)
- Between Premise and Cloud products (reduce maintenance)

#### **Industry standards**

- Genesys is now in a different industry (enterprise, not telecom only)
- Customers expect greater usability

### What we did

- Simplified (what does the user really need to know?)
- Cut word count by 60%, topic count by >50%
- Let the UI do what it does well
- Helped users through the rough spots
- Separated audience info
- Emphasized multimedia

# Structure

• Fewer words and topics in the TOC mean that the doc is easier to scan

• Short H1s, move the questions to H2s

# Content

- Less is more: easier to search and scan
- Less is cheaper: we now have to deal with translation costs
- Less is clearer: readers just want to get their work done; cut everything else
- Tell them once (and then link to it)
- Ripple: connect new features to other features and to the product as a whole

# Genesys Engage cloud Release Notes

Genesys Engage cloud has its own Release Notes, which consist of Cloud-specific RN items from its component products. We're planning hybrid RN blurbs for Cloud and Premise items, which sets up a change to Cloud style from traditional Genesys style.

#### Important

When creating Genesys Engage cloud RNs include JIRA ticket numbers for New Features, RIs and KIs, as it was helpful to customers tracking issues they may have reported or experienced.

#### **Delivery Scenarios**

There are a few scenarios you might encounter related to on-premises features pushed to Genesys Engage cloud. This is how you handle them with respect to release notes.

- Components or features that are available to a limited number of people, as in a restricted release.
- Features and fixes in an on-premises version destined only for on-premises software and on-premises customers: Document them as usual in the component RN for the on-premises product.
- Features and fixes in an on-premises version that are made for Genesys Engage cloud customers in addition to features and/or fixes for on-premises customers:
  - Document the changes in the on-premises component RN but do not include a Genesys Engage cloud note in the on-premises RN about the Genesys Engage cloud features/fixes.
  - Follow the Process for pushing features to the Genesys Engage cloud RN provided below.
- Features and fixes in an on-premises version that are for Genesys Engage cloud customers only but with no features or fixes for on-premises customers:
  - If the software will be available from Software Downloads, add a Genesys Engage cloud note to the component RN according to the **Process for pushing features to the Genesys Engage cloud RN** provided below.
  - If the Developer is specifying Yes for the Genesys Engage cloud option in the component IP and No for Premise, you don't need to add anything to your on-premises Release Note. If Genesys Engage cloud customers don't need to notified about anything regarding this, then no updates are needed in the Genesys Engage cloud RN either.
- Features or fixes made in the on-premises version for Cloud Operations only that are not visible to Cloud customers or on-premises customers:
  - Genesys Engage cloud RN: No action is required.
  - On-premises component RN:
    - If other features or fixes are made to the same on-premises version for on-premises customers, document them as usual. However, you do not need to add the Genesys Engage cloud note to the on-premises RN about the cloud impact.

• If no on-premises software features or fixes are made to the on-premises version, to ensure capitalization, add a Genesys Engage cloud note to the component RN according to the **Process** for pushing features to the Genesys Engage cloud RN provided below.

# Restricted Genesys Engage cloud Releases

You may have a scenario where your team is releasing a feature or component that is only available to a limited number of customers, that is, restricted. In this scenario, while the component or functionality is restricted, the content for it is not strictly restricted.

The way you handle restricted Genesys Engage cloud releases is the same way you handle any Genesys Engage cloud release or content, you do the following:

- Create a Genesys Engage cloud RN, and, at the top, you include the following coding: [[File:Information.png|middle]] Note: Not all changes listed below may pertain to your deployment.
- 2. Then, on the Genesys Engage cloud RN page:
  - 1. For a new component, not already listed on the Genesys Engage cloud RN Welcome page, you add a new row.
  - 2. For an existing component, you update the version and the date.

### Providing a draft cloud Release Note prior to software release

Upon occasion you may be asked to provide the cloud RN prior to the software release. In this situation, convert the RN into a PDF, and insert a DRAFT watermark. Additionally, insert DRAFT next to any instance of the unreleased release number. Include DRAFT in the PDF filename. Send the PDF to Pubs Editors for format check and filename approval. Once approved, provide the PDF to the PjM, PM, or Account Manager for transmittal to customers.

# When no on-premises Release Note is needed for a Cloud Operations delivery

Do not create an internal RN for delivery to Cloud operations. If Development needs to communicate something about the version to Cloud Ops, they must use Confluence pages, which is standard for this type of information. Here's an example: Engineering Release Notes.

This applies to IPs of type Internal and Restricted. XING now includes a field called "No RN allowed." When an IP is only available to the Cloud, the value for that should be N, meaning no. This reiterates that no RN is needed. Here's an example of an IP Report in that scenario: ICON Restricted IP.

**Note:** Although an RN is not needed, per Igor Klyashchitskiy, an IP Test Form still must be published.

# Process for what goes in the on-premises RN

For General, Update, and Hot Fix versions in which the only modification in a 7-digit version is for a Genesys Engage cloud product, do the following:

#### New Feature for Genesys Engage cloud

Add the following text in the What's New/New in this Release section:

This release contains modifications to support Genesys Engage cloud implementations only.

**Note:** This specific text can also be used for restricted release notes, but you are not limited to it. The specific text for General and Hot Fix version is required because on-premises customers will see the release note. This addition is required for capitalization purposes.

#### New Fix for the Cloud

Add the following text in the **Corrections and Modifications/Resolved Issues** section:

This release contains corrections and modifications to support Genesys Engage cloud implementations only.

# Process for pushing features to the Genesys Engage cloud RN

The Product Manager works with the on-premises product writer to feed content pushed to the Genesys Engage cloud RN:

- 1. The Product Manager informs the on-premises product writer what version and features will be released to Genesys Engage cloud.
- That product writer tags the JIRA items with CloudRN and writes the text in the JIRA Release Note field. See RN text for writing instructions.
- 3. When the on-premises product is released, Product Managers (via the Product writer) provide a filter typically component + version + CloudRN label - to the lead Genesys Engage cloud writer that provides him/her with the content for the Genesys Engage cloud RN.
- 4. The lead Genesys Engage cloud writer works with the Genesys Engage cloud Project Manager to determine when the associated component and features will be released to Genesys Engage cloud customers.
- 5. Based on that, the lead Genesys Engage cloud writer updates the Genesys Engage cloud RN accordingly and publishes the updated pages changes when the new component is released to Genesys Engage cloud customers.

# RN text for Genesys Engage cloud RN

Two basic scenarios cover RN writeups:

- 1. Entire RN text of the JIRA item applies to Genesys Engage cloud (in addition to the on-premises RN). In that case, the on-premises RN should use Cloud style, period: short (usually one sentence) and sweet (explain the significance of the new feature/fix). This allows for easy pull into the Cloud RN when the time arrives.
- 2. Only part of the RN text from the JIRA item applies to Genesys Engage cloud, and the remainder is important for the on-premises RN version. In that case, use a hybrid model:
  - The first paragraph uses the Cloud style and applies to both scenarios. The lead Genesys Engage cloud writer pulls this paragraph for the Genesys Engage cloud RN.
  - The second paragraph is for Premise customers (and internals) *only*, and includes greater detail, plus any config options that are *not* going into a Genesys Engage cloud-facing UI. Don't forget to separate the two paragraphs with an empty line.

# Examples for Genesys Engage cloud RN

#### What's New

#### Original

Device management provides the ability to automatically configure, deploy, and manage large numbers of phones remotely in an enterprise solution or contact center environment, including:

- Bulk provisioning of IP Phones
- Remote management of devices, including configuration and firmware upgrades
- Support for Polycom, AudioCodes, Genesys, and Yealink phones
- · Support for phones behind SBCs and firewalls

#### Revision

Device management lets you manage multiple phones, including:

- Bulk provisioning of phones
- Remote management of phones, including configuration and firmware upgrades
- Support for Polycom, AudioCodes, Genesys, and Yealink phones
- Support for phones behind SBCs and firewalls

#### Resolved Issues

Original

T-Server now correctly processes TReconnectCall requests by correctly specifying the third-party parameter of the OAI SCF10 request, when such a request follows call redirection via OAI SCF10 where the third-party parameter is required. Previously, the switch rejected erroneous SCF 10 call reconnection requests. (TS-11082)

#### Revision

[for both Genesys Engage cloud and On-Premises, or Genesys Engage cloud only:] T-Server now correctly reconnects redirected calls that require third-party details.

**[for Premise only:]** Specifically, T-Server now correctly processes TReconnectCall requests by correctly specifying the third-party parameter of the OAI SCF10 request, when such a request follows call redirection via OAI SCF10 where the third-party parameter is required. Previously, the switch rejected erroneous SCF 10 call reconnection requests. (TS-11082)

#### Original

T-Server now correctly processes an unsuccessful single-step transfer of a consultation call, when the PBX sends an OAI SMFN 3 (Release) message for the transfer originator but the call never reaches the transfer destination. Previously, T-Server misinterpreted this scenario, causing the DN initiating the transfer to remain in the off-hook state when the call was released. (TS-10875)

#### Revision

[for both Genesys Engage cloud and On-Premises, or Genesys Engage cloud only:] Phones now correctly hang up when consultation calls do not transfer successfully.

**[for Premise only:]** Specifically, T-Server now correctly processes an unsuccessful single-step transfer of a consultation call, when the PBX sends an OAI SMFN 3 (Release) message for the transfer originator but the call never reaches the transfer destination. Previously, T-Server misinterpreted this scenario, causing the DN initiating the transfer to remain in the off-hook state when the call was released. (TS-10875)

#### Original

The Publish to Schedule action in the WFM Web for Supervisors Calendar Items view is updated to verify that the time zone selected in the view is the same as the time zone of the sites to which the selected Calendar items belong. If they do not match, a warning appears and the supervisor cannot proceed with the action. Previously, WFM Web did not verify matching time zones and allowed Calendar items to have incorrect times when published to schedules. This same limitation exists in Schedules which can only be edited if the time zone of the site to which the schedules belong is selected. (WFM-25127)

#### Revision

[for both Genesys Engage cloud and On-Premises, or Genesys Engage cloud only:] WFM now verifies time zones and prevents supervisors from publishing incorrect times to Calendar items.

**[for Premise only:]** Specifically, the Publish to Schedule action in the WFM Web for Supervisors Calendar Items view is updated to verify that the time zone selected in the view is the same as the time zone of the sites to which the selected Calendar items belong. If they do not match, a warning appears and the supervisor cannot proceed with the action. Previously, WFM Web did not verify

matching time zones and allowed Calendar items to have incorrect times when published to schedules. This same limitation exists in Schedules which can only be edited if the time zone of the site to which the schedules belong is selected. (WFM-25127)

#### **Known Issues**

#### Original

#### **Device management: Firmware upgrades**

- Firmware upgrades initiated for a device may fail if the upgrade timer expires during a call.
- In business continuity and multisite deployments, a peer site cannot upgrade the firmware of phones belonging to the original site.
- If Feature Server terminates during a firmware upgrade, and the firmware upgrade completes after Feature Server is running again, the firmware version and upgrade status are not properly updated.

#### Revision

#### **Device management: Firmware upgrades**

• Firmware upgrades initiated for a phone may fail if the upgrade timer expires during a call. *Workaround:* Try the upgrade again.

# Handling a rollback of a Genesys Engage cloud component in your RN

If your component has to rollback or be recalled, do the following:

- 1. Leave the entry in the Genesys Engage cloud RN.
- 2. Remove the existing content under the What's New and Resolve section.
- 3. Add something like the following under What's New": Date (seven-digit verson)

As of month, day, year, this release is no longer available to most Genesys Engage cloud customers. A critical issue was discovered. A new release is being prepared to correct the identified issue.

If your team (and Customer Care) decide to describe the issue as a Known Issue, add a clear statement that the issue pertains only to the March 4th release. When a new version is released, include the fix description, again stating clearly that the issue only manifested itself in the recalled release.

If your scenario is different, reach out to Pubs Editors and copy Tanya Ivanova.

# Editing

### Important

As of 2021 we no longer use a third-party editor. You should rely on peer edits and the use of Acrolinx (on all.docs.com). To obtain copy editing by a peer, simply ask the writer of your choice or send a request to IX Global.

# General Data Protection Regulation (GDPR)

From Peter Graf's email dated May 25, 2018:

Starting today, the European Union will begin enforcing its new data protection law called the GDPR (General Data Protection Regulation). Under GDPR, EU residents have a number of new rights that enable greater control of their personal information while businesses are held accountable for the protection of that data. Individuals gain the right to access their own data and can demand: a copy of their personal data to see what a company has tracked; deletion of their personal data; and portability of their data.

This regulation affects anyone in the EU, as well as organizations working with the data of anyone in the EU. This includes many of our customers and us.

At Genesys, we've always valued the privacy and security of our customers' data. That's why, in support of these changes, we have introduced all the necessary practices and technical requirements for compliance in all of our platforms:

- For Genesys Cloud we created a self-service feature so businesses can handle high volumes of customer data requests quickly and directly within the Genesys Cloud platform. With the Genesys Cloud GDPR API, businesses can automatically facilitate key end-customer requests easily and confidentially. You can read more in our press release: Genesys Speeds and Simplifies Compliance with GDPR for Genesys Cloud Customers Worldwide
- For PureConnect we have developed SQL queries and anonymization scripts for our partners/direct customers and PureConnect Cloud ops team. You can find the GDPR related content in the PureConnect Security Precautions Technical Reference document located here. We are developing a tool that will allow PureConnect Cloud customers to self-service their GDPR requests and partners/direct customers to change the tool as they see fit.
- For Genesys Engage we created product-specific procedures enabling our customers to comply with GDPR. We've done this with Kerberos authentications, call recordings can now be encrypted, then decrypted for feedback, and when configuring TLS, you can specify the version of TLS protocol to use to secure connections. The Genesys Engage platform holds EU citizens' data to execute processing on behalf of customers. While Genesys Engage customers are the data controllers for GDPR purposes, the platform has a responsibility to support customer compliance with GDPR requests. We support GDPR rights including; Right to Consent, Right of Access and Portability, Right of Erasure (Forget Me), Breach Notification and Privacy by Design. You can find more detailed information on our documentation website.

# GDPR files

For ease of identification, use "gdpr" in the file name followed by the product-specific abbreviation and the associated two-digit release. For example: gdpr\_ucs90.zip.

For ease of tracking, GDPR files will be placed in the General Data Protection Regulation (GDPR) folder in the public folder of the IX repository (and in Global IX SharePoint > Genesys Public, rather than in the product specific folder.

# Some links

- Wikipedia article
- This GDPR Confluence page explains how GDPR compliance is being handled for Genesys Engage products.
- Data Privacy chapter in the Genesys Security Deployment Guide

# Localization

#### Important

May 2021: The localization process is currently in transition. Ask your PjM or PM to contact Michael Katten and Jabashree Amudha for the current policy.

### Overview

Tech Pubs provides the documentation required for a localized product:

- Help Localization Kits: Currently, Help files are the only documentation that is actually translated. A Help Localization Kit contains the content and information required by the translation vendor to localize the Help. The writer is responsible for coordinating with the PCT Project Manager, the Localization Coordinator, and Tech Pubs Localization to provide the needed content/information.
  - Online/Wiki Help Localization Process
  - Non-online Help Localization Process
- **Release Notes:** The writer is responsible for coordinating with the PCT Project Manager and providing either "old style" Localized RNs (rare, as these have been phased out) or Language Pack RNs. Check the localization tab of the Packaging Specs to determine which type is needed. Localized RNs will continue to be in HTML format. Language Pack RNs may either be in HTML format or in online format as a Translation Support page.
  - Localized Release Notes (HTML format)
  - Language Pack Release Notes (HTML format)
  - Translation Support (ONLINE format)
- **Readme:** The writer is responsible for coordinating with the PCT Project Manager and incorporating Localization Support information in the New in Release section of the Online Readme. See International Online Readmes (Adding Localization Support Information in Online Readmes) and Managing Online Readmes. If the Readme is still in HTML (PDF) format, the creation of the Localized or International CD Read Me is the responsibility of a member of Tech Pubs Production (not the writer). Forward the request to the Pubs Editors email alias.

# Some Guidelines

Localization costs can be enormous when localizing Help files. In an effort to limit the cost, we need to develop our Help files accordingly. So, please keep in mind the following guidelines/instructions:

• Minor Mistakes: If you discover a typographical error or a consistency issue (for example, a naming convention or the like), but no other content needs to change in a particular topic, **don't change it**.

- **Version Numbers:** Limit the use of version numbers in your topics, if possible, to reduce the need to update those topics for later releases and localization costs.
- **Minor releases:** Evaluate the impact of a small enhancement if it has a minor impact on the customer, do not update the Help file but mention it in the general and localized/language pack release notes.

**Note:** To find out if your Help file will be localized, check the approved Packaging Spec.

# Localizing online (wiki) Help

#### Important

- May 2021: The localization process is currently in transition. Ask your PjM or PM to contact Michael Katten and Jabashree Amudha for the current policy.
- Questions? Contact Pubs Localization.

Localization of online (wiki) Help requires the coordinated effort of several groups:

- Writers
- Tech Pubs Localization Team
- Genesys Localization Team
- Translation Vendors
- Regional Language Experts (Genesys employees who are native speakers of a relevant language)
- Genesys Functional QA

This topic identifies the steps writers need to perform to localize their wiki Help. It assumes the English version of the wiki Help is already in place and has been approved by the PCT.

To localize an online (wiki) Help file, complete the steps in the **Writers' Process**, which provides detailed instructions for the tasks that **writers** need to perform. The brief outline provided in the **Overview** covers all stages of the localization process and shows how the writers' tasks fit into the larger localization process.

#### Overview

The high-level overview presented below outlines all stages of the larger Genesys localization process pertaining to IX (Tech Pubs). Steps requiring action from the writer are in **bold**. Detailed instructions are provided in the Writers' Process.

- 1. The PCT Project Manager opens a LOCAL JIRA Ticket for Help Localization/Translation, triggering the creation of the English Help localization kit (Help eLK) and preparation of the required vendor/language wiki pages for each language associated with the release.
- 2. When you (the writer) are assigned the LOCAL JIRA Ticket for Help Localization/Translation, prepare the contents of the Help eLK for translation by the vendors. See Steps I through V in the Writer's Process.
  - Set up or update, as needed, the required DRAFT version, manual, and TOC on *one* vendor/language wiki and import the English XML. If a new product is required, contact

the **Pubs Localization** team (Pubs LT) for assistance. Identify and resolve any issues with the import before submitting the finalized Help eLK for translation.

- If needed, Pubs Localization sets up (or updates) the required products, versions, and manuals for the remaining vendor/language wikis associated with the international release.
- The writer attaches the finalized Help eLK to the associated LOCAL JIRA Ticket for Help Localization/Translation, inserts a comment stating that this has been done, and assigns the JIRA ticket to the PCT Project Manager. The writer makes a member of Pubs Localization (currently Kate Breckenridge) a "watcher" on this JIRA ticket.
- 3. The Localization Coordinator (Laurence Carretey) sends the Help eLK to the vendor and requests a quote and timeframe. Once the quote is received, reviewed and approved, the vendor proceeds with the translation.
  - Pubs Localization is responsible for updating the DRAFT TOC and importing the English XML on the *customer-facing wikis*, and noting that this has been done by inserting a comment on the associated LOCAL JIRA Ticket for Help Localization/Translation. The comment includes links to the associated TOCs or Welcome pages.
- 4. The writer is responsible for populating the Special:HelpLink mapping page with localized URLs for their Help document. See Step VII in the Writer's Process. If applicable, update the associated JIRA ticket to indicate this has been done and assign the JIRA ticket to the appropriate member of Genesys QA.
- 5. The vendor translates the file, which is then reviewed by a Genesys Regional Language Expert and tested by Genesys Functional QA. NOTE: On 10/4/18, Laurence Carretey stated that (to her knowledge) this step is no longer being performed or enforced.
- 6. The vendor updates the DRAFT TOC and imports the translated XML into the DRAFT version on the vendor wikis for initial testing and notifies the Localization Coordinator.
  - The Localization Coordinator informs the writer that the Help is available for initial testing and assigns the associated LOCAL JIRA ticket to the writer.
  - The writer performs *initial* testing of the translated Help on the vendor wiki(s). If translation issues are identified, the writer notes them in the associated LOCAL JIRA ticket and assigns the ticket to the Localization Coordinator.
- 7. When all translation issues have been resolved, the vendor delivers the final translated XML (Help tLK) to Genesys.
  - The Localization Coordinator informs a member of Pubs Localization that the finalized translated Help (Help tLK) is available and assigns the associated Localization JIRA sub-tasks to that individual.
  - If needed, Pubs Localization sets up (or updates) the required products, versions, manuals, and TOCs for each customer-facing/language wiki associated with the international release and imports the translated XML. The LOCAL ticket is then assigned to the writer.
- 8. The writer performs a minimal, final, spot check of the approved, final, translated Help on each associated customer-facing/language wiki, and updates the associated LOCAL JIRA ticket if any remaining problems are identified. See Step VIII in the Writer's Process.
- 9. When the international release goes out, the writer publishes the translated Help; marks the associated LOCAL JIRA ticket "Closed", and assigns it to the PCT Project Manager. See Step IX in the Writers' Process.
#### Writers' Process

The English Help localization kit (Help eLK) should be ready for delivery to the vendor **at least 2-3 weeks** before the release.

**Note:** For Waterfall projects, this means the Help eLK needs to be ready at TR. Continuous Delivery projects do not have a TR milestone. If the localized Help needs to be ready by the date of the General (PA) release, allow at least two software freezes before the end of the release cycle for the software development team to incorporate the localized Help and to allow QA time to test it. You will also need to accelerate the completion of the English Help to allow time for localization.

## The process starts when the PCT Project Manager opens a LOCAL JIRA Ticket for Help Localization/Translation to track Help eLK readiness and assigns it to you, the writer.

Important

**STOP!!!** Go no further until you've run your English content through the Validation tool!!!

#### [+] I. Export and prepare the English XML

I. Export and prepare the English XML

#### Important

**Help eLKs are comprehensive.** All content (previously translated and new) must be included in the XML. In other words, the whole Help, not just the changed topics.

#### EXPORT THE XML:

When you are assigned the LOCAL JIRA Ticket for Help Localization/Translation, export your approved English Help to a single XML file (or multiple XML files if the Help is extraordinarily large).

- Use the docs.genesys.com/Special:PonydocsExport wiki page (located under Helpful links for writers/MediaWiki tools/Special pages/Other special pages) to perform the export. It enables you to specify only the document and version that you want to export.
- 1. Choose your product.
- 2. Choose your version.
- 3. Choose your manual.
- 4. Add pages.
- 5. Review the list to ensure that all the correct pages are there.

- 6. Check all three check boxes.
- 7. Click Export

#### Ponydocs Export

• Create multiple XML files, if necessary: If the file is bigger than 1 or 1.5 megabytes then it's probably a good idea to break it up. The easiest way to break a file up is from the export screen – you can copy the list of pages to export into a text editor and break it in half, then run the export once with each half of the list to generate two files.

If you have questions or require assistance, contact **Tech Pubs Support**. Copy **Pubs Localization** on your email.

#### EDIT THE XML:

The following items should be kept in mind when preparing the XML:

- Version: Using a text editor like Notepad++, change the version to DRAFT. To avoid mistakenly removing a version number from within the text, include a colon in the search string. For example, search for :8.5.1 and replace with :DRAFT.
- UTF-8 BOM: The XML must be saved as a UTF-8 BOM formatted file. To confirm, open the file using NotePad++, UltraEdit, or a similar text editor. You can then use the Encoding drop-down menu to view (and change, if necessary) the character encoding. UTF-8 BOM is the required setting.
- **Link Format:** If your English Help includes relative links *to other online documents*, these must be reformatted as EXTERNAL (absolute) links in the English XML.
  - This is an example of a correctly formatted link to English content on the main Genesys wiki: [https://docs.genesys.com/Documentation/IW/8.5.1/User/Welcome Workspace User's Guide].
  - This is an example of a correctly formatted link to a Genesys PDF: {{Repository|81ou\_ref.pdf|f7675552-8d66-4283-81df-f22ede9e3825|Outbound Contact 8.1 Reference Manual}}.
  - NOTE: An exception to be aware of is if your product has more than one document that is being translated and the documents contain links to each other (for example, eServices Manager Plug-in for GAX and eServices Content Analyzer Plug-in for GAX on the FRC wiki). Such links should already be formatted as INTERNAL (relative) links and do **not** need to be changed.
    - Generic example: [[Documentation:product:manual:topic|description]]
    - Specific example: [[Documentation:ES:ESMgr:KMwelcome|eServices Manager Plug-in for GAX]]
- Wikitext modifiers: If you've used Wikitext text modifiers (bold; italic) within a link, this may cause problems when translated. The modifiers should be placed outside of the link structure. You can clean these up in the XML using the find and replace feature of NotePad++, UltraEdit, or a similar text editor. (Of course, you should fix them in your English source as well to avoid having to do this again in the future.) The following is a suggested method provided by Ed Jamer.
  - Try using this as the (regular expression) "Find what" term: (\[\[[^\]\]]\*\|[^\]\]]\*)'''([^\]\]]\*)'''([^\]\]]\*)'''([^\]\])
  - Click "Find Next" a few times to confirm, but it should highlight only links that include text with **bold** wiki formatting (as shown in the sample code above).

- If you feel like it's selecting the right text, try putting this into the "Replace with" field: \$1\$2\$3
- That will paste in the same content, but without the three single quotes on each side of the bolded content.
- **Anchors:** This pertains to older content created when internal links led directly to headings within a section rather than to anchors. Ensure that links to sections are correctly formatted utilizing anchors as described in the Links topic in the Writer's Guide. This will preserve links when headings are changed.
- **Glossary Links:** Glossary entries are not supported for localization. Convert your glossary entries to plain text in the English XML.
- Commented Out Text: Edit the English XML and remove any "commented out" text.
- **Content that is not to be translated:** If you have been asked to exclude current English content from the content to be translated, you will need to prepare a customized TOC for use in setting up the localization wikis. This presumes that you excluded those content pages when you exported the Help to an XML file. Include a .txt file containing the customized TOC in the finalized Help eLK.
- **Special characters:** This is a trouble shooting note. If you encounter problems importing the XML to the localization wikis, it is possible (though unlikely) that special characters in the *text* are the cause. Under normal circumstances, your XML will not (and should not) contain special characters like angle brackets or ampersands within the *text*. You'll need to find and convert them to appropriate HTML coding. Contact **Tech Pubs Support** for assistance, and copy **Pubs Localization** on your email.

#### [+] II. Import and test the English XML on a vendor/language wiki

#### II. Import and test the English XML on a vendor/language wiki

**Before finalizing and delivering the Help eLK**, the writer is responsible for setting up, or updating as needed, the Product, Version, Manual, and TOC on **one** of the vendor/language wikis associated with the international release; importing the English XML and "stepping through" the Help, looking for missing pages or other obvious problems. Coordinate with **Pubs Localization** and/or **Tech Pubs Support** to rectify issues prior to submitting the English Localization Kit (Help eLK) for translation.

Navigate to the vendor/language wiki (locate the appropriate URL in **Localization Wiki URLs**), and log in using the **Writers** username and password (contact **Pubs Localization** if you need the password).

#### Tip

If the MediaWiki controls display in a language you cannot read, see the **Localized MediaWiki Controls** topic in this process for guidance.

- PRODUCT: Check whether the product is already created. (You'll only need to do this if your product hasn't been localized before.)
  - Click the **Create or edit a product** link under **Manage content** in the **Helpful links for writers** box in the left column.

- If the product is not listed, contact **Pubs Localization** for assistance.
- VERSION: Navigate to the Versions page for the product. If needed, create a new DRAFT version. (You'll only need to do this if your product hasn't been localized before.) See the Writer's Guide for instructions: Versions. On the vendor wikis the version should always be DRAFT and the status should always be "preview" (rather than released or unreleased).
- MANUAL: If this is a Help file that has not previously been localized into this language, create a manual as described in the Writer's Guide: Manuals. Do not include the release number in the title of the manual.
- TOC: To create or update the TOC on the vendor wiki, you will copy and paste the English TOC from the approved English version of the Help from which your XML files were exported. This is an ideal time to create the TOC .txt file for inclusion in the finalized Help eLK (see Step III Prepare and name the English Help Localization Kit). The version in the category tag should be DRAFT.
  - If you are creating a TOC for a new manual or a new version, navigate to the Manuals page. (Helpful links for writers/Manage/Manuals)
    - Click the manual name to open the page where you will create the TOC.
    - If necessary change the version in the URL in the browser bar to DRAFT and hit enter and then choose create.
    - If necessary manually modify the category tag with the DRAFT version number. Example: [[Category:V:IW:DRAFT]]
    - Copy and paste in the TOC from the approved English version of the Help or the customized TOC you created. Be careful not to delete the category tag! Check and make sure that the version in the category tag is DRAFT.
    - Click Save page.
  - If you are updating an existing TOC for a version that has previously been translated for an earlier Iteration, navigate to the Table of Contents Management page (Helpful links for writers/Manage/All TOCs)
    - Click the TOC name to open the page where you will update the TOC.
    - Click edit to open the page for editing.
    - Copy and paste in the TOC from the approved English version of the Help or the customized TOC you created. Be careful not to delete the category tag! Check and make sure that the version in the category tag is DRAFT.
  - Click Save page.

To ensure that TOC links are live and properly updated in the left TOC of the Help, open and save the TOC page a second time.

- EDIT THE XML:
  - Timestamps: In a text editor, use regex (regular expressions) to find and replace. Search for
     "<timestamp>.\*</timestamp>" Change all timestamps to the a future date and time (no more than
     one day in the future), and then save the XML file. Note: Do not perform this step before updating
     (or creating) the DRAFT TOC on the vendor wiki. The timestamp must be later than the TOC
     creation/update time.
  - Versions: (NOTE: This should have been done when you exported and prepared the XML. Included here to make sure you did.) Using a text editor like Notepad++, use regex (regular expressions) to find and replace and change all of the version numbers in the file(s) to DRAFT. To avoid mistakenly removing a version number from within the text, include a colon in the search string. For example,

search for :8.5.1 and replace with :DRAFT. Make sure the version in the XML and on the wiki is an **exact** match. For example, if one is DRAFT and the other is Draft or draft, the XML will not import.

- IMPORT THE XML:
  - From the **MediaWiki tools** section under Helpful links for writers on the left-hand side of the screen, choose **Special pages**.
  - Scroll down to Page tools and choose Import pages. [As of December 2020, you need to fill in the Interwiki prefix box to identify the source of the XML. You can either enter your name or Genesys.] If there are any problems with the import, contact Tech Pubs Support for assistance, and copy Pubs Localization on your email.
- TEST THE HELP: Step through the Help and look for missing pages, broken links, or any other issues that should be addressed in your English source and the English XML *before* submitting the Help eLK to the Vendor. Coordinate with **Pubs Localization** and/or **Tech Pubs Support** to rectify issues.

#### Important

Do **not** make any corrections on the vendor wiki. This is a test site only, and your corrections will not carry over. Fixes must be made in your English source, and be present in the English XML that is provided to the vendor.

#### [+] III. Prepare and name the English Help Localization Kit (Help eLK)

III. Prepare and name the English Help Localization Kit (Help eLK)

#### Important

Do not finalize the Help eLK until you have imported and tested the English XML on a vendor/language wiki.

- The Help eLK is a zip file that contains:
- 1. An English XML file that also includes all templates used by the writer.
- 2. A .txt file containing the TOC from the approved English Help or a customized TOC (if specific pages or topics of the English Help are not being translated)
- 3. A second .txt file containing pertinent information for Pubs Localization and the translation vendor, including:
  - A statement regarding previous translation:
    - "This content has not been previously translated." or -
    - "This content has been previously translated."

- A statement that the TOC has changed since the previous translation and needs to be updated on the localization sub-wikis, or that the TOC has not changed and does not need to be updated.
- (OPTIONAL) A high level list of what has changed.
- Full Product Name (for example, Workspace Desktop Edition)
- Wiki Product Short Name as it displays in the URL (for example, GA, GC, GH, IW, PMA, PSAAS, WM)
- Release Version: the three digit release number and iteration number, if applicable (for Continuous Delivery products)
- Software Release Version: the seven digit software release number (must match the release number of the UI that is being localized)
- Complete Help name as it displays on the English wiki (for example, Workspace Desktop Edition Help)
- Wiki Help short name as it displays in the URL (for example, help, faaagent, user)
- A URL to the English version's Welcome page
- A list of the languages required. (You can obtain this list from the LOCAL JIRA Ticket for Help Localization/Translation assigned to you by your PCT Project Manager. If not, contact the PjM to obtain the information.)

#### **INFO text file**

- Name the Help eLK zip file using the naming conventions provided in **Help eLK Naming Conventions**. Once you've determined the name of the zip file, rename the XML file, .txt instruction file, and .txt TOC file (if provided) to match. Naming conventions:
  - Zip file: HELP\_LK\_ID\_specifics\_version-iteration\_date\_alphabetic\_ENU.zip
    - XML file: HELP\_LK\_ID\_specifics\_version-iteration\_date\_alphabetic\_ENU.xml
    - INFO text file: HELP\_LK\_ID\_specifics\_version-iteration\_date\_alphabetic\_ENU\_INFO.txt
    - TOC text file: HELP\_LK\_ID\_specifics\_version-iteration\_date\_alphabetic\_ENU\_TOC.txt

#### [+] IV. Deliver the Help eLK

#### IV. Deliver the Help eLK

#### Important

Effective January 21, 2018, please use the Localization JIRA tickets (LOCAL tickets) to provide English Localization Kits (eLK) to the Localization Coordinator for translation. Similarly, the Localization Coordinator will use the same project JIRA (LOCAL) ticket to deliver the translated localization kit (tLK) to the Tech Pubs team.

## [+] V. Update the LOCAL JIRA Ticket for Help Localization/Translation after updating the vendor wiki and completing/delivering the Help eLK

V. Update the LOCAL JIRA Ticket for Help Localization/Translation after updating the vendor wiki and completing/delivering the Help eLK

The LOCAL JIRA Ticket for Help Localization/Translation is the JIRA ticket that requests the creation of the Help eLK.

- 1. Make a member of Pubs Localization (currently Kate Breckenridge) a "watcher" on the LOCAL JIRA Ticket for Help Localization/Translation.
- Add a comment to the LOCAL JIRA Ticket for Help Localization/Translation stating that the XML has been tested on a vendor/language wiki. Include the title of the Help, three-digit release and iteration; identify the specific wiki, and provide a URL to the welcome page of the tested Help.
   Example of suggested format/wording: "The English XML for the Workforce Management 8.5.2 Web for Agents Help Iteration 3 has been imported and tested on the DEU vendor wiki: https://deu-draft.docs.genesys.com/Documentation/WM/8.5.2/AHelp/Welcome"
- 3. Add a comment to the LOCAL JIRA Ticket for Help Localization/Translation stating that the Help eLK zip file has been **delivered** (attached to the JIRA ticket). Include the title of the Help, three-digit release and iteration, and the Help eLK file name.

**Example of suggested format/wording:** "The Help eLK for Workforce Management 8.5.2 Web for Agents Help Iteration 3 (HELP\_LK\_wfm\_web-for-

agents\_8520209-iteration3\_4-27-2016\_A\_ENU.zip) has been attached to this JIRA ticket."

- 4. Add a comment to the LOCAL JIRA Ticket for Help Localization/Translation stating that a member of Pubs Localization (currently Kate Breckenridge) has been made a "watcher" on the sub-task.
  Example of suggested format/wording: "Kate Breckenridge has been made a watcher on this JIRA ticket. She is responsible for making any necessary updates to the remaining vendor/ language wikis to make them ready for use by the vendor and will provide links to those wikis in a separate comment on this JIRA ticket if any updates are made. (Under normal circumstances, the vendor has taken on the task of updating the DRAFT TOCs and importing the XML on the vendor wikis.) She is also responsible for updating the DRAFT TOCs on the associated *customer-facing wikis* and will provide links to those wikis in a separate comment on this JIRA ticket."
- 5. Assign the LOCAL JIRA Ticket for Help Localization/Translation to the PCT Project Manager.

#### [+] VI. Stay involved

#### VI. Stay involved

Promptly answer any questions from the translators relayed to you by the Localization Coordinator (Laurence Carretey).

## [+] VII. Populate the Special:HelpLink mapping page with localized URLs for your Help

## VII. Populate the Special:HelpLink mapping page with localized URLs for your Help (if appropriate for your product)

- The Special:HelpLink mapping page is a "Special Page". The link is called Help Links -> click this link to open a page where you can select your product, and subsequently open the Special:HelpLink page for your product. For example, the GAX help mapping page is https://docs.genesys.com/ Special:GAXHelp.
- Refer to existing examples for other product help, to see how to structure your contexts.
- Contact Tech Pubs Support if you have questions about adding localized URLs to the Special:HelpLink mapping page. The context strings are the same as in the English Special:HelpLink redirect page, but the localized URLs should redirect to the localized Help. In general, the change consists of creating a new link (using the existing English URL as a base) that incorporates the applicable locale code.
- The writer can add the localization links to the mapping page as soon as they confirm the language, version, and context keywords with Development. This **must** take place before the localized content is published.
- If applicable, update the associated JIRA ticket with a comment stating that you have completed this task and assign that JIRA ticket to the appropriate member of Genesys QA.
- **NOTE**: The localized UI should always point to the corresponding version of the Help. If there is no localized help that corresponds with a localized UI, then point the UI to the corresponding version of the English Help until a corresponding localized help becomes available.

#### [+] VIII. Spot-check the translated Help

#### VIII. Spot-check the translated Help

The writer is responsible for spot-checking the translated Help **twice**. Once on the vendor wiki(s) to identify any obvious issues that may have occurred during the translation process, and again (minimally) prior to publishing the final, approved, translated Help on the customer-facing wiki(s).

#### INITIAL TESTING ON THE VENDOR WIKIS

The vendor notifies the Localization Coordinator that the translated XML has been imported on the VENDOR wikis for initial testing. The Localization Coordinator notifies the writer by updating the JIRA ticket with a comment stating that the translated Help is available for initial testing on the vendor wikis, and includes the associated URLs.

#### Tip

- When the Help is imported, correctly-formed links may initially appear in pink (as if to a non-existent page). To correct this issue, click edit on that page, and then, without making any changes, click **Save**. (This is an exception to the "make no changes" rule noted below.)
- During your review (particularly in Asian languages), you may observe unfamiliar characters bracketing words, titles, or phrases, or bold font embraced by quotation marks. It is likely that these oddities are in accordance with the Microsoft style guide and terms for the language in question.
- You may observe some words that have deliberately not been translated. For example, **Enter, Backspace, Space** and **OK** stay in English for Japanese. The Japanese standard keyboard has those buttons in English.
- Unless you are specifically asked to provide an in-depth review, perform **minimal** initial testing spot check no more than 5 pages of each language. Click though the Help to see if topics have content, the graphics are imported, and that a random selection of links are working.
- Do not make any changes or fixes to the translated Help on the VENDOR wiki(s). This is a test site, and your corrections will NOT be automatically carried over to the customer-facing wiki(s).*Italic text*
- If you identify any issues during initial minimal testing, determine if it is a translation issue, a Genesys
  platform issue, or a problem that originated in your English XML. If issues are found, contact Tech Pubs
  Support and/or Pubs Localization for guidance.
  - If the problem originated in the English XML, consult with **Pubs Localization** to determine if a new eLK is necessary. (Be sure to make the fix in the source English Help to avoid replication when the next eLK is created).
  - If the issue seems to be with the wiki platform, contact **Tech Pubs Support** and copy **Pubs Localization**.
  - If it is determined to be a translation issue, add a comment to the JIRA sub-task, clearly identifying it as a translation issue, and assign it to the Localization Coordinator (Laurence Carretey), who will notify the translation vendor. The JIRA ticket will be reassigned to the writer when the issues are resolved.
  - Do not reassign the JIRA ticket if no issues are identified.
    - Enter a comment on the JIRA ticket stating the result of your testing (issues found and being investigated, or no issues found and ready to publish). TagEnter the @ and the PCT Project Manager's name and select the name from the drop down list in this comment and save the comment. The PjM name should appear in blue. By adding the Project Manager's name in this way, he/she will be automatically notified via email.

#### FINAL MINIMAL TESTING ON THE CUSTOMER-FACING WIKIS

The vendor delivers the finalized, approved, translated Help to Genesys. The Localization Coordinator informs a member of Pubs Localization that the Help tLKs are available (and provides a link to their location) by assigning the associated Localization JIRA ticket to that individual. Pubs Localization imports the translated XML into the DRAFT version on the associated customer-facing/language wiki(s). Pubs Localization then assigns the Localization JIRA ticket to the writer.

- After Pubs Localization has imported the translated Help into the DRAFT version on the associated customer-facing/language wikis (see Localization Wiki URLs for paths), the JIRA ticket will be assigned to you. Make sure you have access for the languages your Help file has been translated into. If you don't have access, you need to create an account on that wiki (each language has a separate wiki with separate authentication). Email Tech Pubs Support or Pubs Localization with a list of the wikis you need to access, and your user name on those wikis.
- Perform very brief **minimal** final testing spot check no more than 5 pages of each language.
- Do not make any changes or fixes to the translated Help, unless the issues are small and are clearly on our side. Remember that any fixes you make must also be made to your English Help so that the issue is not perpetuated in the next translation.
- The JIRA ticket remains with the writer until the International release goes out, as described in the following section.

#### [+] IX. Make the translated Help public

#### IX. Make the translated Help public

When the announcement arrives from Software Delivery, publish the translated Help. The process is similar to that used to publish your English Help file.

- On the customer-facing/language wiki(s):
  - Use the Ponydocs Update feature to migrate content from DRAFT to the current released version. See The Draft Version page in the Writer's Guide.
  - Make sure that the status of the currently released version is *released*.
  - If the entry on the documentation "landing" page of the customer-facing/language wiki has been commented out (so that customers can't see it before the localized release has gone out), edit (Edit Source) the page to make it visible (or insert the coding if needed).
- On your product's landing page on the English wiki (docs.genesys.com), if necessary, update the links to the international Help so that they lead to the current localized language version of the Help.
- Insert a comment on the JIRA ticket stating that the translated Help has been published on the customer-facing wiki(s).
- Finalize and make available any other items associated with the release (Readme, RNs).
- Mark the JIRA ticket "Closed" and assign to the PCT Project Manager.

For an example of how to present your localized content on your product's landing page, see the Workspace Desktop Edition landing page, or the Workforce Management landing page.

#### Restricted translated Help

- 1. "Restricted Access" needs to be appended to the title on the Welcome page. If it is known that the release is going to be restricted when the eLK is created, this should be done in the English XML. If it happens post-translation, contact Laurence (Genesys Localization) to obtain the correct translation of "Restricted Access" and manually edit the content on the sub-wiki.
- 2. Writer creates login credentials on the associated language sub-wikis.(Refer the writer to the existing associated topic for English content.)
- 3. Restricted localized Help should be in PREVIEW mode. (Refer the writer to the existing associated topic for English content.)

#### Help eLK naming conventions

#### NOTE: Recently revised! (April 21, 2016)

Use the following naming conventions for the Help eLK (English localization kit).

#### Structure

The file name for a Help eLK has the following structure:

HELP\_LK\_ID\_specifics\_version-iteration\_date\_alphabetic\_ENU.zip

#### Variables

- *ID* is the abbreviated product name. This is often the same as the Wiki Product Short Name found in the URL for your product's landing page.
- Specifics is an optional variable. The "specifics" variable is for a product that might have more than one Help. Or, as shown in the example below, a Help (Genesys Rules Authoring Tool Help) that doesn't intuitively associate with the product name (Genesys Rules System).
- *Version* is the seven digit software release number associated with the Help that the XML files were derived from. Do **not** include decimal points.
- *Iteration* (for continuous delivery projects) is the iteration number of the software release associated with the Help . Confer with the PCT Project Manager and use the same iteration number used in the UI localization kit.
- Date is the creation date of the XML/eLK.

#### Constants

- *HELP* is a constant.
- *LK* (abbreviation for localization kit) is a constant.
- Alphabetic. A, B, C, etc. Used to identify version if the eLK needs to be revised and resubmitted to the vendor. The first version should be "A", the second "B", and so on.
- ENU (abbreviation for English-United States) is a constant.
- The *.zip* extension is a constant.

**Order of Fields** The fields in the LK file name should occur in the order shown above with underscores as indicated; the specifics field can also include a hyphen.

#### **Examples**

- HELP\_LK\_gax\_8520100-iteration2\_6-17-2015\_A\_ENU.zip
- HELP\_LK\_grs\_auth-tool\_8500100-iteration3\_6-17-2015\_A\_ENU.zip

#### Localization wiki URLs/Accessing the wikis

#### Accessing Customer-facing Wikis

To test, edit (if necessary), and release your translated Help on the customer-facing/language wiki(s), you need to create an account and have appropriate user rights assigned. Be aware that each language has a separate wiki requiring separate login authentication. Create the account(s) and email **Pubs Localization** with your username and a list of the wikis you need to access. A Pubs Localization member will assign you the proper user rights.

#### Accessing vendor wikis

No individual account is required. Contact **Pubs Localization** for Usernames and Passwords.

LANGUAGE	LANGUAGE CODE	VENDOR	CUSTOMER
Arabic (Saudi)	ARA	https://ara- draft.docs.genesys.com/	https://ara.docs.genesys.com/
Chinese (Simplified)	CHS	https://chs- draft.docs.genesys.com/	https://chs.docs.genesys.com/
Chinese (Traditional)	СНТ	https://cht- draft.docs.genesys.com/	https://cht.docs.genesys.com/
Czech	CSY	https://csy- draft.docs.genesys.com/	https://csy.docs.genesys.com/
Dutch	NLD	https://nld- draft.docs.genesys.com/	https://nld.docs.genesys.com/
French (Canada)	FRC	https://frc- draft.docs.genesys.com/	https://frc.docs.genesys.com/
French (France)	FRA	https://fra- draft.docs.genesys.com/	https://fra.docs.genesys.com/
German	DEU	https://deu- draft.docs.genesys.com/	https://deu.docs.genesys.com/
Italian	ITA	https://ita- draft.docs.genesys.com/	https://ita.docs.genesys.com/

LANGUAGE	LANGUAGE CODE	VENDOR	CUSTOMER
Japanese	JPN	https://jpn- draft.docs.genesys.com/	https://jpn.docs.genesys.com/
Korean	KOR	https://kor- draft.docs.genesys.com/	https://kor.docs.genesys.com/
Polish (Poland)	PLK	https://plk- draft.docs.genesys.com/	https://plk.docs.genesys.com/
Portuguese (Brazilian)	РТВ	https://ptb- draft.docs.genesys.com/	https://ptb.docs.genesys.com/
Russian	RUS	https://rus- draft.docs.genesys.com/	https://rus.docs.genesys.com/
Spanish (Latin American)	ESM	https://esm- draft.docs.genesys.com/	https://esm.docs.genesys.com/
Turkish	TRK	https://trk- draft.docs.genesys.com/	https://trk.docs.genesys.com/

#### Localized MediaWiki Controls

## (Sept 21, 2016, Ed Jamer) Recent changes to fix PDF generation may affect how

#### content is displayed

#### What Has Changed, And Why?

To support PDF generation for localized content, David made a change to how localized content is set up in our sub-wikis. Now the proper language code is being set for each wiki.

For anyone working in a localized wiki, this means that MediaWiki default text and values (for example, the "log in" link at the bottom of each page or the controls on the import tool) will now be translated into the appropriate language.

#### **How Does This Affect Me?**

For some people, the effects won't be a big deal. If you can read and understand the language that a sub-wiki is using, then it shouldn't be an issue.

However, for anyone who wants to work in a language other than the one used in that sub-wiki, navigating normal MediaWiki links and controls (ie: logging in, importing content, etc) will be difficult because all labels have been converted to a different language.

#### **How Can I Avoid This?**

There are two key things to know.

• You can typically append "uselang=en" as a parameter at the end of the URL to view the page using English values for MediaWiki controls and functions.

• After logging in, you can set your user preferences to always use English while you are logged in to that sub-wiki.

Recommended steps to fix this:

- 1. Use this URL to log in using English: https://XXX.docs.genesys.com/index.php?title= Special:UserLogin&uselang=en (switching out XXX for the appropriate language code)
- 2. Once you have logged in, change your user preferences: https://XXX.docs.genesys.com/ Special:Preferences?uselang=en (again switching XXX to the language code). Scroll down the page until you see the Internationalisation section (it's the second major topic/heading and has a drop-down box listing languages), choose your preferred language (you want en - English) from the drop-down, and save your settings (the save button is on the left at the bottom of the page - unless you're in ARA where it will be on the right).

These steps will need to be repeated for every sub-wiki you are working on.

#### Languages, Abbreviations, and Codes

**Language Designation:** For use on the Translation Support page of online RNs. For text reference in HTML RNs, see the Marketing Identification tab.

**3-Letter Abbreviation:** These are for use in HTML release note file names, and in Localization Kit file names. The Translation Support pages in online RNs do not utilize these abbreviations. The 3-letter abbreviations are also utilized in the URLs for the localization wikis (for example, https://ara.docs.genesys.com/Documentation

**4-Letter Code:** These are for use in populating the Special:Help mapping page and do not pertain to RNs.

Language Designation	3-Letter Abbreviation	4-Letter Code
Arabic (Saudi Arabia)	ARA	ar-SA
Catalan	CAT	ca-ES
Chinese (Hong Kong) = used by Speechminer	???	zh-HK
Chinese (Simplified)	CHS	zh-CN
Chinese (Traditional)	СНТ	zh-TW
Czech	CSY	cs-CZ
Dutch (Netherlands)	NLD	nl-NL
English (South Africa)	ENS	en-ZA
English (United Kingdom)	ENG	en-GB
English (United States)	ENU	en-US
French (Canada)	FRC	fr-CA
French (France)	FRA	fr-FR
German (Germany)	DEU	de-DE

Language Designation	3-Letter Abbreviation	4-Letter Code
Greek	ELL	el-GR
Hindi (India)	HIN	hi-IN
Italian	ITA	it-IT
Japanese	JPN	ja-JP
Korean	KOR	ko-KR
Polish	PLK	pI-PL
Portuguese (Brazilian)	РТВ	pt-BR
Portuguese (Portugal)	PTG	pt-PT
Russian	RUS	ru-RU
Spanish (Latin America/Mexico) Going forward as of 10-6-2015 previously identified as Spanish (Latin American)	ESM Going forward as of 10-6-2015 (was ESN)	es-MX
Spanish (Spain)	ESN Going forward as of 10-6-2015 (was ESP)	es-ES
Turkish	TRK	tr-TR

### Localization terminology

Term	Definition
English localization kit (Help eLK)	The materials provided by Genesys to the translation vendor. The primary component is the exported XML from the English Help.
Translated localization kit (Help tLK)	The translated XML provided to Genesys by the translation vendor.
Localization Coordinator	The individual responsible for coordinating Genesys localization across departments. Currently Laurence Carretey.
Pubs LT	The Technical Publications localization team.
Language Pack	A Language Pack is a tool created by Genesys engineers that allows installers to to select the language in which the user interface and online help files are displayed. (Not to be confused with the localization kit, which is another thing entirely.)
Translation Support	A broader term than Localization to identify the languages in which Language Packs are available for a particular Genesys component.
Do Not Translate (DNT)	The Do-Not-Translate (DNT) list contains all

Term	Definition
	Genesys terminology that is marked as "do not translate" in our vendor's database.
	Is there anything you'd like to see defined here? Contact <b>Pubs Localization.</b>

#### Do Not Translate (DNT) list

Abandoned (when Pat McKnight left Genesys). If you have questions, contact Michael Katten via the **Pubs Localization** email alias.

#### Troubleshooting notes and miscellaneous info

- If the MediaWiki controls display in a language you cannot read, see **Localized MediaWiki Controls** for guidance.
- XML import issues usually result from one of two things:
  - The timestamp of the TOC or pages in the wiki are later than the timestamp of the XML file. Try updating the timestamp with a date and time slightly in the future (as little as an hour, but no more than one day).
  - There is a misalignment of topic names and the TOC.
- Make sure that the version number in the XML and on the wiki are an exact match. For example, if one is "draft" and the other is "DRAFT", the XML will not import.
- When editing/importing the TOC, you may need to "edit and save twice" to make the links "live" or to ensure that the left-hand navigation TOC works.
- As of September 2016, PDF generation is now enabled on the localization wikis, with the exception of Korean. If you encounter any difficulties generating a PDF on a localization wiki, please contact Tech Pubs Support for assistance.

#### TEMPO Timesheets

- For non-project work like meetings, processes, and the like use XPROJ-6 Localization.
- Before translation: Writers charge localization work that takes place *before* translation, like creating English Localization Kits for DR4 (and setting up one vendor wiki), against the English JIRA issue for the project. Make sure you log the work at the English project level rather than at a localization task or subtask level. Note: Your Project Manager will open a JIRA ticket for the eLK (English Localization Kit) for the Help during the course of your English project. Be aware that this English JIRA ticket may be closed

before translation (and your subsequent post-translation work) begins. Ask your Project Manager.

• After translation: Writers charge localization work that takes place *after* translation, like testing on the vendor wikis and publishing translated content on the customer-facing wikis, to the LOCAL sub-task ticket associated with the localization project. Ask your Project Manager.

## Preparing Localization Kits for Non-online Help Files (being phased out)

A Localization Kit (LK) is a deliverable given to the translation vendor by the Localization PjM. Tech Pubs prepares and provides **Help** LKs to the Localization PjM. The Help LK is a ZIP file that contains the approved Help project (CHM, MPJ, HTM, and image files), plus a "marked up" CHM that highlights the changes between the current approved Help and the last approved Help that was translated.

Preparing localization kits for non-online Help files is a responsibility of Technical Publications production staff (Pubs Editors). To prepare the localization kit, these steps are followed:

- 1. The entire Help project (CHM, MPJ, HTM, and image files) that was approved for General (PA) release, plus the "marked up" CHM, is zipped into a single file. This ZIP file is the "localization kit."
- 2. The ZIP file is named according to the standards outlined below.
- 3. The ZIP file is then placed in the Help eLKs\_GENESYS folder on the Technical Publications Localization site in Afresco, and copies are pushed to the appropriate English Localization Kits (eLKs) subfolders located within the synced vendor folders (also located on the Technical Publications Localization site).

#### Localization Kit Naming Conventions

#### Structure

The file name for a Help eLK has the following structure:

```
LK ID specifics help version ENU.zip
```

#### Variables

- *ID* is the abbreviated product name.
- Specifics includes the abbreviated vendor-specific product/audience/content for the document.
- *Version* is the document version of the approved help frozen in XING that the XML files were derived from. Do **not** include decimal points.

#### Constants

- LK (abbreviation for localization kit) is a constant.
- The doc-type of *help* is a constant.
- ENU (abbreviation for English-United States) is a constant.
- The .zip extension is a constant.

#### **Order of Fields**

The fields in the LK file name should occur in the order shown above with underscores as indicated; the specifics field can also include a hyphen.

#### Examples

- LK\_gax\_help\_8500100\_ENU.zip
- LK\_grs\_auth-tool\_help\_8500100\_ENU.zip

## International Online Readmes (Adding Translation Support Information in Online Readmes)

The writer is responsible for adding Translation Support (formerly referred to as Localization Support) information to the online Readme, and making the localization information public when the localized release occurs.

**NOTE:** For continuous delivery projects, with multiple iterations, it is only necessary to document the introduction of support for a language. It is not necessary to document new iterations of previously translated Help.

- 1. The PCT Project Manager assigns a JIRA ticket to the technical writer for the addition of the Translation Support information section to the appropriate New in Release section of the Online Readme. (The JIRA ticket may refer to the creation of a localized CD readme or the creation of an International CD readme. If your product's readme has transitioned to online format, you need only update the online readme as described in this section.) For more information regarding the readme review process, go here.
- 2. The technical writer follows the instructions for creating or updating a Readme, managing draft vs. approved status as applicable.
- 3. On the three-digit New in Release page for the release that is being localized, add an item for "Translation Support"; specify the exact seven-digit release(s) and language(s) that apply. Examples:
  - Workspace Desktop Edition. View the New in Release 8.5.1 section of the online readme content.
  - Genesys Interactive Insights. View the New in Release 8.1.1 section of the online readme content.
  - Intelligent Workload Distribution. View the New in Release 8.5.0 section of the online readme content.
- 4. When DR4 passes and the Internal PA announcement for the International CD is sent via an email from Software Delivery, the writer makes the updated online Readme available on the product landing page.

#### Tip

Suggested wording and format:

Translation Support. [PRODUCT NAME] language packs are available for the following:

- Arabic 8.x.xxx.xx
- Chinese (Simplified) 8.x.xxx.xx
- French (France) 8.x.xxx.xx

# HTML Language Pack Release Notes (being phased out)

If you're looking for information on how to create an **online** Language Pack 8.5 Release Note, see Translation Support.

#### HTML Language Pack Release Notes

#### Important

This process specifically pertains to old-style HTML Language Pack Release Notes. You will only create these if your English release note is still in HTML format. If you're looking for information on how to create an **online** Language Pack 8.5 Release Note, see **Translation Support**.

Language Pack Release Notes are created based on the availability of individual Language Packs. The PCT Project Manager assigns a JIRA ticket (or tickets) to the technical writer listing the Language Pack release notes that are needed.

For Technical Publications, a Language Pack release has the following implications:

- PCT Project Manager creates the Packaging Specification for the release, which includes definitions for localization deliverables. These definitions include International CD Readme(s), International CD, Language Pack IPs, and Language Pack Release Notes (HTML format). XING entries are created, based on this specification, which enables XING freeze forms to be created and issued for the associated IPs and RNs.
- 2. The writer copies the Language Pack RN template (from the Templates folder located in the Document Library on the Technical Publications site in Alfresco) and uses that document as a guide for standard sentences and content.
- 3. The writer uses the regular (English) RN file name and incorporates "lp" and the language abbreviation in the middle of the file name. Here are some examples:
  - genadmin\_lp-CHS\_81rn.html
  - iwd\_lp-CHS\_81rn.html
  - wfm-web\_lp-CHS\_81rn.html

Confirm the file name with Pubs Editors if you have any questions.

4. The writer collaborates with the PCT to develop a Language Pack RN so that the RN is ready at the committed PA date for the International CD with the Language Packs.

5. At the same time the writer is creating the Language Pack RN for each component, the writer should also prepare the associated English component RN to indicate the availability of LPs in both the New in This Release section of the appropriate release and in the Internationalization section. See the Language Packs and the English RN section below for details.

**TIME SAVING TIP:** The writer can prepare a Language Pack RN in one language for each component and submit these for review to the PCT. After review, the writer can create the remaining Language Pack RNs for the other languages, using the first LP RN created as a template.

- 6. When the draft Language Pack RNs and the updated associated English component RNs are ready, the technical writer sends them to the PCT for review and approval.
- 7. When the Language Pack RN is approved, the writer sends it for a Peer Review (to another writer) to approve grammatical accuracy, quality, and clarity, and then to the Pubs Editors email alias for a final Format/Content Check.
- When the RN is completed and approved by the PCT and Pubs Editors, store the RN in the "hold\_for\_release" folder under //galaxy/tdoc\_final/Current\_RNs/ (by software family) until the software is released.
- 9. Date to be used in a Language Pack RN:
  - Freeze type is "General" PA date (same date as the official Software Delivery Availability Announcement)
  - Freeze type is "Hot Fix" Date of published IP Test Form
  - Freeze type is "Update" Date of published IP Test Form
- 10. When the product passes the Delivery Checkpoint and the internal PA Availability Announcement for the International CD is sent via an email from Software Delivery, the writer uploads the RNs to the appropriate International folder on the Genesys Public site in Alfresco and moves the RNs from "hold\_for\_release" to Current\_RNs on tdoc\_final. In Current\_RNs, if the RN has previously been released, watch for a notice that the old file has been overwritten. This ensures that the writer has the right name and file extension (important for maintaining existing links in the Documentation Library DVD).

**NOTE:** The internal PA Availability Announcement email is automatically generated by Software Delivery when the physical media is ready for customers. Technical Publications WW is now one of recipients of this email. This announcement is the writer's trigger to publish the RNs and make them available on the Documentation website. (Be aware that "Internal DR4 Announcement" is an email alias in the "To" field of the email and is NOT the subject of the email – writers are often confused by this and overlook the announcement. In your email inbox, this announcement will be listed as from "noreply@genesys.com ". The key information is in the body of the email and is the signature of SOFTWARE DELIVERY. Other notifications are sent out by PMs and PjMs, but are NOT the trigger for publishing the RNs.) Here is an example:

FROM: noreply@genesys.com

TO: Internal DR4 Announcement

SUBJECT: PA: Availability Announcement: WFM Configuration Utility - 8.1.3 - German (Germany) D

Greetings,

R&D is pleased to announce PA Availability of WFM Configuration Utility - 8.1.3 - German (Germany) IP

Congratulations and thanks to the R&D teams involved.

OS GROUP: Windows 2008/Vista/7

VERSION: 8.1.300.09

COMMENTS: PA date: 11/21/2014 This IP is available via FTP only and should be used instead of the CD version of this IP.

The "Currently shipping releases" file has been updated.

Kind regards,

Software Delivery

- 11. If this is the initial release of the Language Pack RN, the writer obtains the Alfresco URL from the Genesys Repository Tool and adds links on the Product's International RN page.
- 12. The writer publishes a XING Release Note freeze form for each Language Pack release note. Following the release, the writer verifies that the correct RN is posted on the Documentation website.
- 13. The writer archives the approved files in ClearCase with the product documentation once the release has gone out to customers.

#### Language Packs and the English RN

You will need to make note in the associated English RN that Language Packs have been incorporated. This should be included both in the specific release section and in the Internationalization section. Here are some examples:

New in This Release There are no restrictions for this release. This section describes new features that were introduced in this release of <NAME OF PRODUCT>.

• Introduction of <NAME OF PRODUCT> Language Packs. Language Packs allow installers to select the language in which the user interface (UI) and online help files display.

New in This Release There are no restrictions for this release. This section describes new features that were introduced in this release of <NAME OF PRODUCT>.

- This release of <NAME OF PRODUCT> supports the following Language Packs. Consult the Language Pack release notes for information on changes to the Language Pack that may affect the functionality of <NAME OF PRODUCT>.
  - Chinese (Simplified)
  - French

- German
- Italian
- Japanese
- Korean
- Latin American Spanish

Note: These Language Packs are supported only by 8.x.x releases of <NAME OF PRODUCT>, starting with this release. The Language Packs are not supported by 8.x.x and later releases of <NAME OF PRODUCT>.

Internationalization Information in this section is included for international customers.

Language Packs are supported in 8.x.x releases of this product. Language Packs allow installers to select the language in which the user interface and online help files are displayed. For details on what Language Packs are available, including languages, see the <Product Name> Release Notes section on the Genesys Documentation website (docs.genesys.com).

Internationalization Information in this section is included for international customers.

Language Packs are supported only by 8.x.x releases of <Product Name>, starting with release 8.x.xxx.xx. They are not supported by 8.x.x and later releases of <Product Name>.

#### Languages, Abbreviations, and Codes

**Language Designation:** For use on the Translation Support page of online RNs. For text reference in HTML RNs, see the Marketing Identification tab.

**3-Letter Abbreviation:** These are for use in HTML release note file names, and in Localization Kit file names. The Translation Support pages in online RNs do not utilize these abbreviations. The 3-letter abbreviations are also utilized in the URLs for the localization wikis (for example, https://ara.docs.genesys.com/Documentation

**4-Letter Code:** These are for use in populating the Special:Help mapping page and do not pertain to RNs.

Language Designation	3-Letter Abbreviation	4-Letter Code
Arabic (Saudi Arabia)	ARA	ar-SA
Catalan	CAT	ca-ES
Chinese (Hong Kong) = used by Speechminer	???	zh-HK

Language Designation	3-Letter Abbreviation	4-Letter Code
Chinese (Simplified)	CHS	zh-CN
Chinese (Traditional)	СНТ	zh-TW
Czech	CSY	cs-CZ
Dutch (Netherlands)	NLD	nl-NL
English (South Africa)	ENS	en-ZA
English (United Kingdom)	ENG	en-GB
English (United States)	ENU	en-US
French (Canada)	FRC	fr-CA
French (France)	FRA	fr-FR
German (Germany)	DEU	de-DE
Greek	ELL	el-GR
Hindi (India)	HIN	hi-IN
Italian	ITA	it-IT
Japanese	JPN	ja-JP
Korean	KOR	ko-KR
Polish	PLK	pI-PL
Portuguese (Brazilian)	PTB	pt-BR
Portuguese (Portugal)	PTG	pt-PT
Russian	RUS	ru-RU
Spanish (Latin America/Mexico) Going forward as of 10-6-2015 previously identified as Spanish (Latin American)	ESM Going forward as of 10-6-2015 (was ESN)	es-MX
Spanish (Spain)	ESN Going forward as of 10-6-2015 (was ESP)	es-ES
Turkish	TRK	tr-TR

#### Market Identification

For use in HTML release notes only - does not pertain to online Translation Support pages.

Language	Market Identification in Localized or Language Pack Release Notes
Arabic (Saudi Arabia)	"for the Arabic market."
Catalan	"for the Catalan market."
Chinese (Simplified)	"for the Chinese market."

Language	Market Identification in Localized or Language Pack Release Notes
Chinese (Traditional)	"for the Taiwanese market."
Czech	"for the Czech market."
Dutch (Netherlands)	"for the Dutch/Flemish market."
English (South Africa)	"for the South African market."
English (United Kingdom)	"for the United Kingdom market."
English (United States)	"for the United States market."
French (Canada)	"for the French (Canada) market."
French (France)	"for the French (France) market."
German	"for the German market."
Greek	"for the Greek market."
Hindi (India)	"for the Hindi market."
Italian	"for the Italian market."
Japanese	"for the Japanese market."
Korean	"for the Korean market."
Polish	"for the Polish market."
Portuguese (Brazilian)	"for the Portuguese (Brazilian) market."
Portuguese (Portugal)	"for the Portuguese (Portugal) market."
Russian	"for the Russian market."
Spanish (Latin America/Mexico) Change effective 10-6-2015, used to be identified as Spanish (Latin American)	"for the Spanish (Latin American) market." (Per Inga: Remains the same despite change in language abbreviation and designation. The language we translated to did not change – we only corrected an internal language code [and language name] due to a mistake made by Production years ago (they picked incorrect code and it took a while to get it corrected) – nothing changed from the customer prospective.) (Clarification: While Genesys documentation/help is translated into the Spanish (Mexico) dialect, this translation is intended for <b>all</b> of our Latin American customers.)
Spanish (Spain)	"for the Spanish (Spain) market."
Turkish	"for the Turkish market."

## HTML Localized Component Release Notes (being phased out)

#### Localized Release Notes

#### Important

This archaic form of localization has been replaced by Language Packs. It is extremely unlikely that a new old-style language specific release note should be created. If you are instructed to do so, ask the Project Manager to confirm and contact **Pubs Localization**.

Localized Release Notes (or, more properly, Language Specific Release Notes for localized components) are created based on the release of localized Software CDs. The PCT Project Manager notifies the technical writer that Localized release notes are needed.

For Technical Publications, a localized release has the following implications:

 PCT Project Manager creates the Packaging Specification for the release, which includes definitions for localization deliverables. These definitions include Localized CD Readme(s), Localized CD(s), Localized IPs, and Language Specific ("Localized") RNs. XING entries are created, based on this specification, which enables XING freeze forms to be frozen for the associated RNs and IPs.

**NOTE:** The Localization process begins AFTER the release of the English version of the Product. In other words, you will not be creating Localized release notes unless the English version of the product is already in place.

 The writer uses the regular (English) RN file name and the language extension as the file name for a localized RN. (Example: sci72rn\_CHS.html). Confirm the file name with Pubs Editors if you have any questions.

**NOTE:** For new releases, the writer copies the RN template from Alfresco (https://alfresco.genesys.com/share/page/site/technical-publications/documentlibrary#filter= path%7C%2FTemplates%2FHTML%2520Templates%7C&page=1) and uses the description document as a guide for standard sentences and content.

- 3. The writer collaborates with PCT to develop a RN so that the RN is ready at the committed PA date.
- 4. When a draft RN is ready, the technical writer sends it to the PCT for review and approval.
- 5. When the RN is approved, the writer sends it for a Peer Review (to another writer) to approve grammatical accuracy, quality, and clarity, and then to Pubs Editors for a final Format/Content Check.
- 6. When the internal PA Availability Announcement for the Localized CD is sent via an email from Software Delivery, the writer uploads the RNs to the appropriate International folder on the Genesys Public site in Alfresco. The writer generates a XING Release Note freeze form for the Localized RN.

**NOTE:** The internal PA Availability Announcement email is automatically generated by Software Delivery when the physical media is ready for customers. Technical Publications WW is now one of recipients of this email. This announcement is the writer's trigger to publish the RNs and make them available on the Documentation website. (Be aware that "Internal DR4 Announcement" is an email alias in the "To" field of the email and is NOT the subject of the email – writers are often confused by this and overlook the announcement. In your email inbox, this announcement will be listed as from "noreply@genesys.com ". The key information is in the body of the email and is the signature of SOFTWARE DELIVERY. Other notifications are sent out by PMs and PjMs, but are NOT the trigger for publishing the RNs.) Here is an example:

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OS GROUP: Windows 2008/Vista/7

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COMMENTS: PA date: 11/21/2014 This IP is available via FTP only and should be used instead of the CD version of this IP.

The "Currently shipping releases" file has been updated.

Kind regards,

Software Delivery

- Following the release, the writer verifies that the correct RN is posted on the Documentation website. If this is the initial release of the Localized RN(s), the writer obtains the Alfresco URL(s) from the Genesys Repository Tool (http://docs.genesys.com/Special:GenesysRepo) and adds links on the Product's International RN page.
- 8. The writer archives the approved files in ClearCase with the product documentation once the release has gone out to customers.

Language Abbreviations

**Language Designation:** For use on the Translation Support page of online RNs. For text reference in HTML RNs, see the Marketing Identification tab.

**3-Letter Abbreviation:** These are for use in HTML release note file names, and in Localization Kit file names. The Translation Support pages in online RNs do not utilize these abbreviations. The 3-letter abbreviations are also utilized in the URLs for the localization wikis (for example, https://ara.docs.genesys.com/Documentation

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Dutch (Netherlands)	NLD	nl-NL
English (South Africa)	ENS	en-ZA
English (United Kingdom)	ENG	en-GB
English (United States)	ENU	en-US
French (Canada)	FRC	fr-CA
French (France)	FRA	fr-FR
German (Germany)	DEU	de-DE
Greek	ELL	el-GR
Hindi (India)	HIN	hi-IN
Italian	ITA	it-IT
Japanese	JPN	ja-JP
Korean	KOR	ko-KR
Polish	PLK	pI-PL
Portuguese (Brazilian)	РТВ	pt-BR
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English (United States)	"for the United States market."
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Language	Market Identification in Localized or Language Pack Release Notes
	Genesys documentation/help is translated into the Spanish (Mexico) dialect, this translation is intended for <b>all</b> of our Latin American customers.)
Spanish (Spain)	"for the Spanish (Spain) market."
Turkish	"for the Turkish market."

## Project Delivery Models

Starting in 2021, delivery is handled using services that are made up of containers. This delivery is primarily for Genesys Engage cloud Private Edition. But there have been cases this delivery type for Genesys Engage cloud hosted and Genesys Multicloud on-premises releases.

Up until 2021, project delivery most projects in Genesys Multicloud followed a Continuous Delivery model for developing an releasing software. New product projects often followed the Waterfall model. Some projects also used an Agile approach within their project, whether Continuous Delivery or Waterfall.

Separately, especially for new products, including Private Edition releases, a project may be part of the Early Adopter Program.

## Continuous Delivery

#### Important

In September 2021, Gaby (Gabrielle Lopez-Price) indicated that Release Management is working on a new process for services delivery. It's unknown whether whether it will be a revised Continuous Delivery process or something completely new.

#### Overview

Continuous Delivery (CD) is a set of processes, tools and techniques for the rapid, reliable and continuous development and delivery of software. It is not about having shorter cycles or requiring frequent releases.

Feature development is done using iterations, identified as Iteration 1, Iteration 2, Iteration 3, and so on, and can be handled by multiple teams.

Every iteration has an associated list of requirements. One or several features can be worked on in the same iteration. The requirements included in a particular iteration are decided by the PCT at the start of the iteration, and at the Delivery checkpoint when the software and documentation for the features developed are made available to customers. The feature release date is set at the Commitment Checkpoint.

Each PCT has the freedom to decide:

- Whether iterations overlap or are sequential.
- The iteration length (typically two six weeks).
- The number of features in each iteration.
- How to version each iteration. The standard is that the first two digits, X.Y, align with other products when delivering system-wide features, like security, operating system support, accessibility, and so on. The z value in X.Y.z should only be increased when there is a significant increase of capabilities in the iteration version. The aa.bb value in X.Y.zaa.bb is incremented at each iteration (typically, the a.bb digits). Note: Since the version number is incremented for each build, the released version to customers may not be sequential.
- How to use JIRA to track the features and tasks of each iteration.

For writers on a project using Continuous Delivery, as part of each iteration, you provide feature descriptions and related documentation for the capabilities that the entire team agreed to deliver for that iteration.

**Note:** For information about Continuous Delivery from a project level perspsective, see DevOps - PLC (formerly, Continuous Delivery - PLC).

Important: The Project Manager has been trained on how to implement Continuous Delivery and

should have trained the entire team, including the writer. If that has not happened or if, after reading through the Continuous Delivery PLC and this Multicloud IX process, it seems that your team has a different understanding of Continuous Delivery, ask your Project Manager to review the process with the entire team to ensure everyone is in agreement with the process and each other.

#### Decision Review (DR), Iterations, and Checkpoint Definitions

Unlike standard Waterfall projects, a Continuous Delivery project only uses two DRs, DR0 and DR4.

- DR0 (the only mandatory DR):
  - This DR validates the product opportunity and its initial business case, and verifies that all the elements are available to initiate detailed reviews of requirements, development, project planning and sales and marketing preparation for the given Project Scope. At this point, the requirements are also prioritized. An approval at DR0 indicates the team can proceed with the project.
  - Requirements may be added after the first approval of the PRD and DR0 approval. Requirements can also be moved to another iteration through the course of the project.
  - Multicloud IX is an approver at this DR for Continuous Delivery. See the Manager Workflow tab for his or her role prior to DR0, in conjunction with the writer's role. For writer's pre-DR0 tasks, see the Pre-DR0 section of the Writer Workflow tab for details.
    - *Important*: We do not approve any DR0 that sits in lieu of a DR1, and does not have a writer who has been part of the PRD process. Not all Project Managers will be aware of this, so let's help educate them.
    - Note: IX is not an approver at DR0 for regular Waterfall projects.
  - A target DR4 date must be identified at DR0.
- **DR4:** This DR is automatically approved with the last Iteration's Delivery Checkpoint and indicates the successful completion of the Project Scope. As such, DR4 can be considered little more than a process artifact, since it closes the project. It's usually scheduled to occur within 12 months of the DR0 date and typically is at the end of a calendar year. PCTs can adjust the date as needed. However, the DR4 date should not normally extend much beyond a year. The Multicloud IX writer is the approver of this.
- **Iteration:** An Iteration is a single instance of a process that grows a system feature by feature during self-contained cycles of analysis, design, development and testing and that end in the production of a stable, fully integrated and tested, partially complete system that incorporates all of the features of all previous iterations. An Iteration can be executed in an Agile (sprints) or Waterfall model. At the end of every Iteration a decision is made as to the Product's level of Market Readiness. This will determine how the product will be released and announced externally.
- Checkpoints:
  - **Technological Feasibility Established** means that 1) Requirements have been Reviewed (NOT Committed), 2) HLD is Approved, and 3) Engineering Team, including the Technical Writer, has the necessary skills, technology, and hardware to produce the product.
  - **Commitment Checkpoint** (approved by the PCT) verifies that the Iteration is technically and commercially viable and can be completed within the identified constraints and that the planned Delivery Checkpoint date is agreed. At this checkpoint, the date is set for when the software and documentation will be released to customers.
  - **Delivery Checkpoint** (approved by the PCT) verifies the successful completion of development and testing for the Iteration. The product is available for customer use at this checkpoint. Following this checkpoint approval, for all iteration releases for Continuous Delivery (whether PA, RA, Update, or Hot Fix for CD), the writer posts the documentation specific to this iteration **after** the Product Availability (or RA, or Update, or Hot Fix Announcement) is sent from Software Delivery via email.

**Important!** If documentation has not been reviewed and approved by the PCT at the Delivery Checkpoint, Multicloud IX has the right to fail this Delivery Checkpoint. If you are having trouble getting your team to review/approve your documentation, alert the team, especially the Project Manager and PM accordingly.

**Note:** Currently, the release types are PA (product availability), RA (restricted availability), Update, and Hot Fix. However, the hot fix release type name will likely change as it does not reflect the hot fix model for Waterfall releases.

#### General Iteration Flow

Each iteration is made up of a series of phases and checkpoints:

- 1. Reqs: This Reqs or requirements period usually lasts only 1 or 2 days. During this period, the team decides what requirements will be included in the iteration (the scope for the iteration), based on the priority set by the Product Manager. The discussion may also include the time required to implement the requirements, especially if some requirements require a longer time to implement.
- 2. Design: During this phase, the following occurs:
  - 1. High-Level Design (HLD): The Developer creates a new HLD (or updates the existing HLD) for each iteration and the team reviews and approves it.
  - 2. Technological Feasibility Checkpoint: When the HLD is approved and all team members have determined they have the skills, technology, and hardware needed for the iteration, this checkpoint is considered reached and achieved.
  - 3. Feature Design Specification (FDS): If a FDS is created, the team reviews and approves it. It must be approved by the Commitment Checkpoint. Note: Not all projects, like Cloud projects, need an FDS as the HLD has sufficient information.
  - 4. Documentation planning: The writer creates a plan for documenting iteration features. See the Writer Workflow tab for more details.
- 3. Coding/Unit Testing: During this phase, the following occurs:
  - 1. Development begins coding the features and unit testing. Development will also review build readiness, conduct build validation, consider its readiness for freeze.
  - 2. Quality Assurance may begin testing.
  - 3. The writer begins writing the documentation. The writer may have also schedule a TOI with the Developer to understand the features included in the iteration.
  - 4. Commitment Checkpoint: This occurs early in this period. It indicates everyone knows what they need to deliver and has the tools to do so (i.e. Build verification). At this checkpoint, the release date (Delivery Checkpoint) for the iteration is also set. (Note: If there is a Functional Design Spec, it must be approved by this Commitment checkpoint.)
- 4. SIT/FT and System Test phases
  - 1. Build are frozen and tested.
  - 2. Documentation Feature description(s) are reviewed and approved.
  - 3. RN(s) and other documents prepared for delivery.
- 5. Delivery Checkpoint: The software version and associated documentation are released to customers.



Continuous Delivery Project Flow
#### **Delivery Timeline**

Each team has the freedom to track features and tasks associated with an iteration and project using whatever method they choose. The baseline is that all projects are tracked in JIRA. See the JIRA Usage Examples tab.

## Manager Workflow

The IX Manager for the writer is the DR0 approver of a Continuous Delivery project. The process for approval is as follows:

- 1. When the IX Director or his delegate receives a request to approve a Plan of Record request for a new project, that person does not automatically approve it. After initially reviewing the request, this person turns to the associated IX Manager for approval, who will:
  - Investigate what the project entails, evaluate the scope of the project, and how much work is involved.
  - Identify a writer for the project, so the writer can assist with the investigation and begin the required pre-DR0 work (as spelled out in the Writer Workflow tab) in preparing for the project.

For existing products you may already have a sense of what's needed, and can proceed quickly with an approval of the POR request and move towards DR0. However, for a new product, you need to understand how much work is involved and determine whether there are other projects that might be similar that you can use to assess what's required for this project.

2. As a manager, you approve DR0 only when you are confident that the writer is going into the project with eyes open. Approval does not indicate any specific deliverable of technical content.

**Important:** As the manager, you should be familiar with the official Continuous Delivery process, the *Technological Feasibility Established* checkpoint (which indicates that the writer and all team members have the required skills and resources to proceed with an iteration) and the *Commitment Checkpoint* (where everyone understands what they need to deliver, has the tools to do so, including resource availability, and commits to a Delivery Checkpoint date. Project Managers should **not** proceed with an iteration until the Multicloud IX writer has approved this Commitment Checkpoint. This checkpoint is required for all Continuous Delivery projects and must occur at the beginning of an iteration. As more and more projects start using the Continuous Delivery model, managers should track what the best predictors are for scope of work, like:

- Length of an iteration
- Number of iterations
- Number of features in an iteration
- Number of developers
- Other

**Changed Priorities** - If a Continuous Delivery project becomes a lower priority than another project, a writer on the project may need to be pulled away from a project for one or more iterations or even longer term. If so, as the writer's manager, you need to work with the PCT to determine how to handle it. If prioritizes require that the writer be permanently reassigned with no immediate resource avaialble for this project, then the Product Manager may have to initiate an escalation to see about raising the priority of the project.

# Writer Workflow

Key areas of work for a writer on a Continuous Delivery project are as follows:

- Pubs Editors notification: Alert Pubs Editors that you are changing to the Continuous Delivery model.
- **Pre-DR0 work:** You and your team work together to agree on how to handle customer documentation. This is a one-time only task that you do prior to DR0. See details below.
- **Documentation Plan:** For Continuous Delivery, you do not create the old documentation plan, as the scope of the documentation is dictated by each iteration. However, you can use JIRA to create a documentation plan for the entire project using one "master" task for your documentation work for the project and documentation tasks for each capability that you need to document for that iteration. See the JIRA Usage Examples tab for an example of this.
- Iteration work: You repeat the steps described below for each iteration.
- **Packaging Specification review:** Your effort for this does not change in comparison to Waterfall projects. The specification still needs to list all documentation deliverables for the product, prior to the first iteration. Once the Packaging Specification is approved, it only needs to be re-approved if the deliverables change at a later iteration. This could be the addition of a new component (thus requiring a new release note), the addition of another localization language, and others. If no such changes are required in an iteration, then the latest approved Packaging Specification for the X.Y.z release still applies.

#### Pre-DR0

When a project is approved to use the Continuous Delivery model, prior to DR0 you need to discuss with the team and agree on how documentation for each iteration will be created, reviewed, and delivered. The discussion must include the following:

- **Identifying documentation deliverables per the features scope.** At a high level, this list identifies the documents that need to be delivered from the project and their format. You can use this information to help the Project Manager complete the Docs tab of the Packaging Specification.
- **Prioritizing documentation deliverables, per the writer's resource availability.** As part of this, you need to inform your team what percentage of your time is allocated to the project. In addition, since the Reqs phase determines the features that will be included in the iteration, and only after agreement does the Design phase occur (and the associated HLD and FDS created), you may not know how much effort is required to document each feature. As such, it's important to discuss with the team how to prioritize documentation of those features if you discover that the effort may take more time that the writer has allocated to the project. Since you are an official approver of the Commitment Checkpoint, you can leverage that to ensure the target Delivery checkpoint reflects your availability and the effort involved.

- Tracking documentation tasks for features being delivered. Each team is given the flexibility to track their project in whatever way works for them. All use JIRA to some extent but some may use a separate spreadsheet track team efforts. Also, for some teams, Developers open documentation tasks in JIRA for each feature. For others, the writer creates those tasks. See the JIRA Usage Examples tab for more details.
- **Deciding how the TOI will occur.** Teams may schedule their own TOI for each iteration. However, the writer may want a separate TOI to help him or her write the documentation.
- Determining a review and approval schedule for documentation deliverables. You should create a generic plan on how reviews are scheduled so you can all be clear about expectations. For example, will you ask for your first review sometime after the FDS is approved, after the first freeze of the software, or at another time? Also, what turn-around time are you expecting for reviewers to provide comments?
- **Deciding the method for reviews.** How will you conduct the reviews (for example, providing reviewers access to an unreleased online document) and obtain feedback. You should discuss how reviews will be handled, taking into account the delivery format (PDFs, CHM, online document). Things to consider for online documents include how reviewers will access unreleased online documents and how they will provide comments or feedback. Some writers have the reviewers add the comments into the JIRA documentation task for the feature.
- **Understanding the Product Manager's plans to localize the software:** The Product Manager should indicate that a iteration is a candidate for localization during the Reqs or Design phase of the iteration. If the software will be localized for the iteration, the writer needs to understand what's the delivery plan. If the iteration will be localized, the writer need to include these Document deliverables as part of their plan, including creating a Localization Kit with the content. Contact the Pubs Localization alias for more information.

**Note:** These items are specifically called out in the DR0 checklist for each Continuous Delivery project. While the writer needs to set up and lead the discussion, it's the Project Manager's responsibility to verify that this occurred prior to DR0.

#### **Every Iteration**

At every iteration, the writer:

- 1. During the Reqs phase, reviews the requirements being included in the iteration.
- 2. During the Design phase,
  - 1. Reviews and approves the High Level Design document. (Note: If there is no Feature Design Specification, you are also the Multicloud IX Approver for the HLD. Maintenance iterations that only include defect fixes and minor improvements but no new functionality don't require an HLD and is not capitalized. However, it still includes the Commitment and Delivery Checkpoints.)
  - 2. If there is a FDS, reviews the document. You are an official approver of this document for IX.
  - 3. If necessary, holds a TOI (transfer of information) with Development to understand the feature.
  - Creates some kind of plan for documenting the features in the iteration, based on discussions with your team prior to DR0. See the JIRA Usage Examples tab for examples of how you might use JIRA to create such a plan.
  - 5. Works with the team to propose when feature documentation will be sent for review to the reviewers.
- 3. During the Coding/Unit Test phase, at the Commitment Checkpoint, confirms that you have everything you need document the features for the iteration and together with the team sets the release date

(Delivery Checkpoint).

- **Important:** As an approver of this Commitment Checkpoint, you have the authority not to approve it if the proposed release date (Delivery Checkpoint) does not allow sufficient time for you to document the iteration and have the content reviewed and approved by your team.
- 4. Begin preparing the draft documentation of the content online, using the information obtained from the FDS and the TOI. Some options to consider for the documentation include:
  - Create an unreleased document (typically a DRAFT) to "hold" the various feature descriptions, since you may not know when each feature is going to be released and it's not guaranteed that features will be released in the order in which they were developed.
- 5. When the draft is ready for review, you:
  - 1. To the associated JIRA documentation task, add the URL of wiki page containing the feature draft documentation.
  - 2. Assign it to reviewers and set up due date in JIRA, OR
  - 3. Send the review request to reviewers by email that includes a link to the draft document.
- 6. Update the content, per reviewer comments, when the JIRA review notifications arrive OR when reviewers send their comments in an email.
- 7. Obtain approval for the content from the Development Manager and QA Manager.
- 8. Send the document for editing. When a particular portion of a document is signed-off, you can send it for editing at that point. However, if they are not approved and it's close to the Delivery Checkpoint, you can have them edited post release.
- 9. When the version is ready for release:
  - Create the Readiness Report and send it to Pubs Editors listing the documents that will be released/ updated for the iteration and include the Delivery Checkpoint date.
  - If the product documentation is online and the feature page can be released:
    - Add the URL to the RN to direct readers to that page for the feature description, and send it for review and approval to the PCT as well as send it for a Peer Edit and Format Check per standard RN processes.
    - If you're concerned about layout, request a cursory format check prior to the Delivery Checkpoint. Otherwise, wait until after the Delivery Checkpoint and the online document is released before requesting checking. Links cannot be tested until after the online document is released.
  - If the product documentation is not online, you do either of the following:
    - Copy the feature description to the RN for the delivery (and send it for review and approval by the PCT as well as send it for a Peer Edit and Format Check per standard RN processes). In addition, update the non-online document to which the feature might belong so that it can be released as part of a CD refresh or quarterly, as needed.
    - Add the feature description as online content, even if the main document in which it would belong is not yet online (like a Deployment Guide) and add a link to the online content in the RN. Here's an example of this hybrid solution: SIP Server Deployment Guide Supplement.
    - Send the document to Pubs Editors for checking, per our current process.
- 10. When the Delivery Checkpoint is reached and the software is ready to be released to customers, (for all releases PA, RA, and Hot Fixes (Continuous Delivery only)), wait until the PA/RA or IP Announcement email is sent by Software Delivery before "releasing" the online document and publishing the RN. For

an RN, that means also issuing the RN freeze form. If RN is online, you also make the online RN page available to customers.

Note: The Hot Fix release type is being revisited by Quality & Process to better handle iteration deliveries. Until the new release type is established, publish the Hot RNs for Continuous Delivery projects only after the Software Delivery announcement. This is unlike the process we use for Hot Fixes RN for Waterfall projects.

11. For online documents, request format checking post the Delivery Checkpoint, after you have changed the document to released status.

Here's an example of a JIRA item for a feature:

TSSUE LINKS									
is included in		ded in 🧯	SIP-15836 Iteration3	1					
Sub-Tasks									
	1. 🥑	Create HLD				<sub>4</sub> Closed	Dmitry Pshenov		
	2.	Create FDS				💣 In Progress	Konstantin Abra	men	
	З.	Create a Test Plan-	- Nailed-up in BC			🐴 Open	lvan Zamotokhin	)	
	4.	Review a test plan -	-Nailed-up in BC			🐴 Open	lvan Zamotokhin	)	
	5.	Manual verification	of test cases Nailed-u	ip in BC		🐴 Open	lvan Zamotokhin	1	
	6.	Create automation f	test suitenailed-up in	BC		🐴 Open	lvan Zamotokhin	1	
	7.	Add automation to I in BC	RButton SIP Server 8.1	.1standalonenailed-up		<sub>崎</sub> Open	lvan Zamotokhin	)	
	8.	Add automation to	RBSIP proxy +stand	alonenailed-up in BC		🐴 Open	lvan Zamotokhin	1	
	9.	DOC:Update DGn	ailed-up in BC			🗳 Open	Valentina Petrov	/	

Continuous Delivery in JIRA (highlighted text in the graphic only)

#### Write the Story!

Since iteration content tends to focus on features, every few iterations be sure to create topics that provide the story/business case and within a broader context beyond your product, that this feature or multiple features address. What service does a enterprise want to provide to their customer that results in using these features?

# Content FAQ

When developing documentation for each iteration, here are some answers to FAQs that might help:

- When to create the "doc plan:" At the beginning of an iteration, during the Design phase.
- When to start developing content: After you have reviewed the High Level Design document and/or the Feature Design specification and created a doc plan. If you are using JIRA to track individual documentation tasks associated with each iteration feature, you can also follow that JIRA task creation. Writers should start documenting no later than the Commitment Checkpoint.
- When you do send documents for review: After you complete each document JIRA task.
- Who do you assign reviews to: Tasks can be assigned to the Developer who created the feature or the Development Manager who can then reassign the task as necessary. For QA review, assign it to the QA Manager unless you know the QA person specifically assigned to test that feature. This is one of the items you should work out with your team.
- How much time do you allow for the reviewer to review: Since they are reviewing smaller pieces, reviews should only take two or three days. Work this out with your team, though.
- How do I track the status of documentation tasks assigned to others for review: Create a filter for all tasks you opened for that iteration.
- Do I have to indicate a release version in the documentation: Yes.
  - For non-online documents, you follow the same convention we currently use with the 7-digit document version on the copyright page. The first three digits (X.Y.z) match the software freeze version but the remaining digits just roll up sequentially as you create a new version of that document. For example, if the last released version of the document is 8.1.303.00, the first new version you send out for review would be 8.1.303.01. After the document is signed off and sent to Pubs Editors for testing, Pubs Editors rolls the third digit from the right up to a whole number, like 8.1.304.00.
  - For online documents, include the 7-digit released iteration version in the content. For online documents, you do not create (branch) a new version of documents for each iteration. The standard remains that documents are cumulative to the third-digit (X.Y.z). On the new page or a new section on a existing page, use the following wording: "Introduced in <X.Y.zaa.bb>." If you are creating a new page of content specific to a new feature, include that tag somewhere at the top of the page. If you are updating existing pages with features specific to an iteration, add that "tag" to the added feature. This enables users to easily see if the feature is included in the version of the software they have.
- **Do I create a Change History page for online document:** Yes, just like we do for PDF manuals. The page should list changes and include links to the associated page. In addition, you might consider creating a New Features page to highlight new features added to the release and even briefly add what business need (use case) this feature addresses. You might also add this to the Change History page if the location of that page is not "lost" at the bottom of the book.
- When do I send iteration documents for editing: If it make sense, send pages for editing if they are signed-off early enough before the Delivery Checkpoint. If they are not, send them for editing after the Delivery Checkpoint for the iteration.
- **Do I create a new Readiness Report Checklist for each iteration:** Yes. However, if the document deliverables have not changed, you only need to update the Delivery Checkpoint date.
- **Do I freeze a XING form when sending a document out for review:** If the document is in PDF format or CHM, yes. That's how reviewers access the document. If the document is online, no.
- Do I freeze a XING sign-off form prior to the Delivery checkpoint: UNDER DISCUSSION At a

minimum, you should create a freeze form when DR4 is reached at the end of a project. For iteration releases, we can likely use JIRA for documenting approval of content. Consult with Pubs Editors about when forms should be issued or updated.

## Timecards

When you are filling out your timecard, do the following:

- 1. Create an entry for each Continuous Delivery iteration.
- 2. For each timecard entry, specify only the Active Iteration JIRA key in the Issue field. Timecards must not be filed against Closed Iterations.

Any entries in a timecard that do not follow this will be rejected by the auditors. See the example here.

Key	Summary	Т	S	Σ	Μ	Т	W	Т	F
SIP-17956	SIP-16521 / Iteration56	Po	С	6.5	1	1.5	2	2	
SIP-19078	SIP-16521 / Iteration71	Po	С	1			1		
SIP-19198	SIP-16521 / Iteration74	P.,	С	6		2	2	2	

Continuous Delivery - Timecards

# JIRA Usage Examples

Here are three methods that writers might use to track documentation tasks using JIRA in a Continuous Delivery Model:

#### Example 1: Matt's

- Create a Master task that covers all documents for the entire project (for example, for Workspace Desktop Edition 8.5.1, the Master task was named "Deliver Documentation set for Workspace 8.5.1"). In the task description, list all documents for the release and include links to tasks for each document, per the next step, as defined in the Packaging Spec. The PCT reviews and approves this task. The due date for this task is DR4.
- 2. Create a task for each document included in that project. For example, the task might be "Complete the Deployment Guide Content for Workspace Desktop Edition 851." This is a general task that Matt uses for his own tracking. In the description, list what's needed for this document, like creating an 8.5.1 version of the guide, completing backlog items, tracking updates, verifying that new features are documented. The due date for this task is DR4.
- 3. Create task for a particular iteration of each document. For example, " [DEP] Complete Iteration 1

Deployment Guide Tasks."

- To distinguish the particular document task, pre-pend an acronym for each document to the task name. It enables you to filter tasks for each document more quickly. (Acronym examples, DEP for a Deployment Guide, USR for a User's Guide, HLP for a Help and so on).
- In the description list all features being documented in the guide by JIRA tasks and optionally the G360 value.
- The PCT reviews and approves each task for the documents being updated for the iteration.
- These tasks can be associated with each JIRA feature task that Development creates.
- The due date for this task is the Delivery Checkpoint for the iteration.
- 4. Create individual tasks for each feature that needs to be documented in a particular document. For example, if Development is changing something in the deployment of the software, you would create a new task for that for the Deployment Guide.
  - Include a link to the associated engineering tasks.
  - You could also include notes or any correspondence from the team with respect to this feature.
  - When you have documented this task and are ready to send it for review, for online documents add the URL(s) for the page(s) in which you have documented it. For PDFs or CHMs, you have a two options: forward the reviewers the XING form, or the attach the document(s) to an email.
- 5. After you documented the feature, assign the task to a Developer (for example, the one who developed the feature) and then later to a QA person. If you don't know who developed it or who is testing it, you can assign it to the Manager for that group. If the document is online, add the URL for the page on which is is documented.
- 6. For Release Notes, create a task for each one. The team can then associate feature tasks to it for those items that need to be documented in the RN.

While creating a documentation plan this way using JIRA may take a little more time initially, it's much easier to track. The Project Manager can also monitor tasks from his or her dashboard to see what tasks are being completed or behind the due date.

#### Example 2: Chris'

- 1. The Project Manager creates a new Jira task for each iteration and then creates dependent tasks for each feature associated with that iteration.
- 2. For the UI group, the writer creates the JIRA writing tasks based on the features/issues being worked on in each iteration, in consultation with the appropriate Development Manager. The Development Manager add links to the Functional Specifications and any other helpful documentation for the writer to use to create his or her tasks.
- For back end/API team, the respective Development Managers create document writing tasks with links to the Functional Specification and any other helpful documentation that will aid the writer in documenting the feature.
- 4. The Development Manager (or delegated representative) marks each writing task as a dependency of the associated main Development Jira task for that feature.
- 5. The writing Jira tasks are updated as work continues. Any questions/issues are discussed via Jira when possible (as a central repository for the information).
- 6. Once the writing draft is completed, the writer assigns the task to the Development Manager for review, and later to the the QA person for review. It is assigned back and forth if there are questions/changes,

etc.

7. The Jira tasks are closed when they pass QA.

#### Example 3: Val's

- 1. The Project Manager creates a new JIRA task for each iteration and associates a new feature with that iteration.
- 2. For each new feature, both Development and QA create sub-tasks associated with the feature, such as the creation of HLD, FDS, test cases, and so on, including a documentation sub-task. Many sub-tasks are completed in a consecutive manner.
- 3. Once the writing draft is available, the writer provides a link to the feature draft in the documentation sub-task and adds Development and QA as watchers. Additionally, the writer sends a link to the feature draft for review to a wider audience, including Product Manager, by email. The feedback exchange is done via email. Occasionally, reviews might be copied to the doc sub-task.
- 4. When the feature/iteration is delivered, the writer resolves the sub-task, which is then closed by QA.

This team also creates a spreadsheet for tracking each iteration, like the one shown below so that all team members use so that they are clear about the timeline of continuous delivery features.

đ	A	В	С	D	E	F	G	Н		J	К
	Iteration	Iteration	Custom	Accept	Reg Name	<b>Req Description</b>	JRA	HLD Draft	HLD	FDS Draft	FDS
	Name and #	Status	er	Reg ID			lssue#	Readiness	Approval	Readiness	Approval
		(Planning,	and/or					Date	Date (TF	Date	Date
		Committed,	case #						Established		
		Delivered)							/Cap Start		
									Date)		
	Iteration18	Planning		446219	PBX: Bridged	Support	<u>SIP-13953</u>	08/05/13	09/06/13	01/29/14	05/12/14
	(SIP-14997)				Line	"Industry					
					Appearance	Standard"					
	Iteration22	Committed		457072	Application	Create an	<u>SIP-13993</u>	09/08/13	10/18/13	NA	NA
	(SIP-15131)				Note for Yealink	"application					
					Phones	note" for					
	Iteration23	Planning		446226	PBX: Find-me-	Implement	SIP-13954	11/22/13	12/06/13	01/23/14	03/07/14
	(SIP-15210)				follow-me	"Find-me-					
						follow-me" per					
						industry					
				1	1						

**Continuous Delivery Timeline** 

# Early Adopter Program

Essentially, the Early Adopter Program (EAP) is a program that allows selected/approved customers to evaluate a new product or new features in an existing product before it's released to everyone.

Its intention is to eliminate the following risks:

- Wrong expectations due to lack of sales readiness
- Technical issues not identified as a requirement
- Encountering expect complexity around integration
- Knowledge gaps
- Immature processes

Before a product can follow this program for their product, Product Managers (on-Premises product) or Offer Manager (hosted cloud) need to submit and receive approval for their product. Once approved, the Product Manager informs the associated PCT at the beginning of the project.

The Release Type for an EAP product or EAP product features is typically restricted. However, there may be occasions where the release type in PA or pre-release.

Packaging Specs are required for PA and restricted EAP products. Pre-releases do not generally require Packaging Specs.

# 4 EAP Scenarios

Thus far we've identified 4 scenarios for EAP. Writers tasks are described accordingly.

#### Private Edition services

In 2021, a new delivery model was developed using services and containers. In June 2021, 30+ services were made available using EAP. Content and Release Notes are developed on all.docs.genesys.com using forms and templates developed to support this new delivery model.

As of November 2021, the process for delivering content is still being finalized. However, some information about creating RNs is located in Confluence, NextGen RN (MVP) Instructions for Writers.

#### A new product

- Create release notes according to the release type and follow the usual process, according to the type.
- Create the documentation. Only create the documentation if you have enough lead time prior to the release to develop it and have access to all necessary resources (like environment) to do so.
- If you do create restricted online documentation, add a disclaimer. Here's an example: Genesys Predictive Routing is being released to pre-approved customers as part of the Early

Adopter Program. This means that both the product and the documentation are still under development. As a result, documentation sections might require revision as the product develops. We advise that you use this documentation with care. Before you make changes that could affect the success of your deployment, verify them with your Genesys representatives.

- If you do, for restricted or pre-release products, create login credentials and publish the online documentation in preview mode.
- If your product is restricted, also follow the processes for how to handle restricted documentation.
- If you don't, but the team needs a document provided to the customer, another member of your team, like the Developer, PM, or another person must create the document. Once approved, this along with the approved restricted or pre-release note has to be sent to Pubs Editors for inclusion in the IP.

Delivering non-wiki content or wiki content in a PDF

If you're providing EAP documentation as PDFs, do the following:

- 1. Remove change bars or highlights, if applicable, from the document.
- 2. Add the following on the cover of the PDF:

**Disclaimer:** <product> is being released to pre-approved customers as part of the Early Adopter Program. This means that both the product and the documentation are still under development. As a result, documentation sections might require revision as the product develops. We advise that you use this documentation with care. Before you make changes that could affect the success of your deployment, verify them with your Genesys representatives.

- 3. Generate a PDF of the draft content, and insert a DRAFT watermark (20% opacity).
- 4. Add a footer, if possible with the following: "Genesys' confidential and proprietary information."
- 5. Rename the PDF file name from the one autogenerated to something more meaningful.
- 6. Upload the file to the PrivateEdition folder in our public repository: https://docs.genesys.com/ Special:RepositoryUtils
- 7. Per the repository process, at the top of the Repository Utils page, click Refresh the Map.
- Add the link to the document on the Provisional EAP Documentation page. Reminder: You get the link coding from the Repository Utils page by clicking the associated document and on the right click the wiki text for the link.

#### Important

- After you've uploaded the PDF, upload it to Global IX Sharepoint > Restricted docs > <product folder> in case we want a record of them after the online content is published.
- If you are generating a PDF from Confluence contact, also add a date stamp to the cover page to let readers know the date it was generated.

Existing product where one project (iteration) is EAP

When a specific iteration is EAP, follow the same process described for a new product.

#### Existing product where one or more features or services are EAP

When specific features or services are EAP, these are considered restricted features.

- If it's for an on-premises product, create a release note. For online documentation, contact Pubs Editors to determine the best method to follow for that.
- If it's a Cloud product, contact Tanya Ivanova and copy Pubs Editors to determine the best way to handle this.

# Agile Guidelines

IX recognizes the value Agile can bring to software development projects. The following criteria standards will enable IXs to successfully deliver quality documentation for projects following the Agile methodology.

**Note:** Some of the standards listed here are not specific to IX. However, they are included to ensure that all criteria are identified.

#### Criteria Standards

- The entire PCT should have formal Agile training, including the IX writers.
- The IX writer(s) should be involved from the very beginning of any given project.
- Documentation efforts (at a high level) must be included as part of the release planning meeting(s) (for example, what documents are affected, rather than what documentation effort is needed for each feature).
- Documentation deliverables/tasks must be included as part of the Iteration Backlog spreadsheet for each iteration throughout the length of the project.
  - Notes:
    - 1. These tasks not only include the time for writing but also team reviews for that iteration. In addition, a task may identify the need for members of the team providing information to the writer, whether by assisting in writing or conducting a TOI, per the agreement of the PCT.
    - Each iteration may not have a specific documentation task for that iteration. However, documentation work would continue during that iteration. In addition, the impact of features associated with that iteration on customer documentation must be considered as the iteration is planned.
- A detailed "Working Agreement" (Plan) must be established. It should address items such as the following:
  - Geographically dispersed team members:
    - If the team is spread over many time zones, how will daily meetings be scheduled?
    - If time zone differences prevent a resource from attending a meeting, how will communication be shared among all members?
    - Will the Task Board be available on line?
  - Limited availability of writers who are not 100% allocated to the project.
    - The plan must accommodate this limited allocation by prioritizing features, reducing scope, and/ or limiting the documentation requirements. Writers should turn to the Scrum Master for assistance.
    - Development must provide thorough documentation input.
  - Communication:
    - General.

- Tracking of progress.
- Tracking of changes.
- Software/feature version availability: location and schedule.
- Distribution of specifications and TOI for software and features: location schedule.
- Indication of feature stability. This is particularly important for Tech Writers as it is very costly to document a feature more than once.
- Ratio of Technical Writers to Engineers
  - Industry standards for Agile projects indicate that the ratio of Engineers to Technical writers should be 4 engineers (Developers and QA) to 1 writer. If the ratio exceeds that, the team needs accommodate that when planning the project scope, documentation effort, and the schedule. If the ratio approaches 8 to 1, a flag needs to be raised and a discussion held between an IX Manager, the Project Manager, and Product Manager to determine whether another IX resource can be found and, if none is available, to consider an alternative way to handle customer documentation.
- Multiple Technical Writers (if the team includes more than one writer)
  - Each writer should function equally within the PCT—no single writer should be considered the point of contact for communication by other PCT members.
- Vacations, statutory holidays, and other absences will happen at different times for different members, meaning that they will not be available for daily meetings; in some cases, part or all of an iteration might be missed for these reasons.
- The assignment of stories and tasks should identify the effort and complexity of implementing a feature and at which iteration the feature will be addressed.
- Documentation Schedule for Development Review and QA testing & verification.
  - Allow for the possibility of documentation being out of synch by a whole or half iteration, or not until the final iteration.
- Documentation Schedule for items outside of an iteration:
  - ReadMe
  - Release Note
  - Product Alert
  - Editing/Technical Publications Peer Review
  - PDF Check
  - PDF Test
  - Technical sign-off
  - Documentation freeze
  - Migration chapters (approved chapters must be delivered to writer 3 weeks prior to release)
  - Possibility of documentation for an iteration being delivered during iteration n+1, or as agreed upon by the team.
- Non-Agile Process Schedule:
  - CD building

- Documentation delivery process for review, as documents are not frozen for review in XING. A
  document versioning system must also be implemented / agreed to by the team. (One example is
  incrementing version numbers with each review. Another example is incrementing per iteration.) It
  is essential that Development and QA review the correct version of a document rather than an older
  or previously approved version.
- Documentation review process defining in what form Development and QA will deliver comments.
- Documentation flow and feature integration. Not all aspects of documentation are feature oriented. Many aspects of documentation require a flow and structure that transcend a list of features.
- Cross-project and product dependencies:
  - Plan to accommodate schedule failures due to dependencies.
  - Plan to share information between teams for all team members.
- A set of common tools to provide feature information.
- Documentation issues must be addressed at Iteration Retrospective/Demo meetings.

#### Warning Signs/Alerts/Issues

- The writer should be familiar with IX processes, especially as the project approaches its release and the needs for Readmes, RNs, PDF testing, and so forth.
- The writer should also be vocal/proactive about ensuring that IX issues are consistently addressed through the project. The writer should also look to the Scrum Master for assistance if needed.
- Writers must be able to notify other team members (at the iteration planning meeting and the Daily meeting for example) when a new feature will affect more than one document: Deployment Guide, Help, User Guide, and so on. More time might be required to accommodate the update of multiple documents.
- Changes to the Working Agreement will have significant impact on the delivery of documentation. Tech Writers must be allowed to make changes to the Working Agreement as needed. (The Scrum Retrospective can be used to evaluate the need for changes to the Working Agreement and leverage that information for later iterations.)
- Even in Agile, DR2 marks the point when all new features must be implemented (that is, content complete). After that, only bugs fixes should occur. If the team wants to introduce new features after DR2, raise a flag with the Scrum Master first, and if necessary let a Tech Pubs Manager know.
- Rapid feature change from one iteration to another drastically increases Tech Writer effort. (An example of this occurs when a feature is developed in one iteration and the writer documents the feature. Then the feature is redesigned and the writer has to completely rewrite the text. With limited Tech Pubs resources, this lost time could impact the schedule.) The Working Agreement should account for feature change with respect to documentation effort.
- The scope of an iteration must accommodate documentation review; therefore, before the iteration starts, the PCT needs to ensure that the scope/iteration length reflects IX resources/efforts. Note: Resource constraints might be eased some if Development can provide content/text for customer documents that the writer only has to edit and format. This requires that the Developer has moderate technical writing skills.
- Documentation might fall behind, particularly if there are feature changes/ scope additions. As a Tech
  Pubs resource issue, this might have to be addressed by the temporary addition of another writer, if
  one is available. In this circumstance, given that Agile projects do not typically include the design
  specifications that are part of Waterfall projects, the team must assist the new writer (if unfamiliar with
  the product) in acclimating to and learning about the product and the new features.

# Documentation Development Process

# Introduction

The key phrase to remember for documentation development is Customer Experience (CX). All documentation development, including associated processes, are meant to result in a great customer experience when readers are searching for, accessing, and using our documentation content.

In order to delivery such quality content, the processes described here and in related pages must be followed or exceptions must be granted by IX Production (**Pubs Editors**).

Documentation development synchronizes with the project release:

- For on-premises products, the development process for documentation normally occurs in synchronization with a project release/project life cycle and follows the DR (Decision Review), as it relates to the standard PLC and DR process.
- For Genesys Engage cloud hosted, the development process synchronizes with product/feature development for the associated application following a Continuous Delivery model.

For Genesys Engage cloud Private Edition, the documentation development process synchronizes with the release schedule for the associated service. As of September 2021, Release Management is developing a new process, into which documentation development must integrate.

**Note:** Individual writers should not send documentation directly to a customer or deliver documentation outside of the department for delivery to a customer unless prior approval has been received from IX Production department.

# Release Lifecycle and Documentation

#### Important

(2021) Until the new Release Management process is available, it's uncertain whether any of the following information will change in relation to the new services delivery model.

#### **Decision Reviews**

The Release Lifecycle consists of phases separated by Decision Reviews (DRs). A DR is the synchronization point between all stakeholders. At a DR, the results of the preceding phase and the conditions to proceed to the next phase are assessed, and the decision is made whether or not to approve successful completion of the preceding phase and to proceed to the next phase.

A DR ensures alignment with business strategy and portfolio product management process and requires management approval. Typically, all Release Level DR milestones are approved at the Executive level.

Most projects move through DR0, DR1, DR2, and DR4. Products following a Continuous Delivery project type only use DR0 and DR4.

#### DR0 to post-DR4

#### Important

As of 2021, this section likely no longer applies.

The links below are to pages that provide information on what IX members do from DR0 through post-DR4 for Waterfall projects.

- DR0 to DR1
- DR1 to DR2
- DR2 to TR
- TR to DR4
- Post-DR4

For Continuous Delivery projects, see Continuous Delivery

#### **Projects Types**

There are essentially three project types used at Genesys:

- Continuous Delivery
- Waterfall (likely no longer used in 2021)
- Agile. See guidelines for whole to manage writing on a Agile project.

#### **Document Types**

Information Experience delivers various various types of content types. These types may be delivered online or in other format types, depending on when the product was released. This section provides a little information about these types.

#### Content Article

Content articles refer to self-contained units for information with a specific and limited purpose and our complete, in that they address the user's question. A content article follows a model where

information is organized in a bottom-up architecture, reflecting the web environment, rather than the narrative book model.

Content articles cover areas that were previously covered in deployment guides, user's guides, reference guides, administrators guides, and so on.

These articles use the Every Page is Page One model developed by Mark Baker. Here are a few examples:

- Business Scenario: Phones
- Role-Based Access Control
- Trunk Capacity Control

#### **Release Notes**

Release notes (RNs) provide information about new features, corrections, known issues, and other resources about a product component.

- For on-premises products, there's one release note is required for each component (IP). The RN is cumulative for each major release (X.Y.z), and is organized by the seven digit version number.
- For Genesys Engage cloud hosted, the RNs are still created by component but organized by release date. They may also include the 7-digit version number.
- For Genesys Engage cloud Private Edition, RNs are created for each service and also organized by release date.

#### Product Alerts/Release Advisories

#### Important

**Product Advisories** are created and maintained by Customer Care to convey critical information to the customer. Information provided by a Product Advisory may also be included in the Product Alert or Release Advisory.

Product Alerts (wiki) provide information about the product about which you want to alert the customer. For example, if your product requires a specific version of a component that's part of another product, that information could go in the alert. Previously, (Information that is specific to a component of the same product goes in the component's release note.) If you do not need to provide product-level information like this for your product, you do not need an alert.

**Note:** Previous to release 8.5, release advisories were in an html format. From 8.5 onward, Release Advisories renamed Product Alerts. They are online and added to same section of the product landing page as the Readme (https://docs.genesys.com/Documentation/Ponydocs/1.0/Help/readme). See the Management Framework product landing page as an example.

#### Wizard Advisories

#### Important

As Wizards were phased out of products, Wizard Advisories are no longer a standard deliverable.

Wizard Advisories provide information that the user needs to be aware of when using a product's wizard.

#### **Deployment Procedures**

A deployment procedure provides information to customers who are installing a Hot Fix patch for a component. If a deployment procedure is needed, only one deployment procedure covers each major releases (for example, Genesys Info Mart 8.1.x) with any specific hot fix information detailed in the release. (Prior to 8.0 each component hot fix had it own deployment procedure.)

For information on how to create a deployment procedure, see the Release Note Process, then select Detailed Release Note Development Process, and then Deployment Procedures.

**Note:** Some "Deployment Procedure" documents have been delivered in the past that are permanent documents and not installation for a hot fix. These documents are an exception to this process and will continue to be published like Release Notes.

#### **Developer Documents**

Developer Documents (sometimes known as SDK documents) are a distinct genre of technical documentation. They can include developers guide, API references, and code examples.

The recommended order for writing is to complete the API reference first, complete any code examples, and then complete the developer guide. Once written, developer documentation follows the same rules for review and delivery as other Genesys documentation. Review cycles are completed as indicated in the Technical Publications Freeze Form Process.

#### Code Examples

For Code Examples that accompany developer documentation, the associated writer can add these to the IX Repository folder for the product/version. (Note: Code snippets are provided inline.)

These rules apply to Code Examples:

- Files delivered by the writer are assumed to be technically correct.
- Technical approval of the developer guide implies technical approval of the code examples. Note: Each code example set must contain a disclaimer that these examples are not supported or tested.
- The code examples are zipped files in the .zip format for Windows and .tar.gz format for UNIX.
- The files are not checked or tested by Production Editing.

- These files must be listed as part of the documentation set for the product.
- The code examples are archived in Global IX SharePoint by the technical writer.

#### **API** Reference

Generally, the API Reference is the most used, and therefore most important, of the developer documentation set. In most cases, the API reference is an HTML tree generated from special comments in the source code for the product and shipped as part of the product. The HTML tree is not edited directly; edits must be made to the source code comments.

The technical writer:

- **Does not** submit an API reference HTML tree to the IX Production (aka Pubs Editors) group.
- **Does not** freeze it in XING.
- **Does not archive** the API reference HTML tree in ClearCase, as it is automatically archived when the developer archives the source code.
- **Does** verify with the Project Manager that the Packaging Specifications for the API reference correctly place it on the product CD.
- The API reference HTML tree is available from docs.genesys.com.

In the past and in some cases the API reference is a PDF file based on the FrameMaker templates following standard Technical Publications document development and submission procedures. It is also posted on the docs.genesys.com website. As with any other PDF, the technical writer archives the source files in ClearCase.

#### System-Level Guides

System Level Guides are documents that apply to general releases of most enterprise products, excluding versions that are restricted and some cloud products. System-Level Guides include:

- Genesys Supported Operating Environment Reference Guide (for on-premises products only)
- Genesys Interoperability Guide
- Genesys Support Media Interfaces Reference Manual
- Genesys Licensing Guide (Note: This document is outdated as much of the document is associated with License Reporting Manager (LRM) which is on the EOL track.
- DB Sizing Worksheets
- Genesys Migration Guide this document is no longer maintained. Any instructions about how to upgrade to newer versions of a product are part of the product documentation, and may in fact be called a migration guide for the product.
- Genesys Hardware Sizing Guide
- Genesys Security Deployment Guide
- Genesys Resource Capacity Planning Guide

#### Help Files

These provide instructions how to use use a particular GUI application. Starting with the 8.5 release, Help Files are created online like any other document.

#### **Documentation Planning**

#### Important

2021 notice - Documentation plans are no longer developed as a distinct document. Some writers create main Doc JIRA tickets to indicate and track documentation needs for a product. As such, the information here

The individual writer or team lead plans documentation delivery according to the Technical Publications Development Process. A key delivery early on in the release cycle is product-level Customer Documentation Plan.

Details from the Documentation Plans are incorporated into other Genesys project deliverables including:

- (2021 notice -EPMS may no longer be used) The master schedule for the project in the Enterprise Project Management System (EPMS). Writers should check with their Project Managers to determine how to deliver the documentation schedule so that it is accessible to the entire team. In most cases, only the Project Manager will make changes to the project schedule, and he/she will add the documentation dates as provided by the writer.
- (*As of 2021, the Packaging Spec is online and only lists RNs.*) The product Packaging Specifications, which serves as the baseline for work performed by the Project Support Office and Production in preparation for releases. For example, from the Packaging Specifications, the names of documents and the titles of Release Notes are loaded into the XING, JIRA, and the Production databases. The Packaging Specifications are the official record of manuals, help files, online (wiki) docs, code examples, release notes, advisories, and any other types of documentation deliverables for an individual release of a product. It is imperative that the writer work with the Project Manager to ensure that the Packaging Specifications contains a correct list of Documentation Deliverables. The Project Manager will also submit the Packaging Specifications for review to the PCT and must receive approval from the Technical Publications Lead on the PCT.

**Note:** The official policy of the IX department is to discourage custom documentation for individual clients; however, the department follows normal processes to develop required documentation for custom projects that are a part of the Engineering Plan of Record.

# Writers Document Development Overview

This section provides a general overview of documentation development within Information Experience.

# Tell Users the Story!

When writing customer documentation, we write according to our customers' needs - in other words, for that which they are looking. A critical aspect of developing documentation is that you document the business case for a new or improved feature. Customers don't care what product a feature is associated with. They want to know how to implement a particular need/business or use case. Feature descriptions alone don't answer that. You need to develop a story that tells how they can use Genesys to meet their business needs and thus their customers needs. This may entail creating single article page that ties together information from various product docs. A few examples might be the following:

- A business case example might include how customers get an agent ready to handle his or her first call or interaction. For example, what do they need to set up within various products to enable this to happen?
- An administrator is looking for how to set up an agent to handle calls, email, chat, and so forth.
- An agent simply looking for information on how to login and start taking calls.
- A supervisor wanting to know how to generate a report in the cloud. Here's a link to articles that follow this model.

In Genesys Multicloud CX (formerly Engage cloud) we developed training pages that span products so customers can learn how to do some simple things like setting up agents so they can answer a call. We've created role-based trainings and are working on use case training. See Learning the basics.

Some things to consider:

- Customers can arrive on your page from anywhere, including from a search. Therefore, it's important to provide context at the beginning of the content so that the reader knows if this content contains what they're looking for, or if they need to continue searching.
- When reviewing JIRA issues for documentation needs:
  - A software change could impact something that the customer has already set up. Did the Developers replace an existing feature with a new feature that handles that functionality? Does the new version support the old approach and, if so, is there anything the customer needs to be alerted about?
  - Does the JIRA item mention something about options or a new option being needed? Does it talk about configuration that might require documentation additions?
  - Review any text that might require something the customer needs to know about. Think from the perspective of the user. Developers don't always think like the user, or may not write their comments in a way that clearly explains the impact of a change on the user.

# No Longer Narratives But Topics/Articles

We write articles rather than books. Customers don't consume books. They want answers to questions. They want to know how to do something and to be able to easily search for and find it.

When developing documentation, although PonyDocs is set up for books, when organizing and writing content, think from a topic perspective. While products will add features, they are added so that a customer can achieve some business goal. So, write a topic that includes this feature in the context of the customer achieving that goal.

If this goal is just one among many or if there are other tasks that are related to that goal, provide links to the other topics. Also, remember that since customers don't care what product a feature is from, your topic may link to a topic written by another writer for another product.

# Sources for Document Development

Technical writers rely on various sources to develop documentation.

- Documents, like Product Requirements Documents (PRDs), High Level Design document, and Functional or Design Specifications created by Product Managers and Engineering Development Managers.
- JIRA for issues opened by team members about features added to the product and documentation improvements.
- The Software itself. Writers must have access to the software and to the software engineers while products are being developed.
- Feedback from customers and others.
- Project Core Team (PCT) meetings. Writers must attend project core team meetings. These meetings help the writers to fully understand the software that they are documenting.
- TOI (transfer of information) meetings: Developers regularly hold TOIs to explain to the PCT how features are implemented and give the team a chance to ask questions.

Writing good documentation is an iterative process that requires feedback and revisions. Writers create a documentation plan that includes a schedule for when documents for the release will be reviewed and approved and ready for a release. Previously, the plan was a formal Word document that was reviewed by the team and approved. Since 2018 or so, the plan might be implemented in a Confluence page for the project or via JIRA tickets.

- For PDF and Help files that are not online, previously writers used XING freeze forms to track each stage of the development, review and approval process. We now use the Documentation Type in JIRA that includes a documentation development workflow from writing through team approval. See DocOps and Doc Development Project Core Team (PCT) Responsibilities.
- For online documents, writers use JIRA or email to track document readiness from the review stage through the released stage. Previously, freeze forms for online documents are only used at technical sign-off so that we have a record that the Project Core Team (PCT) has approved the content. We now use JIRA to capture document approval.

All documents must be approved by both Development and QA prior to release. A document cannot be released if there are any unaddressed critical or major JIRA issues open against the document. Writers also archive all feedback written in a draft document (using ClearCase for PDF and non-online Help files) or electronically in JIRA or through comments provided in email. Writers are responsible for archiving comments and project history for their documents for one year after the product release.

## Document Versioning

Whether a document is in PDF format, CHM format, or online, customers rely on versioning to ensure are viewing/using the appropriate documents for the products they have.

There are several places where version numbers appear and their location differs depending on whether the document is an online document, a PDF, or CHM Help file.

#### General

(Applies only to non-online documentation for on-premises releases prior to 8.5.1) The documentation and help files are frozen for the specific software release. So, in XING, the document is frozen as 8.5.1, if there are changes to the software code that required an update for the document for the release. If there are no changes to the document, the document will not be refrozen for a maintenance release, and the latest frozen version of the document will still be considered valid for the maintenance release. The release date and version number will not be changed if there are no other changes to the document.

**Note:** The XING database must have entries for documents before the documents can be frozen. Generally these entries come from Product Packaging Specifications. If an entry has not been added and a document is ready to be frozen, Technical Publications Production can request the entry.

#### Online Documents

Versioning for online documents is handled differently, because PonyDocs supports versions to the third digit. See Versions for information on how to work with versions in PonyDocs.

#### PDFs

A version number appears in the file name. This appears as 81ou\_gs.pdf. As a rule, IX does not change this file name to add a third digit as software maintenance releases occur over the life of the product. So, the file name for example for the Outbound Contact 8.1 Reference Manual is 81ou ref.pdf and not 8111ou ref.pdf for the 8.1.1 release.

Release numbers on the cover of the manuals and in the footers of the manuals refer to the software family or major release. For Genesys 8, the footers contain only the first digit and not the point number.

Part numbers appear inside the cover of the PDF document and inside the help file. The part number is a combination of the name of the file, the release date, and the specific version of the document. The version number should match the XING freeze form version number. For a 8.1 document, this is the complete version number (8.1.001.00, for example).

#### CHMs

(Applied only to Help files that were created using RoboHelp for releases earlier than 8.5) The help files must be frozen to match the first three digits of the version number of the software. Therefore, a help file for a 8.1.1 release is frozen as 8.1.1. The file name is not changed, and the release number shown inside the help file in the "About This File" topic does not add the extra digit. As with PDF files, only the version number is incremented.

Note: There are a couple of unusual cases where the third digit of the release is used on the cover and in the filename. These cases are for products where a back level version has to continue to be supported along with a current version.

# FedRAMP security features versus security features

### Important

Use this information for understanding FeRAMP. However, as of 2020, the specifics no longer apply because FedRAMP was handled in a different manner and IX was not directly involved.

After conferring with Ramnath Soleswaran, Colin Leonard, and Michael Katten, here's some information/guidelines about FedRAMP and security features.

# FedRAMP

- FedRAMP is only for hosted systems (that is Cloud), not for on-premises releases. If the government buys on-premises software, FedRAMP doesn't apply, since they will be hosting the software on their own services. FedRAMP is about the government using cloud services in a secure and compliant way.
- To support this, a separate cloud solution is being created that is a subset of our commercial PEC. It will be set up in a secure area of AWS that is FedRAMP compliant. It's also unofficially called GovCloud or PECG.
- FIPS (Federal Information Processing Standards) is associated with this FedRAMP initiative.
- At this point, we're not creating a compliance page or a page that catalogs FedRAMP pieces. Once we
  are able to say we're compliant, however, we will ask PMs if we can put a stamp of some sort on a
  landing page or central area.
- The Security Deployment Guide won't include anything about FedRAMP.

# Security Features

- Each team is working on implementing approximately 22 security features in their products. These can include, for example, features like improved logging, supporting SSO, better input validation, encrypted data storage and transmission.
- These are general security improvements for hybrid implementations but are not specific to FedRAMP cloud.
- What and when the security features are rolled out will vary by product.
- Once implemented, these security features will be delivered to Genesys Engage cloud & on-premises environments.

#### Important

As the security features will likely be part of the FedRAMP implementation, it's possible that your teams have been talking about them in context of FedRAMP. So, ask your PM for clarification if you are unsure what they mean.

# GovCloud Dates

- GovCloud staging fully up-running July 26, 2019
- GovCloud Production Deploy Shared Application Services (GWS, GVP, GIR and Microservices) October 4, 2019
- GovCloud Production ready for customer tenant deployment October 4, 2019
- GoLive in October 31, 2019.

## Documentation

- Of the 22 FedRAMP requirements (as documented in Aha!), 20 of them are security measures inside the
  product code base that customers don't need to be aware of and are therefore not documented. The
  two Aha! requirements that you do document include:
  - ENCCP-E-164 Inactivity Timeout -15 minutes (FEDRAMP Gap 36-Phase2 & Premise, Cloud)
  - ENPLA-E-91 SSO Support GWS Auth Service (FEDRAMP gap 1, 3, 20, 25, 37, 39, 41 & Premise,Cloud)
- For these two requirements, your Product Managers may choose to include these added security features in their on-premises and PEC Release Notes and guides. Confer with your Product Manager to determine what you should document. Follow the same process you use when documenting any other feature.
- Don't specifically mention FedRAMP or FIPS in on-premises documentation/RNs and PEC documentation/ RNs. Just write what security features are being supported. For example, you might use a phrase like "implemented "security control xyz" or some variation based on the feature. The term "FedRAMP" should only be used for our upcoming PEC environment dedicated to USA government customers.
- We don't have standard wording because what each product supports varies based on the requirements each are implementing. So, again, look to your PM for wording guidance. Then, provide the wording to Pubs Editors. Once Pubs Editors have a few scenarios, we can create standard wording to help other writers implementing the same security features, and for FedRAMP when it applies.

#### Important

Originally, Ramnath requested that documentation specific to FedRAMP be restricted to FedRAMP customers. As of June, Ramnath indicated that the need for this is now an

open question. When we know definitively, we'll determine what to do.

# DocOps and Doc Development - Project Core Team (PCT) Responsibilities

As part of the DevOps initiative, a Customer Documentation DevOps/DocOps charter group was developed. The goal was to create a consistent workflow for documentation creation within an R&D project to improve efficiency, reduce workload (for the entire team), and limit or avoid bottlenecks. The charter team was composed of a Product Manager, a Developer, a Quality Assurance person, a Project Manager, a Technical Writer, and the charter lead (an IX/Tech Pubs Manager).

The outcome of this group is the introduction of the following:

- Two new JIRA features: an Add Documentation button for Software JIRA tickets, and a Documentation workflow for JIRA tickets for the Documentation type. Here's a link to a training video on how to use these features: Doc JIRA workflow training video. (See Doc JIRA Workflow diagram for a supplemental diagram of the workflow.)
- DocOps solutions that were developed and agreed upon by the Customer Documentation DevOps charter group according to the PCT role (as listed below) for implementation by all Project Core Teams.

# Technical Writer

#### Project Planning

- **Communication:** To help ensure the Technical Writer (writer) obtains the information he or she needs in a timely fashion, the writer can ask if there is a preferred way the PCT communicates. It is recommended that teams use JIRA instead of email because it's more easily tracked.
- **Confluence Project page:** Writers can leverage the Confluence project team page to obtain the following information, as mentioned under the Project Manager (PjM) section:
  - An up-to-date list of team members. Writers can use this list to find out from the respective leads which individuals will be reviewing and approving customer documentation, and who will be the resource for obtaining information.
  - The Planning and Schedule links. If the schedule does not include milestones like content complete, documentation complete, or release date, the PjM must provide it in another way (for example, via an email that includes PCT Meeting minutes). The writer will track doc delivery in the Doc plan/ schedule that has previously been reviewed by the team and may be used by the team to track documentation readiness.
  - A link to the main JIRA task for the iteration for Continuous Delivery projects, or the JIRA task for the project for Waterfall projects.
- JIRA Tempo Code: Writers can obtain the JIRA Tempo code via JIRA.
  - For Continuous Delivery, the number is the JIRA number of the JIRA ticket that the PjM creates for the iteration. (Tip: The word "Iteration" is included in the JIRA Summary text.)
  - For Waterfall projects, the number is the JIRA number of the JIRA ticket that the PjM creates for the

project.

- **Project Scope:** Writers use the proposed project scope (identified at the start of the project by Product Management working Development) to scope his or her work so that effort and doc impact can be sufficiently determined prior to the Commitment Checkpoint. (This task is not new. It just reiterates the standard workflow.)
- Doc Plan/Schedule:
  - The writer creates a Doc Plan/Schedule in Confluence that covers all iterations, so the URL is constant.
  - The writer asks the PCT to review the plan/schedule for completeness and, if the effort involved requires more time than the writer has dedicated to the project, to discuss options to limit what's documented or adjust the scope.
  - The Doc Plan/Schedule should include the following:
    - An "Iterations" section with subsections for each iteration.
    - Each iteration section should include a table, generated through the integration with JIRA, listing the Doc JIRA items included in the iteration scope, and the effort involved, especially if the effort required for the proposed scope is greater than the writer's availability for the project.
    - A Review/Approval Handling section where the writer describes how he or she will handle reviews.
      - For reviews, the writer could include the following:
        - An agreement that the writer sends content out for review (that is, the Doc JIRA issue is assigned to reviewers) a week after the software issue is in the Resolved status, and an expectation for when comments are due back (in x number of days). **OR**
        - An agreement that reviews will be based on content type (like Deployment, Help, Reference, and so on). In other words, once the writer updates the document per the Epics and Stories that impact that document, the writer requests a review. The writer could include a date for when comments for that bulk review are due back.
      - For approvals, the writer could include a statement of the date when all approvals are required meaning Technically Signed Off by the PCT. The date should be a few days before the release to allow time for peer edits and format checks.
    - A non-iteration specific documentation tasks section that includes a table of doc tasks not associated with a particular feature or iteration, like reorganizing content, adding another example, and so on.
    - See Sample Documentation Plan/Schedule for a sample Doc Plan/Schedule Confluence page.
- Ad Hoc TOI: A regular (weekly, bi-weekly, frequency agreed between Developer and writer) TOI between the Developers and the Technical Writer should be set up by the Developer or writer.
- **Release Platform:** The writer leverages the Release Platform information provided in the JIRA ticket to determine the customer type (Cloud versus On-Premises, or both) to which the project is being delivered. The Product Manager (PM) must provide information at the start of the project. The PjM and writer can remind PMs to provide this information. The writer can also check Aha! (via the link in the JIRA issue) to determine the target markets. **Note:** With Genesys' new strategy to being a Cloud company, this need will likely be phased out.
- Early Adopter Program (EAP): Writers use the information provided by the Product Manager about whether a project, or a piece of a project, is part of EAP, to assess what is needed and to plan what needs to be set up to support it.
- Aha!/Features/Use cases: Writers must leverage the use case information in Aha! to provide the

context/business need for the feature.

- If the writer needs more information, he or she can request it from the Product Manager or assign a doc task to the PM to obtain it.
- The writer should make him or herself a watcher for each JIRA issue so they are notified if feature updates are made in Aha! that are synced to JIRA. As a watcher, the writer will automatically see updates in the Comments field.
- The writer can also access the associated use case in Aha! via a link from the JIRA issue.
- **Resource Scheduling:** When planning the project, the team must take into account the Technical Writer resource when scheduling the release to ensure that other projects to which the writer is already committed are not released during the same week.
  - Writers should take the initiative to alert the team about other commitments when determining the release date so that the writer doesn't have multiple projects releasing at the same time.
  - Writers should not approve the Commitment Checkpoint if the writer does not have what he or she needs. The Tech Writer checklist in the Continuous Delivery Process reflects this requirement.
- **Backlog:** Writers should be notified when Backlog items are being considered for inclusion in an iteration after the Commitment Checkpoint.
  - As the iteration progresses, the writer should occasionally mention it in the PCT meeting as a reminder.
  - Writers should allow a little time in their planning to allow for the possibility of software improvements being added and other defects fixed. In some cases the work may affect additional documentation other than the Release Note.
- **Review and Doc Approval:** Writers can remind the team that Developers, QA, and PM effort estimations must include time to review and approve documentation.

#### **Documentation Development**

- **Design Review:** The Technical Writer is a reviewer and approver of the Design Specification/High Level Design (HLD).
- **Responsive to Writer Questions:** The PCT must be responsive to questions the writer has about a feature, whether during scoping or when the writer is drafting the documentation about the feature. To support tracking, the writer can do the following.
  - Identify the specific person from whom the answer is needed in the JIRA Comments section of the JIRA ticket.
  - If associated with a specific JIRA Doc ticket, use the Documentation Workflow to raise a question and assign the issue to the subject matter expert (SME), and thus be able to track it. Further, the writer can create a JIRA filter to track outstanding items.
  - If the person is still not responsive, the writer can raise it at the PCT meeting.
  - In the worst-case scenario, the writer can further escalate along the management track if the person still isn't responding.
- Writing Style: Writers need to write their content in the cloud style. Any specific on-premises details
  must be provided in a separate section or page. Note: As of March 2019, the specifics of this are still
  being discussed among IX Managers.
- **Content Development Space:** Writers need to develop their content in the appropriate documentation space based on whether the content is for a Common Microservice, a Microservice/

Docker container to support Private Cloud (this scenario is being phased out), or is specific to onpremises only.

- As of March 2019, our Doc platform owners are currently developing a plan to support Genesys being a Cloud company. The writer should work with his or her IX Manager and the Doc platform team to determine where the content belongs. Until the details have been determined:
  - For Genesys Engage cloud deliveries, follow the Cloud doc process, including working with the Cloud writer about the targeted delivery of the Cloud, and writing in the cloud style.
  - For on-premises deliveries, the writer develops the content in the on-premises doc space if the features are not Common Microservices or if there is specific content that only applies to on-premises releases.
- **Documentation JIRA workflow:** Use the Documentation JIRA workflow/documentation type to track documentation development, reviews, and approvals.
- **Feature Delay:** If the complete implementation of an Epic and/or Story is delayed during the iteration (for example, taking more time than originally determined), but it is still being included in the iteration, and the delay does not leave sufficient time for the writer to document the Epic and/or Story, have it reviewed, update it, and have it approved, the writer has the right to offer the team options from which the team can select. The options offered to the PCT include:
  - Provide limited documentation about the Epic and/or Story, to be updated after the release.
  - Document the Epic or Story after the release.
  - Push the release out (worst-case scenario).

**Note:** This solution comes with the understanding that the writer should try to document as much as possible based on the specification, and TOI/informal discussions with Development and QA, before the Epic and/or Story is finalized.

#### Documentation Review/Approval

- Reviews:
  - The writer uses the Doc JIRA workflow to track reviews. If more than one person reviews the content, the writer can assign the JIRA ticket to the primary reviewer of the content; if additional reviewers are needed, the writer can tag reviewers in the JIRA comments, and/or make the reviewers watchers. Optional: Writers can create sub-tasks on a Documentation issue created with the new Doc workflow.
  - The PCT must review the content regardless of whether it's for the Cloud or on-premise releases. The Cloud team or Cloud writer might also need to review the material for Cloud readiness.
  - For large teams, the writer can request one lead reviewer from each group to ensure that the writer has a reasonable number of reviewers to track. Another option, in a scenario where more than one Developer or QA person is assigned to handle a specific Epic/Story, one lead reviewer from the respective groups can be identified to provide review comments.
  - If the reviewer's comments are not clear to the writer:
    - The writer can reassign the Doc JIRA ticket to the reviewer.
    - If the need for further clarity is due to the reviewer's facility with English, the writer should turn to the Developer or QA person's manager on the team (who speaks the same language and has a greater English proficiency) for assistance.
- For review comments, the writer specifies a due date that takes into consideration how much content is being reviewed (paragraph versus pages or an entire chapter).

- For approval requests, the writer must specify an approval due date that allows enough time for the writer to request peer editing and format checking prior to the release date.
- Since PCT members will likely span multiple time zones, the writer and team must take that into account when identifying return dates for comments and setting expectations. For example, if the writer is in the UK and the Developer is in California, the reviewer should provide comments on the morning of the due date, especially for Release Notes, rather than the afternoon, to ensure that the writer has enough time to address any further comments.

# Project Manager

#### Project Planning

- **PCT checklist:** Ensure that the writer is identified in the PCT checklist as a required member of the PCT.
- **Confluence Project page:** The PjM must maintain the project-specific Confluence page. Specific details covered in that page, and needed by writers, include:
  - An up-to-date list of team members. Writers will leverage this list to find out from the respective leads which individuals will be reviewing and approving customer documentation, and which individuals will serve as information resources.
  - The PjM must provide Planning and Schedule links. If the schedule does not include milestones like "content complete," "documentation complete," or "release date," the PjM must provide it in another way (for example, via an email that might include PCT Meeting minutes). The writer will track doc delivery in the Doc plan/schedule that has previously been reviewed by the team and may be used by the team to track documentation readiness.
  - A link to the main JIRA task for the iteration for Continuous Delivery projects, or to the JIRA task for the project for Waterfall projects.
- **PCT email alias:** The PjM should create a PCT email alias to ensure writers are aware of any meeting invitations or other communications that could impact them. The entire team should use this alias or at least be copied to ensure the writer can review exchanges to see if they are relevant to his or her work.
- **PCT Meeting Minutes:** The Project Manager must capture meeting minutes from the PCT meetings in case the writer or any team member is unable to attend.
- **Time zones:** Like Development, PMs, and QA, the Project Manager should take time zones into account when scheduling the PCT meeting and any other relevant meetings. If the time difference is prohibitive, the Project Manager must come up with solutions to ensure the writer's involvement (for example, the writer only attends occasionally). The Project Manager should check with the writer to determine if he or she can attend a particular meeting. For teams spread out across time zones, it is strongly recommended that, by default, you record your team meetings and make the recording available to your members. This is especially important if there's a 8+ hour time difference between team members. It shouldn't always be the writer who adjusts his or her schedule to fit everyone else's.

#### **Documentation Development**

• **Responsive to Writer Questions:** The PCT must be responsive to questions the writer has about a feature, whether during scoping or when the Writer is drafting the documentation about the feature. It's the Project Manager's responsibility to support the writer in this, especially if the subject matter expert (SME) is not responsive to the writer in a timely fashion.

#### **Documentation Review/Approval**

- **Responsive to Writer Questions:** The Project Manager must support the writer if PCT members are not responsive to the writer's questions.
- **Reviews and Approvals:** The Project Manager must support the writer if the reviewers/approvers are not meeting the agreed upon documentation deadlines for comments and approvals.

## Development

#### Project Planning

- **Regular PCT Meeting:** For active projects, the Development Manager needs to schedule a regular PCT meeting with all functional areas represented (frequency at the discretion of the Development Manager and agreed to by the PCT team). It's understood that Maintenance projects may not have regular PCT meetings, or may handle information about the project in another way.
- **PCT Meeting Minutes:** The Development Manager must capture meeting minutes from the PCT meetings in case the writer or any team member is unable to attend.
- **Time zones:** The Developer Manager and Product Manager should take time zones into account when scheduling the PCT meeting and any other relevant meetings (like design review meetings, defect review meetings, schedule meetings, or any in which scoping decisions are made). If the time difference is prohibitive, the Development Management and Product Manager must come up with solutions to ensure the writer's involvement (for example, the writer only attends occasionally). The Development Manager should check with the writer to determine if he or she can attend a particular meeting. It shouldn't always be the writer who adjusts his or her schedule to fit everyone else's.
- **Project Scope:** At the start of the project, Development (working with the Product Manager) needs to provide the writer with a comprehensive list of what's being considered as part of the iteration project scope well before the Commitment Checkpoint. Please note the following:
  - The Development Manager provides the writer with a JIRA query/filter that compiles all the new features, resolved issues, and known issues that are to be included in the product Release Note(s) and docs. Initially, this is to enable the writer to scope the project. If changes are made to the scope, and it impacts the JIRA filter, Developers should provide the writer with an updated query/ filter.
  - Be aware that the writer can fail the Commitment Checkpoint if the writer has not been provided with a complete list prior to the Commitment Checkpoint.
  - It's understood that changes might be made to the scope during the iteration (additional improvements, backlog items added, new feature descoped, defect fixes delayed, and so on). For these items, Development must raise and discuss the scope change at the PCT meeting at the time they are being considered so that the writer can evaluate the impact on the documentation. In other words, Development can't make the additions and the writer only first learn about them when the issue(s) is Resolved or Closed.
- **Iteration Scope Discussions:** The Developer Manager, along with the Product Manager, must ensure that the writer is included in all meetings that discuss an iteration scope. The Developer must evaluate each new feature, enhancement, or software change to determine whether it requires an update to documentation and if so, open a Doc JIRA ticket using the Add Documentation button in the software ticket.

Important! If a feature, like the integration of a plugin or a microservice, does not require

Development work, the Developer must still assess whether documentation needs to be updated. If so, the Developer must open a Doc JIRA ticket of the Documentation type (that uses Doc JIRA workflow), so the writer can assess the work needed to support it.

- Work Scoping: When scoping work for an iteration, Developers must include time for reviewing and approving customer documentation. Note: This includes time for review regardless of whether features are released in the cloud or to on-premises customers.
  - Writers can ask Developers and the PCT if their effort estimations include time to review and approve customer documentation. This is included in the DevOps – PLC (formerly the Continuous Delivery – PLC) Confluence page.
- Ad Hoc TOI: A regular TOI (weekly, bi-weekly, or other, with a frequency agreed between the Developer and writer) between the Developers and the Technical Writer should be set up by the Developer or writer. This is meant to supplement the other two TOIs to better ensure that the writer is aware of changes and has the information he or she needs to develop the customer documentation. The other two TOIs are:
  - TOI for Customer Care and Professional Services.
  - Team TOIs for entire team.

**Note:** A TOI strategy for IX (Tech Pubs), QA, and Customers is a checklist item for the Commitment Checkpoint milestone.

- **Feature status:** Developers should provide schedule information for when the features/improvements will be implemented in an iteration. If Developers have a dashboard, they can share that with the writer. If the team has sprints, they can share that information with the writer during the sprint planning meetings.
- **Backlog:** Discussions between Development and QA about whether to include additional Backlog items in an iteration after the Commitment Checkpoint must include the writer so that the writer can assess the doc impact and determine what the writer can accommodate. If the team has sprints, the discussion can occur during their sprint planning meeting. Bottom line: If the backlog item does require documentation, and the writer assesses the effort is more than the current schedule can accommodate, and the schedule can't be changed, then the backlog item can't be included.

#### **Documentation Development**

- **Design Development/Review:** The Writer(s) is a reviewer and approver of the Design Specification/ High Level Design (HLD). Developers must provide a Design Spec/High Level Design (HLD) with sufficient detail to allow the writer to initially scope the documentation effort and, later, document the associated feature (Epic and/or Story).
  - If there is a separate Design Spec for each feature (Epic or Story) or improvement, the JIRA feature ticket must contain a link to the spec. If there is one Design Spec/HLD that covers all features and improvements in an iteration, a link only needs to be added by the Development Manager to the Iteration level JIRA ticket.
  - (Recommended) The Developer(s) uses the HLD Confluence template to create this specification. If the Developer(s) does not, the Developer(s) must address the customer documentation questions identified in the HLD template in whatever format used by the Developer(s).
    - Consider the following:
      - What do these changes/features mean to the person who will deploy them, whether Professional Services, a partner, or customer?
      - Refer to sections in your HLD document if that is helpful. When referencing sections in your document, consider describing how these sections might be changed to address the impact on customer documentation.

- Consider the following questions for each new feature or change and include answers for those that apply:
  - Does a feature need customer documentation, or is it a feature that is behind the scenes that will not impact what the customer does?
  - Who is the associated Developer responsible for implementing this feature (in case the writer needs to contact him or her)?
  - Will all customers have access to the feature? If not, provide details and when it is or is not available. For example, is the feature being released as part of the Early Adopter Program, meaning only select customers can obtain it?
  - Will the UI change by this feature? If so, identify where the change will be visible.
  - If the UI is not impacted, will customers have to do something differently from what they currently do?
  - Does this feature impact other features in the product?
  - Does this feature depend on another feature (and/or product) or configuration to enable it to work? If yes, provide details, including whether there is a specific version of that component which must be used to enable it.
  - Suggest what customer documentation might need to be updated because of this feature (for example, Deployment, Configuration Options, User Help, API, and so forth).
- **Doc Plan:** Developers (especially the Development Manager for the project) must review and approve the Documentation Plan, which covers the scope and the review and approval expectations.
- Add Documentation/Doc JIRA workflow:
  - Add Documentation button: A new button was added to the software JIRA workflow for new features (including Epics, and Stories) and Improvements pushed to JIRA from the Aha!. At the start of an iteration, when a Developer is reviewing Epics and Stories being considered for an iteration, he or she evaluates whether customer documentation is needed. If the Developer assesses that it does, the Developer clicks the Add Documentation button. It automatically creates a JIRA issue in the Documentation JIRA workflow, based on the software JIRA ticket.
  - Documentation JIRA workflow:
    - This workflow is created specifically with statuses that reflect the Documentation workflow from the initial gathering of information through the release of the iteration.
    - For Doc work associated with Epics and Stories, it includes a link to the associated software ticket.
    - Writers and others can create a stand-alone ticket for work that is not tied specifically to an iteration or feature, for example documentation improvements, articles, reorganization work, and so forth. This gives the writer the freedom to determine what iteration to include this work in.
    - This workflow enables tracking of where the Doc work is, for example, if the writer is waiting for information from a Developer, or review comments from QA, and so forth.
- Responsive to Writer Questions: Developers must be responsive to further questions the writer has
  about a feature, whether during scoping or writing the content. The writer will use several options to
  obtain this information.
  - The writer can leverage the JIRA Comments section so that the person from whom an answer is needed is emailed.
  - Using the Documentation Workflow, the writer can raise a question in the issue and assign the issue with the question to the subject matter expert (SME), and thus be able to track it.
- If the person is still not responsive, the writer can raise it at the PCT meeting.
- In the worst-case scenario, if the person still isn't responding, the writer can further escalate along the management track.
- Developers must take into account the time zone of the writer when responding to questions.
- **Feature Delay:** If the complete implementation of an Epic, Story, or Improvement is delayed during the iteration (for example, it's taking more time to develop than originally determined), but it is still being included in the iteration, and the delay does not leave sufficient time for the writer to document it, have it reviewed, updated, and approved, the writer will inform Development and the entire team about this. The writer has the right to offer the team options from which the team can select. These include:
  - Provide limited documentation about the Epic, Story, or Improvement initially but update the content after the release.
  - Document the item after the release.
  - Push the release out (worst-case scenario).

**Note:** This solution is provided with the understanding that the writer should try to document as much as possible based on the specification, and the TOI/informal discussions with Development and QA, until the Epic, Story or Improvement is finalized.

#### **Documentation Review/Approval**

- **Responsive to Writer Questions:** Developers must be responsive to any questions the writer has with regards to review comments.
- Reviews:
  - Development is a required reviewer for customer documentation for each project, even if the Epics, Stories, or Improvements are delivered to Cloud or on-premises customers.
  - A new Doc JIRA workflow is used to track the status of reviews, leveraging the Assigned field.
  - Reviewers provide comments by the due date, which is now trackable using the Doc JIRA workflow.
  - Each reviewer reviews all new or changed documentation content and provides comments to the writer.
  - If other reviewers are needed, the primary reviewer can tag the other reviewers in the JIRA comments for the Doc JIRA issue.
  - To ensure that the writer has a reasonable number of reviewers to track, the writer can request one lead reviewer for each group. Another option is if more than one Developer is assigned to develop specific Epic/Story, one lead reviewer from Development can be identified to provide review comments to the writer.
  - If the reviewer's facility with English is more limited, a Developer or Development Manager should be made available to address the writer's questions.
  - Since PCT members likely will span multiple time zones, the writer and team must take that into account when identifying return dates for comments. For example, if the writer is in the UK and the Developer is in California, the reviewer should provide comments on the morning of the due date, especially for Release Notes, rather than the afternoon, to ensure the writer has enough time to address any further comments.
- **Approvals:** The Development Manager must approve content by the date specified in the Documentation Plan or JIRA ticket that was previously approved by the Project Core Team. The

Development Manager must approve the Release Note(s) the day before the release, at the latest, so the writer has time to do the final preparation.

# Quality Assurance

#### Project Planning

- Work Scoping: When scoping work for an iteration, QA must include time for reviewing and approving customer documentation. Note: This includes time for review regardless of whether features are released in the cloud or to on-premises customers.
  - Writers can ask QA and the PCT if their effort estimations include time to review and approve customer documentation.
- **Backlog:** Discussions between Development and QA about whether to include additional Backlog items in an iteration after the Commitment Checkpoint must include the writer so the writer can assess the doc impact and determine what the writer can accommodate. If the team has sprints, the discussion can occur during their sprint planning meeting.

#### **Documentation Development**

- **Doc Plan:** QA (especially the QA Manager for the project) must review and approve the Documentation Plan, which covers the scope and the review and approval expectations.
- **UI Access**: The writer must have access to a User Interface if the product includes one. Most writers need access to an environment to write his or her documentation. However, the frequency of access and the nature of the environment varies per project.
  - If a writer needs access to an environment, the writer must inform QA what specifically is needed and QA must provide access to one that reflects that. In some cases, it may require that QA create a distinct environment for the writer.
  - QA must make this environment available to the writer at the same time they are setting up their own environment for testing during an iteration.
  - QA must also maintain/update the environment if the software is updated. One recommendation is that the team creates automated scripts that can be used to upgrade the environment and that the writer can leverage to limit QA's effort.
- **Responsive to Writer Questions:** QA must be responsive to further questions the writer has about a feature, whether during scoping or writing the content. The writer will use several options to obtain this information.
  - The writer can leverage JIRA Comments section so the person from whom an answer is needed is emailed
  - Using the Documentation Workflow, the writer can raise a question in the issue and assign the issue with the question to the subject matter expert (SME), and thus be able to track it. Further, a JIRA filter can be created to track outstanding items.
  - If the person is still not responsive, the writer can raise it at the PCT meeting.
  - In the worst-case scenario, if the person still isn't responding, the writer can further escalate along the management track.

- QA must take into account the time zone of the writer when responding to questions.
- **Feature Delay:** If the complete implementation of an Epic, Story, or Improvement is delayed during the iteration (for example, it's taking more time to develop than originally determined), but it is still being included in the iteration, and the delay does not leave sufficient time for the writer to document it, have it reviewed, updated, and approved, the writer will inform Development and the entire team about this. The writer has the right to offer the team options from which the team can select. These include:
  - Provide limited documentation about the Epic, Story, or Improvement initially but update the content after the release.
  - Document the item after the release.
  - Push the release out (worst-case scenario).

**Note:** This solution is provided with the understanding that the writer should try to document as much as possible based on the specification, and the TOI/informal discussions with Development and QA, until the Epic, Story or Improvement is finalized.

#### Documentation Review/Approval

• **Responsive to Writer Questions:** QA must be responsive to any questions the writer has with regards to review comments.

#### • Reviews:

- QA is a required reviewer for customer documentation for each project, even if the Epics/Stories are delivered to Cloud or on-premises customers.
- A new Doc JIRA workflow is used to track the status of reviews, leveraging the Assigned field.
- Reviewers provide comments by the due date, which is now trackable using the Doc JIRA workflow.
- Each reviewer reviews all new or changed doc content and provides comments to the writer.
- If other reviewers are needed, the primary reviewer can tag the other reviewers in the JIRA comments for the Doc JIRA issue.
- To ensure that the writer has a reasonable number of reviewers to track, the writer can request one lead reviewer for each group. Another option is, if more than one QA is assigned to test a specific Epic/Story or more than one QA person is testing a specific feature, one lead reviewer from QA can be identified to provide review comments.
- If the reviewer's facility with English is more limited, a QA person or QA Manager should be made available to address the writer's questions.
- Since PCT members likely will span multiple time zones, the writer and team must take that into
  account when identifying return dates for comments and setting expectations. For example, if the
  writer is in the UK and the QA person is in California, the reviewer should provide comments on the
  morning of due date, especially for Release Notes, rather than the afternoon, to ensure the writer
  has enough time to address any further comments.
- **Approvals:** The QA Manager must approve customer documentation by the date specified in the Documentation Plan or in the JIRA ticket that was previously approved by the Project Core Team. The QA Manager must approve the Release Note(s) a day before the release, at the latest, so the writer has time to do the final preparation.

# Product Manager

### **Project Planning**

- **Project Scope:** At the start of the project, Development (working with the Product Manager) needs to provide the writer with a comprehensive list of what's being considered as part of the iteration project scope well before the Commitment Checkpoint. Please note the following:
  - It's understood that changes might be made to the scope during the iteration (additional improvements, backlog items added, new feature descoped, defect fixes delayed, and so on). For these items, Development must raise and discuss the scope change at the PCT meeting at the time they are being considered so that the writer can evaluate the impact on the documentation. In other words, Development can't make the additions and the writer only first learn about them when the issue is Resolved or Closed.
  - Be aware that the writer can fail the checkpoint if they have not been provided with a complete list prior to the Commitment Checkpoint.
- **Time zones:** The Developer Manager and Product Manager should take time zones into account when scheduling the PCT meeting and any other relevant meetings (like design review meetings, schedule meetings, or any in which scoping decisions are made). If the time difference is prohibitive, the Development Management and Product Manager must come up with solutions to ensure the writer's involvement (for example, the writer only attends occasionally). The Development Manager should check with the writer to determine if he or she can attend a particular meeting. It shouldn't always be the writer who adjusts his or her schedule to fit everyone else's.
- **Iteration Scope Discussions:** The Developer Manager, along with the Product Manager, must ensure that the writer is included in all meetings that discuss an iteration scope.
- Work Scoping: When scoping work for an iteration, the Product Manager (PM) must include time for reviewing and approving customer documentation. Note: This includes time for review regardless of whether features are released in the cloud or to on-premises customers.
  - Writers can ask the PM and the PCT if their effort estimations include time to review and approve customer documentation.
  - The Continuous Delivery PLC process reflects this.
- **Release Platform:** The PM must provide information about which features are in Cloud versus On-Premises at the start of the project. The agreement is to include Release Platform (formerly Target Market in Jama) in the Aha!/Jira sync update. (This effort is underway via JIRA changes.)
- **Early Adopter Program:** The PM must provide information at the start of the project if any features in the iteration, the iteration itself, or the entire product is part of the Early Adopter Program (EAP). The Commercialization canvas includes a page to indicate Documentation needs, including if the project is part of EAP. The Commercialization canvas must be shared with the team at the beginning of the project.
- **Use cases:** Aha! is the primary location for use case information. The PM must ensure that features that impact documentation include sufficient information so the writer can provide context for why a customer might want to use a feature. If the writer needs more information, he or she can request it from the PM and, if possible, the PM update the associated Aha! entry accordingly.
- **Scope Changes:** All decisions about scope changes (the addition or removal of a feature, schedule changes, backlog additions, defect fixes, and so on) must be raised/decided at the PCT meeting. The Technical Writer should also be part of any discussions or changes to the design of a previously scoped feature for a project after the project has begun, and changes to the product or component name. Impact on the writer and the docs caused by the change must be taken into consideration. The writer

determines what can or cannot be delivered, especially if the release date is not changing. Per William Judd, Project change control is already a standard part of Genesys project management and must be raised at the PCT meeting. Some suggestions:

- When an item is descoped, the item should be unlinked from the iteration, but also discussed in the PCT meeting and documented in meeting minutes.
- If the schedule needs to be extended, the JIRA iteration item should have the end date extended.
- If adding content, a new feature should be added to the iteration.
- If adding a feature and extending the date, and the addition is customer driven, then there should be an Out of Boundary Review (OBR).
- Backlog: It's recommended that JIRA backlog issues be linked to the iteration, once all team members have agreed that they should be included. If that's not possible, Development should provide a JIRA query to the writer to ensure that he or she knows what backlogs are being considered and then included.
- Ad Hoc Meetings: If separate/ad hoc meetings are needed, this should be raised/decided at the PCT meeting so all PCT members can consider whether he or she needs to be invited.

#### **Documentation Development**

- **Doc Plan:** The PM must review and approve the Documentation Plan, which covers the scope and the review and approval expectations.
- **Responsive to Writer Questions:** The PM must be responsive to further questions the writer has about a feature, whether during scoping or writing the content. The writer will use several options to obtain this information.
  - The writer can leverage the JIRA Comments section so that the person from whom an answer is needed is emailed.
  - Using the Documentation Workflow, the writer can raise a question in the issue and assign the issue with the question to the SME, and thus be able to track it. Further, a JIRA filter can be created to track outstanding items.
  - If the person is still not responsive, the writer can raise it at the PCT meeting.
  - In the worst-case scenario, if the person still isn't responding, the writer can further escalate along the management track.
  - The PM must take into account the time zone of the writer when responding to questions.
- **Feature Delay:** If the complete implementation of an Epic, Story, or Improvement is delayed during the iteration (for example, it's taking more time to develop than originally determined), but it is still being included in the iteration, and the delay does not leave sufficient time for the writer to document it, have it reviewed, updated, and approved, the writer will inform Development and the entire team about this. The writer has the right to offer the team options from which the team can select. These include:
  - Provide limited documentation about the Epic, Story, or Improvement initially but update the content after the release.
  - Document the item after the release.
  - Push the release out (worst-case scenario).

**Note:** This solution is provided with the understanding that the writer should try to document as much as possible based on the specification, and the TOI/informal discussions with

Development and QA, until the Epic, Story or Improvement is finalized.

#### Documentation Review/Approval

- **Responsive to Writer Questions:** The Product Manager must be responsive to any questions the writer has with regards to review comments.
- Reviews:
  - Product Management is a required reviewer for customer documentation for each project, whether the Epics/Stories are delivered to the Cloud or on-premises customers.
  - Product Manager Doc JIRA ticket: In acknowledgement that the PM's availability is usually less, and recognizing that the PM doesn't typically need to review all Documentation content, the writer should create a separate JIRA task ticket (rather than the Documentation-type ticket that uses the Doc JIRA workflow) for the PM with links to a list of topics that the PM must review (for example, topics that cover context or business need or others). This will enable tracking of the PM's work.
  - In some cases, a PM might be assigned a JIRA ticket under the new Doc JIRA workflow if a question arises that requires the PM's input.
  - The PM must provide comments by the due date, which is trackable in the JIRA ticket.
  - Since PCT members likely will span multiple time zones, the writer and team must take that into account when identifying return dates for comments and setting expectations. For example, if the writer is in the UK and the PM is in California, the reviewer should provide comments on the morning of due date, especially for Release Notes, rather than the afternoon, to ensure the writer has enough time to address any further comments.
- **Approvals:** The PM must approve customer documentation by the date specified in the Documentation Plan or the JIRA ticket that was previously approved by the Project Core Team.

### Doc JIRA Workflow diagram

This is a diagram of the Documentation JIRA workflow. It is the same workflow as that in the Documentation type ticket but presented in a different format.

Documentation Type JIRA Worflow



# Charter Team Project

There were 3 phases to the Customer Documentation DevOps/DocOps charter. The goal of the charter was to create a consistent workflow for documentation creation within an R&D project to improve efficiency, reduce workload (for the entire team), and limit or avoid bottlenecks.

- **Phase 1, Project Planning:** Ensure that the Technical Writer is included in all meetings/decisions that impact customer documentation, especially those about scheduling, scoping, and design, as well as a few other areas.
- **Phase 2: Documentation Development:** Ensure that the writer has all the information they need to write the documents, including access to a UI environment.
- **Phase 3: Documentation Review/Approval:** Ensure that the PCT (specifically Developers, Quality Assurance, and Product Management) provides the writer with sufficient and timely reviews and approvals of the customer documentation prior to the release.

# Working with JIRA

### Important

In November 2021, Genesys went from an on-premises version of JIRA to a cloud version. Some of these instructions may no longer apply.

Atlassian JIRA is the major tool we use for tracking new features, epics, improvements, defects, and related tasks for every release of Genesys products, whether they are on-premises products or Cloud offerings.

# JIRA and Projects

Typically, each product has one or more JIRA projects, depending on how the associated Project Team tracks different versions and iterations (for continuous delivery). Some teams may leverage the Found in Version the Fix Version fields to separate on release of the product or offering from another. Project Teams create their own dashboard and filters to enable the team to track features, fixes, and so on from one release to the next. Check with your Project Manager to find the Project Name and how they use JIRA.

For each release, teams identify what JIRA issues are in scope for implementing. As the writer, you should be involved in reviewing the features before the features are committed for a particular release since you need to scope the work and create a plan for delivering customer documentation.

# JIRA Issue Fields

Here are some fields worth noting especially:

- Type: Indicates whether the JIRA issue is a New Feature, Epic, Improvement, Defect, Task. New features and improvements usually require new or revised customers documentation, like Help, guides and the like. Defects require noting in the release note either as a Known Issue, if not fixed, or as a Correction, if it is fixed.
- Component: Identifies the component about which the issue was created.
- Status: There are a number of these. Of particular note is Open (nothing has been done on it yet), Resolved (Development has implemented it), Closed (QA or QE has tested it).
- Release Note: For defects, text should be added here to describe the issue whether fixed or not. If using the RN generation tool, the tool pulls the text in this field to generate the RN.
- Customer Related?: If Yes, this indicates that this issue was identified by a customer. As such, you must ensure whatever documentation is required for it is ready when the issue is Closed and the component is ready for delivery. For example, if it's a defect not fixed, you'd add it as a Known Issue. If the issue concerns looking for more information about a feature, you'd work with your team to document it in the

appropriate location with your content.

• Description area and Comments: These provide information about this issue. Sometimes comments may include how a feature or issues is being addressed from which you can document the issue.

This section provides some tips for using the tool.

### JIRA and Documentation

There is no one way each writer tracks what needs to be documented for each release.

- Some writers create one high-level JIRA issue to cover documentation tasks for each release and one JIRA issue for each "book" that needs to be delivered for the release. Here's a link that shows an example of this: JIRA Doc Plan
- Some Project Managers open a documentation task for each JIRA issue that requires documentation and assigns it to the writer.
- Some writers open their own documentation task for each JIRA issue.
- For reviews, writer assign the JIRA issue to the lead reviewer. Typically, Development review first, then QA, and then the Product Manager. The writer may leverage the Comments field to request reviews from others in those groups.
- Each writer has to determine the best way to have the reviewers provide comments. Some leverage the JIRA comment field. Others generate a PDF of the draft online content and enable it for commenting and attach the PDF to the issue. Others may direct the reviewer to the specific online content pages that document the feature and the reviewer provides comments via email.

### Tips

- Bookmark your JIRA projects for easy access.
- Work with your teams to use consistent labeling to enable you to easily identify items which impact documents. However, they might now always know. So, you might need to do a little digging.
- Ask help from your team to create filters that return the issues that you need to take into account for a release.
- If an issue isn't assigned to you but you want to raise a question to one or more persons in your team, add a comment in the issue and type @<person's name>. The name will appear in a drop-down list as you type. When you add a name to the comment, the associated person receives an email about it.
- RN generation and JIRA
- Create your own JIRA dashboard (video link below) for tracking.

# Useful Queries

Below is a collection of queries you can set in your **Advanced** search field and then **Save as** a **Filter**. Please feel free to add any queries of your own to this table.

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# Related Resources

- Customizing the JIRA Dashboard
- JIRA Dashboard video (created by Krista): Managing JIRA Dashboards

- Using text formatting in JIRA.
- How to Create an RN Dashboard in JIRA.
- JIRA training powerpoint

# System-Level Guides Update Process

### Important

These system-level guide processes are only for on-premises products that are General (PA). If your product is restricted, system-level type information should go in the associated product documentation. If you are working on Cloud offering documentation, send an email to Tanya Ivanova.

# Overview

System-Level Guides are documents that provide system-type information for all General (PA) enterprise level products. On the docs.genesys.com site, System-Level Guides are found here: System-Level Guides. System documentation for the all.docs.genesys.com site are located here: System-Level Documentation. The System-Level Guide documents include:

- **Genesys Migration Guide:** (online only) Provides instructions for users on how to migrate/upgrade from one version to later versions. Previously, writers provided updated FrameMaker chapters that the System-Level writer to add to the book and generate a PDF. As of 2020, writers create online product-specific books and update them, as needed.
  - The PDF includes 6.x migration to 8.x.
  - Writers are responsible for working with the team to provide migration information.
- **Support Operating Environment Reference Guide:** Contains supported OS, Browsers, Databases, IPv6, Prerequisites, Virtualization support and other for on-premises releases. This document is critical to SEs, PS, and internal and external customers. In particular, SEs use it to create RFPs (request for proposal) for potential customers. Therefore, it's critical that the content is up to date and accurate. This type of information should only be in the SOE and not elsewhere. Links in product documentation can be added to the SOE and even to particular product pages in the SOE.
  - Product Managers submit requests to update to this document to the associated product writer, via JIRA tickets within the products JIRA project. Previusly, PMs opened a JIRA ticket in the SLG project.
  - Sathish Madhavan and Colin Leonard (replacing Ramnath) are the PMs responsible for signing-off on unusual requests that come to the System-Level Guide writer. They are also responsible to deciding on the official naming convention for new OS and DB entries.
- **Interoperability Guide:** Contains interoperability information for a product for particular Configuration Layer versions, reporting templates, interoperability with products with respect to T-Server and interoperability with products, various Gplus Adapters, and others.
  - If your Product Manager has interoperability information that does not fit into the existing tables, we can create a new page/table specific to the product. The PM will have to work with the System-Level Guide writer for this document to do so.
  - Product Managers request updates to this document by opening an SLG JIRA ticket that includes the information that needs to be added or updated. The System-Level writer updates the guide and

assigns the SLG JIRA ticket to the PM for review and approval. Once the content is approved, the System-Level Guide Writer assigned to this document publishes the updated page to the customer available location. Writers don't have to do anything with this.

- Support Media Interfaces Reference Manual: Contains information on supported switches for Framework, GVP, SIP Server, SIP Trunk, SDK, Network Solutions and Parking platforms, IVR, Dialogic boards, and others.
  - The PM is responsible for getting this updated by opening JIRA issues with any info that needs to change or be added, reviewing it with his or her team for approval, and then assigning the item to System-Level Guide writer.
  - Updates to this manual happen infrequently, due to Genesys focus on Multicloud and Private Edition in 2020/2021.
- **Genesys Hardware Sizing Guide** (online): Provides guidelines for how customer size their hardware (like host machines) for Genesys products for their contact center. Writers are responsible for working with the team to provide sizing information.
- **Database Sizing Estimator Worksheets:** This is a worksheet to help customers size the database for various Genesys products.
  - Developers for the respective teams are responsible for updating the providing an updated tab of sizing formulas if needed for a particular release.
  - Writers drive this tasks but raising it the team and if an update is needed, includes the item in the Documentation Plan and the Packaging Specification. If it does, the Developers do the work. Once Developers are done, the writer performs a quick check on the content for typos and works with the System-Level Guides writer to get it added to the DB Sizing Estimator Worksheet.
  - Note: Some products have a stand-alone database sizing sheet due to the "hidden" formulas associated with sizing. As such, the DB Sizing spreadsheet includes a link to the associated product spreadsheet or landing page.
- Licensing Guide (On EOL track),: This guide provides customers with information about licensing, including requirements, license manager installation, ordering licenses, and the like.
  - This guide is "on the EOL track" because much of it relies on LRM which will soon be EOL. The remaining content is out of date and there is no PM assigned to review/request updates to this guide. As of October 2021, a Licensing Guide for mixed environments (on-premises and PE services) is underway, working with George Mather's team.
  - Product writers are not responsible for this document.
- **Security Deployment Guide:** This guide provides customers info about how to configure security and is specific to releases.
  - Karl Abraham Abel handles this guide.
  - Teams (PjM, PM, Development and writer) request updates to this guide by opening JIRA issues and assigning them to Karl. Colin Leonard, also provides updates to Xavier as well.
  - Once updated, Colin Leonard signs-off on the guide.

### SOE

#### New SOE Update Process

Key players: Product Manager, Product writer

Review and support: System-Level Guide writer

The Supported Operating Environment Reference Guide is one of the most frequently viewed documents on our site. To ensure that the information in the RNs matches the information in the SOE, the SOE Update Process has been revised. The Product writers will now update the SOE when they update RNs with SOE type information.

#### Process

- 1. When your product supports a new SOE item, an SOE item is no longer supported, or any other change is required, update the respective product's draft SOE page in addition to the RN.
- 2. Once you complete the draft SOE page update, your use of JIRA depends on the scenario:
- 3. Once you complete the draft SOE page update, the next steps involve JIRA and depend upon the specific scenario. The following are known scenarios:
  - There is a JIRA ticket within your project (GIM, GCXI, eServices, or so forth) specific to an SOE change. After you update the draft SOE, assign the ticket to the system-level guide writer (Sandhya) for questions and/or format checking. Use this ticket until the system-level guide (SLG) writer approves the format, at which time you assign it to your PM for approval prior to publishing.
  - Your component supports a new SOE item, or needs to indicate an SOE item type change, but there
    is no JIRA ticket associated with your product project. Once you update the draft SOE, create a JIRA
    ticket within the JIRA project for your product. Set it to type Task, not Documentation. (The
    Documentation type is used for regular documentation updates that require the full workflow.)
    Assign the JIRA ticket to the SLG writer for questions and/or format checking. Use this ticket until the
    SLG writer approves the format, at which time you assign it to your PM for approval prior to
    publishing.
  - There is an existing SLG ticket that the PM opened about an update to the SOE for your project.: When an SLG ticket is created, it is automatically assigned to the SLG writer and the SLG writer assigns it to the associated product writer. Once you have updated the draft SOE, assign the ticket to the SLG writer for questions and/or format checking. Use this ticket until the SLG writer approves the format, at which time you assign it to your PM for approval prior to publishing. (Instances of this scenario should decrease once the PMs get used to this new approach.)
- 4. The system-level guide writer reviews the information. If the information requires the addition of a new OS, Browser, or other items not available in the respective drop-down, or a new table or a new page is needed, the system-level writer assigns the JIRA project ticket to Sathish for approval.
- 5. Once Sathish approves, the system-level guide writer makes the associated change, like the addition of a new OS, and then assigns the JIRA ticket back to you to complete the update.
- 6. Update the page as required, add a comment in the JIRA ticket with a link to the draft page of the SOE, and assign the ticket to the Product Manager for review.
- 7. Once the PM approves, and when the associated product or component is released (Software Delivery email), or when the PM comes up with a specific date, publish the approved draft pages to the customer-facing SOE, then close the JIRA ticket and notify the Product Manager accordingly.

#### Training Videos

The SOE draft page contains forms pertaining to Operating Systems, Browsers, Databases,

Virtualization Support, IPv6 Support for Common Interfaces and Additional Interfaces, and Prerequisites. To update each section, you update the respective form with the relevant information. The following nine videos explain in detail how to update these individual sections:

- Orientation
- Updating SOE page
- Updating OS
- Updating Browsers
- Updating DB
- Updating Supported Virtualization Platforms
- Updating IPV6 Support for Common Interfaces
- Prerequisites
- Form Changes

The video titled **Form Changes** features recent changes that were implemented in the forms. Note that the other eight videos feature the old forms in the examples.

Watch the videos placed here to guide you through updating the SOE section. **Disclaimer:** These internal training videos were created in the home ambience amidst varied distractions. Ignore any imperfections in the audio and visuals.

#### **Recent change in Documentation of Discontinued Support in SOE**

The **Updating OS** video explains how we approach Discontinued Support and its convention with examples. It instructs you to add the date of the version that discontinued support is in effect in the Conditions field. It also explains how to update the Release field to include the release span of that particular item. **However**, after a recent discussion with Ramnath (who was the PM owner of the SOE), we decided to use the last supported version of the component for the associated item. As such, in the Conditions field, use "Last Supported: x.x.xxx.x"

To learn more about handling Discontinued Support documentation, see the instructions here.

Points to note

### Important

After you make updates on the draft version of the Virtualization Data page, do not publish the entire page. Transfer your changes manually to the published version of the page.

- If you're not familiar with the SOE, all of the data is stored in one database. All the data that appears in the OS, Browsers, Databases, and IPv6 tabs is taken from that database. Your product SOE page is the page through which you add the data specific to your product.
- The SOE is the official document that controls the naming convention for all SOE items. Your RN must use the same convention.

- If, while updating the SOE page, you discover that your item (database, OS, specific version number) is not there, include that information in the JIRA project ticket.
- There are two versions of the SOE, the draft version and the Current version. These wiki versions cover all supported releases that are of General or Update type. The SOE does not include information for restricted or pre-release versions. That information should go in the associated HTML release note or in the restricted documentation.
- For the Prerequisites table to appear after you make any update in the table, ensure that every field is completed with the exception of Conditions, and then save the page.
- The forms require that you specify the release version details. If you do not find the release version in the drop-down list, assign the project ticket to the system-guide writer with the details in the comments section. The system-level writer will update the SOE database with the necessary release version and assign the ticket back to you. Also, we have restricted the usage of version numbers that exceed seven digits as it creates an endless list of multiple version numbers. In such cases, mention the first three digits of the release version followed by a plus symbol in the Release field and specify the 7-digit version in the Conditions field.

#### Example: Red Hat Enterprise Linux 7 for 9.0.002.06

In the above example, the release version that needs to be mentioned for *Red Hat Enterprise Linux* 7 support is 9.0.002.06. The recommended approach is:

- 1. In the Release field, select 9.0.0+.
- 2. In the Conditions field, add the phrase: Starting with 9.0.002.06.

It is critical to follow this approach when updating release versions in any SOE section.

• Before you save the changes on the draft, add a comment in the Summary field describing the change or the associated JIRA ticket number.

#### Convention for the Conditions field

Initially, when the SOE was developed as a Word file/PDF, we included the full version digits in the release field when a particular component started supporting an SOE item after previous 7-digit versions did not. When the SOE guide was made available online, we continued the same convention for few months and discovered that our drop-down list was becoming quite extensive. Hence, we limited the release version field as much as possible; ideally two digits but in some cases three, depending on the situation. Then, add the specific version in the Conditions field. Here is an example.

Supports Windows Server 2012 starting with 9.0.100.01.

To document this entry, mention 9.0.1+ in the release field and mention the following in Conditions:

#### Starting with 9.0.100.01

Given the number of SOE pages and rows of information we have, some SOE pages or rows may not follow the new approach. If you find inconsistent convention on your product's SOE page, rewrite the convention per the above example and publish the page with the PM's approval.

#### Disqus comments

Moving forward, Disqus comments pertaining to SOE products will be handled by the respective product writer. For any support, contact the system-level writer.

#### Common Issues

Because the SOE forms are still evolving, at times you may observe that the page does not respond the way it is supposed to. Here are a few common issues, along with some tips that may be helpful.

- The drop-down lists on the new forms do not populate with a single click. You must double-click to populate the list
- When you click Add DB, the existing table may not be displayed. Click Cancel a couple of times and revisit the form again.
- The collapsible entries on the forms may not expand and respond. Click Cancel and exit the specific SOE page. Revisit the page a few minutes later and try to expand the form.
- The DB edit form may not display the existing table. In this case, Cancel the changes, click Edit Source, click Save, and go back to the regular form. This usually results in the table displaying correctly. If you still face issues, add entries using Edit Source. However, this option is not recommended and should only be used in case of an emergency. If this happens to you, contact the system-level writer. If necessary, the system-level writer will contact Barry and team for assistance.

We will keep adding more content here to help one another. Finally, if you are facing continuous or unknown issues, contact the system-level writer.

### SMI

### Important

- As Genesys focuses more on Private Edition and the Cloud overall, updates to this guide are more infrequent.
- Due to issues with the underlying format encountered in 2020, only an IX writer or System-Level Guide writer can update this document.

Key players: Product Manager and System-Level Guide writer.

This guide is now online. Please take a look here: Supported Media Interfaces Guide

Updating and maintenance of this document will now become much quicker and smoother. The Product Manager for the product makes the updates to the draft version, and then opens a JIRA ticket with the SLG (System-Level Guides) product code explaining the details of the change.

Final QA and publication will remain with the IX group and the System-Level Guide writer. Sathish

Madhavan is the overall approval control of the published document.

For instructions on how to update the draft location, view this video: SMI Update Video Tutorial. (**Note:** The video may not exactly match the instructions below. The instructions below are the most up to date.)

#### Phase 1

Player: Product Manager

- 1. Obtain a docs.genesys.com account and edit permissions, this can be requested from anyone in IX.
- 2. Go to the draft SMI Guide.
- 3. Make sure you're editing the 8.5Draft. Always check that initial changes are made in the draft version and not the released version.
- 4. Scroll to the topic that contains information relevant to your change. Click "Edit" in the top right text bar to open up the topic. The edit window is quite small, so you can click and drag the lower right corner (under the word count) to expand the window.
- 5. In the toolbar use the following HTML edit tools to make your changes:
  - Edit: Cut, copy, and paste as you normally would
  - · Insert: Insert internal or external links
  - Format: Edit the look of the text/headings, inline formatting or blocks for paragraphs
  - Table: Unless there is a new topic coming you will normally not need to use this as the table is already set up
- 6. If you need to add or delete a row/column click Table, then either Row or Column (depending on what you're changing) and select the task you wish to perform).

#### Notes:

- Don't worry about Tools source code button, you won't need that.
- If you run into problems, have questions, or need support, send an email to "Systems Level Guides Update Request" alias.
- 7. When all the changes have been made, scroll to the bottom of the page and click 'Submit. Note: Clicking Submit will take you to an earlier version of our editor that will include a preview of the table, now with the changes made. The media code will also be available at the bottom of the page for further editing, if necessary. If you are happy with the changes click Save Page. The updated draft is now saved.

#### Phase 2

Players: Product Manager and System-Level Guide writer person

- 1. The Product Manager:
  - 1. Create a JIRA ticket with the SLG (System-Level Guides) with the following:
    - 1. List the changes made, including the specific page, and ask the System-Level Guide IX person to

confirm the change and formatting.

- 2. Let the System-Level writer know if he or she can publish the change immediately, if the format is approved. If the Tech Pubs person has to wait until a certain date, contingent on an upcoming iteration date, provide the date.
- 2. The System-Level Guide writer.
  - 1. Reviews the JIRA ticket to determine the changes and pages affected.
  - 2. Review the formatting associated with the changes. If there are problems with the formatting, this person corrects the problem.
  - 3. When, format is approved, and the pages can be published to customers
    - 1. Open each draft page(s) that the PM edited, and click **Update** in the top right corner of the text bar.
    - 2. Choose the correct version to publish the updated page to. (Note: The source version is the 8.5Draft and the target version is 8.5.0 –released.).
    - 3. When the Update is completed a dialog box appears, click **OK**.
  - 4. Open the published versions of the pages, and checks the page(s) to see that it's come out correctly, including confirming that the SLG IX person looking at the correct version and the text is displayed as you were expecting.
  - 5. If all is well, add a comment in the JIRA ticket, saying the format is approved and when published indicates that as well. Also add a link to the published pages. Then, assign it back to the Product Manager who made the changes so that he or she can close the ticket.

Congratulations! You've just edited the SMI guide.

# Interoperability

Key players: Product Manager and System-Level Guide writer

Updates to the Genesys Interoperability Guide are the responsibility of the Product Managers. They are free to develop their own processes for updating, and tracking, including the use of JIRA. The steps to update the guide are as follows:

- 1. The PM identifies what needs to be updated, opens an SLG JIRA ticket, and adds the information there.
  - For existing pages/tables, if there are any cells in the tables that are currently blank ' ' or with a dash ' ', the PM reviews and determines what information is needed and adds it to the JIRA ticket.
  - Occasionally, a PM may need a new page added, for example, the Genesys Intelligent Automation compatibility with other Genesys components page or the Digital Messaging Server and Driver Compatibility page. In this case, the PM gathers the type of information that needs to be included so the System-Level Guides writer can create a new page/table.
- 2. When the PM has updated the SLG ticket with all of the details, the PM assigns this ticket to the System-Level Guides writer.

**Note:** Previously, if the update was associated with the first release or a product or a new release and required a new table, the System-Level Guide writer for this document had to email the

System-Level Team sign-off approver for this document requesting approval for those updates. As of 2021, there is no one assigned to this System-Level team approver role.

- 3. The System-Level Guide writer updates the draft location with the information and then sends an email to the PM with a link to the draft location.
- 4. The Product Manager confirms the information is correct in the draft location.
- 5. If the product is already Generally (PA), the System-Level Guide writer publishes the updated page to the customer-facing document and notifies the PM.
- 6. If the product is not yet General (PA), the System-Level Guide writer waits for the announcement from Software Delivery that the product is now available and then publishes the updated page to the customer-facing document.
- 7. After it's published, the PM checks the external Customer-Facing Genesys Interoperability Guide to verify the changes are visible to customers.

# Migration

hen planning your documentation work for every release, it's important that the writer assess whether you need to provide customers any migration information. If it's a new major release, it's a requirement. For Updates, the writer should check with the PCT. As of 2020, there is only one approach to providing migration information:

• A product-specific online Migration Guide

Prior to 2020, you could update FrameMaker chapters and provide them to the System-Level Guide writer for inclusion in the Genesys Migration Guide PDF.

# Creating an online book

To provide migration information in an online document, the writer does the following:

1. **Create book:** The writer creates a Migration book for their product, if one isn't already created. For the URL naming convention, the writer could use <ProductName>MigrationGuide or <Product acronym>MigrationGuide.

Note: There should be a JIRA ticket associated with this work within the project JIRA space. That will enable the writer to track the workflow, including reviews and approvals.

- 2. **Create version:** Consider creating only a draft and Current version. Then, within the content, the writer adds sections to cover the differences between each version. If for some reason draft and Current won't work, then the writer can create a version associated with the major release (for example, 8.5.x or 9.0.x).
- 3. **Develop content:** The writer creates the topics/content of this book as the writer would do for any online book.
- 4. **Request review and approvals from PCT:** The writer requests that the PCT review and approve the content by assigning the associated JIRA ticket in the project to the reviewers.
- 5. Request final review and approval from System-Level Guide approver: As of 2021, there is no

official System-Level approver for migration content. Previously, Herbert Ristock reviewed all migration content.

- 6. When the release passes, and the PA announcement is sent by Software Delivery, the writer does the following:
  - Publishes the online document and makes the document visible to customers.

# (No Longer Available) Updating legacy FrameMaker chapters

As of 2020, this option is no longer available.

- 1. The writer determines whether he or she has the FrameMaker chapter files:
  - If the writer doesn't have the files, the writer emails the System-level Technical Writer via the Outlook alias "System-Level Guides Update Request" to request them.
  - If the writer does have the files, the writer alerts the System-level Technical Writer via the Outlook alias "System-Level Guides Update Request" at least one month in advance of the product's release.

Note: There should be a JIRA ticket associated with this work within the project JIRA space. That will enable the writer to track the workflow, including reviews and approvals.

- 2. The writer updates the files using change bars, generates a PDF (for PCT), and then obtains reviews/ approvals from the PCT by attaching the PDF and assigning the JIRA ticket to them.
- 3. Once approved by the PCT, the product writer assigns the JIRA ticket to Herbert Ristock (the System-Level Team sign-off approver). The JIRA ticket should include the PCT approved PDF with change bars for review. In the Comments, copy Joe McMonagle.
- 4. If Herbert has questions or comments about the content, the writer works with the PCT to update the information, until he approves it.
- 5. After Herbert approves the updated chapters, the product writer confers with the System-Level writer about where to place the updated FrameMaker files and provides the following information:
  - Product name
  - TR date/ PA date
  - Number/Names of Chapters updated
  - Names of New Chapters (if any)
  - Names of new graphic files, if any, and the chapter location
- 6. Following the sign-off and after receiving the FrameMaker files from the writer, the System-level Guide writer adds the updated or new chapters into the guide and creates a PDF.
- 7. The System-Level Guide writer issues the associated XING form, and then submits the final document, along with the PDF checklist, to the Information Experience Production Editors (using the "Pubs Editors" email alias) for testing and publication.
- 8. When the release goes out, the writer lets the System-Level Guide writer know that he can publishs the updated Genesys Migration Guide. (Note: Due to timing and the amount of work involved, the updated Genesys Migration Guide may be published a few weeks after the release.)

# Hardware Sizing

**Key players:** Product Technical writer (with team) and System-Level Guide writer, and PCT. Previously, Nikolay Korolev acted as the System-Level Guide sign-off approver for the Hardware Sizing Guide.

### Important

In 2019, an online tool was created that included hardware sizing. In 2021, Joe is unsure of the status of that online tool or the need for updating hardware sizing information, especially in light of Private Edition.

As part of iteration scoping, the writer should determine whether hardware sizing information needs to be updated. Do so by checking the JIRA tickets scoped for the iteration and, if none are found, ask the PCT.

### Important

If your team has developed an Excel spreadsheet with formulas, the spreadsheet should have a Cover tab with standard information. See the Predictive Routing spreadsheet (linked on this page Sizing for Premise Deployments) as an example. After your team approves it, it should also be reviewed and approved by Nikolay Korolev and format checked by the System-Level Guide writer (currently Joe).

# Creating an online book

To provide hardware sizing information in an online document, the writer does the following:

1. **Create book:** The writer creates a Hardware Sizing book for their product, if one isn't already created. For the URL naming convention, the writer could use <ProductName>Sizing or <Product acronym>Sizing.

Note: There should be a JIRA ticket associated with this work within the project JIRA space. That will enable the writer to track the workflow, including reviews and approvals.

- 2. **Create version:** Consider creating only a draft and Current version. Then, within the content, the writer adds sections to cover the differences between each version. If for some reason draft and Current won't work, then the writer can create a version associated with the major release (for example, 8.5.x or 9.0.x).
- 3. **Develop content:** The writer creates the topics/content of this book as the writer would do for any online book.
- 4. **Request review and approvals from PCT:** The writer requests that the PCT review and approve the content by assigning the associated JIRA ticket in the project to the reviewers.
- 5. (As of 2021, there is no System-Level Team approver) **Request final review and approval from System-Level Team approver:** Previously, the writer sends an email request to Nikolay Korolev, the

System-Level Team sign-off approver for this guide, and asked him to review and approve the online hardware sizing content, and provided the release date. An alternate approach was to assign the JIRA ticket to Nikolay and include a link to the draft page.

Notes:

- (As of 2021, no longer applies) The writer may have to request that Nikolay create a docs.genesys.com account and then provide him with the appropriate permissions to access the draft content.
- (As of 2021, no longer applies) If the hardware sizing content isn't approved early enough prior to the release, the writer can request that Nikolay review the content *after* the release and then update the content post-release, if necessary.
- 6. (As of 2021, no longer applies) If Nikolay has questions or comments about the content, the writer works with the PCT to update the information, until he approves it.
- 7. When the release passes, and the PA announcement is sent by Software Delivery, the writer does the following:
  - 1. Publishes the online document and makes the document visible to customers.
  - 2. (As of 2021, no longer applies) Opens an SLG ticket and requests that a link to the online document be added to the Hardware Sizing Guide PDF. The writer should include a link to the published online book in the JIRA ticket.
- 8. (As of 2021, no longer applies) The System-Level Guide writer updates the Hardware Sizing Guide (FrameMaker version) with a new chapter (if the product is new) or the link and publishes updated Hardware Sizing Guide PDF.

# DB Sizing

Key players: Developer, Product writer, System-Level Guide writer

The DB Sizing worksheet is an Excel spreadsheet with a series of tabs for various products to help customers size the associated database for their needs. The individual tabs include formulas where customers input information.

For this guide, the product writer is the driver for the guide but does not provide the content. The end result is that the product PCT team (usually the Developers) provide an Excel spreadsheet. The spreadsheet is made available in one of two ways:

- The System-Level Guide writer for the DB Sizing Estimator imports the approved spreadsheet into a tab
  of the existing DB Sizing worksheet. For an example of a stand-alone spreadsheet, see the GIM
  Database Sizing Estimator
- The writer publishes the approved spreadsheet in the appropriate product/version folder in Genesys Public. Then, the writer provides a link to the System-Level Guide writer for adding to a tab for the product to the DB Sizing worksheet.

See the following process for details.

1. As the Product writer plans documents for this release, the writer asks the team whether the DB Sizing Estimator worksheet for the product needs to be updated. If there is no spreadsheet for the product,

the writer checks with the team if one is needed.

- 2. If a new worksheet tab is needed or an existing worksheet tab needs to be updated, the writer adds the item to the documentation plan and ensures that it's added to the Packaging Specification.
- 3. For tracking purposes, the writer can open a JIRA issue for it and assign it to the Developer who will be responsible for updating it.
- 4. When the worksheet has been reviewed, tested, and approved by Development and QA, the Developer provides it to the writer.
- 5. The writer does a quick edit of it for typos but does not change the formulas.
- 6. (As of 2021, no longer applies because there is no System Team approver assigned) The writer then sends the spreadsheet on to Nikolay Korolev, the System-Level Team sign-off approver, and copies the Developer.

**Note:** If the worksheet has any hidden tabs to support the visible tabs, let Nikolay know.

- 7. (As of 2021, no longer applies) If any changes are needed, the Developer updates the document, and the writer does a quick check before sending it back to the sign-off approver.
- 8. When the worksheet is approved, the product writer either sends it to the System-Level Guide writer (via the System-Level Guide Update Request alias) for inclusion as a product specific tab in the DB Sizing Estimator worksheet or provides the System-Level Guide writer with a link to the location in Genesys Public.

**Note:** If the worksheet has any hidden tabs to support the visible tabs, let the System-Level writer know. There are two ways to handle this, either the product developer has to do the importing of tabs into the System-Level Guide version of the worksheet to ensure the correct information gets moved over, or a link the stand-alone product specific worksheet is added associated tab in the System-Level Guide version of the worksheet.

- 9. The System-Level Guide writer updates the DB Sizing Estimator worksheet.
- 10. Once approved by Pubs Editors and the product is released, the System-Level Guide writer publishes the updated document.

# Licensing

Key players: Sathish Madhavan(?), Product Manager, and System-Level Guide writer.

### Important

This document is outdated and some of it relies on LRM, which is on the EOL track. As such there is no one overseeing this guide. As of 2021, if a question comes up or a request comes in to update some information, contact Sathish Madhavan, who oversees the SOE to determine how to handle the question. Previously, Blake Roux oversaw this guide, as mentioned in the steps. As of October 2021, a Genesys Choice Licensing Guide is slated for development to cover on-premise customers using Genesys Choice, on-premises customers using some private edition services, and new customers using only services. George Mather's team team is leading the content development. Sandhya Ravindran is the IX contact.

(December 2021 note) The instructions below applied this the process for this guide when Blake Roux

oversaw it. Blake is no longer with Genesys.

- Blake Roux contacts the System-Level Guide writer with the need to update the guide and provides the writer with the content. Blake can decide whether or not to track this update in JIRA.
   Note: If a Product Manager needs something updated, he or she sends an email to Blake about what needs to be updated and copies the System-Level Guides Update Request email alias.
- 2. The System-Level Guide writer updates the document and sends a link to the online document to Blake for review.
- 3. Once approved, the System-Level Guide writer publishes the updated document.

### Security

Key players: Product Manager, PCT, Security Deployment Guide writer. Note that the System-Level Guide writer is not involved in this document.

- 1. Team members assess to need to update the Security Deployment Guide.
- 2. Team members open JIRA issues against the Security Deployment Guide using the System-Level Guides JIRA project and assign them to the Security Deployment Guide writer, Karl Abraham Abel.
- 3. The Security Deployment Guide writer updates the online document and provides links to the updated sections for review to the associated team.
- 4. Upon the PCT approval, the Security Guide writer freezes it for sign-off and sends the links to the same sections for review and approval to Colin Leonard.
- 5. The Security Guide writer requests a peer edit for other Tech Pubs members.
- 6. When approved, the writer publishes the guide to the docs site.

# Packaging Spec Review/Approval

### Important

Note the following:

- As of summer 2021, the Packaging Spec has moved online and there is no Doc tab. Pubs Editors is no longer needed for approval. The online spec does include an RN tab that the Project Manager completes. The writer works with the PjM to ensure the RNs are properly listed and reflects those components that need RNs.
- As of October 2021, occasionally, and Excel version of the Spec is sent to the Packaging Specification Request alias. For the most part, updates to those spec, which do have a Doc tab are to other tabs and don't require Pubs Editors involvement.
- For the Excel version of the Spec, **if the Packaging Spec is specific to Cloud** the Doc tab should be marked as "Not Applicable" and nothing needs to be listed. This is because the Doc tab was designed for On-premises releases. When the project becomes On-premises, the Packaging Spec will need to be updated, especially the Doc tab.

# Overview

**Context:** This process describes what a Packaging Specification is, when it is needed, and Tech Pubs/ Writers responsibility with regards to it. The Packaging Specification defines the scope of software and documentation packaging deliverables for the project as well as the media and the distribution method for those deliverables. Specifically, it does the following:

- Describes the shippable items structure based on the content of project components.
- Describes the deliverables of the project core team members from the product content packaging standpoint.

Users of this document are the Project Core Team (Project Management, Development, QA, Technical Publications, Product Management), FOSS Evaluator/ Procurement, and Production/Product Delivery Teams.

Prior to DR1, the Project Manager creates a packaging specification for every project using the packaging specification Excel spreadsheet. The spreadsheet is divided into a number of tabs based on the the type of information. Writers provide input to the Project Manager for the Doc tab in particular, and also provide input for select items on the CD\_DVD tab, and the Localization tab. v9.0 (formerly G-NINE) can include 9.0, 8.5, and/or 8.1 versions. The v9.0 Packaging Spec reflects the combination of components and versions that are part of the v9.0 Project but are not necessarily at the 9.x 7-digit version level. For example, starting at a certain 8.5 version, Management Framework is a v9.0 project. As such, the Packaging Spec is labeled as v9.0 but the versions identified in the spec are 8.5. To reflect these scenarios, a v9.0 Packaging Spec template was developed by the System-Level team. Because some confusion has arisen around publishing RN Freeze forms, the first section provides FAQs. The second section describes the changes made to the Packaging Spec template for v9.0 projects.

# RN Freeze Forms FAQs

- What determines whether or not I publish an RN freeze form?
  - The Packaging Spec is a v9.0 Packaging Spec (likely has 9.0 in the title). Note that a v9.0 product can be an earlier version, for example Composer 8.1, but the v9.0 Packaging Spec title likely includes the 9.0.
  - The value in the Freeze in XING column for the RN. The Freeze in XING value for RNs that are part of v9.0 must be **N** for No. If the column indicates Y then the PjM must change the value(s) and resubmit the v9.0 Packaging Spec to the Packaging Spec Review Request alias. If an iteration is already underway, the PjM can make the change as part of planning the next iteration.
  - The v9.0 Packaging Spec is approved by the Packaging Spec Review Request alias folks. Soon after that, Software Delivery decouples the IPs from the Release Note Freeze Forms. After the decoupling occurs, you (the writer) no longer publish RN Freeze forms for the associated RNs.
- My product is not part of v9.0. Do I still publish RN Freeze forms? Yes. In Packaging Specs associated with products that are not part of v9.0, the Freeze in XING value for release notes will be Y. Therefore, you still publish Freeze forms.
- If my product is part of v9.0 starting at a certain 7-digit version and I have a hot fix for a 7-digit version earlier than the 7-digit version included in 9.0, do I publish a Release Note Freeze form? No, when an IP is decoupled from the RN Freeze Form for v9.0, the decoupling happens at the major X.Y release number (for example, 8.5). Consequently, from that point on you do not publish RN forms for any version in that major X.Y release family.
- When the RN Freeze Form was still coupled with an IP, customers could not download the software until the RN Freeze Form was published. What happens now as a result of the decoupling and how will that impact me? As a result of this decoupling the IP is automatically pushed to Software Downloads, so customers can access it as soon as the IP Test Report is published for hot fixes (and the new release type called Update). Therefore, it's incumbent upon you to ensure that your team reviews and approves the RN before QA publishes the IP Test Report. When the IP Test Report is published, you must publish the RN soon after. If you are not available to do that, find a backup to do so for you.
- Is there any difference between General, Hot Fix, and Update releases with respect to RN Freeze forms that I need to know?
  - For Hot Fixes and Updates (a new release type introduced at the end of 2017), once QA publishes the IP Test Report as Pass, the IP is automatically pushed to Software Downloads. So, you need to coordinate with your teams to ensure that the RN is approved prior to QA publishing the report so that you can publish the Release Note soon after.
  - For General releases, the Software Availability Announcement is the trigger to publish the Release Note rather than the IP Test Report. The determining factor for publishing RN Freeze Forms for v9.0 projects is described earlier in this FAQ.

- The IP Test Report Passed and I published the Release Note, but the software still isn't available from Software Downloads, what do I do?
  - 1. Confirm that the IP is part of a v9.0 project.
  - If it is, it's likely that the 9.0 Packaging Spec didn't have the Freeze in XING value set to N for the RN. In that case, publish the RN freeze Form and also ask your Project Manager to update the v9.0 Packaging Spec value so that you won't have to publish a RN Freeze Form in the future.
  - 3. If it is not part of v9.0, you are required to publish the RN Freeze form.
- What do I do if I don't recall and can't find out if my product is part of v9.0? Go ahead and publish the RN Freeze Form. It won't hurt. (Note: As new v9.0 projects are planned with v9.0 versions, RN definitions won't be created for those v9.0 versions. Therefore, if your uncertainty is about a v9.0 version, you may go into XING and not find an RN Freeze Form to publish. That's because Software Delivery didn't create a RN definition. That tells you that you don't publish an RN Freeze form.)
- Is there an issue if I accidentally publish a RN Freeze form for an RN that is part of v9.0? No. There is no issue. It won't impact anything since the IP is decoupled from the RN Freeze form for v9.0 components.

# Key v9.0 Packaging Spec Changes

- Key changes are the decoupling of RN freeze forms from the IPs for all products, and thus components, that are part of v9.0. This applies to 9.0 versions, 8.5 versions, and 8.1 versions that are part of v9.0. You will still need to publish RN freeze forms for products/versions that are *not* part of v9.0.
- As part of the template update, we are not requiring freeze forms for any online documentation. It just doesn't make sense with Continuous Delivery. We still ask that XING forms be frozen for legacy format content, like PDFs, CHMs, and HTML Language Packs RNs.

# Scenarios to keep in mind

- If you have an 8.5 or 8.1 product component part of v9.0, the decoupling applies to *all* two digit versions. So, if your v9.0 project includes an 8.5.203.xx version and then later you have a hot fix for an earlier 8.5 version that is not part of v9.0, you do *not* publish an RN freeze form because the RN freeze forms have been decoupled from the IP. If there is an existing RN freeze form in the system and you publish it, that's fine. It's just not needed.
- For Products already generally released as 9.0, that predated the v9.0 Packaging Spec, your Spec may still indicate that RN freeze forms are needed. For those, you will need to publish the RN freeze form until, at some later date, your team changes the values and the decoupling occurs.

# Stepping through a few tabs

Identifying the changes that were made in the new v9.0 Packaging Spec template.

#### Doc tab

#### Note section

 One note at the top, that directs folks to the Writers Guide > Packaging Spec topic. On that page a new Doc tab Samples section was added that identifies what docs are frozen in XING and what docs aren't. It includes a variety of samples to cover different scenarios. If you have a scenario that you're not sure about, please contact Pubs Editors.

#### RN section

### Important

If your v9.0 product is International and does not utilize language packs (for example: Pulse Advisors, and Genesys Mobile Services), the (International) RNs should be listed on the Doc tab, with (INTERNATIONAL) added to the RN title. They are not listed on the Localization tab.

- The heading was revised to make it clear that this list could contain both online and HTML release notes.
- The number of samples is reduced and, in fact, reflects Management Frameworks 9.0 release, which for the most part consists of 8.5 releases. A broader list of samples is provided on the Doc tab Samples tab of this process.
- As usual, one RN for each IP. My understanding is that, if your group is introducing Microservices, there will be one IP per Docker container. That aspect is still in Development
- As usual, there's the 3-digit version for the associated RN that must match the IP version on the IPs tab. However, the RN definition only includes 2 digits.
- A new column "Supported Genesys Release" that matches the column in the IPs tab. The field identifies the Genesys Supported releases that this associated IP is included in. A field with multiple values means that the IP could be part of any of the releases listed. For example, an 8.5.1 version could be part of the 8.5 release suite but beginning with version 8.5.103.00 the IP will be part of v9.0. I must admit a little confusion on 9.0 in the field but the key is that the values in this Column field must exactly match the value in the associated IP row on the IPs tab. If the component version was 9.0, the Supported Genesys Release value would only be 9.0. Tanya, Barry, and I worked up what to do for product pages, release notes, and online manuals and Pat has drafted instructions about how to tag content accordingly.
- The Freeze in XING value is set to N. This is for all RNs, except for HTML Language Pack RNs.
- For online Language Pack RNs
  - We no longer list them on the Localization tab.
  - For online Language Pack RNs, we don't list them separately here either. They are considered subpages of the English online RNs.
- For HTML Language Packs RNs, you do list them here individually for tracking purposes but you don't freeze them in XING.
- For v9.0 online International RNs that do not utilize language packs (like Genesys Mobile Services, and Pulse Advisors):

- Do not list them on the Localization tab.
- List them on the Doc tab, but append (INTERNATIONAL) to the title. Note, however, that (INTERNATIONAL) is not included in the header/title of the actual online RN.
- Deployment Procedures:
  - If you have a Deployment Procedure in your project, whether it's online or HTML, you include an entry for it. However, neither are frozen in XING.

Note: You would only have an HTML Deployment Procedure if you have an HTML RN. The HTML RN would also not be frozen in XING.

#### **Online Documentation Content**

- This was renamed from Documentation Content and now only includes online content.
  - Note that the Freeze in XING values have a value of N. It was recognized that freezing forms in XING didn't make any sense now, especially with Continuous Delivery and the use of JIRA to track doc status.

Non-online Documentation Content (PDF, CHM, XLSX) except HTML RNs and Readme.

• This is a new section that you populate when you still deliver PDFs, CHMs, Sizing spreadsheets, and the like as part of the product.

#### Readmes, Advisories, Product Alerts

• In the Readmes, Advisories, Product Alerts section, only the samples were changed. Again, a full list of samples is provided on the Doc tab Samples tab of this process.

#### Other Documentation Components

• The Documentation Set is still needed (but only if the release includes non-online documentation); it's solely used by Kate for creating the Doc Lib DVD. Hence the need for that row in the Packaging Spec. We recently created the first DVD in about a year. Its value continues to decline as we put more and more documentation online.

#### Localization Tab

- Removed the Language Pack RNs. Apparently, individual entries here when the Language Pack RN (called Translation Support) went online became a source of confusion for some people because they were thinking individual Language Pack RNs were needed. You may have noticed that we do not list online Translation Support on the Doc tab as we consider that part of the English RN, since it's a subtopic.
- Removed the International Readme because writers now add languages to the English online Readme.
- For v9.0 online International RNs that do not utilize language packs (like Genesys Mobile Services, and Pulse Advisors):
  - Do not list them on the Localization tab.
  - List them on the Doc tab, but append (INTERNATIONAL) to the title. Note, however, that

(INTERNATIONAL) is not included in the header/title of the actual online RN.

### Important

If your v9.0 product is International and does not utilize language packs (for example: Pulse Advisors, and Genesys Mobile Services), the (International) RNs should be listed on the Doc tab, with (INTERNATIONAL) added to the RN title. They are not listed on the Localization tab.

# Some Notes

• Hot Fix and Update releases: With the decoupling of the RNs from the IPs, the IP is automatically pushed to Software Downloads, so customers can access it as soon as the IP Test Report is published for hot fixes (and the new release type called Update). Therefore, it's important that you publish the RN soon after.

If you are located remotely from QA, and may not be available when the IP Test form is published, find a backup to handle publishing the RN. This also means you need to remind your team that comments and approvals of for RNs have to be more timely and ideally prior to publishing the IP Test Report.

Because you won't be publishing RN forms, people won't receive an email indicating that the RN was published if they subscribed to receive notifications. As such, when you publish the RN, please alert your PCT. Most of you probably do that already.

- We know that some of this might be confusing. In truth, some of that is because of how they are handling v9.0. But believe me, this could have been more complicated and require closer tracking if we tried to apply this to all RN forms. And at one point, we tried but it just wouldn't work with all the scenarios we have to deal with.
- On the Doc tab, at the top, the Excel row 4 includes a link to access the Packaging Spec topic in the Writers Guide. If you have an account on the docs site and click it, it will log you out of your account. If you already have an account, use your own account to access the associated topic.

### Writer's Process

**Alert:** These instructions were updated to reflect the new Packaging Specification template approved on 11/12/14. They do *not* apply to 9.0 Packaging Specs. For unique differences to Packaging Spec values for a 9.0 project, see the v9.0 & Packaging Spec tab. Please note the following changes to the Doc tab:

- **Doc tab sections** were added to improve usability. In the order they appear within the tab, these include:
  - Release Notes and Deployment Procedure: Under this section, add release notes and any deployment procedure if you have one.

- Documentation Content: Under this section include <Product Name> Online Documentation (for all online content but Helps, online readme, Product Alerts, and release notes), Help content, PDFs (if still being included as part of the documentation set), Migration chapters (if still in FrameMaker), Hardware Sizing chapters (if still maintained in FrameMaker), and Log Events.
- Readme, Advisories, Product Alerts: For Readme content, HTML Readme (if readme is not online), Wizard Advisories, Release Advisories (for older releases) and Product Alerts. Release Advisories or Product Alerts are only needed if you have non-component specific information that needs to be conveyed to the customer that applies to the entire product and the customers need to be alerted about.
- Other Documentation Components: Documentation Set and Genesys Documentation Wikicicle
- **Mandatory Archiving in Source Control** column was removed. You still need to archive your documents but it does not need to be noted in the Packaging Specification.
- Freeze in Tracking System column renamed Freeze in XING.
- **Customer Available Flag** column renamed **Document Availability** and values are changed to General, Restricted, and Internal.
- Online RN URL column was added. This is the URL for the Welcome page of the RN for the component. Specify the URL for main RN page for the major X.Y.x release, as it would be when released to customers. For example, http://docs.genesys.com/Documentation/RN/8.5.x/mm-socmsg85rn/mmsocmsg85rn. After a Packaging Spec is approved, Genesys Production, an approver of this document, uses the URL to populate the "alternative web path" field in the XING definition for the RN. The URL is also used for the link to the release note in the IP Readme that Production creates (not Tech Pubs) according the the Packaging Spec. **Note:** If you don't provide this URL, by default the RN link in the IP Readme points to the Genesys Release Notes page. Likewise, the "alternative web path" field in the XING definition for the RN will remain unpopulated.
- The **Component Type** list was revised and includes the following types: Online Content, Readme, Manual, Help, Sizing Estimator, Release Note, Deployment Procedure, Documentation Set, Wikicicle, Readme Content, Product Alerts, Release Advisory, Wizard Advisory, Video.
- Divisions were inserted to group documents. In order, the sections include Release Notes and Deployment Procedure, Documentation Content, Readme, Advisories, Product Alerts, and Other Documentation Components. This order and division improves readability for all users of this document including the various Packaging Spec approvers.

**Note:** The Documentation Deliverables section of the Definitions tab was updated to reflect these changes. The Definitions tab was also moved forward to the third tab in the specification to make it more visible.

When project managers are developing the Packaging Specification, writers provide input to the specification to ensure all that documents packaged with the product are correctly listed.

#### **General Instructions**

- 1. Identify the documents that you are updating for the associated project.
- 2. Identify those documents that you are not updating for this project but that are still considered part of the overall documentation set for the release. Note, this may include documents from previous major releases if those documents are still relevant to customers.
- 3. Determine what the project release type will be from the Project Manager: General (PA), Restricted, and

General (PA) but Limited Documentation Availability.

**Note:** The last type is not an official type but rather a particular General (PA) scenario where the Product Manager only wants to provide limited access to documentation. This does not necessarily equate to "Under Shipping Control" because documentation is typically available for all even if the software is under shipping control.

4. Provide the information to the Project Manager, based on the release type, as described below.

**Important!** Be sure that your document list is complete for your project. Also, if you or your team has inadvertently named an online Help file a User's Guide, please note that somewhere in the specification and be sure to specify the Help type. The Production Editor who reviews it isn't familiar with your documentation set to be able to determine if anything missing. The Editor also wouldn't know if your Help was called User's Guide. Properly identifying and naming online Help files becomes a source for noting possible localization needs.

### [+] General Availability

- 1. Display the Doc tab in the spreadsheet.
  - 1. Review the list of documents.
    - Document Component Name: Should match the document title without version number.
    - Version: Should be the three digit version for the document.
  - 2. Specify the document component values according to the information below.
    - <Product Name> Online Documentation: Covers all online documentation with the exception of Help files (online or otherwise), release notes (online or html), and readmes (online or html). This entry covers any Deployment Guide, User's Guide, Administrator's Guide, Reference Manual, and so on, previously delivered as PDFs but that are now delivered online. One entry in XING covers all online "books" for the product, with the exceptions noted and corresponds to one technical sign-off form.
      - Located on Product CD/DVD (Y/N): N; Freeze in XING: Y; Document Availability: General; Component Type: Online Content\*
      - For this component type, below the table, next to "Online Documentation Areas Covered," specify what areas are covered at a high level (for example, deployment, administrator, user information, and so on).
    - <Product Name> Readme Content: This is the online readme that replaces the older html version.
      - Located on Product CD/DVD (Y/N): N; Freeze in XING: N; Document Availability: General; Component Type: Readme Content
    - **<Product Name> Readme:** This is the HTML readme. Use this only if you are using the old style HTML readme for your product.
      - Located on Product CD/DVD (Y/N): **Y**; Freeze in XING: **Y**; Document Availability: **General**; Component Type: **Readme**
    - <GUI Name> Help: (for online and non-online)
      - Located on Product CD/DVD (Y/N): N; Freeze in XING: N; Document Availability: General; Component Type: Help
    - <Product Name> Deployment Guide, User's Guide, Reference Guide: This is for guides that are not online; pre-8.5 releases.

- Located on Product CD/DVD (Y/N): N; Freeze in XING: Y; Document Availability: General; Component Type: Manual
- <Product Name> Migration chapters: non-online only; for migration information that is online, the Online Documentation entry covers migration pages.
  - Located on Product CD/DVD (Y/N): N; Freeze in XING: Y; Document Availability: Internal; Component Type: Manual
- <Product Name> Hardware Sizing Guide chapters:
  - Located on Product CD/DVD (Y/N): N; Freeze in XING: Y; Document Availability: Internal; Component Type: Manual
- <Product name> <Sizing Estimator name>: This is a spreadsheet document.
  - Located on Product CD/DVD (Y/N): N; Freeze in XING: Y; Document Availability: General; Component Type: Sizing Estimator
- <Product Name> Log Events Help:
  - Located on Product CD/DVD (Y/N): N; Freeze in XING: N; Document Availability: Internal; Component Type: Help
- <Component Name> Release Note: The name must exactly match the name on the IP tab, with one release note per IP.
  - For the online format:
    - Located on Product CD/DVD (Y/N): N; Freeze in XING: Y; Document Availability: General; Component Type: Release Note; Online RN URL: insert URL to the main online RN page for the component. (Note: After a Packaging Spec is approved, Genesys Product, an approver of this document, uses the URL for the link to the release note in the IP Readme that Production creates (not Tech Pubs) according the the Packaging Spec. Note: If you don't provide this URL, by default the RN link in the IP Readme points to the Genesys Release Notes page.)
  - For the HTML format:
    - Located on Product CD/DVD (Y/N): N; Freeze in XING: Y; Document Availability: General; Component Type: Release Note
- <Component Name> Deployment Procedure: If needed
  - Located on Product CD/DVD (Y/N): N; Freeze in XING: Y; Document Availability: General; Component Type: Deployment Procedure
- <Product Name> Release Advisory: This only applies to the html format. You only need a
  release advisory if you need to alert customers about something about the product rather than
  that's specific to a particular component.
  - Located on Product CD/DVD (Y/N): N; Freeze in XING: N; Document Availability: General; Component Type: Release Advisory
- <Product Name> Product Alerts: For 8.5, release advisory content is renamed Product Alerts and is placed within the online Readme area on the product landing page. You only need a Product Alerts section if you need to alert customers about something about the product rather than that's specific to a particular component. The Readme process in the Writers Guide describes how to create this content.
  - Located on Product CD/DVD (Y/N): N; Freeze in XING: N; Document Availability: General; Component Type: Product Alerts

- <Wizard Name> Wizard Advisory:
  - Located on Product CD/DVD (Y/N): N; Freeze in XING: N; Document Availability: General; Component Type: Wizard Advisory
- <Product name if product is not clear from short title><Short Video title> Video:
  - Located on Product CD/DVD (Y/N): N; Freeze in XING: N; Document Availability: General; Component Type: Video
- <Product Name> Documentation Set: This item is required, as Pubs Editors uses it to create the Documentation Library DVD.
  - Located on Product CD/DVD (Y/N): N; Freeze in XING: Y; Document Availability: Internal; Component Type: Documentation Set
- **Genesys Documentation Wikicicle:** This item is only rarely used for products that have customers that require online documentation to be available offline. The Product Manager has to put forth a clear business case for this. More details will be provided in this Writers Gude about the ramifications of going this route. Until the happens, contact Joe McMonagle for those details.
  - Located on Product CD/DVD (Y/N): **Y**; Freeze in XING: **Y**; Document Availability: **General**; Component Type: **Wikicicle**
- 3. If you have online content, at the bottom of the Doc tab, identify the general areas covered by the <Product Name> Online Content entry.

Note: As more documents are moved on line, the list of documents in your Packaging Spec will reduce, as the Online Documentation will cover more content.

- 2. Display the CD\_DVD tab in the spreadsheet.
  - If your readme is online, in the Build Instruction section, on the <CD/DVD Name> CD Index line (that has /index.htm), the Column E entry must be the URL to the product documentation landing page. For example, for Genesys Administrator, the URL would be http://docs.genesys.com/Documentation/ GA.
  - 2. If your including a Wikicicle, under the Documents section, add a row:
    - Name: Genesys Documentation Wikicicle; Family Contact Pubs editors for the three digit value; Type: Wikicicle; Image location: /documentation/
- 3. Display the Localization tab in the spreadsheet.
  - 1. Note the languages into which GUI(s) might be located. One localized release note is needed for each language into which a GUI is translated.
  - 2. If no items are listed, it could either be that there are no localization plans for the Help or that there are no localization plans for the Help currently.

### [+] Restricted Availability

For online restricted documents, the values in the packaging specification will be the same as for General (PA) documentation. However, customers access the restricted content using the login credentials provided in the Restricted release note or in the simplified readme (html) placed on the Product CD.

1. Display the Doc tab in the spreadsheet.

- 1. Review the list of documents.
  - Document Component name: Should match the document title without version number.
  - Version: Should be the three digit version for the document.
- 2. Specify the document component values according to the information below.
  - <Product Name> Online Documentation: Covers all online documentation with the exception of Help files (online or otherwise), release notes (online or html), and readmes (online or html). This entry covers any Deployment Guide, User's Guide, Administrator's Guide, Reference Manual, and so on, previously delivered as PDFs but that are now delivered online. One entry in XING covers all online "books" for the product, with the exceptions noted and corresponds to one technical sign-off form.
    - Located on Product CD/DVD (Y/N): N; Freeze in XING: Y; Document Availability: Restricted; Component Type: Online Content\*
    - For this component type, below the table, next to "Online Documentation Areas Covered," specify what areas are covered at a high level (for example, deployment, administrator, user information, and so on).
  - <Product Name> Readme Content: This is the online readme that contains the new in this
    release and related sections that were previously located in the html readme. Note: Unlike
    General (PA) products, this readme information should not go on the open landing page but on a
    restricted page that requires login credentials.
    - Located on Product CD/DVD (Y/N): N; Freeze in XING: N; Document Availability: Restricted; Component Type: Readme Content
  - <Product Name> Readme: This is the simplified restricted readme that is placed on the Product CD if you have an restricted online Readme. If you don't have a restricted online Readme, this is the old style HTML Readme using for 8.1 and earlier releases.
    - Located on Product CD/DVD (Y/N): **Y**; Freeze in XING: **Y**; Document Availability: **Restricted**; Component Type: **Readme**
  - <GUI Name> Help: (for online and non-online)
    - Located on Product CD/DVD (Y/N): N; Freeze in XING: Y; Document Availability: Restricted; Component Type: Help
  - <Product Name> Deployment Guide, User's Guide, Reference Guide: This is for guides that are not online; pre-8.5 releases.
    - Located on Product CD/DVD (Y/N): **Y**; Freeze in XING: **Y**; Document Availability: **Restricted**; Component Type: **Manual**
  - <Product Name> Migration chapters: not typically provided for a restricted release. If these are needed, the migration content should be online behind a login. Migration content for a restricted product does not go in the Genesys Migration Guide, which is only for General (PA) products.
    - Located on Product CD/DVD (Y/N): N; Freeze in XING: Y; Document Availability: Restricted; Component Type: Manual
  - <Product Name> Hardware Sizing Guide chapters: not typically provided for a restricted release. If this is required, the hardware sizing content should be online behind a login. Hardware Sizing content for a restricted product does not go in the Genesys Hardware Sizing Guide, which is only for General (PA) products.
    - Located on Product CD/DVD (Y/N): N; Freeze in XING: Y; Document Availability: Restricted;
Component Type: Manual

- <Product name> <Sizing Estimator name>: This is a spreadsheet document.
  - Located on Product CD/DVD (Y/N): **Y**; Freeze in XING: **Y**; Document Availability: **Restricted**; Component Type: **Sizing Estimator**
- **<Product Name> Log Events Help:** not typically provided for a restricted release. If they are, they should be put in the Product CD with a release type of restricted.
  - Located on Product CD/DVD (Y/N): **Y**; Freeze in XING: **Y**; Document Availability: **Restricted**; Component Type: **Help**
- <Component Name> Release Note: The name must exactly match the name on the IP tab, with one release note per IP. (Note: This is for HTML RNs. Online Restricted RNs are not supported as of 11/13/14.)
  - Located on Product CD/DVD (Y/N): **Y**; Freeze in XING: **N**; Document Availability: **Restricted**; Component Type: **Release Note**
- <Component Name> Deployment Procedure: If needed
  - Located on Product CD/DVD (Y/N): N; Freeze in XING: N; Document Availability: **Restricted**; Component Type: **Deployment Procedure**
- <Product Name> Release Advisory: This only applies to the html format. You only need a
  release advisory if you need to alert customers about something about the product rather than
  that's specific to a particular component.
  - Located on Product CD/DVD (Y/N): Y; Freeze in XING: N; Document Availability: Restricted; Component Type: Release Advisory
- <Product Name> Product Alerts: For 8.5, release advisory content is renamed Product Alerts and is placed within the online Readme area on the product landing page. You only need a Product Alerts section if you need to alert customers about something about the product rather than that's specific to a particular component. This can only happen if the landing page for the restricted version is also restricted. The Readme process in the Writers Guide describes how to create this content.
  - Located on Product CD/DVD (Y/N): N; Freeze in XING: N; Document Availability: Restricted; Component Type: Product Alerts
- <Wizard Name> Wizard Advisory:
  - Located on Product CD/DVD (Y/N): Y; Freeze in XING: N; Document Availability: Restricted; Component Type: Wizard Advisory
- <Product name if product is not clear from short title><Short Video title> Video: It's unlikely that you'd have a video for a restricted release. But if you do, the size of it might determine whether you include it and if the PM decides to do so, whether the Product CD has to be a DVD to support it's size.
  - Located on Product CD/DVD (Y/N): Y; Freeze in XING: N; Document Availability: Restricted; Component Type: Video
- <Product Name> Documentation Set: This item is required, as Pubs Editors uses it to create the Documentation Library DVD.
  - Located on Product CD/DVD (Y/N): N; Freeze in XING: Y; Document Availability: Internal; Component Type: Documentation Set
- Genesys Documentation Wikicicle: This item is only rarely used for products that have

customers that require online documentation to be available offline. The Product Manager has to put forth a clear business case for this. More details will be provided in this Writers Gude about the ramifications of going this route. Until the happens, contact Joe McMonagle for those details.

- Located on Product CD/DVD (Y/N): **Y**; Freeze in XING: **Y**; Document Availability: **Restricted**; Component Type: **Wikicicle**
- 3. If you have online content, at the bottom of the Doc tab, identify the general areas covered by the <Product Name> Online Content entry.

Note: As more documents are moved on line, the list of documents in your Packaging Spec will reduce, as the Online Documentation will cover more content.

- 2. Display the CD\_DVD tab in the spreadsheet.
  - 1. If you have an HTML Readme, it must be listed under the Documents section, row 1, and identify its location as /documentation. The readme should include login credentials and link to the restricted online content. It's also listed under the Build Instructions section. The Project Manager is responsible for this tab and Genesys Production approves it.
  - 2. If your Readme is online, you need to create a modified readme that provides the login credentials and link to the restricted online content, including the restricted online Readme. In this case, there is no entry under the Documents section, as is the case for a HTML Readme. In the Build Instruction section, on the <CD/DVD Name> CD Index line (that has /index.htm), the Column E entry must be the URL to the restricted product documentation landing page. Genesys Production will rename your modified readme to index.html when they place it on the Product CD/DVD.
  - 3. If your including a Wikicicle, under the Documents section, add a row:
    - Name: Genesys Documentation Wikicicle; Family Contact Pubs Editors for the three digit value; Type: Wikicicle; Image location: /documentation/
- 3. Display the Localization tab in the spreadsheet.
  - 1. Note the languages into which GUI(s) might be located. One localized release note is needed for each language into which a GUI is translated.
  - 2. If no items are listed, it could either be that there are no localization plans for the Help or that there are no localization plans for the Help currently.

#### [+] General (PA) but Limited Documentation Availability

This release refers to products that are released as General (PA) but the Product Manager wants to control who sees the documentation.

The values you specified in the "Located on the Product CD" and "Customer Availability Tag" columns depend on which documents will be available for all and which will have limited availability. If the documents will be available to all, use the values for General Availability. If the documents have limited availability and are either going on the Product CD or are accessed online (for online manuals) using login credentials, use the values for Restricted availability.

**Note:** This scenario is still under some consideration and can vary with the product. Please contact Pubs Editors to describe the scenario, and who will provide further guidance.

- 1. Display the Doc tab in the spreadsheet.
  - 1. Review the list of documents.

- **Document Component name:** Should match the document title without version number.
- Version: Should be the three digit version for the document.
- 2. Specify the document component values according to the information below.
  - <Product Name> Online Documentation: Covers all online documentation with the exception of Help files (online or otherwise), release notes (online or html), and readmes (online or html). This entry covers any Deployment Guide, User's Guide, Administrator's Guide, Reference Manual, and so on, previously delivered as PDFs but that are now delivered online. One entry in XING covers all online "books" for the product, with the exceptions noted and corresponds to one technical sign-off form.
    - Located on Product CD/DVD (Y/N): N; Freeze in XING: Y; Document Availability: General or Restricted; Component Type: Online Content\*
    - For this component type, below the table, next to "Online Documentation Areas Covered," specify what areas are covered at a high level (for example, deployment, administrator, user information, and so on).
  - <Product Name> Readme Content: This is the online readme that contains the new in this
    release and related sections that were previously located in the html readme. Note: Unlike
    General (PA) products, this readme information should not go on the open landing page but on a
    restricted page that requires login credentials.
    - Located on Product CD/DVD (Y/N): N; Freeze in XING: N; Document Availability: General or Restricted; Component Type: Readme Content
  - <Product Name> Readme: This is the simplified restricted readme that is placed on the Product CD if you have an restricted online Readme. If you don't have a restricted online Readme, this is the old style HTML Readme used for 8.1 and earlier releases.
    - Located on Product CD/DVD (Y/N): **Y**; Freeze in XING: **Y**; Document Availability: **General**; Component Type: **Readme**
  - <GUI Name> Help: (for online and non-online)
    - Located on Product CD/DVD (Y/N): N; Freeze in XING: Y; Document Availability: General or Restricted; Component Type: Help
  - <Product Name> Deployment Guide, User's Guide, Reference Guide: This is for guides that are not online; pre-8.5 releases.
    - Located on Product CD/DVD (Y/N): N if document can be open to all; Y if document must only have limited availability; Freeze in XING: Y; Document Availability: General or Restricted; Component Type: Manual
  - <Product Name> Migration chapters: If the content is not online, only if the Migration chapters can be available in the General (PA) Genesys Migration Guide. If these are needed but the content needs to have limited access, you should put the material online and behind a login. Otherwise, you'd have to create a PDF of the chapters from the FrameMaker files, add a cover page and have it placed on the Product CD.
    - Located on Product CD/DVD (Y/N): N; Freeze in XING: Y; Document Availability: Internal or Restricted; Component Type: Manual
  - <Product Name> Hardware Sizing Guide chapters: If the content is not online, only if the Hardware Sizing chapters can be available in the General (PA) Genesys Hardware Sizing Guide. If these are needed but the content needs to have limited access, you should put the material should be online and behind a login. Otherwise, you'd have to create a PDF of the chapters from the FrameMaker files, add a cover page and have it placed on the Product CD.

- Located on Product CD/DVD (Y/N): N; Freeze in XING: Y; Document Availability: Internal or Restricted; Component Type: Manual
- <Product name> <Sizing Estimator name>: This is a spreadsheet document.
  - Located on Product CD/DVD (Y/N): N if document can be open to all; Y if document must only have limited availability; Freeze in XING: Y; Document Availability: General or Restricted; Component Type: Sizing Estimator
- <**Product Name> Log Events Help:** not typically provided for a restricted release. If they are, these should go on the Product CD with a restricted release type.
  - Located on Product CD/DVD (Y/N): Y; Freeze in XING: Y; Document Availability: Restricted; Component Type: Help
- <Component Name> Release Note: The name must exactly match the name on the IP tab, with one release note per IP. (Note: This is for HTML RNs. Online Restricted RNs are not supported as of 11/13/14.) If the RN can be available to all, you freeze it in XING and place it in Alfresco Genesys Public. If it needs limited access, you do not freeze it in XING and the RN has to be added to the IP. The values here reflect that its available to all.
  - Located on Product CD/DVD (Y/N): N; Freeze in XING: Y; Document Availability: General; Component Type: Release Note
- <Component Name> Deployment Procedure: If needed. (Note: As of 11/13/14. Online Deployment Procedures are not yet supported.) If the Deployment Procedure can be available to all, you freeze it in XING and place it in Alfresco Genesys Public. If it needs limited access, you do not freeze it in XING and the Deployment Procedure has to be added to the IP along with the RN. The values here reflect that its available to all.
  - Located on Product CD/DVD (Y/N): N; Freeze in XING: Y; Document Availability: General; Component Type: Deployment Procedure
- **<Product Name> Release Advisory:** This only applies to the html format. Online release advisories are called Product Alerts and are built into the online Readme mechanism. You only need a release advisory if you need to alert customers about something about the product rather than that's specific to a particular component..
  - Located on Product CD/DVD (Y/N): Y; Freeze in XING: N; Document Availability: General or Restricted; Component Type: Release Advisory
- <Product Name> Product Alerts: For 8.5, release advisory content is renamed Product Alerts and is placed within the online Readme area on the product landing page. You only need a Product Alerts section if you need to alert customers about something about the product rather than that's specific to a particular component. This can only happen if the landing page for the restricted version is also restricted. The Readme process in the Writers Guide describes how to create this content.
  - Located on Product CD/DVD (Y/N): N; Freeze in XING: N; Document Availability: Restricted; Component Type: Product Alerts
- <Wizard Name> Wizard Advisory:
  - Located on Product CD/DVD (Y/N): Y; Freeze in XING: N; Document Availability: General or Restricted; Component Type: Wizard Advisory
- <Product name if product is not clear from short title><Short Video title> Video:
  - Located on Product CD/DVD (Y/N): N; Freeze in XING: N; Document Availability: General or Restricted; Component Type: Online Content\*
- <Product Name> Documentation Set: This item is required, as Pubs Editors uses it to create

the Documentation Library DVD.

- Located on Product CD/DVD (Y/N): N; Freeze in XING: Y; Document Availability: Internal; Component Type: Documentation Set
- **Genesys Documentation Wikicicle:** This item is only rarely used for products that have customers that require online documentation to be available offline. The Product Manager has to put forth a clear business case for this. More details will be provided in this Writers Gude about the ramifications of going this route. Until the happens, contact Joe McMonagle for those details.
  - Located on Product CD/DVD (Y/N): **Y**; Freeze in XING: **Y**; Document Availability: **General**; Component Type: **Wikicicle**
- 3. If you have online content, at the bottom of the Doc tab, identify the general areas covered by the <Product Name> Online Content entry.

Note: As more documents are moved on line, the list of documents in your Packaging Spec will reduce, as the Online Documentation will cover more content.

- 2. Display the CD\_DVD tab in the spreadsheet.
  - If you have an HTML Readme, it must be listed under the Documents section, row 1, and identify its location as /documentation. The readme should include login credentials and link to the restricted online content. It's also listed under the Build Instructions section. The Project Manager is responsible for this tab and Genesys Production approves it.
  - 2. If your readme is online, you need to create a modified readme that provides the login credentials and link to the restricted online content. In this case, there is no entry under the Documents section, as is the case for a HTML Readme. In the Build Instruction section, on the <CD/DVD Name> CD Index line (that has /index.htm), the Column E entry must be the URL to the restricted product documentation landing page. Genesys Production will rename your modified readme to index.html when they place it on the Product CD/DVD.
  - 3. If your including a Wikicicle, under the Documents section, add a row:
    - Name: Genesys Documentation Wikicicle; Family Contact Pubs Editors for the three digit value; Type: Wikicicle; Image location: /documentation/
- 3. Display the Localization tab in the spreadsheet.
  - 1. Note the languages into which GUI(s) might be located. One localized release note is needed for each language into which a GUI is translated.
  - 2. If no items are listed, it could either be that there are no localization plans for the Help or that there are no localization plans for the Help currently.

### [+] Doc tab Definitions

Here are some definitions:

- Document Component Name: Specifies the name of the document, as it will be defined in the XING form Name field for those product that will be frozen. The format should be: <product name>

   <document name>. (Do not include a version number.) Specific information for all documentation types is as follows:
- Version: Specifies the three-digit number of the document, per XING definition requirements. Using three digits also covers the scenario where only some, but not all, of the customer documents that make up the documentation set are being updated for the new release. For manuals, only the first two

digits appear on the Title/Cover page of the actual document. For RNs, RAs, WAs, and Deployment Procedures, the first two digits plus "x" appears at the top of the associated document.

• Located on the Product CD/DVD: Identifies whether the document (or a link to the online document) is to be placed on the Product CD/DVD. Normally, customer-facing documents, like manuals, are placed in online repositories, primarily the Genesys Documentation site, and are only placed directly on the product CD under special circumstances. For Help files built into the GUI or in an online format, select N. For Help files provided on the Product CD in addition to being built into the GUI, select Y. If the Product Manager determines that a General (PA) document should only be available on the Product CD/DVD, select Y. (Normally documents placed on the CD are not included on the Documentation Library DVD.) Values for this are Y (for Yes) and N (for No).

Note: In 8.5, CD Readme Content is online with links to the information on the Product CD/DVD. This replaces the Tech Pubs HTML CD Readme that had previously been been placed on the Product CD/DVD.

- **Freeze in XING:** Identifies whether the document needs to frozen in an established tracking system. The type of document often determines whether a document is frozen. Manuals, guides, help files, online content, release notes (a notification freeze form), and deployment procedures tend to be frozen. Other types of documents, for instance, API References, Code Samples, and Autoruns may not be frozen in the established tracking system. Values for this are Y (for Yes) and N (for No).
- **Document Availability:** Specifies if the document is available to customers, as defined. Values for the column include General, Restricted, or Internal. Specific restricted for a Document Component entry that is either a restricted document for a Restricted product or a limited availability document for a General (PA) product. Specify Internal for a Document Component entry that is never available or for a document, like Migration chapters, Hardware Sizing Guide chapters, or Component Log Events Help, that if General (PA) is part of a larger document.
- **Component Type:** Identifies the component type for the document. Values include:
  - Manual: any manual/book previous to 8.5 delivered in a PDF format
  - Online Content\*: any content delivered online excluding release notes, helps, readmes, and deployment procedures
  - Help: online or RoboHelp-based Helps
  - Readme: simplified HTML Readmes for restricted products or those General (PA) products with documents with limited availability. Also covers HTML Readmes that have not moved online
  - Readme Content: For readme content that is online.
  - Release Note
  - Deployment Procedure
  - Release Advisory
  - Wizard Advisory
  - Product Alerts
  - Sizing Estimator
  - Video
  - Wikicicle
  - Documentation Set
- Online RN URL: For online Release Notes, this is the URL for the main RN page for the component. Specify the URL for main RN page for the major X.Y.x release. For example, http://docs.genesys.com/ Documentation/RN/8.5.x/mm-socmsg85rn/mm-socmsg85rn. (Note: After a Packaging Spec is approved, Genesys Product, an approver of this document, uses the URL for the link to the release note in the IP

Readme that Production creates (not Tech Pubs) according the the Packaging Spec. **Note:** If you don't provide this URL, by default the RN link in the IP Readme points to the Genesys Release Notes page.)

# Doc tab Samples

Here are samples rows, according to the sections, to cover various scenarios. The samples here do not represent a specific set or combination of document and document versions that might be in a Packaging Spec. The intention of these row samples is to provide you guidance for how to complete the Packaging Spec if one of your documents reflects the scenario illustrated by the row. For example, a Social Messaging Server RN would never be in the same Packaging Spec as a CC Pulse+ Language Pack (Japanese) RN.

- **Documents Not Frozen in XING:** online Documentation, online Help files, English Release Notes, online Translation Support (replaces individual Language Pack RNs), Release Advisory, Product Alerts, Wizard Advisory, online Readme Content, online Deployment Procedures, and Video.
- **Documents Frozen in XING:** legacy format Deployment Procedures (HTML), Language Pack Release Notes (HTML), legacy format (CHM) Help files, Sizing Estimator, Documentation Sets, legacy format (HTML) Readme, legacy format (PDF) Manuals, and the Wikicicle.

**Note:** For Packaging specs that are not part of 9.0, ignore the Supported Genesys Release column. That column is specific to 9.0 Packaging Specs.

#### General/PA Release

Release Notes (online and HTML) and Deployment Procedure (if needed)

Documenta Component Name	ntion t Version	Supported Genesys Release	Located on Product CD/DVD (Y/N)	Freeze in XING	Document Availability	Component Type	Online RN URL (not required for HTML RNs)	
Genesys Info Mart Release Note	8.5.0	8.5, 9.0	Ν	N	General	Release Note	https://docs. Documentat RN/8.5.x/ gim85rn/ gim85rn	genesys.com ion/
Social Messaging Server Release Note	8.5	8.5, 9.0	Ν	Ν	General	Release Note	https://docs. Documentat RN/8.5.x/ mm- socmsg85rn mm- socmsg85rn	genesys.com ion/ /
CC Pulse+ Language Pack (Japanese)	81.1	8.1	N	Y	General	Release Note		
Genesys	9.0.0	9.0	Ν	Ν	General	Release	http://docs.g	enesys.com/

Documenta Component Name	tion Version	Supported Genesys Release	Located on Product CD/DVD (Y/N)	Freeze in XING	Document Availability	Component Type	Online RN URL (not required for HTML RNs)
Customer Experience Insights Ops						Note	Documentation RN/9.0.x/
Genesys Info Mart Deployment Procedure (online)	8.5.0	8.5, 9.0	N	Ν	General	Deployment Procedure	
Genesys Interactive Insights Deployment Procedure	8.1.0	8.1	Ν	Y	General	Deployment Procedure	

#### Notes:

- The CC Pulse+ Language Pack (Japanese) row above is an example of what to include when the Language Pack RN is for a release earlier than 8.5 and is thus in HTML format. As such, the associated Packaging Spec is already approved with the Freeze in XING value set to Y.
- The Genesys Customer Experience Insights Ops row is an example of a Microservice/Docker RN. At this point, the details about how we're handling Microservices RN for on-premise products are not determined. Contact Pubs Editors if you have this scenario.

Online Documentation Content except for online RNs, online Deployment Procedures, online Product Alerts, and online Readme Content

Documenta Component Name	ition Version	Supported Genesys Release	Located on Product CD/DVD (Y/N)	Freeze in XING	Document Availability	Component Type	Online RN URL (not required for HTML RNs)
<product Name&gt; Online Documentat</product 	9.0.0 ion	9.0	Ν	Ν	General	Online Documentati	on
Genesys Administrato Help	or8.5.0	8.5, 9.0	Ν	Ν	General	Help	
Genesys Info Mart Database Compatibility Reference	8.1.0 y	8.1, 9.0	Ν	Ν	General	Online Documentati	on

Non-online Documentation Content (PDF, CHM, XLSX) except HTML RNs, HTML Advisories, and HTML Readme

Documenta Component Name	ition Version	Supported Genesys Release	Located on Product CD/DVD (Y/N)	Freeze in XING	Document Availability	Component Type	Online RN URL (not required for HTML RNs)
Reporting 8.1 CCPulse+ Administrato Guide	8.1.0 pr's	8.1, 9.0	Ν	Y	General	Manual	
Outbound Contact Server Log Events	8.1.0	8.1	Ν	Y	Internal	Help	
Interaction Concentrato Database Sizing Estimator	r 8.5.0	8.5, 9.0	Ν	Y	General	Sizing Estimator	

Readme, Advisories, Product Alerts

Documenta Component Name	tion Version	Supported Genesys Release	Located on Product CD/DVD (Y/N)	Freeze in XING	Document Availability	Component Type	Online RN URL (not required for HTML RNs)
Managemen Framework Readme Content	t 8.5.0	8.5, 9.0	N	N	General	Readme Content	
Outbound Contact Readme	8.1.0	8.1, 9.0	Ν	Y	General	Readme	
Social Messaging Managemen Product Alerts	t 8.5.0	8.5, 9.0	Ν	N	General	Product Alerts	

*Note:* The Readme row is for an HTML Readme that is placed on the Product CD/DVD. The component type Readme help distinguish it from Readme Content. The Readme Content row represents a Readme that is online, thus making it Readme Content in contrast to the HTML Readme, which is the traditional way Readmes are understood. Most if not all 8.5 and higher releases use Readme Content. However, there may be exceptions. The writer will know what type of Readme they are using for the release.

#### Other Documentation Components

Documenta Component Name	ntion t Version	Supported Genesys Release	Located on Product CD/DVD (Y/N)	Freeze in XING	Document Availability	Component Type	Online RN URL (not required for HTML RNs)
Universal Routing Documentat Set	.8.1.0 ion	8.1, 9.0	Ν	Y	Internal	Documentati Set	on
Genesys Pulse - Wallboards	8.5.0	8.5	Ν	Ν	General	Video	
Genesys Documentat Wikicicle	iah0.0	1.0	Ν	Y	General	Wikicicle**	

# Localization tab

Tech Pubs is not responsible for the Localization tab, but here are a few things to be aware of.

- If your English release note is in online format (and it should be by now), there is no longer a need to create individual Language Pack release notes because this is handled by the Translation Support subpage in the English RN. If you see Language Pack RNs listed on the Localization tab you can tell your PjM to remove those entries.
- Likewise, if your English readme is in online format (and it should be by now), there is no need for an International Readme entry on the Localization tab because Translation Support is documented in the English readme.

#### Important

If your product is International (and is NOT associated with v9.0) and does not utilize language packs (for example: Performance Management Advisors, Genesys Mobile Services), the Release Note (International) should be listed on the Localization tab, with the following note on the Doc tab (under Release Notes): \*See localization tab (International RNs only)

# Production Editors Process

When Project Manager's send the Packaging Specification to the Packaging Spec Review Request email alias, representatives for various groups review and the approve the content. Production Editors are one of the official approvers and is a member of the alias. If anything is incorrect, the Production Editor approver asks the Project Manager who submitted the specification to revise it. The Production Editor reviews the doc tab, and sometimes other tabs to ensure the document values are entered correctly. Be aware, the Editor does not know if you are missing a document. So, be careful that the docs tab is complete.

#### Important

International products that do not utilize language packs.

- If a v9.0 product is International and does not utilize language packs (for example: Pulse Advisors, Genesys Mobile Services, iWD 9.x, GCXI 9.x), the (International) RNs should be listed on the Doc tab, with (INTERNATIONAL) added to the RN title. They are not listed on the Localization tab. However, the writer needs to be told not to include (INTERNATIONAL) in the header/title of the online RN.
- If a product that is NOT associated with v9.0 is International and does not utilize language packs (for example: Performance Management Advisors, Genesys Mobile Services):
  - The Release Note (International) should be listed on the Localization tab, with the following note on the Doc tab (under Release Notes): \*See localization tab (International RNs only)
- Online International release notes for products that do not use language packs (like Pulse Advisors, Genesys Mobile Services, iWD 9.x, and GCXI 9.x) do **not** utilize the Translation Support page. Instead, the supported languages are documented in the What's New section and in the Supported Languages section on the seven-digit release page of the RN. Here's an example from GCXI: https://docs.genesys.com/ Documentation/RN/9.0.xDRAFT/gcxi90rn/gcxi9000801

# Context-Sensitive Help Widget

Ponydocs and Genesys documentation currently supports two models for deploying context sensitive help. The old way, which is being phased out, is to use a Ponydocs Mapping Page to link directly to a specific topic in Ponydocs. The new way, mainly for products that support ARK, or that have adopted the ARK interface look and feel, is the CTX Widget.

The CTX Widget uses **contexts** provided by a Genesys product to link a help request from a user to help content in the Genesys Documentation Website through an in-application widget instead of through a web browser.

See this blog for a couple of quick videos about the CTX Widget context-sensitive help.

Where do contexts come from?

#### Product

Workspace Web Edition 🗸



To create contexts, you must collaborate with the product developers to formulate a list of keywords (contexts) that represent the various UI elements for which you have written (or will write) help content.

For example, the product UI might employ a series of tabs or window panes to enable the user to view or access functionality. In your product help you have likely described each of these UI elements. Work with the developers to come up with unique keywords to identify these UI elements.

It is useful to employ a naming convension that is specific to your product so that contexts between products have unique names.

For Workspace Web Edition (WWE), it was decided that all context names would have the 'WWE.\*' structure, where '\*' represents a keyword reference to a UI element. For example, the keyword 'WWE.Channels' is the context associated with the **Channels** tab in the WWE UI.

Keywords can contain periods or dashes but not the '&' or '?' symbols.

Developers working on ARK products have access to the Ark Contextual Help ARK component. The documentation for this component tells your developer how to link help calls to the widget.

Confirm with your developers what Product Name, Product Version, and Locale you will use when you use the CTX Widget tool to create contexts.

Request that developers provide you with a spreadsheet that includes the keywords and the associated feature or function to which it applies.

If you have not done so already, create help pages with content related to a context. Since contexts can include page subheads, it is possible to document more than one context in a single Ponydocs topic.

All the contexts must be created and ready when the product is released. Your QA team will probably want the contexts to be finished well before this so that they can test the widget as part of testing the application functionality. It is okay to create contexts for Ponydocs topics that have been created but are blank. Just make sure that you have completed and approved content by the release date.

#### CTX Widget

#### Link to video

The CTX Help Widget was developed as part of ARK to enable users to view Genesys help content inside an ARK based application rather than leaving the application to view help in a browser window.

The video explains how to access the CTX Help tool and create contexts, organize a set of help links and entries to be displayed in the help widget, and test the help widget.

The CTX Help tool is here: https://docs.genesys.com/ui/#/ctxhelp

### Tip

If you do not have access permissions to the CTX Widget, you must request it from a Tech Pubs Manager. Provide them with your Ponydocs login username and request the "ContextualHelpUser" permission.

#### The basic steps to create a help widget for your product are:

- 1. Open the CTX Help tool.
- 2. Add your product to the tool. Before you can complete this step, contact Nivetha Shreeram and request that your product be added to the search configuration.
- 3. Add a version of your product to the tool (you can add multiple versions), specifying the exact version that is used in Ponydocs.
- 4. Specify a locale for the product (you can add multiple locales). Usually you start with en-US.
- 5. Add Contexts that are associated with product UI elements.
- 6. Add entries to associate the contexts to specific topics in Ponydocs.
- 7. Test the widget to verify that the links work and that the correct content is displayed in the widget.

# CTX Widget Best Practices

uuci		version		Locale			
Vorkspace Web Edition 🖌	۵	8.5.2	~ =	ENU - English (United States) 🖌 Load		Widget	
+ Add Context	+/	dd new entry	Show as: Ad	ministrator Supervisor Agent			Search Configurati
WWE.Channels	;	‡ Type	Display name	Links	Scroll to	User roles	Privileges
WWE.Chat	•	) no-link	Voice Calls				
WWE.cobrow	▲ ▼	I internal-link	Handling v	https://enu.docs.genesys.com/Documentation/GC/v852/Agent/Voice			
WWE.Contacts	▲ : •	2 internal-link	Using my	https://enu.docs.genesys.com/Documentation/GC/v852/Agent/Voice#webp	webphone		
WWE.custinter	•	3 no-link	Channels				
VWE.email	•						
WE.Facebook	* '	t internal-link	My Chann	https://enu.docs.genesys.com/Documentation/GC/v852/Agent/channels			
VWE.GKCWWE	*	5 internal-link	Blending c	https://enu.docs.genesys.com/Documentation/GC/v852/Agent/blending			
VWE.Hist	•	5 no-link	Workspace				
WE.History	•						
VWE.Intinter	* *	7 internal-link	Using the	https://enu.docs.genesys.com/Documentation/GC/v852/Agent/Nav			
MMC Mullioching		internal link					

Think of the help widget as more than just a simple one to one mapping between a context provided by the application when the user requests help for a UI element and that UI element. The widget should provide the expected help topic as the first entry in the widget, but you should go deeper. Provide links to associated topics or content that you think might also be useful.

Try to think beyond just the UI element. If the user requested help, is it because the UI is not intuitive enough, or is it because they do not understand the product as a whole?

Use the widget to guide the user to other content, including Getting Started information in case they are completely lost.

The image shows the WWE.Voice context for the Workspace Web Edition 8.5.2 ENU - English (United States) project.

Go to the CTX tool and open the widget for this or many of the other contexts in this project to get an idea for how you can shape your own contexts for your project. Try to give the user lots of places to go to dive deeper into the documentation. Think of the context in terms of EPPO.

Widget	×
Q Search	
Voice Calls	
Handling voice calls	
Using my Web Phone	
Channels	
My Channels tab	
Blending conversations	
Workspace	
Using the Workspace Main Window	
Quick Start	

The WWE.Voice context viewed in the widget

# How do I use the Widget?

#### Link to video

Become familiar with using the widget. It will help you to think like a user and plan better how to lay out the content for each context.

This video shows you some of the widget basics. You can launch the widget from the CTX tool or from your product if it has already been integrated. The video demonstrates launching and using the widget from a product. To test out the widget from the CTX tool for any product page, select any context, then click **Widget**. If you are working on your first context-sensitive help, it is a good idea to look at the contexts that other writers have already created.

The widget has the following features:

- A search box that will find any help topic that contains the search keyword.
- Links to the help content from search results.
- The **Topic List** button that returns you either to the search results or to the last used context.
- The Back to Previous Page button that allows you to go back to the previous view.
- The **OPEN IN A NEW WINDOW** button which opens the current help topic in a browser window.
- All links inside topics that are displayed in the widget either open a new topic in the widget or scroll to

the anchor within a topic.

## How do I create localized contexts?

The process to create a localized set of contexts is still being worked on. In the future, you will be able to export your en-US contexts as a CSV, provide this to the Genesys Localization team, get the Display Names translated, then import the language specific CSV to create a new set of localized contexts.

## Ponydocs Mapping Page

If you are looking for information about the Context Sensitive Help Mapping page, it is found here. This is an example of the old style context sensitive help mapping page: https://docs.genesys.com/Special:HelpLink/WWEHELP

# Additional Developer details

For additional Developer details, see Ark Contextual Help.

# Handling 9.x (formerly called G-NINE) scenarios

## Important

As of October 2021, it's uncertain whether the G-NINE template needs to be used for services/containers with version 100. Contact Tanya Ivanova who oversees Private Edition.

#### Tagging v9 documents

Use the 9.0 Tagging Job Aid to check your v9 page tagging.

<table to the suite of products, to limit customer confusion, we changed references to 9.0 to 9.x in various templates. Template changes have been already made to support that. However, for products that are part of the suite, there are some changes that you have to make.

#### Writers need to do the following

- Landing page tab: If you have a 9.0 tab on your product documentation landing page, change 9.0 to 9.x Tanya, what about writers who have both 9.0 and 9.1 versions. Will links to both versions of the document be listed under the 9.x tab?
- Readme section: Change the heading from 9.0 to 9.x.
- Product Alerts: Change heading and Product Alert link on the landing page to 9.0 to 9.x.
- v9 page: Verify that your product components appear on this page.

#### Important

- For Release Notes 7-digit pages, on draft version, you still need to add GNINE template manually to the page but you don't need to edit any text.
- For products that are 8.1 that are part of the 9.x "suite," writers are granted an exception not to create a 9.x tab on their product landing page. Also, since the RNs are still HTML, writers don't need to add text mentioning the version is part of the 9.x suite, like we require for 8.5+ online RNs.

Tanya, is this RN step in the RN topic in this Writers Guide? Should we just include a section here about what they need to manually add not just to

support this change but to support tagging their pages to support this G-NINE thing?

#### What writers don't need to change

- What's New section: The boilerplate text below What's New new.
   Tanya, is the the RN or the manual or the product landing page?
- Manual welcome page: The boilerplate text comes from the template. You can edit that text if necessary but we advise against it normally. So, if you have a scenario where you think revising the template for your product is merited, please check with Joe and Tanya.
- Release Note Welcome and 7-digit pages: All text associated with this comes from the template that you've added to your pages.

#### Pubs Editors need to check

As part of format checking, Pubs Editors will check the following:

- Readme: That the heading show 9.x instead of 9.0.
- Product Alerts: That the heading in the Product alert shows 9.x and link on the product doc landing page show 9.x.
- Release Notes: That the templates are included on the appropriate pages.

#### |-|

Converting 8.x Docs to 9.x=

If your products are now moving to an 9.x release that until now was at an 8.5 or 8.1 release, follow the procedures in this section.

#### Important

- It is assumed in these instructions that the last release prior to 9.0 was 8.5.xxx.xx. If you product's last release was something different, adjust the instructions accordingly.
- Template calls might be contain the term "G-NINE". That is ok, it is internal and doesn't affect the output.

The instructions are based on the first production models of 9.0 documents, and do not include the following:

- Updated methods for creating What's New and related sections. These instructions will be updated when the new templates are ready to use.)
- Using the RN Tool to generate 9.0-ready RNs.

For a finished example, see the Management Framework (FR) pages.

#### Warning

DO NOT PUBLISH ANYTHING FOR THE 9.0 Release -- 9.0 <product name> docs will be separate from 8.5.x docs, and will contain separate updates - see step 3.

#### **Create New Versions**

- 1. Create a new version in the wiki: Current (released)
- 2. (Optional but Recommended) Create a new Library book, say 9.0Source or something like that.
- 3. For each manual/guide/help file that will be a part of 9.0 <product name>, whether now or later, use the UPGRADE Special Page to copy the published version of the doc from 8.5 to Current.

#### Set Up Your Landing Page

- 1. Set up your landing page first. Unless you have the go-ahead to publish, you must set it up on your personal wiki page (docs.genesys.com/User:<your wiki username>).
- 2. If you do not have the go-ahead to publish, copy the existing landing page to your personal page. Optionally, remove all but the 8.5.x tab and category tab, just to reduce the scrolling.
- 3. Insert the following code after the product title but before any descriptive text:

```
{{GNINE
|PageType=Product
|ParentProduct=<Same Parent Product as entered on the RN>
}}
```

- 4. Copy the 8.5 tab code, and paste it immediately above itself. Call the tab 9.0.
- 5. In the new 9.0 tab, replace the content of the What's New section with the following code:

```
{{GNINE_List
|ParentProduct=<Same Parent Product as entered above>
}}
```

6. Add the following code under the 9.0 What's New code that you just entered:

```
===Product Alerts===
<div class="item">
{{#ppin:
    ==<product name> 9.0 Product Alert==
    {{Documentation:<product URL>:Library:<name of PA>:<name of source library>}}
    |9.0 Product Alert}}
</div>
```

7. In the Documentation section, update the path of all docs to include 9.0 instead of their last release.

Convert your Release Notes

#### Important

The RN tool does not yet support this, so if you do step 4 on a draft before the final draft, you will have to either repeat step 3 for the final draft; or manually update the RN content for subsequent drafts.

For each RN that will be updated for this 9.0 release, preferably after they have been approved, make the following changes (manually):

1. On the RN front page, put the following after the title but before "This Release Note ...":

```
{{GNINE
|PageType=RN
}}
```

2. On the G-NINE release-specific page, put the following text after the title but before the table:

```
{{GNINE
|PageType=RN
|ParentProduct=<Name of product, e.g. Management Framework>
|SubProduct=<name of SubProduct, based on Readme's, if only one RM, same as
ParentProduct>
|StartingVersion=Yes <for the first G-NINE release only, then No>
}}
```

#### Set up your Read Me What's New section(s)

For each What's New section, do the following:

- For the first 9.0 release, add an entry for the new WN(s) in the TOC of your 9.0 Source library (if you created it) or your 8.5 Source (if you didn't, and speed is of the essence right now), giving it a unique name such as cproduct>WN\_9.0.
- 2. For the first release, add the following code to the first of the page:

```
{{GNINE
|PageType=ReadMe
|ParentProduct=<the product name, e.g. Management Framework>
|SubProduct=<the name of each product grouping, e.g. Security Pack on UNIX>
}}
DRAFT=
<onlyinclude>
==What's New in <product name> for G-NINE==
==<<published date>===
</onlyinclude>
```

- 3. In the Draft= section, enter a bulleted list of the new stuff, highlighting it, if necessary (for your reviewers).
- 4. When you are ready to publish the material, just copy the Draft material under the What's New line.

After you have set the Read Me up for the first time, just continue updating it with the new material.

#### Set up your Product Alerts

Unless you have the go-ahead to publish, you must set it up on your personal wiki page. So, for each PA, whether it needs updating or not:

- Add an entry for the new PA in the TOC of your 9.0 Source library (if you created it) or your 8.5 Source (if you didn't, and speed is of the essence right now), giving it a unique name such as <product>PA\_9.0.
- 2. If your PA requires updating for the 9.0 release, copy the published PA to your personal wiki page. Otherwise, copy the original PA to the new entry created in the previous step.
- 3. If the PA needs updating, update the copy located on your personal page.
- 4. Make sure the copy of the PA (regardless if it needed updating) contains the correct version number where applicable (mostly in the title), i.e. 9.0 not 8.5.
- 5. When approved, and if applicable, copy the RN (updated or not) from your personal page to the new PA page.

For the rest of your links on the landing page (legal notices, third party stuff, ...), do the same as in step 6 to add a similar link as in step 4.e (or whatever you have to do to link to them).

#### Add 9.0 to Welcome Page of Each Doc

Open the Welcome page of the 9.0 <product name> version of each of your documents and paste in the following text immediately below the page title:

```
Published: <publication_date>
{{GNINE
|ParentProduct=<product_name>
}}
```

# Converting G-NINE Docs to 9.0

All template actions are handled internally, and you shouldn't have to touch anything there, unless mentioned here. This section covers things that you might have done manually (such as the PA link) to get to G9.

#### Setup

- 1. Create a new version in the wiki: 9.0 (released) (keep the two G-NINE versions there, for now)
- 2. (Optional but Recommended) Create a new Library book, say Library90 or something like that.
- 3. For each manual/guide/help file that was part of G-NINE and will be part of 9.0, do the following:
  - a. Use the UPDATE Special Page (the same one you use when publishing a doc) to copy the latest G-NINE (published) version to 9.0 (published).

- b. Then use the same Special Page to copy the GNINEDraft to the latest draft version, such as 851Draft. There is no 9.0Draft version
- c. And again, use that same Special Page to purge the GNINEDraft and GNINE versions of the docs.

#### Important

If your docs include a context-sensitive Help system, don't forget to update the links on the mapping page to point to the new URLs.

#### Convert G-NINE Landing Page to 9.0

- 1. Convert your landing page first. Unless you have the go-ahead to publish, you must set it up on your personal wiki page (docs.genesys.com/User:<your wiki username>).
- 2. If you do not have the go-ahead to publish, copy the existing landing page to your personal page. Optionally, remove all but the 8.5.x tab and category tab, just to reduce the scrolling.
- 3. Change the G-NINE tab to read 9.0.
- 4. Replace "G-NINE" in the following code snippet with "9.0":

```
===Product Alerts===
<div class="item">
{{#ppin:
==<product name> G-NINE Product Alert==
{{Documentation:<2-letter product>:Library:<name of PA>:<name of source library>}}
|G-NINE Product Alert}}
</div>
```

5. In the Documentation section, change G-NINE to 9.0 in the paths of all docs. If you are changing your live landing page, you might want to do this right after you move each doc, just so you don't have to blame somebody else when customers start screaming about broken links to the docs.

#### Convert your Release Notes

#### Important

The RN tool does not yet support this, so if you do step 4 on a draft before the final draft, you will have to either repeat step 3 for the final draft; or manually update the RN content for subsequent drafts.

In the TOC of each RN that was converted to G-NINE (both published and draft versions), remove the G-NINE subheader, moving all the releases under G-NINE to under the last release header (8.5.1, e.g.):

Set up your Read Me What's New section(s)

For each What's New section that was created for G9 and has G9 or something in the name, do the

following:

- In the TOC of your 9.0 Source library (if you created it) or your 8.5 Source (if you didn't, and speed is of the essence right now), rename the G9 WN doc (<product>WN\_GNINE, e.g.) to something with 9.0 in it, such as <product>WN\_90.
- 2. Use the UPGRADE PAGE to copy the contents of the previous WN into the new one, or just open both and copy the text manually.
- 3. Change G-NINE to 9.0 for "What's New in <product name> for G-NINE".

#### Set up your Product Alerts

Unless you have the go-ahead to publish, you must set it up on your personal wiki page. So, for each PA, whether it needs updating or not:

- 1. Create a new entry in the TOC of your 9.0 Source library (if you created it) or your 8.5 Source (if you didn't, and speed is of the essence right now), giving it a unique name such as cproductPA\_90
- 2. Use the UPGRADE special page, or use copy and paste, to put the info from the G-NINE PA into the 9.0  $\,$  PA on the .

#### Add G-NINE to Welcome Page of Each Doc

Open the the Welcome page of the 9.0 version of each of your documents, and replace this line:

|context=This version of the <document\_name> applies to <product\_name> that is part of G-NINE. For releases of <product\_name> prior to <release\_date>, see the [[Documentation/<product short name>|<product name> home page]].

ТΟ

|ParentProduct=<product\_name>

#### Get the G-NINE out of your docs

G-NINE must not appear in any of the documents, so go through them, and replace with 9.0 where necessary. Given the more-than-before confusion that this is going to do, I suggest that where necessary, you say 9.0 cproduct name>, instead of just 9.0.

# Troubleshooting

When you are preparing an RN with the sub header "9.0 This is the first release of xxxx in 9.0" OR "9.0 xxxx is part of 9.0 starting in x###", you may end up with only the red 9.0, no text. If you have checked that your code is ok (the GNINE template call), the problem is most likely just a timing issue. Just open and resave the release-specific page (and if the problem is on the RN cover page, open and resave that too). If it doesn't work, don't despair. Just keep resaving every minute or so, and it should eventually work.

The problem results from the time it takes for the underlying tables to propagate changes to each other.

# 9.0 Tagging Job Aid

Use this drilldown to see how your pages are currently tagged. This can help with troubleshooting for example, look for typos or inconsistencies in your SubProduct and Component naming conventions - as well as quick link access to your tagged pages to correct errors.

Link to video

# What To Do When a Product Name Change is Proposed

#### Important

The guidelines provided below still apply as of 2021. However, the naming convention to identify the milestones, like the DRs, may be different.

If your Product Manager wants to change the name of the product, it's important to understand that the change significantly impacts tasks that various groups have to undertake, including IX, Software Delivery, Genesys Production, and Customer Care, to name a few.

If a change is being discussed, do the following:

- 1. Contact Pubs Editors as soon as you find out so they are alerted to help you evaluate the nature of the change and start to plan so that it can be successfully implemented.
- 2. Contact your manager.

#### Product name changes should ideally occur:

- Pre-DR1 (Waterfall model) or at the beginning of an iteration (Continuous Delivery), and before the Packaging Specification is approved, since it is used to create the product, component, and RN definitions in XING.
- At a new major release level (first or second digit like 8.5 or 9.0) rather than a minor release (third digit, like 8.5.1) since a number of documentation deliverables are designed for major releases. These include the product landing pages, Release Notes, and PDF manuals. Note: If the change has to occur at a minor release, product name changes would require some work-arounds to ensure existing customers are clear about where to find the documentation, including release notes, especially if component names are changing.
- Product renaming should not occur at a hot fix, because it would look strange to have the first entry of a Release Note called a Hot Fix rather than General. A Hot Fix presumes that it follows a General version.

#### Detailed Breakdown of Potential Impact on Tech Pubs Work

#### • Product landing page:

We have two scenarios:

- If the product name change is significant and the product has been released as General for a "good" amount of time, a redirect is likely needed. Work with Pubs Editors to determine whether a new page/URL with a redirect is needed, and find out further details about what you need to do. Pubs Editors will also help you determine whether your product has been released "for a while."
- If the product was restricted or had a limited release the entire time, you likely won't need a redirect and can use the same URL. In this case, you'd need to rename the documentation landing.

- In both scenarios, on the landing page, you should alert customers about the name change.
- Navigation areas and the Product short code in the URL on docs.genesys.com
  - Send an email to the Tech Pubs Support alias a few weeks before the change is needed with:
    - Information about the change.
    - Whether a redirect is needed, based on your exchange with Pubs Editors.
    - The date when the change needs to be implemented.
    - Copy Pubs Editors.

**Note:** The Wiki Admins will have to update the left navigation list (being phased out), the **Find Information About** drop-down list, and the <u>Genesys On-Premises Documentation</u> page or <u>Genesys Engage cloud Documentation</u> page. Here are graphics of the first two:

Product Offerings	١
System Guides / Release Notes Other	1
Genesys Cloud Desitoes and Gelus Adapter	
Framework.	
Digital	
Genesys Callback	
Genesys Co-browse	
Genenys Widgets	

Navigation list



Find Information About drop-down

- Product manuals:
  - **Online:** If the product name is reflected in the online manual name, you will have to create new online manuals.
  - **PDF:** You will have to create a newly named manual with the new product name. If the change occurs at the third-digit, you will have to maintain separate PDFs and alert customers to the difference.
- Release Notes:

- **Online:** If the component names change, new online RNs will likely have to be created. Consult Tanya Ivanova about that. If Tanya confirms this, work with Pubs Editors to determine what to do with the RN for the existing component name. It will vary based on whether the change is occurring at a major or minor release.
- **HTML:** If the change occurs at a major release, create the new Release Note with the previous release pointing to the RN for the older named component. If the change occurs for a minor release, contact Pubs Editors to work out the details.
- **XING Forms:** If components are renamed, your Development team has to freeze the component under the new name. For release 8.5 and earlier, you will need to be able publish the XING freeze form for the associated RN using the new name. RNs for version 9.x no longer require publishing an RN freeze form.
- Readmes
  - **Online:** Since the online Readme is on the product landing page, you'll have to change the path to the product page URL in the Packaging Spec DVD/CD tab for the newly named product. Work with your Project Manager to ensure the change is made and submitted to the Packaging Spec Review Request alias. This ensures that Production is made aware of this change and implements it for the next release.
  - **HTML:** You'll need to create a new readme with the new product name. You might also mention the old name of the product.
- **System Level Guides:** Your PM will have to work with the System-Level Guide writer for the SOE, Interop, and other guides to determine how to handle the change. Changes to those guides take time due to resource constraints. So, for a while, the old name may be in place until the documents can be updated. You will likely also have to update any migration articles. Note: The PDFs for the Migration Guide and the Hardware Sizing Guide are no longer updated.
- Notify Genesys Multicloud CX writers: Send an email to the entire department using the Mulitcloud Writers email alias about the upcoming change and the date when that change will be implemented. This affects writers (who may reference your product name in their product documents), Pubs Editors (who maintain the Genesys Release Notes page), and Wiki Admins (as already mentioned).

# Customer Doc Plan Development

#### Тір

As of April 2019, Doc Plans should be created in JIRA (in the form of linked tickets) and/or Confluence rather that using a Word file. The specifics of what to consider in creating a Doc plan still apply.

The Customer Documentation Plan lists the customer documents that will updated for that particular release. It also identifies where/how features will be documented, the effort involved in documenting it, and the schedule for delivery of drafts for review, technical sign-off, and approval.

You have the option using JIRA (following a model created by Matt (see JIRA Examples) or proposing another way of providing this plan. The **key requirement** is that you establish with your team from the start of the project what documents will be updated and the schedule for when the documents will be ready for review and approval. Their agreement to the schedule indicates their agreement to make time for the review. This is especially helpful for you to leverage should you not receive timely reviews, per the schedule.

**Note:** This list of customers documents in the plan may be a subset of the documentation associated with the particular product. For example, In a project, you may not need to update all the guides. However, those not updated are still considered part of the overall documentation for the product. This may also include documents that apply to an earlier release (8.1 for example) and that you are not updating for 8.5 but are considered part of the 8.5 documentation set. The more complete list needs to be included in the Packaging Specification.

When is a Customer Documentation Plan Required?

- For major release (new development and maintenance) projects are typically high rigor, a Customer Documentation plan is required.
- For minor/low rigor projects, only a PCT approved documentation schedule is required. Typically, the Project Manager includes the document delivery dates in the overall project schedule.
- For Continuous Delivery projects, a documentation plan of some sort is required at the iteration level using JIRA. The writer must work out with the team how the writer will track documentation needs. See the Continuous Delivery process for more information and for methods using JIRA to track documentation tasks.

Source of Information for Creating the Documentation Plan

- **Product Requirements document (PRD):** The Product Manager creates the PRD and provides drafts to the PCT for review and approval. The review gives the team an opportunity to understand each requirement and begin thinking about how/where a particular requirement might be documented.
- **High-Level Design Document and/or Functional Specification:** The Development team creates a functional spec that describes how they will implement the requirements identified in the PRD. The writer uses the specification to assess how to document the requirement, how much time is needed to do so, and create the actual content. So, it's important that the writer understands the details in the

spec. Both QA and the writer can often rely on each other to understand how something is being implemented.

- **JIRA Issues:** Issues opened in JIRA for documentation defects or improvements carried over from previous release, if there are any. Defects might be opened by a customer or internally by you or someone on your team. The defect could be a mistake in the document. It also could be a request to add more information to a section, reorganize some information to better usability, add a use case, and so on. It may also be that due to a tight release schedule and your time allocated to the project, you could only provide limited documentation for a feature and now want to add more information.
- **Release Notes and Advisories:** Occasionally, a writer may add a documentation defect in the release note, especially for non-online (wiki) documents. In addition, there may be a known issue added to the release note that is actually a permanent condition rather than a defect, which should go into the documentation.
- **PCT discussions:** In a more limited way, weekly PCT discussions may provide information to help you assess customer documentation needs.

#### Assessing the Effort and Creating the Plan

<multistep> |-| Assess each requirement.= Consider the following when determining the effort:

- Does the feature need to be documented in various locations or documents?
- If you're not sure where something should be documented, ask your Developers and QA people. They can also help you determine if there are existing features that are related to a new feature or might be impacted by the new or updated feature.
- The time needed for the requirement. This should not only include the time you need to document it but you need but time needed to update the associated sections following reviews.
- To help you assess effort, use the Effort Estimate Calculator. **Note:** The effort results using this may be a bit bloated. If you've never estimated effort before, work with others to create more realistic numbers.
- If you are converting a document to an online format, count that conversion time into the overall delivery. It would be ideal if you can convert the document between releases though so you don't find yourself in a crunch.
  - For Help files, you must work with Developers closely to make this work as they need to add coding into the GUI to enable linking to a particular topic and understand what's needed from them. Until a process is written, please contact Pubs Editors and we'll connect you with the appropriate people to understand what this involves.
  - For PDFs conversions, set up a meeting with the Wiki IA Consult group to help you determine the best way to move content online.

|-| Determine the number of reviews.= As part of the plan, you need to determine the number of reviews needed for the project. Typically, there are three reviews: Development Review, QA Testing/ Review, and Technical Sign-off Review.

- Normally, the first review cycle (Development review) occurs before DR2, as DR2 is the official milestone for QA to begin testing the software and reviewing the documentation.
- The second review cycle starts DR2, after Development has completed its review and the writer has updated the document with their comments.
- The third review, technical sign-off, is the final review were by Development and QA review and approve the content. Any changes request as a result of this review should be minimal.

Typically, you schedule for these three. However, sometimes more may be needed depending on the complexity of the release. If addition reviews are needed, you don't need to update the Documentation Plan schedule but you should come to some agreement with your team about delivery dates.

|-| Complete the Customer Documentation Plan.=

These steps are for Waterfall projects. For Continuous Delivery projects, use JIRA to create plans for each iteration. See the Continuous Delivery process for more information.

- Once you have a sense of the effort and the documents that you need to update, download the Customer Documentation template from Alfresco: Customer Documentation Plan template. Note: You can also use JIRA to create your documentation plan if that works better for your and your team. Matt has done such for Workspace Dekstop Edition. Here's a link to his example: JIRA Examples.
- 2. Fill in each section, as described in the template document.
- 3. In the Detailed Work Plan section, double-click the embedded Excel spreadsheet.
  - When setting the delivery dates, take the following into account:
    - Your reviewers schedule, as ideally you want to synchronize reviews with times they are more available.
  - You also want to give them as much time as possible to review, while taking into consideration time for you to do you work, and the target TR/DR4 date.
    - Try not to overlap reviews of multiple documents.
    - As part of your plan, at DR2, at least the Deployment Guide must be ready for QA to review. So, you will need to have had a least this one document reviewed by Developers and comments added to it by you such that you can send it out for a QA review at DR2. It's a plus if you can have more documents ready for the QA review a week or so after DR2.
    - If a pre-release is planned, take into account the effort needed to prepare pre-release documentation. Up until recently, typically only a pre-release note is planned. However, recently pre-release online documents have been introduced, which requires additional work to provide access prior to the official release.
  - Schedule the creation of the Readme. Ensure that the Product Manager agrees to the schedule as he or she provides the readme content.
  - When you done making changes to the spreadsheet, simply save and close it.

#### </multistep>

**Note:** If the amount of time needed to document everything sufficiently goes beyond the target release date, you will need to work with your team to prioritize documenting the features and how much detail to provide. Although, not preferred, it's possible that some customer documentation can be delivered after TR/DR4.

# Documentation Review Process

As part of the customer documentation planning for a project, you determine how many reviews you might require based on the scope of the project and the extent of your changes. Typically, you have three PCT reviews for which your reviewers provide comments and two internal Tech Pubs reviews.

#### Important

With the roll out of Genesys Multicloud CX private edition, the number of reviews may differ.

#### PCT Reviews

Customer documentation reviews are required by Product Management, Developers, and Quality Assurance personnel within the Project Core Team (PCT).

- Development Review: Developers review your updated content to ensure that what you have written about the feature and improvements matches their design/implementation.
- QA Testing/Review: QA tests the documentation against the feature in the software to ensure what you wrote reflects what they see in the software.
- Product Management: Product Managers should review the content to ensure that the customers' business need, that led to the reason for the feature, is covered in the document and properly reflects the PM's intent. This review can happen at the same time as Development's or QA's review.
- Technical Sign-off Review: The Development Manager, QA Manager, and Product Manager should take a quick look at the final draft version of the content to ensure that it is ready for release to customers in terms of technical content. At this point, any further changes requested to be made by them should be minor. If they are not, you might have to scope major changes for the next iteration or post-release.

**Important!** Developers, QA, and Product Manager review content from a technical perspective and they may suggest ways of writing about a specific feature to make its technical abilities clearer. However, they are not the experts on content organization, grammatical rules, and related writing skills. As such, you have the final say on those pieces, if there is a disagreement, due to your expertise.

#### Internal IX Reviews

In addition to these reviews, after the PCT reviews and signs-off on the technical content, you requests these internal reviews.

- Peer Review: Using the Multicloud Writers email alias, request a peer to copyedit your content. Ideally, this should happen prior to the release. This should be done for regular documentation and for Release Notes. (Note: This is something distinct from external copyediting. See the Editing page in this Writer's Guide for more information.
- Format check: Using the Pubs Editors email alias, request a format check for content (both manual-type content and Release Notes).

## What is reviewed?

In terms of what is reviewed, it may vary depending on whether your project the follows the Continuous Delivery method or the Waterfall method.

**Note:** As of September 2016, most projects now follow the Continuous Delivery method.

#### Continuous Delivery

#### Important

As of August 2021, Gaby Lopez-Price indicated the a new process is being developed for Private Edition releases. That will likely impact the process described here.

For the project following the Continuous Delivery method, you still have multiple reviews but what content is reviewed may vary.

- If features are frozen incrementally, after writing the content for the features in the freeze, you request reviews for the documentation associated with those features. As later freezes occur with additional features, after writing the content for them, you request reviews for that documentation. Notes:
  - Ideally, Development should still review the content first, before QA, so you can ensure that you have correctly documented the feature. Then, after you've integrated their comments, you can request QA and Product Management to review it.
  - If your features are not associated with a UI, you don't need to wait for a freeze to document it; therefore can request reviews for associated technical content as soon as you believe it's ready for review.
- If all of the features scoped for a release are frozen at the first freeze, then you can request reviews for all new or updated documentation at once. However, it's still important that you use JIRA to tie the associated feature with the URL for the content.
- See Continuous Delivery in this Writer's Guide for a description of this method and the typical Writer's workflow for Continuous Delivery.

#### Waterfall

For project following the Waterfall method:

- The first review cycle (Development review) occurs before DR2, because DR2 is the official milestone for QA to begin testing the software and reviewing the documentation.
  - The second review cycle starts DR2, after Development has completed its review and the writer has updated the document with their comments.
  - The third review, technical sign-off, is the final review were by Development and QA review and approve the content. Any changes request as a result of this review should be minimal.

Typically, you schedule for these three. However, sometimes more may be needed depending on the

complexity of the release. If addition reviews are needed, you don't need to update the Documentation Plan schedule but you should come to some agreement with your team about delivery dates.

# How Do Reviewers Know What to Review

You inform reviewers what to review in a few ways:

- In the associated JIRA documentation task, you include the URL to the associated documentation page. If the feature impacts multiple documents, typically, you have different JIRA tasks based on the document being updated (for example, Help, Deployment Guide, User's Guide, Reference Guide). For each JIRA document task, you would include a link to the associated documentation page for that guide.
- On the associated documentation page, include change bars that call out those sections of the page that you updated for the release. If the entire page is new, then the change bar should span the entire page.
- If you have questions you want to post to the review, you use the coding for highlights.
- Also, if you need to distinguish changes made following the first review to the second review, you can also use highlights to call those out separately from the original text. However, if you do so, you need to let your reviewers know.
- If it makes sense, in addition to notations in the JIRA task, you can use email. However, be aware that
  emails often get lost in reviewer inbox. Using JIRA for reminders is a better route because you can track
  it better.

# Other Links

- Online Content Review Process
- CD Readme Process
- Release Notes with JIRA

# Older Processes Rarely Used

- PDF Review Process
- RoboHelp Projects
## PDF Review Process

## Important

This process only applies to legacy documentation that still uses Framemaker for documentation updates. As of October 11, 2021, such an update would be rare if not nonexistent.

The following steps provide the instructions required when your PDF is being reviewed as part of it's preparation for publications:

- When the draft PDF is ready for review, comment enable the PDF, and post the draft in the appropriate product folder in the Tech Pubs Review site on Alfresco. For example, Tech Pubs Review/Product Name/Version/Book/, or /GAS/8.1/8.1.2/Pre-release/DeploymentGuide/dep\_81200103.pdf. Add a new version each time a draft is ready for review. Do not overwrite the previous version. A good practice is to include the version number in the file name.
   Note: Links can break in the freeze forms if the file structure is changed after the document is frozen.
- Freeze the PDF in XING.
   Note: On Agile teams, documents are updated for all iterations, but are frozen in XING only at the sign-off stage (for Pre-release, Beta, or actual release).
- 3. Inform, by email, the PCT that the document is ready for review, and provide the link (see step 1) to the document.
- Update documents based on reviewer's comments.
   Note: If there are multiple reviewers, combine all comments into one PDF file, and upload to the same directory in the Tech Pubs Review site. See below for the descriptions of the review cycles.

#### Notes :

- Send to outside editor for predetermine level of editing .
- After DR4, copy files to Clear Case. Optionally, after every freeze copy files to clear case.

## Review Cycles

Depending on your project, the review cycle may be different from the description below.

## Review Cycle #1

Documentation Review Cycle #1 is intended primarily for development and occurs after the Content Complete freeze (usually at DR 2). The complexity of the release, amount of GUI elements, and the overall release time frame will dictate the beginning of this review cycle.

## Review Cycle #2

Documentation Review Cycle #2 follows the first software correction freeze. This makes documentation available for QA Cycle # 2 (Functional Testing). While primarily a QA review, developers should at a minimum review documentation changes made as a result of their review cycle #1 feedback.

## Review Cycle #3

Documentation Review Technical Sign off Cycle #3 begins shortly after the last Code Freeze and ends with the Joint Document Review (JDR). However, a JDR can be done after cycle3 or at anytime through the review cycle process.

For more information on the Development Life Cycle, see the Technical Publications Development Process document. Note that some of the embedded links are old and refer to Alcatel-Lucent.

# RoboHelp Projects

## Important

This process only applies to legacy documentation that still uses RoboHelp for documentation updates. As of November 2019, it's likely RoboHelp is no longer used.

## Content

## Creating RoboHelp Content

When creating RoboHelp content, please keep the following items in mind:

- Write short paragraphs—no more than three sentences.
- Write short sentences.
- Use lists rather than paragraphs:
  - Numbers, if the user is to do a procedure in a sequence.
  - Bullets, if the sequence of actions is not important; if the user can choose to do some, or none, of the actions; or if these are items rather than actions.
  - No more than 5-7 steps in a procedure.
- Use active voice.
- Speak directly to user.
- Use declarative sentences.
- Use task oriented organization, rather than descriptive or explanatory.
- Use an easy-to use layout. Online help is a visual art form; its content should be easy to identify.

## New Project

## Creating a New RoboHelp Project

Creating a RoboHelp HTML Help Project

To create a RoboHelp project:

- 1. Open RoboHelp HTML.
- 2. Select Create a new project.
- 3. Click **OK**.
- 4. Select **HTML Help** in the **New Project** dialog box, even if you intend to generate WebHelp or JavaHelp, and then click **OK**.
- 5. In the Project Wizard:
  - a. Enter your project's title, file name, and location.
  - b. Title the first topic **Overview**.
  - c. Clear Enable WebSearch—if it is selected.
  - d. Verify that **English** is the selected language and that **Save as Default** is selected.
  - e. Click Finish.
- Using Windows Explorer, copy the .css file (cascading style sheet) into your project's folder. For instructions on applying the CSS, see the topic, *Applying a Cascading Style Sheet (CSS) File*. You can access the .css file at the following Alfresco location: Documents > Templates > RoboHelp > 8.0 Templates . CSS Stylesheets.

Converting RoboHelp Topics to a Media Wiki Format

To convert RoboHelp topics to a Media Wiki format, refer to the procedures in the following topic: http://internalwiki.us.int.genesyslab.com/draft\_docs/index.php/Converting\_a\_RoboHelp\_File\_to\_a\_Wiki

Note: This information is for internal use only.

Mandatory Topics

A Help project begins with these mandatory topics:

• Overview—contains the document title, part number, and copyright information, a brief description of the main topics, books, or sections in your Table of Contents (TOC). This topic is the start page, or default topic, for the project. It displays first when the Help file opens.

The following mandatory topics belong to the Supplemental Information book that goes at the end of the TOC:

- **About Genesys**—contains the following sections: About Genesys, Technical Support from VARs, Technical Support from Genesys, Ordering Information, and Released by.
- Disclaimers—contains the disclaimer and trademarks information.
- **Printing This Help File**—contains information on how to print the Help file.

**Note:** There might be some exceptions for this topic. These exceptions must be approved by Tech Pubs production.

Organizing a RoboHelp Project

Begin a Help project by outlining your information using the TOC.

- Generally, you should start with an overview of the interface, and then list the tasks that users will perform using the application you are documenting. Your Help file should be task-oriented rather than organized as a description of the interface.
- Use books to group related sets of topics.
  - A book should cover a collection of procedures that relate to a single task or functionality.
  - A topic should cover a single procedure, or a non-arbitrary sub-set of a procedure.
- As a general rule, arrange information in the order that a user would follow in learning to use the software.
- Pay careful attention to topic headings and filenames. Whenever you modify a topic heading, be sure to change its filename accordingly.

**Warning!** If you are creating context-sensitive Help, you must never change a filename without first consulting the developer responsible for maintaining the context-sensitive Help.

• Do your best to organize books and topics so that there are no more than nine single topics, books, or subbooks.

When the TOC is in place, begin writing the contents for each topic.

Guidelines for the TOC

Your TOC is the most linear part of your Help document and should present information in the order that the reader will need to read it.

#### **The Rule of Nine**

Develop your TOC using the basic rule of nine:

#### **For Single Topics**

Generally have no more than nine single topics in a project. If you have more than nine topics, combine them into books. (Do not count the four mandatory topics in the nine-topic limit.) If your Help project has nine or fewer topics (excluding the four mandatory topics), list the topics directly in the TOC. Do not organize them into books.

**Note:** If your project has only topics (no books) then the topics don't have navigation links at the top of the topic. Navigation links always return the reader to a book's overview topic.

#### For Topics within a Book

Generally have no more than nine topics within a single book. If your Help project has 10 or more topics, organize these topics into books. Try to have no more than nine topics within a book. **Note:** You can ignore this "rule of nine" when the project lists error messages or glossary topics.

#### **Creating Second-Level Books**

Generally have no more than nine books in a project. If your Help project has 10 or more books, reorganize the subject matter by creating second-level books. **Note:** Avoid third- and lower-level books. The TOC should have as few books-within-books as possible.

Importing Template Files and Topics

To import template files into your project:

- 1. Using Window's Explorer, place the files in your project's folder.
- 2. In RoboHelp, select File > Import > HTML file.
- 3. Select a file or multiple files in the **Open** dialog box.
- 4. Click **Open**.

To insert imported topics into the TOC:

- 1. Select the **TOC** tab on the left pane and the **Topics** tab on the right pane.
- 2. Select the topic.
- 3. Click and drag the topic onto the **TOC** pane. You can also click and drag to change the order of topics within the TOC.

Applying a Cascading Style Sheet (CSS) File

To apply a .css file to a Help project:

- 1. Using Windows Explorer, copy the .css file into your project's folder. You can access the .css file at the following location: > Templates > RoboHelp > 8.0 Templates . CSS Stylesheets
- 2. Open your project and select **Topics** on the right pane.
- 3. Select all the topics.
- 4. Right-click, and then select **Edit > Properties > Appearance** from the shortcut menu.
- 5. Select genesys8.0.001.css from the Style Sheet list.
- 6. Click **OK** and wait while the system updates each topic.
- 7. In Windows Explorer, remove the old .css file from the project folder.

## Settings

## Applying Project Settings

Project settings are the parameters that govern how a generated Help project looks and behaves.

Project settings are configured for:

- The entire project.
- The project's default window.
- The final generated product, which can be CHM, WebHelp, or JavaHelp.

#### **Applying Project Settings**

To apply your Project Settings:

- 1. Select File > Project Settings.
- 2. On the **General** tab, fill in the following parameters:
  - **Project Title**—The title for the project. This should be the full document title, omitting the release number, not the file name.
  - **Primary Output/Layout**—Select **Microsoft HTML Help**, even if you are generating a different final output type. This option enables you to generate a CHM. It also enables you to mark topics in the TOC with red stars, which is important for the review process.

**Note:** If you plan to generate WebHelp or JavaHelp, choose those layout options later, when you actually generate the finished product.

• Index—Topics

Warning! Do not select Binary Index, unless this is the Master project for merged WebHelp.

- 3. On the **Websearch** tab, clear **Enable Websearch** (if it is selected).
- 4. Click **OK**.

#### Setting the Window Settings Parameters

Here, *window* refers to the window in which the generated Help opens. Genesys Help style does not support secondary windows or pop ups.

To set the correct window parameters:

1. On the **Project** pane, expand the **Windows** folder. It should contain a window called **NewWindow**. If a window with this name does not exist, right-click the **Windows** folder, and then select **New Window** from the shortcut menu.

Note: Certain projects use a custom window with a different name. For example, the correct window

name for the WFM Web for Supervisors Help is **WFMWebSupvs**. If your project has a custom window, do not switch to or create the **NewWindow**.

- 2. Double-click **NewWindow**.
- 3. In the **Window Properties** (HTML Help) dialog box, enter or select the following values:
  - Window Name—NewWindow.
  - **Window Caption**—Enter the document name, for example, Universal Routing Interaction Routing Designer Help. Do not include the release number.

For application-specific log events Help projects, type the application-specific name (for example, IVR Log Events Help). Do not include release number.

- Windows to Display—NewWindow.
- Buttons—Select Hide/Show, Back, Forward, and Print. Clear any other options.
- Placement—Change to: Top: 5; Left: 5; Height: 600; Width: 600.
- Tri-pane Tabs and Windows—Select TOC & Index and Search Tab. Clear all other options.
  - Default Tab—Contents
  - Tab Position—Top
- Tri-Pane Options—Select Auto-synchronize TOC and Remember Window Size and Position. Clear all other options.

Note: Do not choose Advanced Properties or make any selections in Advanced Window Properties. All Advanced Properties fields must be blank.

4. Click **OK**.

Single Source Layout—CHM

This option determines how your generated project looks. To define the correct appearance for your CHM project:

- 1. Select **Project tab** on the left pane. Expand **Single Source Layouts**.
- Right-click Microsoft HTML Help (Primary Layout) and select Properties. Set the following properties:

Property	Value
Output Folder and File Name	Delete the \!SSL!\Microsoft_HTML_Help folders from the path, so that the CHM is stored along with your source files.
	<pre>81tp_online-help\!SSL!\Microsoft_HTML_Help\ tp_online-help.chm, use D:\OnlineWriterGuide\ 81tp_online-help\tp_online-help.chm.)</pre>
Conditional Build Expressions	None
Default Topic	About_This_File.htm
Default Window	NewWindow
	Optimize CHM File Size

- 3. Click the **Advanced** button.
- 4. On the **Index** tab, select:

Property	Value
Default Window	<default></default>
Default Frame	Default (none)
Font	Default. Click the <b>Default Font</b> button if any other font is specified.

#### 5. On the **TOC Styles** tab, select:

Property	Value
Styles	<ul> <li>Border</li> <li>Lines from Root</li> <li>Plus/Minus Squares</li> <li>Always Show Selection</li> <li>Single Click to Open Books</li> <li>Raised Edge</li> </ul>
Font	Default. Click the <b>Default Font</b> button if any other font is specified.
Default Window	<default></default>
Default Frame	Default (none)
Custom Image File	None (leave empty)

6. Click **OK**, and then click **Save**.

Single Source Layout—WebHelp

This wizard determines how your project appears on the web; however, a user's browser also influences the Help file's appearance.

**Note:** The correct Single Source Layout is WebHelp, not WebHelp Pro.

This topic explains how to:

- Generate a WebHelp project
- Deliver a WebHelp project

#### **Generating a WebHelp Project**

When you are ready to generate a WebHelp project:

- 1. Select **Project** tab on the left pane. Expand **Single Source Layouts**.
- 2. Double-click WebHelp.

- 3. On the WebHelp General page, you can delete the !SSL! subfolder from the path in the Output Folder and Start Page field and save your WebHelp to a folder (named WebHelp) inside the Help project folder. You may want to change the filename of the Start Page to one that can easily be located inside the WebHelp folder, in case users need to open the WebHelp as a stand-alone file. Note: If you change the filename of the WebHelp Start Page, make sure that the developer for the product knows about it. The Publish page is used when creating a merged WebHelp file.
- 4. Click Finish.

After RoboHelp generates the WebHelp project, click **View Result** and test the TOC, Index, and Search functionality to make sure that it is working correctly.

**Note:** Our version of RoboHelp 7 does not support the Google Chrome browser. If your help project includes support for Google Chrome, contact Peter Chaplin as he has the only copy of RoboHelp 10. He can then compile your help files into the proper format for viewing on Google Chrome.

#### **Delivering WebHelp**

A WebHelp project is delivered as a zip file containing all the files that RoboHelp placed in the **WebHelp** folder when you generated the WebHelp. The filename for the zip file is the project filename, minus the release number, for example, gd\_desktop-help.zip.

To open a WebHelp project, double-click the **Start Page** file.

## Formatting

## Formatting a RoboHelp Project

All Genesys RoboHelp projects must look and act alike. Therefore, pay close attention to how you apply CSS (cascading style sheet) tags, format tables, and display graphics.

- Applying style tags
- Selecting fonts
- Formatting visible tables and invisible tables.
- Using graphics
- Applying a skin. (This is currently applicable only to WFM Web for Agents Help, which is delivered as WebHelp and includes a custom-designed skin.)

## Applying Style Tags

Use tags consistently so that all Genesys Help projects look alike and behave in the same way. The most commonly-used tags are listed below, along with their uses.

Тад	Value
Heading Tags	<ul> <li>Heading 1—Used only for the topic title. The topic title appears at the top of the topic, directly below the navigation link (if there is one).</li> <li>Headings 2 through 4—Make sure to maintain the hierarchy of headings so that users are clear about which sections belong under other, more-general headings.</li> </ul>
Body Tags	<ul><li>Body</li><li>Body2</li><li>Body3</li></ul>
Invisible Table Tags	<ul><li>BodyBold</li><li>BodyBoldCtr</li></ul>
Visible Table Tags	<ul><li>CellBody</li><li>CallBodyCtr</li></ul>
Graphics	• Graphic
Special Use Tags	<ul><li>Message</li><li>Syntax</li></ul>

#### **Creating Nested Lists**

The best practice is to use **Body/Normal** for first-level number or bullet lists and **Body2** for second-level number or bullet lists. Select the tag before selecting the number or bullet button.

If you select **Body** or **Normal** and then select the **Numbered List** button:

1. xxx

2. xxx

If you select **Body2** and then select the **Numbered List** button:

1. xxx 2. xxx

If you select **Body3** and then select the **Numbered List** button:

1. xxx 2. xxx

Selecting Fonts

The only fonts used in Genesys online Help are:

Arial

.

.

Courier New

- Do not change the size or face of any heading font. This includes names of options and commands that, in text, should have special formatting.
- Do not change the size or face of text except to apply bold, italic, or Courier New when appropriate.

## Note:

Do not use the Crystal font in Help files

Font Type	Use for:
Arial	Arial 10.5 point is the font that is specified in our CSS (cascading style sheet). Headings use varying sizes of Arial.
Arial Bold	<ul> <li>Commands that a user performs.</li> <li>Listed terms.</li> <li>Phrases such as Warning! and Note:.</li> <li>Examples:</li> <li>Click OK.</li> <li>Open—Opens a log file in plain text</li> <li>Warning! The DB Server that provides</li> </ul>
Arial Italic	<ul> <li>Book titles.</li> <li>Emphasis (but be sparing in your use of emphasis).</li> <li>Words used as words, or words that are being defined.</li> <li>Examples:</li> <li>See Framework 8.1 Deployment Guide</li> <li>Do not use bold</li> </ul>

Font Type	Use for:
	<ul> <li>Here, <i>window</i> refers to the window in which</li> <li><i>Project settings</i> are the parameters that</li> </ul>
Courier New	<pre>Never use Crystal font. Use Courier New for text that a user types, scripts, code, and for values and options. Examples: • Text that a user types • Type yes when asked •type the command line: multiserver - host <configuration host="" server=""> - port <configuration port="" server=""> - app cfg_dbserver. • save the sample file as dbserver.cfg. • Scripts or code <links> <url name="CodeCenter">http:/www.telera.com/ dev_code_center.html  <url name="CodeCenter">ctml.exe</url> </url></links> <!--#include file="StudioIncludes/<br-->MyPrivateStuff.inc"&gt; • Values and options • Create a new option called standard and set its value to network. • the true value</configuration></configuration></pre>

## Formatting Visible Tables

Help projects have two kinds of tables:

- Visible tables—in which the user sees the grid lines (see example below).
- **Invisible tables**—in which the user does not see the grid lines, for example, when you use a table simply to align text.

**Note:** Visible tables use Cell tags (CellBody, CellHeading, and so on).

To format a visible table in the Genesys style:

- 1. Select the table, right-click, and select **Table Properties**.
- 2. For **Preferred Width**, enter 100%.
- 3. Click **Cell Borders** and then select the following:

- Setting: All
- Style: Ridge
- Color: Automatic
- Width: 2 px
- ок
- 4. Click Table Borders and then select the following:
  - Setting: **Box**
  - Style: Solid
  - Color: Automatic
  - Width: **1 px**
  - **OK**
- 5. Click **Shading** and then select the following:
  - Color: (Transparent)
  - **OK**
- 6. Click **OK**.

The table should look similar to this:

Ххх	Ххх	
Ххх	Ххх	
Ххх	Ххх	Xxx

#### Formatting Invisible Tables

Help projects have two kinds of tables:

- **Invisible tables**—in which the user doesn't see the grid lines, for example, when you use a table simply to align text (see example below). Although the grid lines are invisible in the final deliverable, they appear in RoboHelp as faint lines.
- Visible tables—in which the user sees the grid lines.

Note: Invisible tables use Body/Normal tags (Body, Body2, and so forth).

To format an invisible table:

- 1. Select the table, right-click, and select **Table Properties**.
- 2. Click **Cell Borders** and then select the following:
  - Setting: None
  - Style: None
  - **OK**

- 3. Click Table Borders and then select the following:
  - Setting: None
  - Style: None
  - ок
- 4. Click **OK**.

The table should look similar to this:

Ххх	Ххх	
Ххх	Ххх	
Ххх	Ххх	Ххх

#### Using a Skin

A skin controls the appearance of a WebHelp project. Currently, the only project that uses a skin is WFM Web for Agents Help.

The skin for WFM Web for Agents Help is called WFMAgent.skn. It also requires the logo.gif file. These files should be placed in ...<project\_folder>\!SkinSubFolder!\WFMAgent.

To use the skin:

• When generating WebHelp, select **WFMAgent** from the **Select Skin** drop-down list on the first WebHelp window.

If this skin is not available for selection:

- 1. Exit the WebHelp wizard.
- 2. On the **Project** pane, right-click the **Skins** folder, and then select **Import** from the shortcut menu.
- 3. Browse to the skin in \<project\_folder>\!SkinSubFolder!\WFMAgent, and then click **Open**.
- 4. The skin opens in the **WebHelp Skin Editor** dialog box. Click **OK**. **Note:** Do not edit the skin.
- 5. Click **OK** in the **Save As** dialog box. Do not change the name or filename of the skin.

The skin is added to your project. When you next generate WebHelp, the skin is available for selection.

## Indexing

## Creating an Index

Before creating an index, review the RoboHelp project to identify the tasks and objects that should be indexed.

Index:

- Controls, commands, and key areas of the interface (File Menu, Hide and/or Disconnect, Object Browser)
- Tasks (adding, creating, editing, deleting)
- Objects and concepts (strategies, agents, accrual rules)

**Note:** If you are writing an application-specific log events Help project, you must follow special guidelines for creating the index.

#### Indexing Guidelines

- All keywords should be all lower case, except for names of specific objects or controls.
- After you create the index, sort it alphabetically.
- To identify unindexed topics, click the Index tab on the left-hand pane and the Topics tab on the right. Click the Index column header to sort the topics into indexed and unindexed topics. Unindexed topics have a white page icon rather than a blue one.

**Note:** You should not index bookmarks.

#### Manually Creating an Index

The recommended way is to create your index manually. Doing so ensures a customized and consistent index.

You may be tempted to use RoboHelp's Smart Index Wizard. If you do so, you must edit your index. The Smart Index Wizard creates many unusable entries and omits important words and phrases. **Note:** If you are writing an application-specific log events Help project, you follow special guidelines for the format of your index.

You can add entries to your index on the Index tab, or in a topic's Properties dialog box. Creating index entries on the Index tab enables you to associate multiple topics with a keyword or subkeyword at one time.

#### Creating an Index Manually from the Index Tab

To create an index manually from the **Index** tab:

- 1. Select the **Index** tab on the left-hand pane.
- Select the **Topics** tab on the right-hand pane. Click the **Index** column header to sort the list into indexed and unindexed topics. Indexed topics are listed with a blue page icon. Unindexed topics have a white icon.
- 3. Click the New Index Keyword icon, located above the Index pane, and enter a keyword in the text

box that opens.

- 4. To create a subkeyword, click the **New Index Subkeyword** icon, located above the **Index** pane, and enter a subkeyword in the text box that opens.
- 5. Drag the topics that should be associated with the selected keyword or subkeyword into the Topics for: area of the Index pane.
- 6. When you have finished adding all index entries, sort your index.

## **Adding Index Entries to a Single Topic**

To add index entries to a single topic:

- 1. Right-click anywhere in the topic WYSIWYG pane, and then select **Topic Properties** from the shortcut menu.
- 2. Select the **Index** tab.
- 3. Enter a keyword in the Index Keywords text box, and then click Add.
- To create a subkeyword, enter the keyword and the subkeyword, separated by a forward slash (Creating\index), and then click Add.
- 5. If the keyword you want to add already exists in the index, click Add Existing, select a keyword from the list in the left-hand pane of the dialog box that opens, and then click the single arrow button. To add all the keywords in the list to the topic, click the double-arrow button. When you have selected the keywords you want, click OK.
- 6. Click **OK** in the **Topic Properties** dialog box to save the new index entries.

## Sorting the Index Alphabetically

To sort the index alphabetically:

- 1. Right-click in the **Index** pane.
- 2. Select Sort.
- 3. Select either Current Level or Current Level and Below.

Note: If the Sort command is disabled, your index is already sorted.

#### Deleting Index Entries

To delete an index entry:

- 1. Select the **Index** tab on the left pane.
- 2. Select the index entry.
- If you want to delete the index entry itself: right-click and select **Delete**. This removes the index keyword from all topics that it was associated with.

To remove an index keyword from a topic:

- 1. Select the **Index** tab on the left pane.
- 2. Right-click the topic on the **Topics for:** pane, and then select **Delete**.

or

- 1. Right-click in the topic's WYSIWYG pane, and select **Topic Properties** from the shortcut menu.
- 2. Click the Index tab.
- 3. Select the keyword to be deleted in the **Index Keyword** list, and then click **Delete**.

Removing Unused Index Keywords

Unused index keywords are keywords no longer associated with any topic; they appear in bold on the **Index** pane.

- If an unindexed keyword should remain in the index, select it, and then drag at least one topic into the **Topics for:** section of the **Index** pane.
- To remove unused index keywords, click the Index tab, and then select Remove Unused Index Keywords from the Tools menu.

#### Updating Topic Names in the Index

If your index keywords are stored in the index (.HHK) file rather than with the topics, and you change a topic name, the old name continues to appear when a user selects an index keyword. The topic title must be updated manually for each keyword and subkeyword.

To update a topic name in the index:

- Open the Index tab of the topic's Properties dialog box to see a list of the keywords and subkeywords associated with the topic. To do so, right-click the topic text and select Topic Properties... from the shortcut menu that appears.
- 2. Click the Index tab on the left-hand pane of the RoboHelp window.
- 3. Select an index keyword that is associated with the topic that has the changed title.
- 4. A list of topics associated with the keyword appears on the lower section of the **Index** pane.
- 5. Right-click the old topic name and select **Rename** from the shortcut menu.
- 6. Type in the new topic name.
- 7. Continue this process until all occurrences of the old topic name have been updated.

**Note:** You must select both keywords and their subkeywords separately, and update the topic title for each.

## Organizing

## Organizing a RoboHelp Project

Importing the Updated RoboHelp Templates

The updated RoboHelp templates are found in the following Alfresco location: https://alfresco.genesys.com/share/page/site/technical-publications/ documentlibrary#filter=path%7C%2FTemplates%2FRoboHelp%2F8.0%2520Templates%2FNewSource%7C&page=

To import the updated RoboHelp Templates:

- 1. Copy the updated template files to a clean folder.
- 2. Click your project's .xpj file.
- 3. Click File > Import >HTML File. The Import File dialog box opens.
- 4. Select the HTML file.
- 5. Click **Open**.

Using the TOC as an Outline

Use RoboHelp's TOC to outline your information.

You can begin your outline either by creating books and then adding topics beneath them or by creating topics and then combining them into books.

- 1. Select the **TOC** tab on the left pane.
- 2. Select the **Book** icon or the **Topic** icon.
  - If you select the **Book** icon, the **New TOC Book** dialog box appears:
  - a. Enter a title in the **Title** field.
  - b. Select **Book with Link**.
  - c. On the **Book Destination** pane, scroll down the list of topics to select the Overview topic for the book you are creating. If the topic does not yet exist, you can add the link later by right-clicking the book and selecting **Properties** from the shortcut menu.
  - d. Click OK.
  - If you select the **Topic** icon, the **New Topic** dialog box appears:
  - a. Select the General tab.
  - b. Enter a title in the **Topic Title** field. The phrase you enter becomes the topic heading and is automatically entered in the **File Name** field.
  - c. Modify the File Name field if necessary. See Naming HTM Files.
  - d. Click **OK**.

To rearrange the order of books and/or topics:

• Click and drag the item to a new location within the TOC, or select the item and then select a directional

arrow.

#### Versioning

Versioning is very important, so make sure that the version of your help file is correct.

You update the help file version in the Overview.html topic file.

In versioning, the first three digits stay the same as the software release number and the last two digits are up-versioned to reflect the current draft. Occasionally, the versioning will not follow this standard model as some project teams are versioning their software to the fourth digit. For example, if the General release number is 8.5.21x, the first draft version number will be 8.5.210.01. This fourth digit version numbering means that the final help version number is 8.5.211.00 as the developer wants to keep the 8.5.21x stream going.

Working With Topics and Files

It is important that you name topics and HTML files consistently and that you update a topic's properties when you change the topic's heading.

Inconsistently named topics and files can create confusion for you, the writer, as well as for anyone who has to work with your Help project. Inconsistently named topics and files can also corrupt the Help project.

Use the project file name (the name of the .xpj file) and add the topic name. You should match the topic title with the file name. For example, the topic title could be *Working With Topics and Files* and the the file name could be *Working\_With\_Topics\_and\_File.htm*. When the heading is changed, look into renaming the file name to match the heading.

**Warning!** If you are creating context-sensitive Help, you must never change a file name without first consulting the developer responsible for maintaining the context-sensitive Help.

## **Naming Topics**

The *topic* is the basic unit of your Help project.

The **topic heading**, tagged with a Heading1 paragraph style, appears at the top of the topic page—just below the navigation line if your project contains books.

For topic headings and titles, adhere to the following:

- The topic heading and the topic title in the TOC must be identical.
- If your project contains books, the first topic in each book (whether it is a main book or a lower-level book) must be an overview topic. This topic provides an overview of the topics that follow, and its heading should start with the word Overview, followed by a colon. For example, "Overview: Planning the TOC."
- The topic (and book) headings must be distinctive so that readers understand a section's subject matter without having to expand the section or to examine individual topics to find out what information they contain.
- The topic headings must closely correspond to the phrasing in links embedded on other pages. When

readers click a link to another topic, it should be immediately clear to them that they have reached a page that discusses the subject they want.

- Keep topic headings and HTML file names consistent.
- HTM and HTML files are used interchangeably.

## **Changing Topic Headings**

It is important that the topic heading, the title in the TOC, and the HTML file have the same name so that the Help project's organization is obvious—to you, the writer, and to anyone else who works with the Help project.

Whenever you change a topic heading:

- Update the topic's properties to reflect the new name.
- Change the topic's title in the TOC to match the new heading.

To change a topic name:

- 1. Right-click in the topic.
- 2. Select Topic Properties.
- 3. Update the **Topic Title** and **File Name** fields.
- 4. Change the topic name in the TOC.
- 5. If you have index keywords that are assigned to the index file (the .hhk file), instead of to the topic, the topic name must be changed manually on the Index pane for each keyword with which the topic is associated.

**Note:** Renaming topics and .html files affects all links that are based on those topics and file names; but RoboHelp usually transfers the link to the new name.

#### **Naming HTML Files**

Each topic in a Help Project is a separate .html file.

RoboHelp HTML automatically names a topic's .html file the first time you type the topic's heading into the Topic Title field in the New Topic dialog box (but you can manually change the .html file name if you need to).

The following naming tips are important to keep in mind:

- Consistently name .html files, topic titles, and topic headings so that the Help project's organization is obvious—to you, the writer, and to anyone else who works with the Help project. Try to start the file name with the same word that begins the topic heading, so that it is easy to match the two.
- Keep file names as short as possible while still being clear.
- Update an .html file name when you change a topic's heading.

Warning! If you are creating context-sensitive Help, you must never change a filename without first

consulting the developer responsible for maintaining the context-sensitive Help.

To update an .html file name:

- 1. Right-click in the topic's WYSIWYG view.
- 2. Select **Topic Properties > General**.
- 3. Type the new file name into the **File Name** field (this new name should reflect the name in the **Topic Title** field).

**Note:** Renaming HTML files affects all items in your Help project that are based on those file names, but RoboHelp usually transfers the link to the new name.

#### **Removing a Topic from a Projec**

Deleting a topic from the TOC does not remove it from the project.

To remove a topic from the project:

- 1. Click **View > Pods**. (Pods is a term used since Robohelp 7 and they are workflow panes that you can float or dock anywhere in the application window.)
- 2. Open the **Topic List** window.
- 3. Right-click the topic to be deleted and then select **Delete**.
- 4. Click **Yes** in the confirmation dialog box that opens.

**Warning!** If you remove a topic by deleting it from the project folder using Windows Explorer instead of deleting it from the **Topics List** window, you will break all links in the topic.

Creating Context-Sensitive Help (for older Windows-style help files)

**Note:** This topic is only for a limited number of help projects.

A context-sensitive help file is one in which each application window or dialog box is linked to the corresponding Help topic. Some help projects use Map ID files and some help projects use the interface XML files that are updated with the links to the appropriate files. As a result, there are certain constraints to keep in mind when creating a context-sensitive Help project:

- All information about a window should appear in the associated topic for Map ID files. In the case of a complex window, this may make for a very long topic. It is important to provide users with ample links from the top of the topic to the information located further down. You may link to additional pages, as long as you provide clear links to the information from the topic that initially opens from the application window. This works best for self-contained information that is necessary only for a specific task and that is not generally useful. For interface XML files, provide the links to the associated topics that cover that window as necessary.
- If you are creating context-sensitive Help, you must never change a filename without first consulting the developer responsible for maintaining the context-sensitive Help. Topics are linked to application windows and dialog boxes using filenames. If you change a filename, it will not match the developer's script. Not to mention that the topic will not open. Context-sensitive CHMs are linked to the application

using Map IDs rather than filenames. However, it is still good practice when working with any contextsensitive Help project not to change filenames.

- It is your responsibility to identify new windows and dialog boxes and create the new topics for them. It is best to work closely with the developer during this process, to make sure you are not missing any new sections of the GUI. It is possible for new dialog boxes to be added at any point during the software development process.
- You must provide the developer with a list of the new windows and dialog boxes and the corresponding topics, including the filenames or the Map IDs. Again, you should work closely with the developer to make sure that your schedule fits with the software development schedule. You can provide topic names and filenames early in the writing process (before you create the content), as long as you don't change the filenames after you do so. **Note:** The Help file should be signed off and tested/approved by the final freeze.
- To create a Map ID list, or update one, select **Map IDs** from the **Edit** menu.
- To create a printable list of Map IDs, select **Reports > Map IDs** from the **Tools** menu.

## Localizing

## Localization Guidelines for Product Documentation

Localization costs can be enormous when localizing Help files. In an effort to limit the cost, we need to develop our Help files accordingly.

Keep in mind the following guidelines/instructions:

- **Graphics:** If you are creating a Help file for a new product, limit the number of graphics. Graphics should not contain labels, callouts, or added text. Screen captures should be used to illustrate only specific controls and screen areas. Assume that the user has the interface in front of them when using the Help file, so it is not necessary to show them everything.
- Version Numbers: Limit the use of version numbers in your topics, if possible, to reduce the need to update those topics for later releases and localization costs.
- **Minor Mistakes:** If you discover a typographical error or a consistency issue (for example, a naming convention or the like), but no other content needs to change in a particular topic, do not change it.
- "Change Bars" Delta in Help Files for new releases of existing products: After your Help file has been tested by the Tech Pubs Tester, you've incorporated any required changes, and have sent it back for Approval, save a copy of the files with the change bars (highlighting and red asterisks) in another location and label it for localization. When Tech Pubs Production requests a zip of the Help file for localization, generate a "Marked Up" CHM from this file. Provide a zip file to Tech Pubs Production that contains the clean source files of the final approved Help project, a copy of the final CHM, and the "Marked Up" CHM. That will reduce localization costs.
- Minor releases: Evaluate the impact of a small enhancement if it has a minor impact on the customer, do not update the Help file but mention it in the general and localized release notes.

#### Notes:

- To find out if your Help file will be localized, check the approved Packaging Specifications document.
- If you are updating an existing Help, inform the Tech Pubs Tester that testing should be limited to topics that were changed or added since the last release.

# Readme Review Process (includes Product Alerts)

This covers Readmes and Product Alerts for docs.genesys.com. As of November 2021, it's uncertain whether such is needed for all.docs.genesys.com content.

## Online Readme

## Creating an Online Readme Detailed Instructions

See Managing Online Readmes

## HTM (PDF) CD Readme

## Important

As of 2020, this process is no longer used.

#### Notes:

- This process is for the "old style" HTML (PDF) CD Readme. This Readme format is being phased out and replaced by the Online Readme which is made available to the customer on docs.genesys.com.
- Writers create the draft CD Readmes, and deliver them to the Production Editors. The Production Editors are responsible for creating the final version of the Readme and publishing the Approval freeze form that indicates that the Readme is ready to be included on the software CD.
- The CD Readme is not the same as the IP Readme, which is created by Production. The IP Readme appears in same folder along with the installation files for each platform/component. The HTML CD Readme (prepared by Tech Pubs)appears in the documentation folder at the top level of the software folder structure. If you get an inquiry/complaint referring to a link to an RN from a Readme, it refers to the IP Readme. The HTML CD Readme contains a link to the Release Advisory (RA), but not to any Release Note (RN).
- If the Readme is for a Restricted or Pre-release, follow the steps in Readme for a Restricted or a Prerelease CD

#### Suggestions:

- Try to get your HTML Readmes done as soon as possible (ideally, a couple weeks before the release if not sooner). Requests for a same day turn-around or even the next day may not always be possible.
- For new product, a graphic for the Readme needs to be created. So, a little more time is needed, especially if there are any issues with it.

Procedure for creating a Readme:

- If this is for a new major release, a Dummy PDF version of the Readme will be required. Notify the Production Editors via email that you need an Alfresco URL for a new Readme file. Include the product name, version number, and TR date in your email. The Production Editor will post a dummy Readme to Alfresco and provide you with the URL (Note: You will need this URL for your Release Notes and Release Advisory). If this is a maintenance release, the URL will remain the same as the previous release, and a dummy Readme is not required.
- 2. The Product Manager requests the Readme and supplies the content, including third party information.
- 3. Create a draft Readme. See Creating a Readme Detailed Instructions.
- 4. Post the draft Readme on the Tech Pubs Review site. Place the Readme file in the correct folder. For example: Tech Pubs Review > Product > Version (8.x.x). Send the link to the Readme file to the PCT.
- 5. The PCT—or whichever members of the PCT the Product Manager identifies as reviewers—reviews the draft Readme. The Product Manager, Development, and QA should sign off on the content.
- 6. After the PCT signs off on the content, ask a fellow writer to provide a peer edit and format review on the Readme file.
- 7. Notify the Production Editor that a Readme file is ready. Send a link to the Readme file to the Production Editor. Include the needed-by date, TR date, and DR4 dates in your email to the Production Editors. The Production Editor reviews the Readme, updates the graphic (if necessary), and creates the Approval Freeze form. The Production Editor also creates a PDF of the Readme, and replaces the dummy file with the approved PDF in Genesys Public on Alfresco when the product is released. For the short-term, documents will be double-posted to the Knowledge Base, so the Production Editor will also copy the approved file to Current\_ReadMes on galaxy.
- 8. Subscribe to the Readme freeze form, if you have not done so already, so that you will automatically receive an e-mail when the Readme is frozen. Then, you can forward it on to your team.

Note: There are also localized Readmes, but they are created by Tech Pubs Production.

## Creating a Readme Detailed Instructions

## Creating a Readme: Detailed Instructions

Use the following steps for reference when you are creating a new Readme file.

- 1. Copy an existing Readme or the Readme template:
  - For existing products, copy the existing Readme from either:
    - The Production CD image in \\Galaxy\production\GA\_Master\_CD\_Images\ <release\_number>\ English\_US\

Current\<product\_name>\<version\_number>\<disc\_version\_ENU>\documentation\
read\_me.htm.

- The freeze location \\galaxy\tdoc\_final\DOC\_Review\ Software\_Readme\_xx > (look in the folder for your version and product).
- The Genesys Public site on Alfresco (Documents/<Product>/<Version>/)

**Important:** Use the latest published version of the Readme.

• For new products, copy the Readme template from \\galaxy\tdoc\8.0\_Templates (for example)\ HTML\_Templates\ Readme\_template

**Warning:** Do not use Word to update your Readmes. Saving a Word file as an html adds coding. Please use whatever tool you use for creating RNs so that the coding is clean, as per the Readme template.

- 2. Update the content. Do not use Word. Use whatever tool you use for creating RNs.
  - a. For a new release, update the **About This Software** section. In most cases, this won't change for minor releases.
  - b. Enter the appropriate content under the New Features in #.#.x section. If this is an update to an existing release (8.0.1, for example), the new features should be added at the top of the New Features section, above the existing set. Do not delete the new features listed for earlier releases. You can use dividers and/or bolding of the new version number o further identify the division from other releases. Be sure it looks clean.
    Note: This is a high-level list, meant as a teaser. It should not go into technical details. The more detailed information belongs in the Deployment Guide, and perhaps the Release Note.
  - c. If this is a new release, change the release number to the new one throughout (from 8.1 to 8.5, for example).
  - d. Update the **Directories** section to match those directories specified in the Packaging Specification. **Note:** In very rare cases, customer documentation may be placed on the General (PA) Product CD so only customers who buy the product can see it. In this case, after the last line of the documentation directory add: "It also includes the following documentation:" Then, create a bullet list identifying those documents. The Packaging Specification should list those that go on the Product CD. (Be aware that before the Readme can be frozen as approved, approved versions of those document must be frozen.)
  - e. If necessary, change the copyright date at the beginning of the Legal Notices section.
  - f. Update the filename, date, and version number at the bottom of the Readme. Draft Readme's should start at version 0.01. The first approved Readme will be 1.00, and so on.
  - g. Update the Documentation section. To do so:
    - Check that the only links in the **Documentation** section go to the top level of the Customer Care (http://genesys.com/customer-care) web site and the documentation wiki (http://docs.genesys.com).
    - ii. Update the link to the RA in the Readme to link to the URL for the new RA. Link to the RA on Alfresco, not the Knowledge Base.
       Note: There are cases where a Product does not have an RA (for example, an OEM product). The Packaging Spec should specify whether one is required. If an RA isn't needed, that line of text should be removed.
    - iii. Look in Genesys Public on Alfresco to see whether there is a dummy (or real) Release Advisory set up for this product. If not, create one. Follow the filename format from the prior release to get the correct file name.
  - h. Under the Customer Care, Contact section, confirm that the versions path is just <a href="versions.html"> at the end of second paragraph.

**Note:** Genesys Production creates that version file and places it on the CD when they create the CD image.

i. For the **Third-Party** section: As you develop the Readme, check with your PCT to see whether additions need to be made to that section as this section has been expanded for a number of products.

To add component-specific third-party disclaimers, copy them between the **Third-Party Software** section's intro lines and the Oracle acknowledgement, which is in all Readmes by fiat from Legal. **Notes:** 

- Make sure that the intro line says: "Genesys follows applicable third-party redistribution policies to the extent that Genesys solutions utilize third-party functionality. Please contact your Customer Care representative if you have any questions."
- If there are a lot of high-profile disclaimers (that is, the team seems very stressed about them), add a link to that section from the **About This Software** section.
- j. Post the draft Readme on the Tech Pubs Review Alfresco site under the correct product and version. Send the link to the Readme file to the PCT.
   Note: When sending a Readme out for review, request that they review the entire Readme, including software description, directories, and third-party, and not just the New Features section. If a mistake is found after the Readme is frozen as approved and the CD request is made, Tech Pubs Production will have to freeze another version of the Readme after it's been updated. Then, another CD request will have to be made so that Genesys Production can pick up the changed file. So, this adds more time to this process all around.
- 3. Notify the Production Editor that a Readme file is ready. Send a link to the Readme file to the Pubs Editors alias. Include the following information in the request:
  - The needed-by date, when the team would like the Readme approved ideally. That will help prioritize this task. And if the writer gives a heads up a couple days before they send it, the task can be calendared.
  - The TR and DR3/4 dates (the old Gate 3 date). For 7.6 and higher Readmes, the Production Editor creates a Readme PDF and posts it to Genesys Public on Alfresco (and the Knowledge Base for the short-term) when the PA passes. Since RNs associated with the Readme PDF must include a link to that Readme PDF, knowing the release date will help.
  - If you suspect that the team might want to tweak the Readme but the team still wants a CD image to test, Tech Pubs Production can freeze the Readme as "For Testing".

**Note:** Once the text is approved by the team, Tech Pubs Production will still have to freeze it as approved and a new CD request made by you team before it's ready for release.

- 4. Subscribe to the Readme freeze form, if you have not done so already, so that you will automatically receive an e-mail when the Readme is frozen. Then, you can forward it on to your team.
- 5. The Production Editor performs the final steps, creates the Approval Freeze form. When you receive the e-mail notification, you can forward it on to anyone on your team that needs to know that the Readme is ready.

## Readme for a Restricted or a Pre-release CD

In addition to the instructions above, there are some unique requirements for Readme for a Restricted or Pre-release CD.

- 1. Add as the first line in the **About This Software** section:
  - For a restricted release: "This is a Restricted release of this product."

- For a pre-release: "This is a Pre-release of this product."
- 2. In the **Documentation** section, you may need to remove all references to documentation being on the web site, including the sentence with the link to the RA. Exactly how you handle this section depends on whether there is a set of special restricted or pre-release documentation. If so, it is probably going to go on the software CD, so indicate that here. If not, you can leave in the references to the web site. (For example, you could revise the text to: Release notes are available in the installation package. Other documents are included in the documentation folder on the Product CD.)
- 3. If the documentation will be on the CD, edit the description of the documentation directory in the Directories on this CD section to list the manuals, help files, log events, RA, that are included. RNs are not included because they are sent to Genesys Production for inclusion in the IP. (For example if you are including one document, the documentation directory text take might be: "Contains the ReadMe file, the graphics for the ReadMe, the versions.html file, and the <Product Name doc>. If you are including more than one document, you could use add a sentence after the standard sentence: "It also includes the following:" and then add a bullet list identifying the document titles.) Before the Readme can be frozen as Approved, Pub Editors must have copies of the approved restricted or pre-release documentation for the restricted release or pre-release so they can be placed in the documentation folder in which the Readme is located.
- 4. When you send a request for freezing Restricted or Pre-release ReadMe, please indicate the release type, because the Readme graphic will also need to indicate that.

#### Notes:

- When the Readme is frozen as approved, Genesys Production picks up all documents from the documentation folder located along the path identified in the freeze form.
- If any of the documents included in that documentation folder need to be updated prior to the release, a new version of the Readme will need to be frozen, even if the text of the Readme doesn't change. As a further consequence, a new CD request must be made to create a new CD image.

# Online (wiki) Content Review Process

## Important

- This article applies to docs.genesys.com, not all.docs.genesys.com. As most new content is 2021 is developed on all.docs.genesys.com, the information in here is retained for a reference.
- See also DocOps and Doc Development Project Core Team (PCT) Responsibilities.

The process for review of online content depends on the type of updates being made to your document:

- Major updates
- Minor updates
- Typographical or format corrections

#### Wiki PDFs Note

We recommend that writers test out the PDF generation from the wiki source early into the writing process and keep testing it regularly. Writers might run into problems with the PDF generation that could be caused by something as simple as forgetting to close a tag, or something more major, such as a category problem or experimentation with different layout schemes.

## Major Updates or Next Release

A major update is any work that requires significant changes to your document, such as a maintenance release, a major release, or any release that involves changing the component's second- or third-digit version—for example, a change from version 8.1.1 to 8.1.2, or from 8.1.x to 8.5. See Next Release.

When working on major updates, follow this procedure:

- 1. Create a draft version of your document.
- 2. Update/move your existing document to a draft version.
- 3. Update the content in the draft version of the document.
- 4. When the wiki pages are ready for review, send the page URLs to your reviewers. Request feedback by considering the following options:

- Using email
- Adding comments to the page
- Using a comment-enabled PDF that is generated from your wiki draft document

**Note:** For unreleased (draft) versions, make sure you grant access to your draft content.

- 5. Incorporate reviewers' comments. Several review cycles may be required.
- 6. Obtain Development and QA approvals either by email, or by having the approvers indicate their approval in the freeze form: QA and Dev indicate a status of "PASS" on the Technical Sign Off freeze form ("Approved" and "Editorial Check/HTML" are statuses indicated by the Tech Pubs editor). If approvals are received by email, add "PASS" in the freeze form, annotating the approval accordingly.
- You might want to generate a Change History page for changes made to your document since the previous release. Follow steps here. Examples:
  - http://docs.genesys.com/Documentation/IW/latest/Dep/ChangeHistory
  - http://docs.genesys.com/Documentation/IW/latest/Dep/NewInInteractionWorkspace8.5.101.00
- 8. Send a peer review request to the Tech Pubs team.
- 9. Make the updated content publicly available when the Software Delivery announcement for your product is sent out.
- 10. Inform Pubs Editors about the published content. Send the link to the Product Welcome page or links to particular pages depending on the percentage of content updated.

## Minor Updates

If you need to make small updates to your already released content—for example, to add new steps or correct existing steps in a procedure, to add or correct an option description, or to insert a new "page" to your existing document, follow the procedure below.

- 1. Create a draft version of your document. **Note:** If the link does not open, copy and paste it in the browser where you logged in to Ponydocs.
- 2. Update your existing document to a draft version.
- 3. Update the content as needed.
- 4. When the wiki page is ready for review, send the page URL to your reviewers. Request feedback by considering the following options:
  - Using email
  - Adding comments to the page
  - Using a comment-enabled PDF that is generated from your wiki draft document

**Note:** For unreleased (draft) versions, make sure you grant access to your draft content.

- 5. Incorporate reviewers' comments.
- 6. Obtain Development and QA approvals either by email or, if a freeze form is used for this update, in the freeze form.

- 7. Send a peer review request to the Tech Pubs team.
- 8. Make the updated content publicly available.

## Corrections of Non-Technical Items

To fix a typographical error or make a minor improvement to already released content, just do so directly on your page.

**Examples** of minor improvements include any format- or style-related fixes, graphic updates/ replacement, or anything that does not change technical meaning or does not require review or approval of your PCT members.

# Glossary Updates

Any writer can add new terms or update existing terms in the Glossary. Before you add a new term, confirm that the term doesn't already exist. If it does, and your definition differs from the current term, add a second definition and indicate that it's specific to your product.

**Note:** The Glossary Update Request email is now primarily meant for customers and others in Genesys who want terms added to our Customer Documentation Glossary.

## To Add a New Term

- 1. Open an existing page for a term.
- In the URL, replace the existing term/phrase with the glossary item for which you want to add a definition. For example, the URL for the Automatic Number Identification is https://docs.genesys.com/ Glossary:Automatic\_Number\_Identification. You would replace "Automatic\_Number\_Identification" with the term you want to add
- 3. After you revised the URL, press your Enter key to open the page.
- 4. On that page, click Create.
- 5. If needed, click Edit button add the definition.
  - Add cross references to other terms if they are used in the description. If there is an acronym for the term, add that as well as a new term pointing to this page.
- 6. Add the following as the last line on the new page:

<noinclude>{{glossary footer}}</noinclude>

1. Click Save.

Note: When you add a new term, it is available immediately, but it does not immediately appear in the main list of terms on the main Glossary page. It does appear in the Recently Added list on the left.

## Next step

Now that you've added a term to the Glossary, the next step is to add a link to the Glossary term in your documentation. See Glossary Links.

# Wikicicle Usage

The wikicicle is a static snapshot of the live Genesys Documentation website that uses a Server2Go application in order to provide access to a copy of publicly available content taken from the Genesys Documentation website. Because it is static, it might not contain the most up-to-date information about your product. As such, the Wikicicle should rarely be used.

The wikicicle, officially called the Genesys Documentation Wikicicle, is a packaged .rar file that contains the snapshot pages as well as a deployment procedure for installing it.

It is delivered to customers on the product DVD. If it is required, Genesys Documentation Wikicicle item needs to be added to the CD\_DVD tab, as described in the Writer's Process tab of Packaging Spec Review/Approval process.

FYI: Server2Go is a pre-configured, portable WAMP that allows you to temporarily create a local web server with all applications required to view a local MediaWiki instance. For more information, including license and configuration details, please visit the Server2Go and WampServer websites.

## Wikicicle Warnings

Because it's a static snapshot of our Genesys Documentation site, the Wikicicle should be considered a very last resort for Online Help delivery because it negates the advantage of wiki-based documents. If your Product Manager insists on delivering a wikicicle be aware of the following:

- Your team must decide whether you will be delivering such at the beginning of the release.
- The wikicicle needs to be delivered on the product media. As such, it needs to be a DVD instead of a CD because the Wikicicle is around 1 GB. The wikicicle is not available as a separate downloadable item or DVD. It also can not be downloaded from docs.genesys.com. (Note: Another option is to make the .rar file available to the specific product customers via FTP. However, the Product Manager would have to determine how to make that available to the product customers.)
- Instructions for installing the wikicicle are in a deployment procedure delivered with the Wikicicle on the product DVD.
- It can take some time to generate the wikicicle (days).
- Since the wikicicle has to be added to the product DVD, you will must have the Online Help done at least a week before the release date to create the wikicicle. (Because you need to deliver your documents early, you lose the time up until the release date when you could have continued revising your documents and that you would have had if you did not need to deliver a wikicicle.)
- If you have links to another online document from the online Help, both documents need to be ready and released or the links won't work when the wikicicle is generated. This creates a Catch-22, if the wikicicle needs to be placed on the product DVD prior to the release.

## Process

1. Request that your Project Manager add Genesys Documentation Wikicicle as an item to the Packaging Spec. See the Writer's Process tab of Packaging Spec Review/Approval process. For the wikicicle version

specified in the Packaging Spec, check with Pubs Editors. For a General release, the other values for that row should be Y, Y, General, Wikicicle.

- 2. At least a month before the end of your project, send an email to Valentina Petrov, and copy Pubs Editors alerting them to the need for it to coordinate its creation in relationship to your product release date.
- 3. Request that your Project Manager opens a JIRA ticket to track the wikicicle creation process. Here is an example: PUBSWIKI-1710.
- 4. Prior to the wikicicle creation, your documentation content must be approved if you want the latest version of your content on the wikicicle. Communicate with your QA team, so they accommodate wikicicle testing in their schedule.

**Note:** Be sure to run the Validation tool against your content to ensure that all your coding is correct (for example, that the links on a Welcome page do not use the old/no-longer-supported format). The wikicicle exposes old coding formats that will need to be corrected before the wikicicle can be frozen, thus adding overhead for you and Val.

5. Valentina creates the wikicicle and sends a Box link to it to the writer. The writer and corresponding QA team may need to test the wikicicle to confirm your content is there. (If necessary, Val can make some corrections based on the testing feedback.)

**Important:** See the **Wikicicle\_Readme.htm** for the wikicicle creation instructions located in the Box: https://genesys.app.box.com/folder/45073304952

- 6. Valentina generates freeze form in XING for the wikicicle and informs the writer of such. (Ideally, the writer should subscribe to the form if his or her product requires the wikicicle at each release.)
- 7. The writer lets the Project Manager know it's been created and available.
- 8. When ready, the Project Manager sends a request to create the product DVD.
- 9. When Genesys Production creates the product DVD, they pick up the wikicicle from the location indicated in the freeze form.

**Note:** If the documentation isn't approved prior to the release, the Product Manager will have to determine how to provide the wikicicle to customers post release.

# Release Note Process

Release notes are the most efficient means of communicating product changes and known issues to customers and Genesys field personnel (like Sales Engineers and Professional Services). They also serve as an ongoing means of sharing product information with customers.

The purpose of this section is to describe a process for defining the content of Genesys software release notes and the process for approving the content so that the level of information provided is consistent across all products.

## Important

- Information about the Genesys Engage cloud release note process is available here.
- For instructions on how to create a Release Note for Genesys Engage cloud Private Edition, see NextGen RN (MVP) Instructions for Writers. As of 10/27/21, those instructions are not yet in IX Writer's Guide.

## Applicability

This process applies to the following kinds of release notes, and release types:

- General (PA)
- Update
- Hot Fix (or Patch)
- Deployment Procedure
- Restricted
- Localized Release Notes (HTML format)
- Language Pack Release Notes (HTML format)
- Pre-Release

A separate topic will cover: Release Advisories/Product Alerts and Wizard Advisories.

Note: As of 2009, Technical Publications no longer create beta release notes.
# **RN** Quick Reference

# Important

To determine if an RN Freeze Form is required, check the RN Freeze Forms FAQs section on the v9.0 Packaging Spec tab located here.

Release Type	RN Type	RN Date	Approved By	Posted on docs.genes website	Generate RN sys <b>Exere</b> ze Form	Writer Sends to Production Builds	On Doc Library DVD
Online format: General (PA), including under shipping control	Cumulative	Date of Internal PA Announceme from PjM	Dev/QA	Yes	See note above	No	No
HTML format: General (PA), including under shipping control	Cumulative	Date of Internal PA Announceme from PjM	ent ent	Yes	See note above	No	Yes
Online format: Update	Cumulative	IP test pass date	Dev/QA	Yes	See note above	No	No
HTML format: Update	Cumulative	IP test pass date	Dev/QA	Yes	See note above	No	Yes
Online format: Hot Fix	Cumulative	IP test pass date	Dev/QA	Yes	See note above	No	No
HTML format: Hot Fix	Cumulative	IP test pass date	Dev/QA	Yes	See note above	No	Yes
Restricted	Restricted	Date of release	Dev/QA	No	No	Yes	No
Pre- release	Pre- release	Date of release (or date of software readiness if the PjM is insistent)	Program Managemen	<sub>t</sub> No	No	Yes	No

Release Type	RN Type	RN Date	Approved By	Posted on docs.genes website	Generate RN sys <b>.Foere</b> ze Form	Writer Sends to Production Builds	On Doc Library DVD
Online format: Language Pack Translation Support page	Language Pack	PA or IP test date	Dev/QA	Yes	See note above	No	No
HTML format: Language Pack	Language Pack	PA or IP test date	Dev/QA	Yes	See note above	No	Yes
Localized (rarely needed)	Localized	PA date	Dev/QA	Yes	Yes	No	No

## **Component Description Requests**

## Important

As of 2021, requests for Component descriptions are rare if nonexistent.

A member of Production Builds (currently Svetlana Kuldiner) initiates JIRA tickets requesting short descriptions of components for inclusion in the IP Readme (not to be confused with the CD Readme). The tickets are assigned to a member of Pubs Editors (currently Kate), who contacts the writer and requests the needed information. The description should be brief, ranging from one to four sentences. When the description is finalized, the Pubs Editors member enters the information into the JIRA ticket and reassigns it to the member of Production Builds.

If your team determines that the text in an existing IP Readme needs to be revised, the Project Manager should contact Genesys Production (Igor Klyashchitskiy, Diana Shimberg) with that request.

# Tip

The short description for Language Packs (LPs) is always the same. If the product/ component has no associated translated Help, adjust the language accordingly.

• Example 1 (with Help):

<PRODUCT/COMPONENT NAME> Language Pack(s) allow installers to select the language in which the user interface (UI) and online help files display.

• Example 2 (without Help):

<PRODUCT/COMPONENT NAME> Language Pack(s) allow installers to select the language in which the user interface (UI) is displayed.

## Terms or Acronyms

Here are the Terms and Acronyms associated with this process.

Term or Acronym	Meaning
CD Refresh or CD Update	Upgrade of the Software CD. This release type usually does not include documentation, but it does include release notes.
Continuous Delivery (CD)	A set of processes, tools and techniques for the rapid, reliable and continuous development and delivery of software. Feature development is done using iterations, identified as Iteration 1, Iteration 2, Iteration 3, and so on, and can be handled by multiple teams. See Continuous Delivery for more information.
Hot Fix Release	Intermediate Hot-Fix Releases issued to correct specific problems experienced by the customer.
Maintenance Release	Scheduled releases that include updated software and documentation. (Note: Strictly speaking this release is officially called Maintenance Release with New Development. However, most people usually abbreviate this release as a Maintenance Release. Per Product Management though, "Maintenance Release" (without new development) does not include documentation updates.)
Patch Request	Patch releases correct specific problems experienced by the customer. These releases are scheduled based on the Genesys Engineering Daily Process for Critical Defect Resolution. The freeze type for a patch release can be either Hot Fix or Restricted.
Planned Date	The Planned date (specified by QA) is the deadline for the release note to be completed. This is the date Customer Care has committed to the customer. Note: With the move from Siebel to JIRA, this term may no longer officially be used. Check with your QA team to determine the planned date for a hot fix release.
Pre-release	The process for an early release of code. A pre- release requires a pre-release note, and it may

Term or Acronym	Meaning
	require documentation. Note: There is a separate pre-release process.
PA Release	A product availability release. The product has completed all required Engineering, Quality Assurance, and Documentation activities and has met the criteria corresponding to its Engineering TR-DR4/Delivery milestone.
PA Release with PM Control	A product availability release of the product but the Product Manager controls what customers can receive it. The Release notes associated with products/components with this control include this "Under Shipping Control" for the version to which it applies.
Release Note	Primary means of notifying customers of incremental changes to software. In this process document, it is a generic term that also includes Release Advisories and Wizard Advisories.
Restricted Release	A product release in which revenue can be realized for a product where complete Field Readiness is not achieved and thus some form of control is put in place.
Technical Documentation	Information written by Technical Publications staff to support Genesys software. This documentation may be in the form of reference or procedural material, or it may be more informal information included in release notes for Genesys software components.
Technical Review (TR)	For Technical Writers, this is the milestone/date that all customer documentation must be signed- off and approved, including release notes when a project is following the Waterfall release model. Writers create the Documentation Schedule for projects to meet this date.
Update	Update is an intermediary release following a PA release (known as the base release) that uses a simplified release process. The release is available only through the download system and might be limited to a sub-set of supported operating systems. Updates cannot contain restricted content. If Product is currently listed as Restricted (RA), it must be moved to PA prior to initiating the Update process.
Waterfall	This release model is typically for older projects with lower priority. A release cycle can last from 3-6 months depending on the priority of the project. In contrast, the cycle for a project following a Continuous Delivery model can range from 2 weeks to 2 months.
XING	An interface for Development, QA, and Production support for tracking component freezes, installation package requests and reports, test reports, and CD

Term or Acronym	Meaning			
	requests/reports. Documentation is frozen using this interface (XING Freeze Forms).			

# Uploading files to the Production Server via the Repository Utilities tool

Our IX Developers created the Repository Utilities tool for the relatively small group of Genesys Multicloud writers who are still updating HTML release notes, and for those writers who are posting non-wiki documents for their products.

Access for this tool is located on docs.genesys.com under **Helpful links for writers/MediaWiki tools/Special pages/Other special pages/Utils to upload and manage repository files** or on all.docs.genesys.com. Once you have accessed the tool, bookmark the page for future use.

In addition to posting your non-wiki files to the Production Server Repository, you must also upload a copy of the file to the Global IX SharePoint site. This step is for internal IX (Tech Pubs) archival purposes only.

# Who can do what

Pubs Editors and writers (ie: docteam group members) have slightly different permissions within the Repository Utilities tool.

wiki group name	add new file	update file	rename file/folder	delete file/folder	download file	add folder	reinstate backup
pubs- editors	yes	yes	yes	yes	yes	yes	yes
docteam	yes	yes	no	no	yes	no	yes

There are three main directories in the repository:

- endofsupport
- public
- restricted

## NOTE:

# Important

- Writers should only upload files to the associated product folders in the **public** directory.
- Only certain members of Pubs Editors are designated to place files in the **endofsupport**

#### directory. ALERT: Writers may take on this responsibility starting in 2022.

• The **restricted** directory was maintained for one specific product (SpeechMiner) and Pubs Editors are responsible for uploading files to those folders. However, in early 2021, SpeechMiner documentation is no longer Closed. As such, all of the associated documentation was moved to the public directory.

# Updating an existing file in the Repository

Note: Here's a link to the demo (stored in SharePoint) that Kate gave at the IX Global Office Hour on July 9, 2020: Repository Utility demo.

- 1. Access the Repository Utilities tool.
- 2. Under Browse Repository Content/Cache/Public, choose the appropriate product directory and release sub-directory. If you are unsure what directory the file resides in, use the "Search for" tool located at the top of the Browse Repository Content box.
- 3. Confirm that the directory selected is the one in which you want to update the file. When you scroll down to the Draft and drop area, it should display the path to the directory you selected.
- 4. Drag and drop the file into the "Drag and drop files in /public" box. NOTE: The file should be located on your computer, not on a network drive.
- 5. If you are updating an existing file, a dialog box appears stating that the file already exists and asking if you want to update it. Click OK. If it uploads successfully, a check mark will briefly display across the file icon. If unsuccessful, an X will display.
- 6. Upload the file to the appropriate product directory and release sub-directory in SharePoint > Genesys Public.

# Adding a new file to the Repository

## Important

- Files are not limited to documentation; they can include almost any file type. That being said, we should offer executable files with some caution as they might be blocked on the client side if considered an untrusted/dangerous download.
- Although the Repository does have a file size limit, it's configurable on our end so we can expand it if there is a valid reason.
- If a large file fails to upload, contact the Tech Pubs Support email alias to help you with a resolution.

- 1. Check with Pubs Editors first to confirm that the file name meets standards and isn't already in use. If a file already exists in another folder with the same name, the Repository tool will reject it.
- 2. Access the Repository Utilities tool.
- 3. Under Browse Repository Content/Cache/Public, choose the appropriate product directory and release sub-directory.
- 4. Confirm that the directory selected is the one in which you want to add the file. When you scroll down to the Draft and drop area, it should display the path to the directory you selected.
- 5. Drag and drop the file into the "Drag and drop files in /public" box. NOTE: A dialog box will appear in the upper right providing you with the details of the upload and the appropriate wiki coding for the document: {{Repository|filename|| displaytext}}
- 6. Go to the top of the Repository Utils page (just below the title) and click on "(force) Refresh the map ".
- 7. Take a look at the Journal box to confirm that the operation has completed successfully.
- 8. Upload the file to the appropriate product directory and release sub-directory in SharePoint > Genesys Public.

# Adding a new directory to the Repository and SharePoint

Contact Pubs Editors to request the creation of a new directory.

# Moving a subfolder to another folder in the Repository

The structure of the repository is based on product > version. As such, it is a rare thing that a subfolder would need to be moved to another folder. However, if there is a legitimate reason for doing so, the repository tool allows you to do this.

Only Pubs Editors can perform this action. So, contact them to explain the situation and request it. To move a subfolder:

- 1. In the repository, select the folder you want to move.
- 2. On the right side of the screen, click the Pencil icon (called Rename or Move). The Rename to dialog box appears.
- 3. Change the path in the dialog box to move the subfolder and click Rename.
- 4. Refresh the Map.
- 5. Move the folder in Global IX SharePoint as well.

# Requesting an RN Format Check

All RNs need to be format checked by Pubs Editors, whether for on-premises RNs, Genesys Multicloud hosted RNs, and Genesys Multicloud private edition RNs. Pubs Editors check different things depending on whether the release note is online or HTML and also if the HTML is General, Restricted or a Pre-release. Here are few things to look for before sending an RN for a format request.

# When to Request a Format Check

You can request an RN format check any time after you have had your RN approved by your team and peer edited, ideally.

## Important

Be aware of the following:

- With changes to IX resources, starting in January 2022, there will be no Pubs Editor located in California. As such, if you can't send an RN for format checking prior to 5 pm Easter time and the RN has to be published that day, publish the RN and then get the format check done the next day. In November 2021, we added Brian Marshall to the Pubs Editors group, who works out of Toronto, Ontario, Canada, and Santhosh Annamalai, who works out of Chennai, India.
- Follow this same approach if no one from Pubs Editors is available due to other work or holidays for example. In other words, just publish the RN and a Pubs Editor will check it when one is available.

# Online RN

- Validation tool "Page Status:" Does the tool indicate a check mark? If not, the tool has identified some blockers that you need to fix before requesting a format check. Note that the tool will display a check mark if there are minor errors. So, you may want to click Page Status to see if there are minor errors to fix.
  - Be aware that there may be situations where the draft page is clean but the published page is not. Here are a few scenarios:
  - When you edit the published page manually.
  - When the published page links to a draft version that the customers cannot access
  - When the published page links to a page that does not exist in a published version, but the page exists in a draft version (so the link worked for the draft). As a result, customers click the link and get redirected to the start page very bad user experience.

- When the published page (in particular, an RN) contains an option that is a draft in progress. The customer will not see the draft but the widget will detect change bars in the rendered page.
  - It only says for now that there are change bars somewhere, but Sophie will implement a fix soon so that it says "an option with change bars has been detected."
  - It can be an issue if the option has not been published at all and so, the customer will not see any text for this option.
- Pink links.
- For on-premises RNs, does SOE link point to the new SOE both on the main page and if you are adding support to a new OS, DB, and so forth?
- Is there any excessive white space in the What's New section?
- Are items separators correctly paired and is the JIRA number listed in the Resolved Issues section?
- Are items separators correctly paired on the Known Issues page?

# HTML RN

- Does the file name match the existing RN?
- Does the copyright date start with the year of the first release and end with the year of the most current release?
- Does the copyright banner have the new Genesys name, Genesys Cloud Services, Inc. instead of Genesys Telecommunications Laboratories, Inc?
- In the Contents section, is the release date and version correct and do they match what's in the release section?
- Does the introduction section reflect that release type? For example, the restricted boilerplate is the following: "This release note applies only to the X.X releases of <Name of Component> that are specified in the Contents, above."). A General, Hot Fix, or Update version boiler plate is the following: "This release note applies to all X.X releases of <Name of Component>."
- In the New in this Release section,
  - Does the intro boiler plate reflect the release type? (General and Update: "There are no restrictions for this release." Hot Fix: "This is a hot fix for this product." )
  - Are the New in this Release section formatted as square bullets?
  - If you are adding support for any SOE items, like OS, browser, or database, have you added the correct wording per SOE Information in RNs?
  - Are there items separators correctly paired for Corrections and Modifications and Known Issues and Recommendations?

# Sending an email to Pubs Editors

When your RN has been peer edited and has received all required PCT approvals, send an email to the **Pubs Editors** alias requesting a final format check/approval. In the subject line, include the words "RN FORMAT CHECK". In the body of the email, include a link to the RN or, if it is an HTML file,

attach a copy. If the RN is either Restricted or Pre-release, be sure to tell Pubs Editors, as these types of RNs require special handing.

To allow the gathering of metrics, provide the number of new features/enhancements included in the release, using the features table Joe provided in an email. The table looks something like this:

RN Name:	RN Name:											
		Platform				Initia	tive					
Feature	Genesys Multicloud (hosted)	Genesys Multicloud Private Edition	On- premises only	Voice Inbound	Analytics	Outbound	Non-voice channels (aka Digital)	WFO	Open Platform			
<feature 1&gt;</feature 												
<feature 2&gt;</feature 												

Note the following:

- We no longer count support of new operating systems, databases, or Java versions in our new feature metrics. So, don't include the number in the table.
- By features, we mean any new feature or enhancement to an existing feature.

## **RN** Format Check email examples

## Example One

To: Pubs Editors Subject: RN FORMAT CHECK

Hello,

The attached RN has been approved by the PCT and peer edited.

<b>RN Name</b>	RN Name: SIP Server											
	Platform				Initiative							
Feature	Genesys Multicloud (hosted)	Genesys Multicloud Private Edition	On- premises only	Voice Inbound	Analytics	Outbound	Non-voice channels (aka Digital)	WFO	Open Platform			
3	х		х	х								

Thanks,

Writer's name

## Example 2

Another example of appropriate text.

To: Pubs Editors Subject: RN FORMAT CHECK

Hello,

2 RNs for format check. Both RNs have been approved by the PCT and peer edited.

- link to draft RN 1
- link to draft RN 2

RN Name:	RN Name: Cloud IWD											
	Platform				Initiative							
Feature	Genesys Multicloud (hosted)	Genesys Multicloud Private Edition	On- premises only	Voice Inbound	Analytics	Outbound	Non-voice channels (aka Digital)	WFO	Open Platform			
1	×						x					

RN Name:	RN Name: Email											
		Initiative										
Feature	Genesys Multicloud (hosted)	Genesys Multicloud Private Edition	On- premises only	Voice Inbound	Analytics	Outbound	Non-voice channels (aka Digital)	WFO	Open Platform			
1	x						x					

Thanks,

Writer's name

# Unusual Release Note Scenarios

This describes how to handle unusual release note scenarios.

## Important

If you are looking for information on the various Genesys Engage cloud RN scenarios, see Genesys Engage cloud Release Notes. It includes the scenario when a new feature is added for Genesys Engage cloud only but the on-premises RN also has to be updated.

# Non-type specific Releases

- When your component will support mixed mode scenarios
- When a new build of an existing version is released with correction
- When an untested Hot Fix or untested Update is being released
- When an IP is delivered to Cloud first and then to on-Premises
- When support for a new feature is added to a 7-digit release after it was released
- When a Resolved Issue is added to a 7-digit release after it was released
- When a database is upgraded as part of the release
- When a version of a component is released but the component version is no longer available to customers
- When a feature is deprecated
- When an RN is published but the associated version is still not available to customers Non-Language Pack Issue Projects
- Wording for when Help content differs from what the user sees in the GUI
- · On-premises component freeze for Cloud products only
- When there's an IP but no component and an RN is needed
- When there seems to be no new Features and no Corrections
- When changes or features are rolled back
- When a resolved issue is removed after publishing
- When code is added to a release available to all, but specifically for one client, that is not documented in the RN
- When your Private Edition RN is now delivering the exact same fixes/implementations made in the previous AWS- & Azure-only RN, and nothing else.

When your component will support Mixed mode scenarios

Mixed mode refers to implementations of Genesys Multicloud CX that include a combination of existing on-premises components that are integrated with collections of deliverables packaged as containers. If you see a reference to a Mixed mode release, that means a given container and its components/services are now available for those Mixed mode types of environments. That container version may later also be made available for full Genesys Multicloud CX private edition implementations (or used in the Genesys hosted offerings).

The all.docs.genesys.com platform is set up to support Mixed mode using the associated RN generation tool.

The November 23 release of Digital Channels is an example of a Mixed mode version: Digital Channels, November 23, 2021.

## Important

As of November 2021, only a limited number of containerized products (about ten) is approved for deployment in a Mixed mode environment and PM approval is required even for shipping those ten. So, while we expect it to become a standard scenario, it won't apply to most of the products/services. We should have more details after PMs finalize the Mixed Mode strategy.

When a new build of an existing version is released with correction

If a 7-digit version was previously released but more than a few days later developers had to freeze a new build of the same version, in the existing 7-digit version section of the Release Note, do the following:

- 1. In the New in This Release section add a bullet similar to the following: "On <mm/dd/yy>, <7-digit-version> Build X was released and includes a Correct <JIRA number>.
- 2. In the Corrections and Modifications section, include the correction per the standard process.

When an untested Hot Fix or untested Update is being released

Technical Publications does not create pre-release notes for Hot Fixes (sometimes referred to as an "untested hot fix") or untested Updates. These early releases do not require an RN because they are not tested. In rare occasions (that has not happened recently), a restricted RN could be required, per agreement with the team and Software Delivery.

IP Deliveries to Cloud first and then to on-Premises

If you have a situation where the IP has to be delivered first to the Cloud and then days or weeks later to on-premises customers, the process is a follows:

1. For the Cloud delivery, the QA person publishes the IP Test Report but only selects the Cloud delivery option.

- 2. The on-premises writer does the following:
  - 1. Alerts the Cloud writer just in case that writer doesn't know.
  - 2. Continues to prepare the on-premises RNs towards the on-premises release, with the date reflecting the on-premises release date.
- 3. On the day of the on-premises release, the QA person publishes the IP Test Report, by opening the existing IP Test Form, selecting Premises delivery in addition to Cloud delivery, and republishing the Form.

**IMPORTANT:** The QA person must not publish the IP Test Form before the release date. If the person does, the IP is immediately available to customers on the Software Downloads side, prior to the actual release. The PLC checklist includes this information.

4. The on-premises confirms that the RN date matches the release date, and on the release date, publishes the Release Note along with the other updated product documentation.

When support for a new feature is added to a 7-digit release after it was released

There could be a scenario where a feature is included in a product but, for whatever reason, QA is only able to test it after the release goes out. In that case, do the following:

- Add a new bullet to the What's New section describing the new feature.
- Add a clause to the first sentence of that feature identifying the date it is available to customers. For example, add something like "As of 07/21/17, Genesys Feature Server supports..."

When a Resolved Issue is added to a 7-digit release after it was released

- Add the issue(s) to the existing RN.
- Do not change the date.
- If the issue is listed in Known Issues, update the Fixed In field with the release number.
- Use the same process as with any update -- request a peer edit and format check. Let your editors know it's just an addition of a Resolved Issue (or issues) to an existing RN.

When a database is upgraded as part of the release

If your product includes databases and one or more have been upgraded, you must inform customers if they need to execute database scripts to upgrade the database and provide instructions if they do.

When a new release impacts your product database, do the following:

- 1. Check with our Developers to determine whether customers need to perform an upgrade. If they do:
  - Check to see if this information is covered in the Migration Guide. If it is, verify with your team that it provides all the information that customers need.
  - If there is no information in the Migration Guide, work with the Developers to document the procedure.
- 2. For online RNs:
  - If the information is included the Migration Guide, mention the database upgrade requirement in the

Upgrades section on the 7-digit release page and add a link to the Migration Guide.

- If the information is not included in the Migration Guide, create an online Deployment Procedure with this information and add a link to it from the Upgrades section on the 7-digit release page. See the Genesys Info Mart RN, release 8.5.006.09, for an example of an online Deployment Procedure, and how GIM covered database schema upgrade instructions in the Deployment Procedure for this online RN. Also see the Interaction Concentrator RN, release 8.1.511.01, for an example of the wording used for this HTML RN.
- 1. For HTML RNs:
  - If the information is included the Migration Guide, mention the database upgrade requirement in the New in This Release section of the 7-digit release section and add a link to the Migration Guide.
  - If the information is not included in the Migration Guide, add an Upgrade Notes section with this information within the 7-digit section, between the New in This Release section and the Corrections and Modifications section. See the Interaction Concentrator RN, release 8.1.511.01, for an example.
- 2. If the customer doesn't need to run an upgrade script:
  - For online RNs, add a note to that effect in the Upgrades section on the 7-digit release page.
  - For HTML RNs, in the New in This Release section:
    - If you have a bullet that mentions the database, add a note mentioning that customers do not need to upgrade the database.
    - If you do not have a bullet that mentions the database, add a note at the bottom of the New in This Release section that explains the database was impacted but informing customers that they not need to upgrade the database.
- 3. As usual for RNs, request that your Developers and QA review and approve the RN.

When a version of a component is released but a problem is discovered and the component version is no longer available to customers

Scenario: You published a General (PA), Update, or Hot Fix release note for a component version but the team later discovers a problem and needs to remove it from customer availability. There are three ways to handle this.

- 1. If the problem is discovered the same day or the next day, do the following:
  - Delete the entry from the release note. If it's online, check with Tanya or Juan to determine the best approach.
  - In XING, open the associated RN freeze form and click Remove.
- 2. If the problem was discovered a few days after the release, check with your Project Manager to determine if anyone downloaded the software. If not, follow the same procedure as described above.
- 3. If the problem was discovered a week, weeks, or even months later, you cannot simply delete the entry. Customers may have already downloaded the software and they need to be informed that it is no longer available and should not be installed. In this scenario, do the following:
  - Under What's New / New in this Release, at the top of the section, add text that explains the situation. For example, the wording might be: "As of X date, this release is no longer available. A critical issue was discovered during regression testing. If you've already downloaded the software, please refer to the Release Advisory or Product Alert before installing it." Confer with your team about the wording and get their approval. NOTE: This text may also be needed in the online

Readme.

- Note: If there's a possibility that this release will be available at a future date, copy the text before deleting it and save it to some location for use at a later date, if necessary.
- For online RNs, in the release table on the RN cover page and version page, add "Unavailable" in the Restrictions column.
- For HTML RNs, add "(Unavailable)" to the right of the release type in the release table located in the Contents section, and in the heading area for the 7-digit version.
- In XING, open the associated RN freeze form and click **Remove.**

**Note:** This does **not** address restricted RNs. Restricted RNs are added to the IP and the Project Core Team must inform Software Delivery that the version should no longer be available.

#### When a feature is deprecated

You may encounter a scenario when a feature, option, or something else is deprecated. How you document that depends on what is being deprecated and why? Things to think about:

- Is capability is being handled by another component or feature?
- Is the item being deprecated because the associated feature is no longer supported?

Develop wording to explain the deprecation based on your specific scenario.

**Writers:** Please contact Pubs Editors if you have other deprecation scenarios. We'll help you determine appropriate wording and then we'll add your scenario to this section.

#### Examples

• An option that is being deprecated because something else is no longer supported. The wording could be: The "Allow Reject Call" option is deprecated, because Reject Call is no longer supported.

When an RN is published but the associated version is still not available to customers - Non-Language Pack Issue Projects

There are a few projects that don't use Language Packs to handle localization but implement it through the software itself. One example is Genesys Mobile Services.

If you have such a project, you may have a scenario where you publish the RN but customers are not able to access the RN. If so, check with your Project Manager to find out if the IP language was changed from English to International but the RN definition was not. If it was, the RN definition language needs to change from English to International to match it.

If you confirm that this is what happened, email Pubs Editors and we'll make the request to Software Delivery/Production Builds (the current XING administrators) to have the RN definition changed.

Once the RN definition is changed, open the RN form and confirm that the language is changed and then republish the form. Then verify that the form says approved.

**Reminder:** A correctly published RN form (with language and type) must exactly match the IP. Publishing the RN is the trigger that makes that version of the component available to customers.

Wording for when Help content differs from what the user sees in the GUI

Do you have something along the following scenarios:

- A customized or branched GUI is provided to customers that includes feature variations (additional or changed, for example) that differ from the standard features available in the GUI.
- A customer can have their account configured with only specific features.

Due to resources issues, the same Help file is available for all customers. This scenario is not uncommon for Cloud products in particular.

In this case, in the Release Note and in the Help, call out those differences and possibly direct the customer to their Genesys or account representative. Since the features dictate the specific wording, an exact boilerplate is not possible. However, here are some examples:

- Some features or settings might not apply to your contact center.
- eServices (Chat and Email) are add-on options to the inbound voice contact center and, therefore, are
  not visible until activated. Contact your account representative if you wish to activate any of these new
  add-on features. See the "Are there any add-on features?" section to find out more information about
  these features.
- RN example: "Note: This branch release uses online help. Some features and options that are described in the online help might differ from what is available in this version. Contact your Genesys representative if you have questions about features that are available in this version."
- Help example: "This help documents CX Builder features for multiple CX Builder platforms, including the Genesys Classic Platform and the Genesys Next Generation Platform. CX Builder features may differ based on your platform and the features configured for your account. If you do not know your platform, or what features are available to you for your account, contact your account representative."

On-premises component freeze for Cloud products only

Process moved here: Process for what goes in the on-premises RN.

**Note:** If the Developer is specifying Yes for the Genesys Engage cloud option in the component IP and No for Premise, you don't need to add anything to your on-premises Release Note. If PEC customers don't need to notified about anything regarding this, then no updates are needed in the PEC RN either.

When there's an IP but no component and an RN is needed

Generally, there's a one to one to one relationship between a component, an IP, and an RN. However, there may be a circumstance where there's an IP but no component but an RN is needed.

One example of this is when the IP is a DB script that is provided on the Product CD/DVD at the same level as the components. As such, it will have it's own version number and a unique RN is needed. Therefore, the Packaging Spec needs to include an RN entry for each script on the Doc tab.

If you have a similar scenario, please confer with Pubs Editors so we can confirm it and advise you accordingly.

When there seems to be no new Features and no Corrections

RNs must have either a new feature, a correction, or both. Otherwise, there's no point for the release. If there is no new feature and no correction, some possible reasons are listed below. If one of these applies to your situation, please add further clarification to help readers understand whether it affects them. For example, what exactly does compatibility mean? Did something have to change to your component to make it compatible with the release? Contact Pubs Editors to explore further. Another example: "This release contains modifications for internal improvements." is too generic. Customers complain about this vagueness because their not sure how this improvements will impact what they set up in their enterprise. Provide some specifics. If they are performance improvement only, indicate that. If they are improvements that impact specific features, mention those.

## • Compatibility

- This release was updated for alignment with changes in <product name> or <component name> release x.x.xxx.xx.
- This release of <component name> is compatible with <product name> release x.x.xxx.xx.

*Clarification Example:* This release is compatible with Genesys Co-browse Server release 8.5.000.30. More specifically, it uses the same communication protocols.

#### • Support New Functionality

- This release of <component name> contains changes to support new functionality in <product name> 8.x
- This release contains changes to support new functionality in <product name> 8.x.
- This release of the <component name of plugin> requires <associated component name> release x.x.xxx.xx or later to support <associated component name> features introduced in release x.x.xxx.xx.

*Clarification Example:* This release of the SIP Feature Server GAX plugin requires SIP Feature Server release 8.1.201.92 or later to support SIP Feature Server features introduced in release 8.1.201.92.

- Synchronize
  - This hot fix was released to synchronize with the hot fix versions of <product name> components.
- **Updated Library:** It may also be that the component was released with an updated library. That is considered a new feature and should be added to the New Features section.
  - This release contains an updated library... (And provide why).

## Important

Additional examples will be added here as they arise.

When changes or features are rolled back

If the PCT has decided to roll back (remove) changes or features made available in previous releases (Hot Fix or General), because they didn't work as expected or for any other valid reason, do the

#### following:

- Add a note below the correction/feature that is rolled back, in that particular release: Note: Starting with version x.x.x.x, this modification is no longer available as it did not function as expected.
- In the x.x.x.xx version, in the Corrections and Modifications/Resolved Issues, add the note: Note: Starting with version x.x.x.xx, the modification *<JIRA# and a link to it>* made previously (or in the previous versions) has been removed and is no longer available.

If the feature has been removed, add a corresponding note to the New in This Release/What's New section.

When a resolved issue is removed after publishing

If, for any valid reason, the PCT has decided to remove a resolved issue that was published in a release (Hot Fix, Update, or General), follow the appropriate procedure below:

If the RI was published less than a month from the current date:

- 1. Ask the Product Manager (PM) if you can simply remove the RI. He/she should know if there are any customers that might be impacted or confused by the removal.
  - If there are no customers impacted or the impact is minimal, remove the RI and Jira issue number from the draft and published RN.
  - If there are customers impacted, follow the same procedure as if the RI was published more than a month from the current date (see below).
- 2. For tracking purposes, update the Jira ticket with an explanation for the removal of the RI and add the date that it was removed.

If the RI was published more than a month from the current date:

- 1. In the draft version of the RN, remove the fix description, but not the Jira ticket number.
- Replace the fix description with a sentence or two that explains why the resolved issue was removed and add the date of removal.
   *Example text:* "As of April 15, 2020, the fix description for this issue was removed from this Release Note as it is an internal issue that is not relevant for customers. (WFM-32490)"
- 3. Ask the PCT to review the text for the explanation so that everyone is in agreement before republishing the RN.

When code is added to a release available to all, but specifically for one client, that is not documented in the RN

Scenario: A Hot Fix included six fixed defects. However, one specific API fix/improvement that was included in the code was for only one client (in this case, Apple) and, therefore, was not documented in the RN. The PCT/PjM asked the writer to create a PDF containing the RN information for the API fix, to be delivered to the client by Customer Care (by attaching it to the Salesforce case). NOTE: Because this was a Hot Fix, the info had to be delivered in a custom way for Apple, via a PDF delivered directly to the customer. This PDF was archived in the appropriate product folder in Genesys Public on SharePoint, with a file description explaining the circumstances.

Should you have this or a similar scenario, do the following:

- 1. Create a standalone wiki page containing the content specific to one client.
- 2. Include the following disclaimer as an Important note on the first page of text: "This document has been prepared specifically for <CLIENT'S NAME> for release with <PRODUCT NAME X.X.xxx.xx>. The information contained herein is proprietary and confidential and cannot be disclosed or duplicated without the prior written consent of Genesys Telecommunications Laboratories, Inc. Copyright © 202x Genesys Telecommunications Laboratories, Inc. All rights reserved."
- 3. Generate a PDF from the unpublished wiki content.
- 4. Send the PDF to Pubs Editors for a release note format check. Provide an explanation of the situation.
- 5. When approved, provide the PDF to the PjM for transmittal to Customer Care.

When your Private Edition RN is now delivering the exact same fixes/implementations made in the previous AWS- & Azure-only RN, and nothing else.

Scenario: You've got nothing to announce other than the fact that the updates you had in AWS/Azure 9.0.000.91 are now ALSO available for Private Edition 9.0.000.92. In other words, they aren't making 9.0.000.91 available to PE customers but everything found in .91 is now available for PE customers in .92.

We don't ever want to duplicate the same items in 2 different RNs so, instead you can say:

"As of [the current RN release date], all [New Features/Resolved Issues/etc.] found in [product name] [link to previous RN] are now also available for [Private Edition/AWS/Azure/ etc.]."

#### Example

• As of **December 10, 2021**, all **Resolved Issues** found in **Agent Setup 9.0.000.91** are now also available for **Private Edition**.

# Update Releases

In addition to the scenario described below, look to the other General and Hot Fix sections to see if a scenario is like yours and apply to your Update release type. If you are still not sure, contact Pubs Editors.

- When an Update becomes General
- Faulty Update version released

## Update becomes General

If you have an update release that is becoming a general release:

1. In the associated release section for that update and in the Contents table of the RN, change the release date to the date that it becomes general.

- Change the release type from Update to General in both the Contents table and the associated Release section. (Note: Double-check that the IP type was changed from Update to General. If not request that your Development change the release type.)
- 3. Add the following note under the New in this Release section: "This version was first released as an Update on mm/dd/yy."
- 4. Post the RN according to the following:
  - For CD updates, you post the RN when you receive the Software Delivery email announcement.
  - For other scenarios, you post it on the date that it becomes general, when you are given the go ahead by your team to do so. (QA may issue another an IP Test form for it.)
- 5. Open the RN freeze form for the update release, change the type to general, add a comment about the change, and re-freeze the form. If you are unable to change the release type to general, it's likely that your Developer did not change the release type from update to general. Check it in XING and if that's the case, contact the Developer to change it.

**Important:** In this scenario, the component version does not change, just the release type.

#### Faulty Update version released

Follow the procedure for a hot fix release, replacing "Hot Fix" with "Update" where applicable. On the Hot Fix Releases tab above, see "Faulty Hot Fix version released".

# Hot Fix Releases

- When a Hot Fix becomes General
- Hot Fix correction propagation for earlier streams of a major release
- Adding OS Support to a RN for a version previously available
- Issue is fixed for one OS but later fixed for another OS
- Issue is fixed in an earlier 8.1.x release but not fixed in later 8.1.x releases
- Faulty Hot Fix version released

## Hot Fix becomes General

If you have a hot fix release that is becoming a general release:

- 1. In the associated release section for that hot fix and in the Contents table of the RN, change the release date to the date that it becomes general.
- Change the release type from Hot Fix to General in both the Contents table and the associated Release section. (Note: Double-check that the IP type was changed from Hot Fix to General. If not request that your Development change the release type.)
- 3. Add the following note under the New in this Release section: "This version was first released as a Hot

Fix on mm/dd/yy."

- 4. Post the RN according to the following:
  - For CD updates, you post the RN when you receive the Software Delivery email announcement.
  - For other scenarios, you post it on the date that it becomes general, when you are given the go ahead by your team to do so. (QA may issue another an IP Test form for it.)
- 5. Open the RN freeze form for the hot fix release, change the type to general, add a comment about the change, and re-freeze the form. If you are unable to change the release type to general, it's likely that your Developer did not change the release type from hot fix to general. Check it in XING and if that's the case, contact the Developer to change it.

**Important:** In this scenario, the component version does not change, just the release type.

#### Hot Fix correction propagation for earlier streams of a major release

In some cases, hot fixes may be required for earlier streams of a component. For example, an 8.1.1 release may have gone out but a hot fix may be required for an 8.1.0 version. In some situations, the PCT may decide to make the same correction in an 8.1.1 hot fix that implemented in the 8.1.0 version. The fix is identical but for tracking it likely has a different ER number.

- In this scenario, if the content for the earlier 8.10 ER is present in the newer 8.1.1 ER, the writer should only include the 8.1.1 ER number for the 8.1.1 version.
- If the content in the new 8.1.1 ER does not include the associated description and comments, it is OK to include the 8.1.0 ER in the RN. To distinguish it from the 8.1.1 ER, you might include the 8.1.1 ER in brackets next to the 8.1.0 ER; for example, (ER# 300793695 [299219094]). Inclusion of the 8.1.0 ER in this scenario enables Tech Support to find information about the issue from the earlier ER.

#### Adding OS Support to a RN for a version previously available

You may have a scenario where a component/RN was previously released and later support for a new OS is added for that same version. (For example, component x, version 8.1.001.03 was released in December 2012 and supports the Windows OS. In January 2013, support for Solaris is added to that same version, 8.1.001.03.)

In this scenario:

- You do not change the date that the version was first released.
- In the section for the version, under the Supported Operating Systems section, add a note that says: Support for the *<name>* operating system was added to this release on *<date>*.
- When the IP test form is published, after you replace the RN with the one you updated, open the RN freeze form that was previously created for that version, add a note that you added support for the OS and then publish the form again.

Issue is fixed for one OS but later fixed for another OS

If an ER was fixed for one OS in an earlier release and is now fixed in a later version for another OS, repeat the ER text. You could note that the ER was fixed in another OS previously and link to the release.

Issue is fixed in an earlier 8.1.x release but not fixed in later 8.1.x releases

In this scenario the issue is fixed in a specific 8.1.0 hot fix and will later be fixed in a specific 8.1.2 MR release, but the issue still exists in all the releases prior to the 8.1.0 hot fix and between this hot fix and 8.1.2 MR release. To handle this do the following:

- 1. Add a new Known Issue, with Fixed In left empty, but with a note explaining that the issue has been fixed for a particular 8.1.0 hot fix only. Do not add an active link to the HF correction.
- 2. Add a note at the end of the Correction item in HF release entry that the fix applies to that 8.1.0 release only, and link the ER ref to the Known Issue.
- 3. When the issue is fixed in 8.1.2 MR release, add a link from the Correction item to the Known Issue as well.
- 4. When the issue is fixed in the 8.1.2 MR release, update the Fixed In field for the Known Issue with the 8.1.2 MR number, potentially reword/expand the note about 8.1.0 hot fix, and create an active link to the 8.1.2 Correction item.

#### Faulty Hot Fix version released

In this scenario, a hot fix of a component was released and later discovered (a week later) that the hot fix correction was not complete and a new hot fix had to be issued for the component. (Note: The hot fix was removed from software downloads so other customer could not download it.) To handle this, do the following:

- 1. In the RN, keep the faulty hot fix in the RN as other customers may have downloaded the version since it was first released.
- 2. In the faulty hot fix section of the RN, under "New in this Release" replace the existing standard text (typically just "This is a hot fix for this product. There are no new features introduced in this release of...) with the following: "This hot fix is no longer available as it did not function as expected. Hot fix version x.x.xxx.xx corrects the identified issue."
- 3. In the faulty hot fix section, leave the wording of the correction as is.
- 4. Indicate that the faulty hot fix is unavailable:
  - For online RNs, in the release table on the RN cover page and version page, add "Unavailable" in the Restrictions column.
  - For HTML RNs, add "(Unavailable)" to the right of the release type in the release table located in the Contents section, and in the heading area for the 7-digit version.
- 5. Add a new hot fix section for the hot fix version that fixed the issue completely.
- 6. Under the Corrections section for this new hot fix, write how the issue was corrected, per standard process. (It may be the same wording used in the faulty hot fix.) Then, add the following text at the end of the sentence: "This release corrects an incomplete fix of the same issue addressed in release "faulty hot fix version number."
- 7. Follow the normal procedure for reviews and approval of an RN.
- 8. When the RN is approved, open the RN freeze form for the faulty hot fix version and add a comment about what was done. For example, the text could be as follows: "This version is no longer available because the fix was incomplete. However, this version is still listed in the RN in case others downloaded the version before the version was removed from Software Downloads." Then, republish the form.

9. Then, create a new freeze form for the new hot fix version, per the usual RN process.

Notes:

- In this circumstance, you should also confirm with the team that Software Delivery is notified so that Tech Support knows that they need to remove it from Software Downloads. You should also alert Pubs Editors that this is going on.
- If the new hot fix was issued in less than an hour after the release of the faulty hot fix, the writer can simply remove the faulty hot fix version of the RN at the same time as include the new version of the hot fix.

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# Restricted Releases

- When a Restricted Release version becomes General (PA) but no version change
- When Restricted Release version content is propagated to a new General (PA) release version

When a Restricted Release version becomes General (PA) but no version change

If you have a version of a restricted component that becomes a general release (the version doesn't change just the type):

- 1. In the General (PA) RN, you don't list the previous restricted release versions.
- 2. Add the following note under the New in this Release / What's New section: "This component was previously available as a restricted release."
- 3. Under this same New in this Release / What's New section, list all features that were part of the restricted release and are still available in the general release.
- 4. Under the Corrections and Modifications / Resolved Issues section, include only those items fixed since the last restricted release.
- 5. Under the Known Issues section, include all of the known issues listed in the restricted version that are still present in the general release version.

When Restricted Release version content is propagated to a new General (PA) release

If you have a version of a restricted component and the features, corrections, and known issues are being propagated into a new General (PA) release version:

- 1. Under the New in this Release / What's New section, in addition to adding the new features associated with the new General (PA) release version, add features that were added to the restricted release and are still available in the general release.
- 2. Under the Corrections and Modifications / Resolved Issues section, in addition to adding the corrections included in the General (PA) release version, add all corrections that were propagated from the restricted version to the General (PA) release version.
- 3. Under the Known Issues section, in addition to adding new known issues associated with the General

(PA) release version, include all of known issues from the restricted version that also apply to the General (PA) release version.

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# General Releases

When Under Shipping Control is removed

If a component was under shipping control and then a later version is no longer under shipping control, you should remove all "under shipping control" notations in the release note for previous releases. Although the latest version becomes the default shipping version, customers can downgrade to any previous version, even those previously marked with shipping control.

When you remove "under shipping control" you have have to replace the "This release is under shipping control" with "There are no restrictions for this release." You also need to delete "For availability of this release, contact your Genesys representative."

# Release Note Process Changes

# Important

This topic only covers changes to on-premises RNs. It does not cover changes associated with Genesys Multicloud CX (formerly Genesys Engage cloud hosted) or Genesys Multicloud CX private edition.

February 2019

## Add JIRA numbers in the RN's What's New Section

As of this date, writers will add (or make visible) JIRA ticket numbers for new features and enhancements in Release Notes generated for new releases. Writers will place the JIRA ticket number in brackets after the description in the What's New section (just as they do in the Resolved Issues section).

This functionality has been implemented and tested for 8.5, 9.0, and 9.1 RNs and is available on the production wiki as of January 31st.

To listen to a recording of the announcement, see the PonyDocs meeting notes dated 2019-02-07.

# September 2018

## Epics, Stories, and Release Note Content

With the move to Epics and Stories, where Developers provide RN text depends on how the team implements the Epic and how Product Management wants to present the feature in the RNs. Please consider the following:

- Typically, when the Epic is completed entirely and is implemented in one component, a single entry in the Epic's RN field will suffice.
- If cascading stories have unique customer-facing pieces that are completed at different times, or that are implemented in different components, using the Stories' RN field will be more appropriate. The RN Tool is flexible and supports either approach.

RN text should not be presented in the documentation JIRA ticket. It should always go in the **software** *Italic text*JIRA ticket to which the documentation ticket is linked.

# July 2015

# Premise RN Updates for the Cloud

If a General, Update, or Hot Fix version of your on-premises component is being released to support a Cloud product, but it contains no other changes, you need to add to your premise release indicating why the premise component is being frozen. This addition to the premise release notes is primarily for capitalization purposes. Use something along the lines of the following text in the **What's New/New in this Release** section:

"This release contains modifications to support only Genesys Engage cloud implementations."

Also, contact Devon Judge to discuss how this will impact BEC customers so he can determine whether he needs to document this for those customers.

Tech Pubs Managers and others are working on a better way to handle this and to leverage JIRA. Until that is determined, if this arises, also contact Pubs Editors and we'll help.

## Notes:

- This specific text can also be used for restricted release notes, but you are not limited to it. The specific text for a General, Update, and Hot Fix version is required because on-premises customers will see the release note.
- Do not add the text if your General, Update, or Hot Fix version includes changes for the on-premises component in addition those for the Cloud product.

# Supported Operating Environment Info in RNs

Instructions about this were moved to SOE Information in RNs.

# Release Note Content Details

This explains what details to include in the various sections of a release note. Where a section appears in a release note depends on whether it's an online release note or an html release note.

# General

Release notes must provide enough information so that customers can determine whether it's worthwhile for them to upgrade, if the issue applies to their environment and configuration, and for a fix, if it can help resolve an issue they are experiencing.

## Style

Observe the following writing guidelines:

- Use direct sentences and avoid passive voice as much as possible.
- Do not use "should" or "could."
- Do not use "please" in instructions.
- Avoid using potentially ambiguous pronouns such as "it" and "this."
- Do not use jargon or negative terms. For example, an alternative to "crash" is "unexpectedly shuts down" or "terminates abnormally."
- Use "release" instead of "version" for Genesys product releases (Hot Fixes, General, and Restricted alike).
- Use official names and abbreviations for Genesys and third-party products. Do not use internal or legacy names.

# Copyright date in HTML release notes

# General releases

The copyright date should begin with the year of the first release for that major release and end with the year of the latest release. For example: Genesys Cloud Services, Inc. © 2021 **-or-** Genesys Cloud Services, Inc. © 2017–2021.

# Restricted releases

- If the restricted release is standalone, use the year of that restricted release. For example: Genesys Cloud Services, Inc. @ 2021
- If the restricted release is cumulative and spans more than one year, the copyright date should start with the year of the first restricted release and end with the year of the current restricted release. For example: Genesys Cloud Services, Inc. © 2017-2021

# Available Releases

This section includes a link in the table for each release included in the RN.

- For online RNs, the RN generator adds the links for each new release.
- For HTML RNs, you add a new row and a link manually.

The table identifies, at a high level, the Supported Operating Systems in which the release is available. This information is important to customers and Customer Care because it informs them whether a particular 7-digit version is available on the operating system they are using. **Note:** For a General release, you can find out what operating systems are supported for the release in the Packaging Specification.

## What's New

This section summarizes new software features in the 7-digit release. The following types of information should be included:

- **New features,** including new supported versions of third-party interfaces (for example, DBMS, Speech servers, Java Runtime Environment). *Source of information:* JIRA, Features and Benefits document, Functional Spec, etc.
- Enhancements may or may not be considered to be new features. (In JIRA it may be identified as an Improvement type.) Depending on how PCT wants to position it, the enhancement might be considered an extension or modification of an existing feature, in which case the enhancement is described in **Resolved Issues.** Similarly, information about new or updated configuration options can be presented in **What's New** or bundled with a fix description in **Resolved Issues,** depending on the reason for the configuration option change.
- Discontinued Support. As noted in SOE Information in RNs, if an OS (or database, etc.) is no longer supported as of the current release, include a bullet item directing them to the Discontinued Support section on the main page of the RN: "See also the Discontinued Support section for discontinued operating systems starting with this release." Note: "Discontinued Support" should be a live link.
- Add JIRA ticket numbers in Release Notes generated for new releases for new features and enhancements. Add the number (or make visible) in brackets after the description in the What's New section.

 New or updated configuration options. This information needs to be communicated most frequently. If the option is already documented in the new-style *Configuration Options Reference*, *Deployment Guide*, or other customer-available documentation, just mention the option name with a brief statement about the new functionality; if the option is in the *Configuration Options Reference*, use the {{Optionslink}} template to reference the option. If the new option is not yet described in documentation (a situation that used to occur more often before the documentation was online) or you want to include full information in the release note, use the Optionslink template with the additional parameter |display=yes — for example, {{Optionslink|link= Options:WFM\_Data\_Aggregator:Identity:ApplicationType|display=yes}}, which will show all details in the release note, namely:

## option name

Section: <section name>

Default Value: <value>

Valid Values: <value list>

Dependencies: <options or settings that this option requires>

Changes Take Effect: <when a newly configured value takes effect>

<Option description>

## Notes:

- Use square brackets to indicate configuration sections in text.
- Use a comma-separated list to specify the valid values. On the "Valid Values" line, specify only the values; explain the meaning of the values in the option description.
- Specify "None" for the "Dependencies" parameter if the option has no dependencies.
- Refer to your product documentation for the standard wording to use for the "Changes Take Effect" parameter. Some examples are:
  - Immediately
  - After restart
- Versions of the built-in libraries including:
  - **Common part libraries**, if the common part has its own RN. *Source of information:* component freeze form.
  - **Internal libraries**, if this release of the component is built with a new major version of an internal library (for example, starting with this version, Tserver 8.1 is built with Common Library 8.5). *Source of information:* a JIRA issue and the component freeze form (this situation is most likely to occur in a Hot Fix release).
  - **Third-party libraries**. *Source of information:* Packaging Specification for a General release or a JIRA issue for a Hot Fix release.

## When You Don't Document Functionality

There are times that the PCT may decide not to document new functionality:

- Change to the code does not affect customer implementation or usage, for instance, a fix for internal library compatibility update.
- Change to the code might affect customers, but it cannot be tested in time for release X, and so will be tested and documented for release X+1. In this case, after the code has been tested, we document the change and announce feature availability ONLY in release X+1, even if the code was in place for release X. (We DO NOT retroactively document in release X.)

# Important

If Development added code that is not tested in a production release, the feature or improvement associated with the code should not be available for use by the customer. Development can control this by using feature toggles.

## Under Shipping Control Scenarios

When a product or component is under shipping control, the product/component is General (PA) but the Product Manager controls who can order it.

- Writers should add the phrase "Under Shipping Control" to the Restrictions field of the Contents table for General online RNs or "(Under Shipping Control)" to the right of the date in a General HTML RN. Writers also add "Under Shipping Control" in the table located on the release page itself. Hot fixes are *not* designated as under shipping control.
  - For HTML RNs only, the first sentence of the release detail section must include the following text: "This release is under shipping control."
  - Optionally, for all RNs, the writer adds the phrase "For availability of this release, contact your Genesys representative." into the What's New section. Note: If there are new features announced in this release, instead write "This release is under shipping control and contains the following new features and enhancements:"
- If a component has been under shipping control and then a later version is no longer under that control, the writer must:
  - Remove all "Under Shipping Control" text for all of the previous releases in that RN. Although the latest version becomes the default shipping version, customers can downgrade to any previous version, even those previously marked under control, without needing the Product Manager's approval.
  - For HTML RNs, writers replace the text "This release is under shipping control" for each version previously under control with "There are no restrictions for this release." Also, if it exists, remove the text: "For availability of this release, contact your Genesys representative."

## Configuration Option Example

New-style (option is documented in the Configuration Options Reference)

## Wiki markup:

A new configuration option, {{Optionslink|link=Options:Genesys\_Info\_Mart\_ETL:errorpolicy:error-policy-irf-exception-resumable}} in the [error-policy] section, enables you to fine-tune the behavior of the transformation job (as specified by the {{Optionslink| link=Options:Genesys\_Info\_Mart\_ETL:error-policy:error-policy-irf-exception}} option) by controlling which exceptions that might be triggered during interaction transformation can be considered to be discardable. (ESR-5555)

#### **Resulting display:**

A new configuration option, error-policy-irf-exception-resumable in the [error-policy] section, enables you to fine-tune the behavior of the transformation job (as specified by the error-policy-irf-exception option) by controlling which exceptions that might be triggered during interaction transformation can be considered to be discardable. (ESR-5555)

Old-style (option is not documented elsewhere)

#### error-policy-irf-exception-resumable

Section: error-policy Default Value: Exception Valid Values: Any correct Java expression Dependencies: error-policy-irf-exception=log\_db\_resume or resume Changes Take Effect: On the next ETL cycle

The value defines a filter. If the specified regular expression matches the name of the exception class or the name of the exception super classes, the exception is considered to be noncritical; the results of the interaction transformation (IRFs and MSFs) will be discarded, but Job\_TransformGIM will continue. If the specified regular expression does not match the name of the exception class or the exception super class, the job will be aborted.

(ESR-5555)

# Resolved Issues

This section lists all changes made between this release and the previous customer available release (General or Hot Fix). The list of the modifications must be complete and accurate so customers can:

- Assess if they can benefit from upgrading.
- Assess the magnitude of other software modifications, and therefore weigh the risks of upgrading against the benefits.
- Identify the functional areas that underwent major changes and make a decision to do a regression test for these areas before rolling out the new version into their Production environment.

The information included in this section comes from the JIRA. ALL fixed JIRA Issues that fall into this category should be listed, independent of their Priority or originator (Genesys QA or customer).

Include the following details when you describe corrections:

- · Information about the correction or description of the new behavior
- Description of the previous problematic behavior

- To help customers understand or identify the problem, provide one or more of the following:
  - Extended description of the scenario in which the problem occurred
  - Results of the behavior on other products or environment
  - Samples of application log messages that indicate the error
- If relevant, in what environment (type of OS, RDBMS, Switch, etc.) the problem occurred

#### Wording Format

The wording format for corrections should start with how the component functions now first. Then, followed by a "Previously...." sentence explaining what happened prior to the defect being fixed. For example:

OCS now applies the configuration options specified for the Common Library timer controls, regardless of the configuration settings for the Audit Trail Log file. Previously, if the log\_call\_stats option was enabled OCS ignored the Common Library flexible timers configuration. (OUTBOUND-8971)

#### Notes:

- Depending on the type and amount of information, the correction may have multiple sentences or use numbered steps.
- There are situations where writers don't need to include a "Previously" sentence if the sentence explaining how it now works implies how it previously worked before the fix. However, if additional details about the scenario and its implications on customers are not covered in the "how it works now" sentence, include the "Previously" sentence.
- If a new option was introduced as part of a correction or modification, include full details.

## Criteria To Identify Qualifying JIRA Issues

Use the following to identify the qualifying JIRA Issues (select all JIRA Issues for which all of the conditions below are true):

- Problem Area IS NOT Documentation
- Status field = Resolved
- Resolution field = Fixed
- Fixed Version field is:
  - Greater than (>) the PREVIOUS customer available version (General of Hot Fix)
  - Less than or equal to (<=) THIS version (the version of the software that is being released)
- The problem exists in the previous customer available version (so customers can encounter it)
- The problem is applicable to the previous customer available version. (However, it is not included if the problem only manifests itself when a certain function is used and this function is not supported in the previous version, as it is a part of new functionality.)

See Release Notes with JIRA Process for information on how to work with JIRA to create filters and

generate release note content.

#### **Criteria Exceptions**

There are several exceptions for when a JIRA Issue that satisfies the above criteria should not be documented:

- The JIRA issue that was fixed/documented in a previous customer available version (or for earlier versions of the same Major release as the previous version) is propagated to the new version so that the fix is included in the new version. For example, we are issuing the very first 8.5 release (so the previous customer available version is 8.1.xxx); the same issue has been already fixed in 8.1 and we are now making sure it is addressed in 8.5 as well, hence the JIRA issue.
- The JIRA Issue is an improvement implemented to support the new functionality that is documented in New In This Release section.
- The JIRA Issue is not marked as "Customer Related" (for example, there is no associated customer SRs) and is truly minor and not likely to affect customers. For example, a typo was corrected on a GUI label or a problem was corrected that could only be reproduced in a simulated environment. A defect can be considered "truly minor" upon agreement between the PCT and Customer Care. Note: Be careful not to exclude a JIRA issue that causes changes to an external interface, as customers could have built functionality (agent desktops, routing strategies, etc.) based on the old behavior.

## Examples

## Correction Example 1

Genesys Info Mart now creates the correct number of INTERACTION\_RESOURCE\_FACT (IRF) records in scenarios in which an internal interaction originates from an internal resource that is not a handling resource (for example, a trunk). In earlier 8.1 releases, Genesys Info Mart did not create IRF(s) for the receiving part of the interaction. (ER# 291171184)

## Correction Example 2

When Genesys Info Mart encounters a database error that it cannot immediately resolve, Genesys Info Mart now logs the following dedicated log message:

GIM\_ETL\_DB\_ERROR (55-20155) Database error: <error>; CODE= <error code>; SQLSTATE= <state>; DBError=<database error>

You can set an alarm on this message in the Genesys Management Framework. (ER# 291344855)

## Correction Example 3

OCS now keeps the original type of the records that are submitted to Interaction Server when a Campaign that runs in Push Preview dialing mode is stopped and unloaded in the following scenario:

- 1. The records that OCS retrieves and submits to Interaction Server are of a type other than General (for example, Personal Callback). (Personal Callback records are submitted to Interaction Server for processing only if the OCS option direct-personal-callback is set to a value of false.)
- 2. The Campaign is stopped and unloaded while Interaction Server is still processing the records.

- 3. The OCS option recall-on-unload is configured so that recall is in effect. For example, the option might be set to a value of always.
- 4. OCS requests Interaction Server to recall the records.
- 5. Interaction Server successfully recalls the records.

Previously in this scenario, OCS set all successfully recalled records to type General, regardless of their original type. (ER# XXXXX)

## Correction Example 4

An ICON that is configured with the cfg role can now automatically resynchronize with Configuration Server when ICON detects an inconsistency between the cfg IDB and Configuration Server data. Previously, ICON required manual intervention to start the resynchronization process. A new configuration option, cfg-auto-resync, controls this enhanced functionality.

#### cfg-auto-resync

Section: callconcentrator Default Value: false Valid Values: true, false Changes Take Effect: Immediately

Specifies whether ICON will automatically initiate resynchronization of configuration data between Configuration Server and cfg IDB when ICON detects an inconsistency:

- true—ICON will initiate automatic resynchronization.
- false—ICON will not initiate automatic resynchronization.

## (ER# 294440771)

## Correction Example 5

Genesys Info Mart now correctly extracts data in the following scenarios:

- T-Server and Universal Routing Server (URS) are on different hosts, and the hosts have a time discrepancy.
- There are more than 200 records in the G\_DSS\_\* table in IDB.

As a result, the transformation job now populates the INTERACTION\_RESOURCE\_FACT (IRF) table correctly, and the aggregation job no longer fails with an arithmetic overflow error.

Previously in such scenarios, the extraction job skipped some records in the GIDB\_G\_PARTY\_HISTORY\_MM table, which caused the transformation job to set abnormal values in the following columns of the IRF table: MEDIATION\_DURATION, QUEUE\_DURATION, ROUTING\_POINT\_DURATION, and START\_TS. As a result, the aggregation job used to fail with an arithmetic overflow error. (ER# 271344120, 271691478)

## Correction Example 6

ICON now correctly populates values of termination timestamps for login sessions. In an interim
version of ICON between 7.6.100.14 and 7.6.100.19, the G\_LOGIN\_SESSION table contained records with terminated\_ts=0 and terminated\_tcode=0. (ER# 225518416)

# Known Issues

This section lists the JIRA issues that were published as open issues for a major release (for example 8.5.x) at any point in time.

All known issues listed remain in the release note, even those fixed during the course of the major release. The reason for that is that not all customers choose to upgrade or are able to upgrade, and those fixed known issues may not be fixed in the version they are using.

There are two types of updates that can happen in this section:

- Adding new items (further details below): These are usually added to the list at the time of each General release or during post-release reviews if deemed appropriate by the PCT. A new item always corresponds to a JIRA issue that is still open (not fixed). Defects found and fixed in the same version are NEVER added to the list as new items.
  - *Note:* A new known issue may also be discovered during the testing of a hot fix and likewise needs to be added.
- Updating an existing item: This can be updated with a Fixed In version when the problem is fixed and documented in the Corrections and Modifications section. If the Known Issue first appeared in a previous major release, if possible, add the Fixed in value to the Known Issue there as well.
   Notes:
  - If you are being asked to add a Known Issue after an RN was published, you can add a new Known Issue to an RN at any time. You should follow the normal review process with the addition with your team, peer reviews, and format check. Once everything is approved and you post the RN, publish a "B" version of the form for the last version of the component RN and note the addition of the Known Issue in the Comments section of the form.
  - If you are updating a Known Issue with a Fixed In version, enter only the seven-digit release number. The RN template will automatically convert the fixed-in entry to a link to the Resolved Issue. (June 2017: Template update not yet implemented.)

# Include the following details when you describe limitations (Known Issues):

- If relevant, in what environment (type of OS, RDBMS, Switch, etc.) the problem occurs
- · Description of the problematic behavior
- To help customers understand or identify the problem, provide one or more of the following:
  - Description of the scenario in which the problem occurs
  - Results of the behavior on other products or environment
  - Samples of application log messages that indicate the error
- Information about any workarounds or recommendations that may help to prevent the problem or handle its consequences

Found In/Fixed In fields

Version numbers are listed for the first available release in which a problem is reported and the release in which it is fixed. The numbers used must be the seven-digit release that is available to customers. (This covers the scenario where a known issue is fixed in a frozen version and passed but another issue in the same frozen version didn't pass and therefore was not going to be released to customers. As a result, a new version had to be created and tested for the other issue. If that frozen version passes for that second issue, when the version is released to customers that new version number is specified in the Fixed In field for both fixed known issues.)

## Style

Clearly describe what the problem is and how it may manifest itself in the customer's environment. Whenever possible, provide suggestions on how to prevent or work around the issue.

### **Standard Syntax 1:**

Component X <br/>behaves this way in this scenario...> As a workaround, <do so and so>.

### Standard Syntax 2:

In an environment with <certain switch, OS, or RDBMS>, Genesys recommends that you <avoid certain scenarios or apply certain settings>. Otherwise, Component X may incorrectly <behave this way>.

**Note:** Depending on the type and amount of information, the known issues may have multiple sentences or use numbered steps.

## Adding New Items

At the time of each General release, the PCT reviews all outstanding JIRA Issues (with a Status that is other than CLOSED) for inclusion in the Known Issues and Recommendations section. The open issues published in the RN should be carefully selected based on the value of this information for customers. Avoid publishing everything unconditionally, which decreases the value of the information.

The greater the number of JIRA Issues that are listed the more difficult it is to come up with good problem descriptions. When description is inadequate, it is either useless or can even be harmful. In other words, we should take a Quality over Quantity approach. There are guidelines rather than rules to assess whether to include a JIRA Issue as a Known Issue. The purpose for publishing open issues is to forewarn customers about problems that exist in the software and to provide the specific details that can help them deal with it, such as:

- Details that help assess if the problem can affect a particular customer environment
- Details about the impact of the actual problem on the system (sometimes the impact is actually less than it seems)
- Details on the specific conditions that can trigger the issue, so customers can think of ways to avoid it
- Specific workaround steps

Notes:

- If the details are not identified internally, there is not much sense in publishing the open issue, as there is not enough information for the customer to use.
- Open Known Issues are not published to:
  - Inform customers that the software is faulty overall and they should test it thoroughly before upgrading
  - Inform customers that we are already aware of their issue, so they do not have to report it

### Updating Existing Items

If a JIRA issue that was previously published as an open issue has been fixed, the corresponding entry in the Known Issues and Recommendations section must be updated with the Fixed In version, as described above.

### Examples of Known Issues to Include

- A major issue that affects a particular configuration; in which case the affected configuration must be clearly defined.
- A major issue that affects a majority of customers and there is a workaround that we recommend; the workaround should be clearly described.
  - *Note:* It is expected that all serious problems that affect a majority of customers are fixed and therefore are not on the list of open issues. However, the PCT can make a decision not to fix a defect if there is a simple workaround or only very specific configurations are affected (making such decision is a part of the Defect Review process). In this case, the defect and all the details of the workaround and/or affected configurations must be described in the Known Issues and Recommendations section.
- Certain functionality (usually new) does not work as expected (or as it may be implied to work) and we
  want to make the current behavior is clear and sets the customer expectations correctly. Sometimes
  there can be a workaround involved.

*Example:* When using the Session Timer, IPCS does not support the sending or processing of the 422 error code. Therefore, if the far end responds with the 422 error code to an outgoing INVITE, IPCS ignores the min-SE and keeps using the same Session-Expires header; so no new session can be initiated. As a workaround, please configure the Session Timer Interval (secs) parameter to the minimum min-SE header field value expected to be received by IPCS in a SIP session.

- The problem is easy to encounter and is alarming, but there is actually no impact on the system (usually something displayed incorrectly on a GUI or sporadic error messages appear in the log).
- The problem can impact the system for certain user actions but can be easily avoided. *Example:* EMPS GUI displays an incorrect value in Task Execution Date & Time field when you open a scheduled task in a View or Edit mode. The displayed value is always the same as in the EMPS Server Time and it does not reflect the Schedule/Execution time that is actually stored for the task. As a result, if you open a task in the Edit mode and click Save, EMPS will override the Task Execution Date & Time value with the current EMPS server time. Please keep this in mind when updating existing tasks and always correct the Task Execution Date & Time before saving the task.
- This is a third-party issue and there is no defect on our side; however we want to highlight the problem to forewarn customers and set their expectations correctly upfront.
  - *Example:* While performing transaction recording using DMV/B boards with Dialogic SR 6.0 SU 148, the last few milliseconds of a transaction recording are sometimes not recorded because of a known limitation with Dialogic.

# Known Issue Example 1

When a Genesys Info Mart database is deployed on Microsoft SQL Server, the transformation job might never complete, and a deadlock results. As a workaround, set the value of the irf-io-parallelism option to 1 in the [gim-transformation] section of the Genesys Info Mart Application object. (ER# 260883291)

## Known Issue Example 2

The test function in the Business Rule block incorrectly interprets numeric literals as variables and prompts the user to provide a test value for these variables.

**Workaround:** Specify a value for the numeric property and execute the rule. The rule will execute correctly. There is no impact on the application at runtime. (ER# 284482622)

### Known Issue Example 3

On the Windows 2008 64-bit platform, the Genesys Administrator display does not automatically refresh when a Campaign Sequence is Loaded, Started, Stopped, Unloaded, or ForceUnloaded.

**Workaround:** Use the browser's refresh control or press the F5 key after each step, to manually refresh the display. That is:

- 1. Click Load, and manually refresh the display.
- 2. Click Start, and manually refresh the display.
- 3. Click Stop, and manually refresh the display.
- 4. Click Unload, and manually refresh the display.
- 5. If necessary, clickForceUnload, and manually refresh the display.

#### (ER# 291915511)

## Known Issue Example 4

If you use Configuration Layer version 8.0 or earlier to deploy Social Messaging Server, you must edit the .sh or .ini file to select the ThirdPartyServer configuration type.

On a UNIX platform (AIX, Linux, Solaris), update the smserver.sh as follows:

- 1. Locate and comment the following string: JVMPARAMS= ...
- 2. Uncomment the following string: #JVMPARAMS= ...

On Windows, update the JavaServerStarter.ini file as follows:

- 1. Locate and comment the following string: -Dgenesys.mcr.stdserverex.apptype=CFGSocialMS
- Uncomment the following string: ;-Dgenesys.mcr.stdserverex.apptype=CFGThirdPartyServer

### (ER# 282769075)

Examples of Known Issues to Omit

- The issue has not yet been investigated and confirmed as a defect by Engineering.
- Engineering has confirmed that this is a defect, but the scenario is not reproducible and cannot be clearly described.
- The scenario is extremely complex and practically unlikely to be encountered (such as a complex race condition scenarios or very specific multi-step scenarios).
- Obvious GUI problem (for example, "The Data Migration tool opens in the upper left of the screen instead of in the center of the screen" or "The EMPS GUI's left pane cannot be widened.").
- No impact on the product functionality.
- The software does not work according to the specifications available internally, but the customer available documentation does not contain the same level of details, so there is no discrepancy that would be visible to the customers. At the same time, the functionality always worked this way (no modifications have been introduced in this release) and there are no customer complaints.

## Tips

- Known Issues and Recommendations items are cumulative and entries are in release-number order with the newest known issues and recommendations listed first. Items are never removed from this section when an issue is fixed.
- If a previously documented Known Issue is fixed in a release, the fixed issue must be documented in the Corrections section for the release in which it was fixed. However, items in the Corrections section are not automatically carried over into the Known Issues and Recommendations section unless requested by the PCT.
- In the Known Issues section, do not change the verb to past tense when an item is fixed.
- If an item is just an issue and will never be fixed, it is permissible to delete the "Found In and Fixed In" table. JIRA Issue numbers should be visible in this section.

# Discontinued Support

This section documents features that are no longer supported in this software. This cumulative list is in release-number order with the most recently discontinued features at the top of the list.

As noted in SOE Information in RNs, if an OS (or database, etc.) is no longer supported as of the current release, include a bullet item under the What's New section on the 7-digit RN page directing them to the Discontinued Support section on the main page of the RN: "See also the Discontinued Support section systems starting with this release." Note: "Discontinued Support" support section starting with this release." Note: "Discontinued Support" systems starting with this release." Note: "Discontinued Support" support section systems starting with this release." Note: "Discontinued Support" support section systems starting with this release." Note: "Discontinued Support" should be a live link.

# Internationalization

Information in this section is included for international customers and can include Known Issues

associated with Language Packs.

# Additional Information

This section provides a link to the the docs.genesys.com website, the Customer Care website, and a list of product documentation associated with the software.

# SOE Information in RNs

The varying levels of detail in release notes has caused confusion for our customers. So our release notes must consistently present Supported Operating Environment information, and emphasize that the *Genesys Supported Operating Environment Reference Guide* (SOE) is the official, complete, and detailed source of that information.

Please follow the conventions described below. For Restricted and Pre-release Notes, it's optional to add the link to the SOE in the RNs, as the SOE only contains information for versions that are General, Update, and Hot Fix types.

# Important

When you add SOE information in your RN, please remind your Product Manager that he or she needs to immediately request updates to the SOE via the System-Level Guides Update Request alias or preferably open a JIRA ticket in the System Level Guides project. This will reduce discrepancies between the RN and the SOE and also customer complaints.

# Available Releases

#### For online RNs only.

In both your draft and published locations, revise the text for the Supported Operating Environment Reference Guide following the Available Releases table as follows:

 The operating systems available for use with each component release are listed in the table at a high level only. For more detailed information about the supported operating environments, including requirements, supported versions, and any conditions or limitations, see the <PRODUCT NAME> page in the Genesys Supported Operating Environment Reference Guide. (Include live links to the SOE page for the Product and to the SOE; for example, the eServices page in the Genesys Supported Operating Environment Reference Guide.)

You can obtain the URL for the SOE page for your product on the **Find a Product** tab on the Welcome page of the SOE.

# What's New/New in this Release

For both online RNs, the 7-digit Page and HTML RNs.

# Important

If your component is being delivered in Docker containers, note the following:

- If there are updates to the operating environment used in the containers, in the What's New section, use wording accordingly to the specific scenario. For example, if the CentOS OS is being updated, the text for your What's New bullet item would be: "Operating environment updates – This release includes updates to all included CentOS packages."
- As we are still learning what's being delivered in containers, if the container feature you need to document in the RN is something other than an OS update, please contact Tanya Ivanova and Joe McMonagle for assistance with the wording for your RN.
- The System Guide information about containers is not in the SOE on docs.genesys.com. A new SOE is being developed on all.docs to handle requirements that include Docker containers, hybrid, private edition cloud, and Genesys Engage cloud.

# Identify Official Name

When your component adds support for an Operating System (OS) or a database (DB), or browser, locate the official name on the in the *SOE*.

- For an OS, on the OS tab select an OS from the first drop-down menu, and find the official name in the Filter by Version drop-down menu. If your team didn't specify the level of detail provided in Filter by Version, check with them to find out which one they mean. For example, Windows 7 64-bit native.
- For a database, choose the **Database** tab and find the official name. If your team didn't specify the level of detail provided in the **Select your database version** drop-down menu, check with them to find out which one they mean. For example, Oracle 11g RAC.

## **Operating System additions**

- For one new OS use: "Support for <official OS name> operating system. See the <product> page in the Genesys Supported Operating Environment Reference Guide for more detailed information and a list of all supported operating systems."
  - For example, if an eServices release added support for a new OS, the **What's New** bullet would be:
  - Support for Windows Server 2008 operating system. See the eServices page in the Genesys Supported Operating Environment Reference Guide for more detailed information and a list of all supported operating systems.
- If you're adding support for multiple new OSs, for the first bullet use: "Support for the following
  operating systems. See the <product> page in the Genesys Supported Operating Environment
  Reference Guide for more detailed information and a list of all supported operating systems." Then add
  sub-bullets for each new OS using the official OS name only.
  - For example, if an eServices release added support for two OSs:
  - Support for the following operating systems. See the eServices page in the *Genesys Supported Operating Environment Reference Guide* for more detailed information and a list of all supported operating systems.

- Windows Server 2008
- Red Hat Enterprise/CentOs Linux 7

**Important!** For HTML RNs, just add the text instead of the link. *For example,* in the first case noted above it would be: "Support for Windows Server 2008 operating system. See the eServices page in the *Supported Operating Environment Reference Guide* for more detailed information and a list of all supported operating systems."

### Database additions

- For one new database use: "Support for <official database name> database. See the <product> page in the Genesys Supported Operating Environment Reference Guide for more detailed information and a list of all supported databases."
  - For example. if an ICON release added support for a new database, the **What's New** bullet would be:
  - Support for PostgreSQL 9.3 database. See the Interaction Concentrator page in the *Genesys* Supported Operating Environment Reference Guide for more detailed information and a list of all supported databases.
- If support for the database was previously added, and you are only adding support for a driver, use this wording: "See the <product> page in the Genesys Supported Operating Environment Reference Guide for more detailed database information and a list of all supported databases."
- If you're adding support for multiple new databases, for the first bullet use: "Support for the following databases.See the <product> page in the Genesys Supported Operating Environment Reference Guide for more detailed information and a list of all supported databases." Then add sub-bullets for each new database using the official database name only. Follow the model provided earlier for multiple operating systems.

**Note:** If your team asks you to include additional information to the entry, determine if it is restrictive or descriptive.

- If it's restrictive, the information belongs in the SOE and the Product Manager should request that it be added to the SOE, according to the current process.
- If it's descriptive (about a feature related to the database, for example) you can add it. Here's an
  example of information that is descriptive rather than restrictive: "PostgreSQL 9.2. The Info Mart
  database on PostgreSQL must be partitioned. A new job, Job\_UpdateStats, supports the use of
  PostgreSQL."

#### **Browser additions**

For online RNs, this is in the 7-digit page.

- For one new browser, use: "Support for <official browser name>. See the Supported Browsers section on the <product> page in the *Genesys Supported Operating Environment Reference Guide* for more detailed information and a list of all supported browsers."
  - For example, if an eServices release added support for a new browser, the **What's New** bullet would be:
  - Support for Microsoft Internet Explorer 11. See the Supported Browsers section on the eServices page in the *Genesys Supported Operating Environment Reference Guide* for more detailed information and a list of all supported browsers.

- If you're adding support for multiple new browsers, for the first bullet use: "Support for the following browsers. See the Supported Browsers section on the <product> page in the Genesys Supported Operating Environment Reference Guide for more detailed information and a list of all supported browsers." Then add sub-bullets for each new OS using the official browser name only. For example, if an eServices release added support for three browsers:
  - Support for the following browsers. See the Supported Browsers section on the eServices page in the *Genesys Supported Operating Environment Reference Guide* for more detailed information and a list of all supported browsers.
    - Microsoft Internet Explorer 11
    - Firefox 43.0
    - Google Chrome 48.0.2564

**Important!** For HTML RNs, just add the text instead of the link. *For example,* in the first case noted above it would be: "Support for Microsoft Internet Explorer 11. See the Supported Browsers section on the product> page in the *Genesys Supported Operating Environment Reference Guide* for more detailed information and a list of all supported browsers."

#### For support combinations

If a particular release supports a new OS, Database, Browser, and so on, we don't want to include the reference verbage three times. For that make the verbage more generic. See the example below. (Be sure to make the product name and the SOE title as links.)

### Combination example:

Support for the following operating environments. See the Framework page in the *Genesys Supported Operating Environment Reference Guide* for more detailed information.

- Oracle Linux 7
- OpenJDK 11
- Oracle 12c R2
- Oracle 12c R2 RAC on Linux and Windows

#### All other additions

For updated versions of Web Servers (for example Tomcat), a new Java version, a new JDK version, and others not covered here, please follow the same approach noted above for other additions.

For support for a single item, add a bullet with "Support for... " For example:

• Support for Java 8. See the Prerequisites section on the eServices page in the Genesys Supported Operating Environment Reference Guide for more detailed information and a list of all prerequisites.

For multiple items, use an intro bullet and sub-bullets underneath. For example, for Java:

 Support for the following Java versions. See the Prerequisites section on the eServices page in the Genesys Supported Operating Environment Reference Guide for more detailed information and a list of all prerequisites

- Version 9
- Version 8

Discontinued Operating Systems, etc.

If an OS (or database, etc.) is no longer supported as of the current release, include a bullet item directing them to the Discontinued Support section on the main page of the RN: "See also the Discontinued Support section for discontinued operating systems starting with this release." Note: "Discontinued Support" should be a live link.

# Discontinued Support

# For online and HTML RNs

# Important

- Following the convention here is only required when you need to add new discontinued items. It's your decision if you want to update existing entries.
- A new Discontinued Support button, called DS, was added to the Genesys menu in the Edit Source tab. See instructions at the end of this topic.
- If an OS (or database, etc.) is no longer supported as of the current release, include a bullet item under the What's New section on the 7-digit RN page directing them to the Discontinued Support section on the main page of the RN: "See also the Discontinued Support section for discontinued operating systems starting with this release." Note: "Discontinued Support" should be a live link.
- For online RNs, in your draft and published location, revise the introductory text to the following (noting both Discontinued Support and the SOE title are links):

"This section documents features that are no longer supported in this software. This cumulative list is in release-number order with the most recently discontinued features at the top of the list. For more information on discontinued support for operating environments and databases, see Discontinued Support in the *Genesys Supported Operating Environment Reference Guide*."

• For HTML RNs, use the same text as the online RNs but without live links.

# Three Scenarios

# This process was revised in October 2019 and is effective starting on 10/24/19 for handling all future discontinued support entries.

When your team brings up discontinuing support for an OS, database, browser, Java version, or the like, you add this information under the Discontinued Support section. There are three scenarios associated with discontinued support of an SOE item.

• Scenario 1: When a component no longer supports an SOE item (like an OS, database, Java version, and

so on) but Genesys and the vendor still support it.

- Scenario 2: When the SOE item reaches Genesys EOS and the PM doesn't extend support for it.
- Scenario 3: When the SOE item reaches Genesys EOS, but the PM extends support for a particular product and/or component. Then, at some point, the PM decides the component should no longer support it.

# Important

Remind your PM to open an SLG ticket and include in the ticket an explanation of the scenario to which it applies so that the SOE can be updated accordingly. Note: For scenario 1, we update the associated row in the SOE to indicate what version is the first version that no longer supports the SOE item. For scenarios 2 and 3, we just remove the associated row from the SOE.

Scenario 1: Component no longer supports an SOE item but Genesys and vendor do

- If the component has an online release note, do the following:
  - 1. In the Discontinued Support section on the RN Welcome page, create a new entry for the discontinued item(s).
  - 2. If only one item is no longer supported, add the item. If more than one item is no longer supported, use bullets to list them.
  - 3. Underneath the item(s), add the following template call coding: {{RNDS|Month DD, YYYY|Version number}}
  - 4. Replace the "Month DD, YYYY" with the date of the first version that does not support the SOE item.
  - 5. Replace "Version number" with the first 7-digit version that does not support the SOE item. Here's a template call example: {{RNDS|September 27, 2019|8.5.008.19}}
  - 6. To separate entries, add the following tag after the template call: <hr class=\"item-separator\">
- If the component has an HTML release note, do the following:
  - 1. In the Discontinued section, add a new entry for the discontinued item(s).
  - 2. If only one item is no longer supported, add the item. If more than one item is no longer supported, use bullets to list them.
  - Underneath the item(s), in the Discontinued as of table, add Month DD, YYYY; Version number, where the "Month DD, YYYY" is the date of the first version that does not support the SOE item, and "Version number" is the first 7-digit version that does not support the SOE item.
  - 4. To ensure that the table does not wrap, change the table width in the table coding to 350 so that it appears as the following:
  - 5. To separate entries, add the following tag after the item: <hr class=\"item-separator\">

**Note:** If multiple X.Y versions (like 9.0, 8.5, 8.1, 7.6) of your component are still supported, check with your team to determine if the item(s) is no longer supported on the other versions. If that is the case, add a new Discontinued entry to each release note.

Scenario 2: SOE item reaches Genesys EOS and the PM doesn't extend support

For this scenario, you need to find the Genesys EOS date. See Discontinued Support in the SOE. If the item is not listed on the page, contact Joe McMonagle.

- If the component has an online release note do the following:
  - 1. In the Discontinued Support section on the RN Welcome page, create a new entry for the discontinued item(s).
  - 2. Add the item. **Note:** Since this scenario depends on the Genesys EOS date, if you have multiple items to add, it's extremely unlikely they will all have the same Genesys EOS date. In that case, create separate entries.
  - 3. Underneath the item(s), add the following template call coding: {{RNDS|Month DD, YYYY|All releases}}
  - 4. Replace the "Month DD, YYYY" with the Genesys EOS date listed in the SOE Discontinued Support page.
  - Keep the "All releases" text because this discontinued support applies to all releases that Genesys still supports. Here's an example: {{RNDS|September 27, 2019|All releases}}
  - 6. To separate entries, add the following tag after the template call: <hr class=\"item-separator\">
- If the component has an HTML release note, do the following:
  - 1. In the Discontinued section, add a new entry for the discontinued item(s).
  - 2. Add the item. **Note:** Since this scenario depends on the Genesys EOS date, if you have multiple items to add, it's extremely unlikely they will all have the same Genesys EOS date. In that case, create separate sections.
  - 3. Underneath the item(s), add Month DD, YYYY; All releases.
  - 4. For "Month DD, YYYY," specify the Genesys EOS date listed in the SOE Discontinued Support page.
  - 5. Keep the "All releases" text because this discontinued support applies to all releases that Genesys still supports.
  - 6. To ensure that the table does not wrap, change the table width in the table coding to 350 so that it appears as the following:
  - 7. To separate entries, add the following tag after the item: <hr class=\"item-separator\">

**Note:** If multiple X.Y versions (like 9.0, 8.5, 8.1, 7.6) of your component are still supported, add a new Discontinued entry to each release note.

Scenario 3: SOE item reaches Genesys EOS, PM extends support, then later ends support

- If the component has an online release note do the following:
  - 1. In the Discontinued Support section on the RN Welcome page, create a new entry for the discontinued item(s).
  - 2. If only one item is no longer supported, add the item. If more than one item is no longer supported and support ended on the same date and for the same 7-digit version, use bullets to list them.
  - 3. Underneath the item(s), add the following template call coding: {{RNDS|Month DD, YYYY|Version

number}}

- 4. Replace the "Month DD, YYYY" with the date of the first version that does not support the SOE item.
- 5. Keep the "All releases" text because this discontinued support applies to all releases that Genesys still supports. However, per the note below, please confirm with your team that all releases of the component no longer support the item.
- 6. To separate entries, add the following tag after the template call: <hr class=\"item-separator\">
- If the component has an HTML release note, do the following:
  - 1. In the Discontinued section, add a new entry for the discontinued item(s).
  - 2. If only one item is no longer supported, add the item. If more than one item is no longer supported and support ended on the same date and for the same 7-digit version, use bullets to list them.
  - 3. Underneath the item(s), add Month DD, YYYY; Version number, where the "Month DD, YYYY" is date of the first version that does not support the SOE item.
  - 4. For "Version number" specify "All releases." However, per the note below, please confirm with your team that all releases of the component no longer support the item.
  - 5. To ensure that the table does not wrap, change the table width in the table coding to 350 so that it appears as the following:
  - 6. To separate entries, add the following tag after the item: <hr class=\"item-separator\">

**Note:** If multiple X.Y versions (like 9.0, 8.5, 8.1, 7.6) of your component are still supported, check with your team to determine if the item(s) is no longer supported on the other versions. If that is the case, add a new Discontinued entry to each release note.

#### **Online Examples**

**Note:** Be aware that these examples are just to give you examples of the coding for the scenarios. Most don't reflect actual dates or versions.

#### Example 1: Scenario 1

- Windows Server 2008
- Red Hat Enterprise Linux 5 <!--JIRA number if applicable-->

{{RNDS|January 15, 2018|8.5.008.19}} <hr class=\"item-separator\">

Example 2; Scenario 1 Java 7 {{RNDS|July 27, 2017|8.5.008.19}} <hr class=\"item-separator\">

Example 3: Scenario 2 Red Hat Enterprise Linux 5 {{RNDS|June 30, 2018|All releases}} <hr class=\"item-separator\">

*Example 4: Scenario 3* Red Hat Enterprise Linux 5 {{RNDS|September 25, 2019|All releases}} <hr class=\"item-separator\">

**HTML Examples** 

**Note:** Be aware that these examples are just to give you examples of the coding for the scenarios. Most don't reflect actual dates or versions.

Example 5: Scenario 1

- Solaris 8 operating system
- Sybase database, all versions

**Discontinued as of:** June 15, 2019; 8.5.008.19 <hr class=\"item-separator\">

Example 6: Scenario 2 Sybase database, all releases Discontinued as of: January 1, 2013; All releases <hr class=\"item-separator\">

Example 7: Scenario 3

• Red Hat Enterprise Linux 6 operating system

**Discontinued as of:** February 1, 2021; 8.1.104.07 <hr class=\"item-separator\">

Using the Discontinued Support button

- 1. If you need to add a new discontinued support item on your RN Welcome page, click the Edit Source button.
- 2. Under the Discontinued Support section, place your cursor in the location where you want to add the item.
- 3. In the tool bar, click the Genesys drop-down menu, and click the DS button on the far right.



The following coding is added where you placed your cursor.

----

Discontinued item placeholder

{{RNDS|Month DD, YYYY|Version number}}

4. Update the information based on your scenario.

Thanks Balaji for implementing this.

# Discontinued Support convention for SOE

# Important

Following the convention here is only required when you need to add new discontinued items. It's your decision if you want to update existing entries.

Similar to the RNs, consider the following three scenarios associated with discontinued support of an SOE item:

- Scenario 1:When a component no longer supports an SOE item (like an OS, database, Java version, and so on) but Genesys and the vendor still support it.
- Scenario 2: When the SOE item reaches Genesys EOS and the PM doesn't extend support for it.
- Scenario 3: When the SOE item reaches Genesys EOS, but the PM extends support for a particular product and/or component. Then, at some point, the PM decides the component should no longer support it.

# Scenario 1

Once you clarify with the PM that the discontinued support of an SOE item comes under scenario 1, specify the last supported release version in the **Conditions** field of the required SOE item per the following convention:

Last supported version: <7-digit-version>

Example Windows Server 2012 discontinued as of 8.1.514.47.

Conditions Last supported version : 8.1.514.47

Scenarios 2 & 3

For scenarios 2 and 3, remove the associated row from the SOE.

# Related Resources/Addtl Info

#### For both online RNs and HTML RNs.

If you have a link to the SOE in the Related Resources (online RNs) section or Additional Information (HTML RNs) section, add text that points directly to the product page of the SOE associated with the the RN. For example, for an eServices component, you can add the following bullet:

• For online RNs: The eServices page in the Genesys Supported Operating Environment Reference Guide

provides detailed information about the supported operating environments, including requirements, supported versions, and any conditions or limitations for eServices components.

• For HTML RNs: Add the same wording, but without links.

**Note:** All online RNs include this link. Some HTML RNs may have it if you or the previous writer added it to the HTML RN.

# Release Notes with JIRA Process

This document is part of the overall Release Note Process which is available in the Genesys Documentation Writer Guide.

This document focuses on the creation of Release Note (RN) drafts from JIRA (the Genesys bug-tracking system) to:

- Documentation/RN wiki, in an automated way.
- Legacy RN files in HTML format, in a semi-automated way.

# Online

# Release Note with JIRA—Online Wiki Pages

Use the following instructions to create Release Note (RN) drafts from JIRA to online output format. Additionally, you can watch the video.

Link to video

# Release Note Generation Steps

At a high level, you first need to select from JIRA all the issues that are relevant to the release you are documenting; then ensure that all the issues that need to be documented have the Release Note field populated; and, finally, use the Release Note View to compile the Release Note entry.

To move the content from the Release Note view to wiki, you use the Wiki RN Extension that creates and/or updates pages in the wiki-based Release Note manual for your component. You need to supply information that is not available from JIRA (such as, Operating Systems for a given release) on special web forms.

## **Prerequisites:**

1. The Release Note manual for the component must exist on the Documentation wiki (docs.genesys.com) before you start the generation to wiki. Contact the Pubs RN Admin alias to create a Release Note manual for your component. Include a copy of, or a link to, the Packaging Specs.

2. You must be logged in to docs.genesys.com for the generation to succeed.

# Gathering Your Content in JIRA

To select relevant issues from JIRA:

- 1. Select your project in JIRA.
- 2. Under **Summary** in the left pane, select **Issues**, and then click **All Issues**.
- 3. On the Issue Navigator page, under Filters, select a correct filter.
  - If a filter for this particular release is defined, select it and proceed to Step 4.
  - If a filter is defined for a previous release of the product, select it, modify it appropriately, save it (or **Save As**), and proceed to Step 4.
  - If no filter has yet been created for a particular component release, select **All Issues** and build a new filter to gather all applicable features, fixes, and open issues. You can save the filter and reuse/ modify it later for the same/new release of the same component. You can also share the filter with your team or ask Project Managers and/or Development Managers to share their filters with you.

JIRA Filtering capabilities enable you to select the issues that are considered for Release Notes, by various criteria: type (Defects, New Features, etc.); priority (Blocker, Critical, Major, etc.); status (Open, Closed, etc.); version (Affects Version/s, Fix Version/s); time (range of dates when issues were Created or Resolved); or content of a particular field ("Release Note" field is not empty, for example). Recommended filtering settings depend on your use case. See the section on Sample Filters for guidelines.

4. Review the issues that were selected from JIRA and are now displayed on the **Issue Navigator** page. Check that they have **Release Note** information.

The **Release Note** field must be populated for an issue to appear in the **Release Note View**. If an issue must be included in the RN, but is missing a **Release Note** field, work with your team to edit the issue and add information to the **Release Note** field.

**Note:** You can modify the appearance of your **Issue Navigator** page in JIRA so that the **Release Note** field is included among the visible columns. To do so, on the **Issue Navigator** page, click the **Columns** icon in the right top corner and search for the Release Note column. Select the **Release Notes** column to add it to the list configuration either as a default view or particularly for this filter. Drag and drop the column headings to change the order of appearance, if necessary.

- 5. Open the **Export** menu that you can access from the **Export** icon at the right top corner.
- 6. Select Release Note View.

**Tip:** Right-click the view name (**Release Note View**) to see a command to open the view in a new tab or a new window. Otherwise, the **Release Note View** will replace the list of issues in your browser, and you'll have to use the **Back** button if you need to return to the issues list on the **Issue Navigator** page.

7. In the **Release Note View** that opens, verify that issues are placed in correct sections.

Note: Do not fill parameters in the top section of the Release Note View just yet.

For wiki Release Notes, check the tabs in the **Selected Issues** section:

• Improvements tab, for resolved Epics, New Features, and Improvements.

- Corrections tab, for resolved Defects and Tasks.
- Known Issues tab, for open Defects and Tasks.

For legacy (HTML) Release Notes, check the **Release Note Preview**:

- New in This Release section, for resolved Epics, New Features, and Improvements.
- Corrections and Modifications section, for resolved Defects and Tasks.
- Known Issues and Recommendations section, for open Defects and Tasks.
- 8. Verify that the wording is correct for each issue. To edit the descriptions, choose one of these three methods:
  - (Recommended) To ensure that the latest wording is in JIRA, return to Issue Navigator in JIRA and edit the wording in the **Release Note** field for a particular issue. Then, repeat Steps 5 through 7.
  - To change an issue description only for the generated Release Note, update the text in the **Selected Issues** section of the **Release Note View**. (See also the **Version Check** section.)
  - Otherwise, plan on correcting the wording in the Release Note draft when you are revising it in wiki or, for legacy HTML Release Notes, in your Editing tool.

# Important

Keep in mind that wiki RN generation overwrites the content of the DRAFT 7-digit release page (such as, 8.5.100.03) when you generate the same RN draft multiple times. Capturing the latest wording in JIRA ensures that you don't lose any revisions that you made in wiki if you have to generate a new draft for the same 7-digit release. Note that you can always trace your in-wiki edits through the history tab on the 7-digit release page.

9. When the content is finalized and you are ready to transfer it to the Release Note draft, fill out or update all fields in the form in the Release Note Generator (the top section of the **Release Note View**).

# Moving Content from JIRA to Wiki

- 1. If you haven't already, log in to the Documentation site in a separate browser tab or window.
- 2. In the Release Note View window, click Wiki Draft Generator under Choose a Release Note Format.
- 3. In the **Publish to Wiki** section that appears, click the **Submit** button.
- 4. In the **RN Form** window that appears, confirm or specify the following:
  - Component Release Note title
     Note: If your component does not appear in the list, contact the Technical Publications Wiki Admins alias to add the Release Note manual to the system.
  - Release number
  - Operating Systems
  - Date when Release Note is expected to be published

Then, click Submit.

5. On the **Validate Known Issues** form, make any adjustments to the wording or status of Known Issue items. By default, new JIRA wording is used for any issues that were previously documented in the wiki Release Note.

The following color legend helps you to identify different issues:

- Yellow--The issue already exists in the wiki RN, but either the wording or Version parameters changed since the last generation. Review the changes carefully.
- Blue--The issue is brand-new for this wiki RN, so review the wording carefully.
- Green--The issue already exists in the wiki RN, and it did not change since the last generation.

Then, click **Submit**.

As a result of this and the previous Steps, a new page for the release is added to the Release Note manual for the component; the **Welcome** page and, if necessary, the **Known Issues** page are updated with new release information.

- 6. From the **Special:RNForm** page, click the links to navigate to the new and updated pages. Verify the generated content of the DRAFT pages, then click **Edit** at the top and **Save** each page. Make any editing and formatting adjustments as required, saving regularly.
- 7. If necessary, update the TOC page.
  - If the TOC for your RN Manual looks correct on the left-hand side, going to the TOC page and saving it is optional. Because of a Ponydocs issue, the TOC page appears nearly empty after each new generation, which does not impact the appearance of the manual itself because the TOC code is preserved.
  - If the TOC appears to have extra or missing pages (for example, a 3-digit release page, such as 8.5.2, while your component only has 8.5.1 and 8.5.0 releases), edit the TOC page as follows:
  - 1. Select RN View Current TOC in the left-hand column.
  - 2. Select the Edit tab at top.
  - 3. Delete invalid topics from the TOC code and any empty lines following the topic. For the 8.5.2 release example, delete the line for the following topic: *topic:component852*
- 8. When you are editing a newly created Component's Release Note for the very first time, add the following information to the **Welcome** page:
  - Link to this Component's Release Note for the prior release (for example, 8.1 HTML file), if applicable.
  - Documentation references for your particular product in the **Additional Information** section, preceding the generic list (that is, the SOE and any other System Guides).

After the draft is generated, make the Release Note available to the product team for review and follow the review/approval process.

# Release Note Review

For online Release Notes (8.5 and later releases), use the same review process as for other wiki content. Note that your reviewers need permissions for the "RN" product rather than your typical product in order to see the draft versions of Release Note manual for your component.

- If your reviewers have user accounts on the Documentation site, granting "Employees" permissions to their accounts should give them read access to RN DRAFT versions.
- If your reviewers don't have user accounts on the Documentation site, and if you don't require your
  reviewers to submit comments in the wiki, a generic login account can be used for the purpose of RN
  review:
- login name: RN\_reviewer
- password: **genesys**

# What if the Release Number Changes?

If the release number of your release note changes, use the **Modify Release Note** feature to update your draft. The release number appears in the release note's URL and TOC. Changing the release number involves updating several pages, creating a new page, and deleting the old page. We added the "Modify Release Note" feature to simplify this process.

If you adjust the seven-digit release number, the "Modify Release Note" function makes the following changes in the DRAFT version only:

- 1. Creates a new release note draft and copies over the existing content.
- 2. Replaces all instances of the old seven-digit release number with the new number on the page.
- 3. Updates the Available Releases table on the Welcome page.
- 4. Deletes the old release note page.

If you adjust the publishing date, release type, or supported operating systems, the tool:

- 1. Makes the requested changes on the draft release page.
- 2. Makes the same changes in the Available Releases table on the Welcome page.

# Warning

The tool does not update release numbers on the Known Issues page. After running the tool, you may need to update Fixed In and Found In numbers on the Known Issues

page.

# Using the Modify Release Note Feature

1. Open your release note draft and click the **Modify Release Note** button.

# Modify Release Note

The Modify Release Note button.

- 2. You should now see the **Modify Release Note Draft** form. From this form, you can adjust the release number, release type, release date, and/or supported OS of your release note.
- 3. Click **Modify** to save your changes. If the release number matches the release number of an existing release note draft, you will be warned that you will overwrite the existing content.
- 4. When the tool finishes the update, you will see a confirmation page with links to the updated overview page and your updated release note.

# HTML

# Release Note with JIRA—HTML Files

Use the following instructions to create Release Note (RN) drafts from JIRA to HTML output format.

# Release Note Generation Steps

On a high level, you first need to select from JIRA all the issues that are relevant to the release you are documenting; then ensure that all the issues that need to be documented have the Release Note field populated; and, finally, use the Release Note View to compile the Release Note entry.

To move the content from the Release Note View to an HTML file, you then manually copy the HTML source of the generated Release Note entry and Known Issues section and paste them into an existing RN file for your component. You need to add a release row in the Table of Contents section,

including the information that is not available from JIRA (such as, Operating Systems for a given release).

### **Prerequisites:**

1. The Release Note file in HTML format must exist for the component.

# Gathering Your Content in JIRA

To select relevant issues from JIRA:

- 1. Select your project in JIRA.
- 2. Under **Summary** in the left pane, select **Issues**, and then click **All Issues**.
- 3. On the Issue Navigator page, under Filters, select a correct filter.
  - If a filter for this particular release is defined, select it and proceed to Step 4.
  - If a filter is defined for a previous release of the product, select it, modify it appropriately, save it (or **Save As**), and proceed to Step 4.
  - If no filter has yet been created for a particular component release, select **All Issues** and build a new filter to gather all applicable features, fixes, and open issues. You can save the filter and reuse/ modify it later for the same/new release of the same component. You can also share the filter with your team or ask Project Managers and/or Development Managers to share their filters with you.

JIRA Filtering capabilities enable you to select the issues that are considered for Release Notes, by various criteria: type (Defects, New Features, etc.); priority (Blocker, Critical, Major, etc.); status (Open, Closed, etc.); version (Affects Version/s, Fix Version/s); time (range of dates when issues were Created or Resolved); or content of a particular field ("Release Note" field is not empty, for example). Recommended filtering settings depend on your use case. See the section on Sample Filters for guidelines.

4. Review the issues that were selected from JIRA and are now displayed on the **Issue Navigator** page. Check that they have **Release Note** information.

The **Release Note** field must be populated for an issue to appear in the **Release Note View**. If an issue must be included in the RN, but is missing a **Release Note** field, work with your team to edit the issue and add information to the **Release Note** field.

**Note:** You can modify the appearance of your **Issue Navigator** page in JIRA so that the **Release Note** field is included among the visible columns. To do so, on the **Issue Navigator** page, click the **Columns** icon in the right top corner and search for the Release Note column. Select the **Release Notes** column to add it to the list configuration either as a default view or particularly for this filter. Drag and drop the column headings to change the order of appearance, if necessary.

- 5. Open the **Export** menu that you can access from the **Export** icon at the right top corner.
- 6. Select Release Note View.

**Tip:** Right-click the view name (**Release Note View**) to see a command to open the view in a new tab or a new window. Otherwise, the **Release Note View** will replace the list of issues in your browser, and you'll have to use the **Back** button if you need to return to the issues list on the **Issue Navigator** 

page.

7. In the **Release Note View** that opens, verify that issues are placed in correct sections.

Note: Do not fill parameters in the top section of the Release Note View just yet.

For wiki Release Notes, check the tabs in the **Selected Issues** section:

- Improvements tab, for resolved Epics, New Features, and Improvements.
- Corrections tab, for resolved Defects and Tasks.
- Known Issues tab, for open Defects and Tasks.

For legacy (HTML) Release Notes, check the Release Note Preview:

- New in This Release section, for resolved Epics, New Features, and Improvements.
- Corrections and Modifications section, for resolved Defects and Tasks.
- Known Issues and Recommendations section, for open Defects and Tasks.
- 8. Verify that the wording is correct for each issue. To edit the descriptions, choose one of these three methods:
  - (Recommended) To ensure that the latest wording is in JIRA, return to Issue Navigator in JIRA and edit the wording in the **Release Note** field for a particular issue. Then, repeat Steps 5 through 7.
  - To change an issue description only for the generated Release Note, update the text in the **Selected Issues** section of the **Release Note View**. (See also the **Version Check** section.)
  - Otherwise, plan on correcting the wording in the Release Note draft when you are revising it in wiki or, for legacy HTML Release Notes, in your Editing tool.

# Important

Keep in mind that wiki RN generation overwrites the content of the DRAFT 7-digit release page (such as, 8.5.100.03) when you generate the same RN draft multiple times. Capturing the latest wording in JIRA ensures that you don't lose any revisions that you made in wiki if you have to generate a new draft for the same 7-digit release. Note that you can always trace your in-wiki edits through the history tab on the 7-digit release page.

9. When the content is finalized and you are ready to transfer it to the Release Note draft, fill out or update all fields in the form in the Release Note Generator (the top section of the **Release Note View**).

# Moving Content from JIRA to HTML

- 1. Click **Refresh Preview** to update the **Preview** section and verify that everything looks correct.
- 2. Click the Generate HTML Code button.
- 3. Copy the source code of the release entry from the **Release Note Entry HTML** box and paste this content into the **Releases** section within the Release Note HTML file for your component.
- 4. Copy the source code of the known issues from the **Known Issues and Recommendations HTML** box, if applicable, and paste this content into the **Known Issues and Recommendations** section

within the Release Note HTML file. Change the order of the new items, if necessary.

- 5. In the Release Note HTML file, update the **Contents** table to include the newly added release entry, marking the operating systems that are applicable to this particular release.
- 6. Revise, edit, and format any descriptions, if you have not updated the descriptions directly in JIRA.

# Release Note Review

For HTML Release Notes (8.1 and prior releases, as well as some components in 8.5 release), use the usual review process that works for your team. It is recommended that you upload the review drafts in your product's folder on the **Tech Pubs Review** site in Alfresco and send out the link, rather than sending an attachment. This way, your reviewers can always find an up-to-date version in the same location.

# Filters

# Sample Filters

This section describes the RN plug-in logic and covers use of JIRA filters for a few typical use cases, which you may need to adjust based on the way your team is using JIRA.

For comprehensive information about filtering and search capabilities that JIRA offers, see Atlassian Help

**Note:** The examples are intended to illustrate the syntax rather than to produce accurate results at any point in time. Because the status of JIRA issues changes continuously, the results of certain filter expressions may differ for the products used in the examples.

# RN Plug-in Logic

# Issue Placement

The table below illustrates how different JIRA issues are sorted into the three sections in a Release Note. Issues of the types that are not listed are *not* included into **Release Note View**.

**Note:** For any JIRA issue to appear in the generated RN, the issue *must* have a populated **Release Note** field.

A combination of the type and status determines the default placement of an issue in the generated RN.

<b>RN Section Name</b>	JIRA Issue Type	JIRA Issue Status
New In This Release	Epic, Improvement, New Feature	Closed, Code Done, Verified, Resolved
Corrections and Modifications	Task, Defect	Closed, Code Done, Resolved
Known Issues and Recommendations	Task, Defect	Open, In Progress, Reopened. Resolved or Closed with Resolution: Will Not Fix

# Hot Fixes

# Hot Fixes Use Case 1: Patch Request

This use case assumes that a Hot Fix is tracked in JIRA by means of a Patch Request issue, and that all the software changes that are relevant to this Hot Fix are tracked in JIRA as Epics, Improvements, Defects, and Tasks and are linked to the Patch Request issue.

To create a filter, specify the following text in **Advanced Search**.

## Syntax:

issue in linkedIssues(<JIRA#>)

where <JIRA#> is the JIRA issue number for the Patch Request.

#### Example:

issue in linkedIssues("SIP-14601")

This filter returns all JIRA issues that are currently linked to the Patch Request issue. (In the example, it is a Patch Request for SIP Server.)

The same filter can be defined for a Hot Fix that is created as a Story in JIRA, as long as all relevant issues are linked to the Story issue.

**Note:** If any Improvement issues are included in the Hot Fix (for example, a new configuration option), they will appear in the New in This Release section in the generated Release Note.

# Hot Fixes Use Case 2: No Patch Request

This use case assumes that a Hot Fix is tracked in JIRA by means of an issue other than Patch Request, but that a specific release number is used for the Fix Version/s field of each issue that has been corrected in the Hot Fix.

To create a filter, specify the **project** and **fixVersion** parameter.

## Syntax:

project = <project name> AND fixVersion = "<version>"

## Example 1:

project = SS AND fixVersion = "statserv 8.1.000.43"

### Example 2:

project = ICON AND fixVersion = "8.1.100.35"

This filter returns all JIRA issues that are currently Fixed or Code Done in the specified release number.

**Note:** If the product indicator is omitted in a freeze version in JIRA (such as statserv\_ in the example), you may receive issues from other projects in your list. If this happens, fine-tune the filter to exclude other projects.

# Hot Fixes Use Case 3: New Known Issues

Typically, the number of Known Issues that are added to a Hot Fix Release Note is low, and the JIRA numbers for these issues are communicated by the team. To include these issues into the filter, specify the issue IDs at the end of the search expression.

## Syntax:

OR Key = <JIRA#>

## Example:

The Stat Server filter used in Use Case 2 changes as follows to account for two new open issues:

project = SS AND fixVersion = "statserv\_8.1.000.43" OR Key = SS-5529 OR Key = SS-5584

This filter returns two open JIRA issues in addition to the issues fixed in statserv\_8.1.000.43 release (as long as they are still have an Open status).

# General Release

# General Release Use Case 1: Genesys Project

This use case assumes that a General Release is tracked in JIRA by means of a Genesys Project issue, and that all the software changes that are relevant to this General Release are tracked in JIRA as New Features, Improvements, Defects, and Tasks and are linked to the Genesys Project issue.

To create a filter, specify the following text in **Advanced Search**.

# Syntax:

issue in linkedIssues(<JIRA#>)

where <JIRA#> is the JIRA issue number for the Genesys Project.

## Example:

issue in linkedIssues("GIM-7746")

This filter returns all JIRA issues that are currently linked to the Genesys Project issue. (In the example, it is the v813 Genesys Info Mart Genesys Project.)

# General Release Use Case 2: No Genesys Project

This use case assumes that a General Release is tracked in JIRA by means other than a Genesys Project issue. For a project like that, you can search for relevant fixes by defining a component, a range of Fix Versions, and/or a range of Resolved dates in your filter.

This use case can apply to a JIRA Project that covers multiple software components, with each component requiring a separate Release Note. In this situation, you can modify the filter from General Release Use Case 1 to return only the issues that relevant for a particular component.

# General Release Use Case 3: New Known Issues

At the time of a General Release, it makes sense to review all the outstanding issues at the product team level and assess their addition to the component's Release Note as Known Issues and Recommendations.

## All Open Issues

To create a filter for Known Issues, specify the project name, applicable issue types, and issue status (include issues in Code Done or Reopened status, so that they are not lost).

## Syntax:

project = <project\_name> AND resolution = Unresolved AND "Release Note" is not empty
ORDER BY updated DESC

## Example:

project = GIM AND resolution = Unresolved AND "Release Note" is not empty ORDER BY
updated DESC

The above filter returns all open issues ("Unresolved") that have Release Note information.

**Note:** To see all the open issues, regardless of Release Note information, remove the AND "Release Note" is not empty parameter from the search expression.

### Customer-Reported Issues

You can limit the issues to those that were reported by the customer by filtering on the **Customer Related** flag, as follows.

#### Syntax:

project = <project\_name> AND resolution = Unresolved AND "Release Note" is not empty
AND "Customer Related?" = Yes ORDER BY updated DESC

#### **Example:**

project = GIM AND resolution = Unresolved AND "Release Note" is not empty AND "Customer Related?" = Yes ORDER BY updated DESC

### **Priority Issues**

Additionally, your team may decide to focus on blocking, critical, and major customer defects only, for the Release Note purposes.

#### Syntax:

project = <project\_name> AND resolution = Unresolved AND "Release Note" is not empty AND priority in (Blocker, Critical, Major) AND "Customer Related?" = Yes ORDER BY updated DESC

#### **Example:**

```
project = GIM AND resolution = Unresolved AND "Release Note" is not empty AND
priority in (Blocker, Critical, Major) AND "Customer Related?" = Yes ORDER BY updated
DESC
```

#### Recently Opened Issues

You can further limit the issues to those that were opened recently by filtering on the time when the issues were created. Specify the number of days during which issues may have been opened in the recent past, or use the date of the last General Release as the starting point in this filter.

#### Syntax:

created >= "-<N>d"

## Example:

```
project = "SIP Server" AND created >= "-30d" AND "Release Note" is not empty ORDER BY
updated DESC
```

### Syntax:

created >= "YYYY/MM/DD"

### Example:

project = "SIP Server" AND created >= "2014/09/30" AND "Release Note" is not empty
ORDER BY updated DESC

# Combining Fixes and Known Issues

You can build complex filters by combining various parameters into a single search expression. Moreover, one filter can combine an expression that searches for fixed issues with an expression that searches for open issues. When you do that, be careful about the choice of operators and the order of parameters. For more information about filters, click **Syntax Help** when you are in the **Advanced Search** view.

# Complex Filter Example

Examples in this section illustrate how complex filters work. Example 1 provides filtering by date for open (Unresolved) issues that have Release Note information in JIRA. Example 2 provides filtering for issues that are linked to a Patch Request. Example 3 combines Example 1 with Example 2. Note the order of the two expressions and the use of the operator 0R in Example 3.

## Syntax:

<Filter 1> OR <Filter 2>

### Example 1:

project = "SIP Server" AND created >= "2014/09/30" AND resolution = Unresolved AND "Release Note" is not empty ORDER BY updated DESC

#### Example 2:

issue in linkedIssues("SIP-14601")

#### Example 3 (Combined):

project = "SIP Server" AND created >= "2014/09/30" AND resolution = Unresolved AND
"Release Note" is not empty OR issue in linkedIssues("SIP-14601") ORDER BY updated
DESC

# Version Check

# Checking the Versions

Use the Version Check logic to adjust visibility and placement of issues in the generated RN for projects in which fixes are not necessarily included into a current release. This situation is typical for a Continuous Delivery model in which issues that are fixed in the next code branch are pulled from JIRA because of their type and status; however, they are not delivered until a future release. For such cases, the plug-in compares the Fix Version in JIRA against the Release Number you specify in the form.

- If the Release Number is equal to, or is greater than, the Fix Version, the issue placement does not change.
- If the Release Number is less than the Fix Version, you are given a choice whether to include the issue into the RN.
- 1. To activate the Version Check logic, fill out the parameters in the top section of the **Release Note View**, including the release number.
- 2. Click the Version Check button in the Issue Selection section.
- 3. Review the updated list of issues on the three tabs:
  - On the **Improvements** tab, any New Features and Improvements with a Fix Version higher than the specified Release Number no longer appear.
  - On the **Corrections** tab, any Defects and Tasks with a Fix Version higher than the specified Release Number have the **Include** check box cleared. If a given issue needs to be included in the Corrections and Modifications, select the **Include** check box. If the issue needs to be included in the **Known Issues** section, click the **Move to Known Issues** button.
  - On the **Known Issues** tab, any Defects and Tasks with a Fix Version higher than the specified Release Number have the Fixed In field cleared.

In the **Selected Issues** section, you can modify the issue description or Found In and Fixed In version numbers, if necessary. Note, however, that these changes are not propagated back to JIRA issues.

# Publish

# Publishing Release Notes

For 8.1 and prior releases (and those 8.5 RNs that are not yet converted to wiki format), use the established publication process for Release Notes in HTML format.

For 8.5 and later releases, use the publication process described below for wiki Release Notes.

For both HTML and wiki Release Notes:

- Pubs Editors must approve the format prior to publication.
- The writer must publish a Release Note Freeze Form in XING, unless the RN is associated with v9.0 (formerly G-NINE) and has been decoupled from the IP.

# Publishing a Release Note

The triggers for Release Note publication for General, Update, and Hot Fix releases are described in the overall Release Note Process.

To publish an online Release Note for a new release:

- 1. Receive approval from the team (particularly, Development Manager and QA Manager) on the technical content of the Release Note page for the 7-digit release, **Welcome** page for the Component Release Note, and **Known Issues** page for the component.
- 2. Receive a peer-edit and apply any copy-editing corrections to the pages.
- 3. Receive a format approval from Pubs Editors.
- 4. Make sure you are logged in to the Documentation wiki.
- 5. On the DRAFT Release Note page for the 7-digit release, select the **publish release note** tab.
- 6. On the **Genesys Release Note Generator** page that appears, confirm the publication of the 7-digit Release Note page. Click **Publish Draft**.
- 7. The **Genesys Release Note Generator: Publish Draft—Complete** page appears. Here, right-click and Open in New Tab/Window the following links:
  - a. The Release Note for the 7-digit release. On the page that opens, verify that the content was moved from the DRAFT version to the final RN Manual. Click **Edit** and **Save** the page.
  - b. The Welcome page for the Component's Release Note. On the page that opens, verify that the content was moved from the DRAFT version to the final RN Manual, including the link to the new 7-digit release. Click Edit and Save the page.
- 8. If you made any manual changes to the TOC in the Draft version, they don't carry over. Repeat the required TOC updates in the published version. For example, add or remove 3-digit release pages for 8.5.1, 8.5.2, etc. releases, if required.
- 9. To publish Known Issues, go to the DRAFT **Known Issues** page and select the **publish known issues** tab.

**Note:** Yes, the **Known Issues** page has to be explicitly published because publication of the 7-digit release page does not include Known Issues. This separation enables you to update Known Issues independently of a release.

- 10. On the **Genesys Release Note Generator** page that appears, confirm the publication of the **Known Issues** page. Click **Publish**.
- 11. The **Genesys Release Note Generator: Publish Known Issues—Complete** page appears. Here, right-click and Open in New Tab/Window the Known Issues link. On the page that opens, verify that the content was moved from the DRAFT to the final version. Click **Edit** and **Save** the page.

**Note:** If you receive an error during the publication process, check whether the RN was published despite the error. To do so, navigate to the final version of your 7-digit release page by replacing the DRAFT version number with the final number (such as, 8.5.x) in the URL. If the page does not exist, contact the Pubs RN Admin alias to publish your RN manually.

Your wiki Release Note has been published.

After publishing the online, wiki Release Note, do the following:

- Publish the Release Note freeze form in XING, unless the RN is associated with v9.0 (formerly G-NINE) and has been decoupled from the IP.
- Verify that the Release Notes link from your product landing page on the Documentation site points to the **Welcome** page of the Component's Release Note.

# Updating a Previously Published Release Note

If you need to make any changes to a previously published Release Note, including an additional operating system or updated release type, always make the change in the DRAFT version of the Release Note first. Then follow the same process as for Publishing a Release Note.

# Publishing/Updating Known Issues

If you need to make any changes to a previously published **Known Issues** page (including an additional issue, updated description, or Found In/Fixed In version), always make the change in the DRAFT version of the **Known Issues** page first. Then follow steps 8 through 10 of the process for Publishing a Release Note.

# Q&A

This section lists frequently asked questions and some outstanding issues.

### Q1: What is the process around updates to RN field for Closed issues?

**A1:** While it is a good practice to keep the final, approved wording for issues in JIRA, there is no automated process to achieve this currently. If you want to update the Release Note field after an issue is closed, you can do so manually.

### Q2: How do I filter by resolution values?

**A2:** If necessary, you can use specific resolution values to include or exclude certain issues, by using the **AND resolution** = **<resolution>** parameter. Below are the JIRA values for this parameter.

### **Example:**

project = GMS AND resolution = "Will Not Fix"

Below are the JIRA values for the resolution parameter as applicable to the Resolved and Closed status, respectively.

#### **Resolved:**

- Fixed (system default)
- SIT Pass
- Will Not Fix
- Duplicate
- Not a Bug

### Closed:

- Fixed (system default)
- Will Not Fix
- Duplicate
- Not a Bug

## Q3: Are there any additional recommendations for filtering?

**A3:** If sample filters don't satisfy your project needs, start building a filter in **Basic** mode. Once a basic filter is working, switch to **Advanced Search** if you want to add more complex parameter combinations to the filter. The **Syntax Help** icon (which looks like a question mark) in the **Advanced** filter view takes you to JIRA documentation regarding various search and filtering functions. Short video tutorials on the subjects are also available on the Atlassian site.

## Q4: Can the RN Plug-in read the Component Name from JIRA?

**A4:** For most filters, the product name must be specified in the search expression that defines the filter. However, the component name is not necessarily the same as the product name, and the RN Plug-in does not retrieve the component name from each particular issue. It is the responsibility of the writer to check or enter the correct component name in the HTML Generator form. The Wiki Generator form allows you to quickly choose the component from a drop-down list—just start typing the first letters of the component's name.

# Q5: How does a writer track product issues to identify those issues that were documented as Known Issues in prior releases and are fixed now?

**A5:** It is recommended to copy the approved KI text back into the JIRA Release Note field, for future reference. After the issue is fixed, you need to update the Release Note field to describe the correction. During subsequent generations, the script compares the wording of a KI in the RN with the description of a new fix it gets from JIRA. You can choose to leave the old wording on the Known Issues page so that it is not overwritten with the description of the correction.

#### Q6: Does RN Plug-in populate the Found In version for Known Issues?

**A6:** Yes, as long as it is specified in JIRA. Be careful, however, in the cases when the Found In version is internal, as only publicly available version numbers are supposed to appear in the published RN.

#### Q7: Is General Release Use Case 2 (No Genesys Project) a valid use case?

**A7:** This use case is provided for completeness. We are monitoring the use of JIRA by different teams; and, if the use case is determined unnecessary, the information will be removed or replaced, as appropriate.

# Q8: How do you order items in Issue Navigator so that the most recent issues appear first (or last) in Release Note View?

**A8:** The ORDER BY parameter can be used as the last parameter in a filter definition. Assuming that the lower values for issue numbers identify the oldest issues, the descending order for issues numbers can be defined with the following syntax:

ORDER BY KEY Desc

The syntax for making the oldest issues to appear at the top of the list is the same, with the last word replaced with Asc.

# Q9: Is the new RN Plug-in something everyone needs to download/install on their computers?

A9: The Release Note Plug-in is available as part of JIRA, and there is no need to install it separately.

#### Q10: I do not see the RN field in the issue I'm working on. How can I find/add it?

**A10:** The **Release Note** field is not visible until some text is added to it. As long as the issue is of the correct type (for example, a defect), the **Release Note** field becomes available for input during the Create, Edit, Resolve, or Close operation. Once the text is added, the field and its content become visible in the issue view.

#### Q11: Can I use HTML tags to have more options with formatting RN text in wiki?

**A11:** Some HTML tags are allowed in MediaWiki, and our MediaWiki platform is most likely to support them. The JIRA RN plug-in is expected to pass the supported HTML code to the generated wiki RNs. If you need to use typical HTML formatting (such as lists or font treatment), you can code the format in the RN entry text in JIRA. Consult the official list of supported HTML tags: http://www.mediawiki.org/ wiki/Help:Formatting#HTML\_tags

#### Q12: What URL do I, as a writer, send to my reviewers?

**A11:** This is up to you and to the team, as long as you're referring your reviewers to the DRAFT RN pages. If you want to ensure that the team checks all three pages (7-digit release page, Welcome
page for the RN manual, and Known Issues page), you can list the three URLs separately in your review request. For the initial release, sending the URL for the Welcome page gets the reviewers into the right manual. For subsequent releases, most writers only send the URL for the new 7-digit release and most reviewers find their way to the Known Issues and Welcome pages.

#### Q13: How do I, as a writer, move my HTML Release Note to wiki?

**A13:** For 8.1 release, you can continue using HTML format for release notes until further notice. In fact, the JIRA Plug-in supports generation of HTML code and can still be helpful for RN updates in HTML. If the Release Note for your 8.5 component has already been published in HTML format, you need to select the time when to move it to the wiki. Do understand that a component's Release Note for the same release family (such as 8.5.x) must not exist in two formats simultaneously. Thus, when you move to wiki, you are required to convert the existing HTML RN to wiki pages. When you contact the Release Notes Administrator with a request to create a new wiki Release Note to replace an existing HTML RN for your component, ask for any automation suggestions.

## Q14: What if the release number of my wiki release note changes? Do I need to start over from JIRA?

A14: If the release number of your draft wiki release note changes, use the **Update RN** feature to update your release note. See **What if the Release Number Changes?** under the **Online** tab of the **Release Notes with JIRA Process**.

#### Q15: How do I link to a subsequent release family?

A15: On the welcome page of your wiki RN, add the following line

{{LatestRNVer|Component\_Name|9.0}} or {{LatestRNVer|Component\_Name|9.1}}

just before \_\_TOC\_\_ == Available Releases==

Make sure to replace the **Component\_Name** with the actual component name. This will add an important note with the proper link.

# **Example:** The {{LatestRNVer|Digital Messaging Server|9.1}} line creates this output:



# Known Issues in online RN

Starting from August 2020, the sorting algorithm for Known Issues (KI) items during RN generation requires specific wiki coding. The KI items are sorted and displayed in the following order:

- 1. Recommendation KI items.
- 2. KI items without JIRA IDs.
- Regular KI items with Found In and Fixed In values. KI items with release numbers are sorted on descending order starting from the latest release. If two or more KI items have similar release number, they are sorted by JIRA IDs in descending order.
- 4. KI items for Engineering Requests (ER prefix).
- 5. Documentation KI items.

### Format Regular KI Items

#### Make sure that every KI item has

<!-- Beginning of known issues item -->

#### and

<!-- End of known issues item -->

#### tags.

Otherwise, on the next RN generation KI list might get corrupted. It is a good idea to do a history check on the KI page after new RN generation to make sure that only expected changes were made. If some KI items where not formatted properly, there might be some unexpected updates and not necessary to this item. For example, JIRA ID or the release number was modified by the tool in the KI item that was previously correctly displayed.

There are no changes to the {{RNKI}} template for regular KI items.

### Format Recommendations and no JIRA ID Items

To ensure the RN Automation tool sorts KIs automatically, writers must adopt the following guidelines for issues such as recommendations and KI without JIRA IDs.

• Every recommendation and every no JIRA ID item on the KI page must follow the following structure:

```
<!-- Beginning of known issues item -->
<Placeholder for the KI content>
<!-- {{RNKI|||}} -->
<hr class="item-separator">
```

<!-- End of known issues item -->

```
Important
The {{RNKI}} template is commented out for recommendations and no JIRA ID items.
```

 If the item is a recommendation, replace the third line with <!-- {{RNKI|RECOM-1||}} -->. The subsequent recommendations will follow the sequence as RECOM-2, RECOM-3, etc. Example:

```
<!-- Beginning of known issues item -->
PostgreSQL deployments require JDBC4.1 Driver Version 9.4.1211.
<!-- {{RNKI|RECOM-1||}} -->
<hr class="item-separator">
<!-- End of known issues item -->
```

 If the item is a KI without a JIRA ID, replace the third line with <!-- {{RNKI|NOID-1||}} -->. The subsequent KI without a JIRA ID will follow the sequence as NOID-2, NOID-3, etc. JIRA IDs can follow after the NOID-1 string.

```
<!-- Beginning of known issues item -->
By default, user data transformation supports date and time only in ISO 8601 format:
YYYY-MM-DDTHH:MI:SS. Note that the character 'T' between DD (date) and HH (hour) is
required.
<!-- {{RNKI|NOID-1||}} -->
<hr class="item-separator">
<!-- End of known issues item -->
```

#### Example

The first item on the https://docs.genesys.com/Documentation/RN/9.0.x/pulse90rn/pulse90KI page is a known issue without JIRA ID.

docs.genesvs.com/Docum	entation/RN/9.0.x/pulse90rn/pulse	90KI					合 熙	0
	🔞 Genesys Engag	e.	Genesys Engage 🗸		Q Search	our docs		-0
			Release Notes					
Release Notes							Feedback Download a PDE v	
Genesys Pulse 9.0.x - Release Note	As of Friday Octob	er 16th, access to restricted conter	nt on this site now requires you to lo	g in with your Genesys account. If you	ı don't have an accou	nt, you can	In this article	
Translation Support	request one at the	se locations: Request MyPartner Po	ortal Account or Request My Suppor	rt Account.			Genesys Pulse	
Known Issues and Recommendations							Internationalization Issues	
Release 9.0.0 +	edit Edit source						Back to top	
Helpful links for	Genesys Pulse 9.0.x Release No	te / Known Issues and Recommendations			_			
writers					9.0.x 9.0.xDRAFT	Page Status 🧭		
Manage RN 🗸 🗸								
Manage content v	Known Issi	ues and Recom	nmendations					
resources								
MediaWiki tools 🗸 🗸								
	Genesys Pulse							
	The Known Issues and Re recommendations associa release describes the corr	commendations section is a cumul ated with this product. It includes in ections and may list additional issu	lative list for all 9.0.x releases of Ge formation on when individual items ues that were corrected without first	nesys Pulse. This section provides the were found and, if applicable, correct being documented as Known Issues.	e latest information of ed. The Resolved Issi	n known issues and ues section for each		
	See also Internationalizati	ion Issues.						
	Single Sign-On (SSO) is no	ot supported until GWS Auth service	es are available on premise.					
	The Select All checkbo Workaround: Disable the S	x in Dashboard, Wallboard, and Wid Search by Column function.	lget Template Management interfac	es does not work when the Search b	y Column function is	enabled.		
	ID: WBRT-14405	Found In: 9.0.005.02	Fixed In:					
	The Widget Count colum Workaround: Use the Refr	n of the Widget Management scree resh button.	en does not show the actual values	after remove operations are performe	d from the same scre	een.		
	ID: WBRT-14037	Found In: 9.0.005.02	Fixed In: 9.0.006.00					

#### The code for it is:

```
<!-- Beginning of known issues item -->
Single Sign-On (SSO) is not supported until GWS Auth services are available on premise.
<!-- {{RNKI|NOID-1||}} -->
<hr class="item-separator">
<!-- End of known issues item -->
```

### Under Investigation

The following questions are under investigations:

- Can I use <!-- {{RNKI|RECOM-3 GIM-11283, GIM-11361 ||}} --> to have the JIRAs in the markup for future reference?
- Can I use <!-- {{RNKI|NOID-1|8.5.100.10|}} --> to have the version, this issue was found in, for future reference?

Let RN Admin (PubsRNAdmin@genesys.com) know if you have other questions.

# General Release Note

### Important

In May 2020, a new automated procedure for Internal Announcements was introduced that leverages the IP Test forms for IPs and CDs of the General and Restricted type. Sometime after QA publishes the associated form, the Project Manager (usually) completes various fields under the PA Planning section of the form, including the PA date. Based on this information the announcement email is generated and sent out. Previously, Project Managers created the email announcements manually. This change does not impact writers directly because writers only publish the documentation and RNs when they see the Software Delivery announcement.

### PA Planning:

PM Control for New orders:
PM Control for All orders:
Custom PM Approver:
New Sellable Item:
New Sellable Item Info:
New Sellable Item(s) URL:
New ders: or All ders: over: tem: Info: m(s) JRL:

However, a few things are worth noting:

- For your Release Notes, if your team hasn't yet communicated the date, you can use the date in the IP Test form to begin with. You can later confirm the date with your team or from the Internal Announcement.
- Two other fields, called *PM Control for New orders* and *PM Control for All orders* (also usually populated by the Project Manager), indicate whether there is any PM control. Writers can use this information to determine if they need to indicate PM control in the Restrictions field of the RNs.

It is likely that the information in the form is not only tied to the automated Internal Announcement but to

Software Delivery processes as well. Given this, if the information is not filled out in the form, it is possible that neither the Internal Announcement or the Software Delivery will be generated, and you won't have the notification to publish your documents.

A General release/build is for a new product or a new major release of an existing product that meets Product Availability (PA) criteria and is available to customers. It is also for a maintenance release or CD refresh of a product that is already generally available in the field.

General release notes are also used for PA products/components that are under shipping control. For products/components that are under shipping control, the Product Manager determines which customers can obtain that product or component version.

General release notes are online starting with 8.5 releases and use the RN generator tool, which leverages JIRA and was developed by our department. (Note: Some 8.5 products still have HTML RNs if they have not yet transitioned to online RNs.) For information on using that tool, see Release Notes with JIRA Process.

#### The Packaging Spec and General RNs

At the beginning of a project, the Project Manager prepares a Packaging Specification, with the writers help to complete the Doc tab. The Packaging Specification identifies each component that will be included in the software release. Since Genesys product RNs are written for components, the Packaging Specification enables Technical Publications to determine the RNs that will be needed for the product. XING entries are created, based on this specification, which enables RN notification forms to be frozen for the associated component.

### Writers Steps

- 1. The PCT schedules and tracks the PA release.
- 2. The software is frozen by the developer. The developer adds release notes comments in the Release Note field or as a Comment in the JIRA issue about each fix or change that is deemed relevant to customers by the PCT. A component freeze form is generated using the XING database that informs you of the version number of the component. Using that version in JIRA, you can also determine what issues are addressed in that General version. As part of the process, the developer or Development Manager updates the JIRA issue status for each issue to Resolved for QA to test. QA changes the status to Closed if the issue works as expected and can be documented in the release note. If an issue is not fixed or working as expected, it will be left open and Development and QA will let you know via the JIRA issue if you need to document it as a Known Issue.
- 3. The Project Manager may organize a Defect Review Meeting with the PCT prior to the release. The purpose of this meeting is to determine which open defects will be documented as Known Issues in the RNs. If draft RNs are already in process, they may be reviewed at this meeting. Otherwise, the team may just leverage JIRA to identify open defects as well as corrections and new features.
- 4. The writer's next step depends on whether the release note is online or in HTML format.
  - If the RN is in HTML format, and the RN for that same major release (for example, 8.5.x) has already

been published, the writer downloads the most recent release note from the associated Genesys Public location in SharePoint.

• If the RN is online, the writer uses the RN generation tool to create the RN. See Release Notes with JIRA Process for information on how to use the tool.

Notes:

- If you have a scenario where it seems that there are no new features and no corrections for a component, see the "When There Seems to Be No New Features and No Corrections" section of Unusual Release Note Scenarios.
- Generally, the Release Type for Major and Maintenance Releases is General (PA). However, check with your Project Manager to be certain. New products may be released as Restricted initially or under shipping control. For more information, on the Release Note Content Details page, What's New tab, see the Under Shipping Control Scenarios section.
- 5. Typically, the writer provides Development with a draft RN for review first. After Development approves the technical content, the writer provides it to the Product Manager, QA reviewer, and a Customer Care person (if your team regularly works with someone from that group for your product) for their technical content approval. Approval is typically sent via email for tracking purposes. (Note: Customer Care is not an official approver of release notes though.)
- 6. The Project Manager mediates any blocking issues regarding technical content between Development, QA, and Customer Care for your product to ensure final consensus and approval of the release note. Note: These reviewers are not approvers of grammar or template-related issues. The assigned writer/ Technical Publications department is responsible for those areas.
- When the RN is approved, the writer sends it for a Peer Review (to another writer) to approve grammatical accuracy, quality, and clarity. *Notes:*
  - RNs should be completed prior to the product release (if the project follows the Waterfall model, before TR).
  - The timeframe for delivery of the RNs is determined through negotiations between the Project Manager, Technical Publications, QA, and Development, and is included in the Documentation Schedule and the overall project schedule.
- 8. Request an RN format check.
- When the RN is completed and approved by the PCT and Technical Publication Editing, you are ready to publish it on the release date. Notes:

When the project release is released, the PM publishes an email announcement. That is not the indicator to publish the RN. Software Delivery needs a little time to make the software available. Hence, writers need to wait until they see either the PA Availability Announcement from Software Delivery (if the product has not yet been fully automated in XING) or the Internal Delivery Announcement from XING Automation (if the product is fully automated in XING) before freezing the release note.

- Release Note Date: The date you use for the RN release is the PA date rather than the IP Test Pass date.
- Internal Delivery Announcement: This is automatically generated by XING Automation when the physical media is ready for customers. An example of this email is as follows: To: (a variety of email addresses, including Software Delivery Request and Project Delivery Notification)

Subject: FYI: Internal Delivery Announcement ( Genesys Customer Experience Insights 9.0.0 English (United States) 9.0.015.00 ) PA .

Greetings,

R&D is pleased to announce PA availability of IP Genesys Customer Experience Insights 9.0.0 English (United States) 9.0.015.00

PA availability date is 18-JUN-20.

IP is available for Pure Engage Premise deployments

IP is available for Pure Engage Cloud deployments

This version contains the following available languages: English (United States)

Genesys Customer Experience Insights 9.0.0 English (United States) 9.0.015.00 is shipping without PM approval.

There are no new Sellable Items to be marked as available for customers as of the PA date.

Shipping versions list is located here: http://genotype.genesyslab.com/xing/ shipversions/.

In case of any questions please contact SW Delivery request email alias.

Kind regards,

**XING** Automation

• PA Availability Announcement: The Internal DR4 announcement email (Availability Announcement) is automatically generated by Software Delivery when the physical media is ready for customers. Technical Publications WW is now one of recipients of this email. An example of this email is as follows:

To: Internal DR4 Announcement

Subject: PA: Availability Announcement: Nuance Vocalizer Network 5.0 Swedish-Sweden (sv-SE Alva) Voice Installer - 5.0.0 (English (United States)) 5.0.002.00 CD/ DVD

Greetings,

R&D is pleased to announce PA Availability of Nuance Vocalizer Network 5.0 Swedish-Sweden (sv-SE Alva) Voice Installer - 5.0.0 (English (United States)) 5.0.002.00 CD/ DVD

Comments: PA Date: 10-Nov-10. No PM control.

Congratulations and thanks to the R&D teams involved.

The "Currently shipping releases" file has been updated.

Kind regards,

Software Delivery

10. The writer does the following:

- 1. For online RNs, the writer publishes the RNs, per the Release Notes with JIRA Process.
- For HTML RNs, the writer notifies Pubs Editors to place the HTML RN into the Production Server and SharePoint. Note: At some point, automation will be set up so that the writers can upload the HTML RN to both locations.

3. Using XING, you publish the RN Freeze Form for each release note. (RN Freeze Forms are not required for Wizard Advisories, Release Advisories, or restricted RNs.)

11. Following the release,

- The writer verifies that the correct RN is posted on the product page of docs.genesys.com website.
- For HTML RNs, the writer posts a copy of the RN on \\Galaxy\tdoc\_final\Current\_RNs.

# Update Release Note

Update is an intermediary release type which follows a General (PA) release (known as the base release) that uses a simplified release process. The release is available only through the download system and might be limited to a sub-set of supported operating systems. Updates cannot contain restricted content. If the Product is currently listed as Restricted (RA), it must be moved to PA prior to initiating the Update process. An Update release may consist of a delivery of features, bug fixes or a combination of both.

Unlike Restricted release notes or Pre-release notes, Update releases are part of the same cumulative release note as General (PA) releases.

Like General (PA) release notes, starting with 8.5, Update release notes can be delivered in online format. However, if the General release note is still in HTML, you add the Update release to the same cumulative HTML release note as used for the General release. If your 8.5 release note is not yet converted to online format, please contact Tanya Ivanova to begin that process.

#### Notes:

- An Update release presumes that the component has been first released as General for that major version (for example 8.5.x). If you have a situation where there is no General release listed, contact **Pubs Editors**.
- The Update release type can be used for any product that is still supported by Genesys. In most cases, that would likely be 8.0 releases and onward.

#### Updates for General releases under shipping control

If the previous General (PA) release for a component is under shipping control, any following Update does *not* need to be identified as under shipping control in the release note. Updates are not designated as under shipping control because:

- The PM has to approve a customer to receive the General release.
- Any Updates following that version will only help those who were already approved for the General release.
- Adding Under Shipping Control to an Update would mean that every approved customer who wants the Update would have to receive approval from the PM prior to receiving it.

### Procedure

- 1. The PCT schedules and tracks the Update release and JIRA issues are opened.
- 2. The software is frozen by the developer. The developer adds proposed text for the release note in the Release Note field in JIRA about each fix or new feature. A component freeze form is generated using the XING database. As part of the process, the developer or Development Manager updates the JIRA status to "Resolved."
- 3. Technical Writers track the need for an Update using JIRA and the associated Project Core Team

meetings.

- 4. As Developers provide the text in the Release Note field, the writer reviews the text and revises if necessary to improve the wording. If the writer has questions about the proposed wording, the writer contacts the Developer to obtain clarification, using the Comment field in JIRA.
- 5. The Technical Writer develops the Update content for the JIRA issues associated with this update. See Release Note Content Details for details on the technical content of release notes.
- 6. Using the RN generation tool, the writer generates the code (HTML, if RN is in HTML format, or Wikimarkup, if the RN is online). Note: If the RN is in HTML format, and the RN for that same major release (for example, 8.5.x) has already been published, the writer downloads the most recent release note from the associated Genesys Public location in SharePoint.
- 7. Typically, the writer provides Development with a draft RN for review first. After Development approves the technical content, the writer provides it to the Product Manager, QA reviewer, and a Customer Care person (if your team regularly works with someone from that group for your product) for their technical content approval. Approval is typically sent via email for tracking purposes. (Note: Customer Care is not an official approver of release notes though.)
  - If the RN is online, be sure that your reviewers have permission to access draft online content. This requires that they create an account on our docs.genesys.com site. See Wiki Access for information.
  - If the RN is in HTML format, you can attach the HTML RN to an email sent to reviewers.
- 8. The Project Manager mediates any blocking issues regarding technical content between Development, QA, and Customer Care for your product to ensure final consensus and approval of the release note. **Note:** These reviewers are not approvers of grammar or design/format/template-related issues. The assigned writer/Technical Publications department is responsible for those areas.
- 9. When the RN is approved by your Project Core Team, the writer sends it for a Peer Review (to another writer) to approve grammatical accuracy, quality, and clarity.
- 10. Request an RN format check.
- 11. If the Update has a deployment procedure:
  - For an HTML RN, if your RN already has an existing Deployment Procedure, you update the Procedure as necessary to include the Update version. To the Update release entry in the cumulative RN, you add a link to the Deployment Procedure HTML. The standard wording should be, "Refer to the Deployment Procedure for this release to deploy the installation package within your environment."
  - For an online RN, the RN generation process should cover what to do. If not, contact Pubs Editors.
- 12. For the Update release date, specify the date that the IP Test form is published as Pass (by QA).

### Warning

For an iteration release, QA should only publish the IP Test **on the release date** for that iteration, not before! Otherwise, the software will be available before the iteration release occurs.

- 13. When the IP Test form is published as Pass by QA , the writer does the following:
  - For online RNs, the writer publishes the RNs, per the Release Notes with JIRA Process.
  - For HTML RNs, until Box is fully implemented, the writer follows the procedures provided by Pubs Editors in an email as part of RN format checking. Note: When Box is fully implemented, this section will be updated.

- Using XING, you publish the RN Freeze Form for the release note. (**Note:** RN Freeze Forms are *not* required for RNs that are part of the v9.0 release where the Packaging Spec Freeze in XING value is set to N.)
- 14. Following the Update release,
  - The writer verifies that the correct RN is posted on the product landing page on the docs.genesys.com website. Contact **Pubs Editors** if the correct version is not displayed.
  - For HTML RNs, the writer also posts a copy of the RN on \\Galaxy\tdoc\_final\Current\_RNs, and in Genesys Public on SharePoint per the reminders provided by Pubs Editors in the RN format check email replies.

# Hot Fix Release Note

A hot fix release is the release of a component version that includes corrections to that version. Often these corrections are to defects found by customers. Sometimes hot fix releases include new features. The new feature may be implemented to resolve one of the defects.

Unlike restricted release notes or pre-release notes, hot fix releases are part of the same cumulative release note as General (PA) releases.

Like General (PA) release notes, starting with 8.5, Hot Fix release notes can be delivered in online format. However, if the General (PA) release note is still in HTML, you add the hot fix release to the same cumulative HTML release note as used for the General (PA) release. If your 8.5 release note is not yet converted to online format, please contact Tanya Ivanova to begin that process.

#### Notes:

- A hot fix presumes that the component has been first released as General (PA) for that major version (for example 8.5.x). If you have a situation where there is no General (PA) release listed, contact **Pubs Editors**.
- If you have a hot fix that is now becoming a General (PA) release, see the "When Hot Fix Becomes General" section in Unusual Release Note Scenarios.
- A patch release for a restricted release is still a restricted release. The Hot Fix freeze type only applies to code that is generally available and intended for multiple customers.

### Untested hot fixes

Technical Publications does not create pre-release notes for Hot Fixes (sometimes referred to as an "untested hot fix") or Updates. These early releases do not require an RN because they are not tested. In rare occasions (that has not happened recently), a restricted RN could be required, per agreement with the team and Software Delivery.

### Hot fixes for General (PA) releases under shipping control

If the previous General (PA) release for a component is under shipping control, any following hot fix does *not* need to be identified as under shipping control in the release note. Hot fixes are not designated as under shipping control because:

- The PM has to approve a customer to receive the General (PA) release.
- Any hot fixes following that version will only help those who were already approved for the General (PA) release.
- Adding Under Shipping Control to a hot fix would mean that every approved customer who wants the hot fix would have to receive approval from the PM prior to receiving it.

### Procedure

- 1. One or more defects are escalated to the PM or another Genesys representative and JIRA issues are opened.
- 2. The PCT scopes the effort to fix and test the defects, assigns a hot fix version to the associated JIRA issues, and sets a target date for delivery of the hot fix version.
- 3. The software is frozen by the developer. The developer adds proposed text for the release note in the Release Note field in JIRA about each fix. A component freeze form is generated using the XING database. As part of the process, the developer or Development Manager updates the JIRA status to "Resolved."
- 4. Technical Writers track the need for a hot fix using JIRA and the associated Project Core Team meetings.
- 5. As Developers update the text in the Release Note field, the writer reviews the text and revises if necessary to improve the wording. If the writer has questions about the proposed wording, the writer contacts the Developer to obtain clarification, using the Comment field in JIRA.
- 6. The Technical Writer develops the hot fix content for the JIRA issues associated with this hot fix. See Release Note Content Details for details on the technical content of release notes. Note: If you have a scenario where it seems that there are no new features and no corrections for a hot fix, see the "When There Seems to Be No New Features and No Corrections" section in Unusual Release Note Scenarios.
- 7. The writer's next step depends on whether the release note is online or in HTML format.
  - If the RN is in HTML format, and the RN for that same major release (for example, 8.5.x) has already been published, the writer downloads the most recent release note from the associated Genesys Public location in SharePoint.
  - Using the RN generation tool, the writer generates the code (HTML, if RN is in HTML format, or Wikimarkup, if the RN is online). See Release Notes with JIRA Process for information on how to use the tool.
- 8. Typically, the writer provides Development with a draft RN for review first. After Development approves the technical content, the writer provides it to the Product Manager, QA reviewer, and a Customer Care person (if your team regularly works with someone from that group for your product) for their technical content approval. Approval is typically sent via email for tracking purposes. (Note: Customer Care is not an official approver of release notes though.)
  - If the RN is online, be sure that your reviewers have permission to access draft online content. This requires that they create an account on our docs.genesys.com site. See Wiki Access for information.
  - If the RN is in HTML format, you can attach the HTML RN to an email sent to reviewers.
- 9. The Project Manager mediates any blocking issues regarding technical content between Development, QA, and Customer Care for your product to ensure final consensus and approval of the release note. **Note:** These reviewers are not approvers of grammar or design/format/template-related issues. The assigned writer/Technical Publications department is responsible for those areas.
- 10. When the RN is approved by your Project Core Team, the writer sends it for a Peer Review (to another writer) to approve grammatical accuracy, quality, and clarity.
- 11. Request an RN format check.
- 12. If the Hot Fix has a deployment procedure:
  - 1. For an HTML RN, if your RN already has an existing Deployment Procedure, you update the Procedure as necessary to include the hot fix version. To the Hot Fix release entry in the cumulative RN, you add a link to the Deployment Procedure HTML. The standard wording should be, "Refer to

the Deployment Procedure for this release to deploy the installation package within your environment."

- 2. For an online RN, the RN generation process should cover what to do. If not, contact **Pubs Editors**.
- 13. For the Hot Fix date, specify the date that the IP Test form is published as Pass (by QA).
- 14. When the IP Test form is published as Pass by QA , the writer does the following:
  - For online RNs, the writer publishes the RNs, per the Release Notes with JIRA Process.
  - For HTML RNs, the writer notifies Pubs Editors to place the HTML RN into the Production Server and SharePoint. Note: At some point, automation will be set up so that the writers can upload the HTML RN to both locations.
  - 1. Using XING, you publish the RN Freeze Form for the release note. (**Note:** RN Freeze Forms are *not* required for RNs that are part of the v9.0 release where the Packaging Spec Freeze in XING value is set to N.)
- 15. Following the hot fix release,
  - The writer verifies that the correct RN is posted on the product landing page on the docs.genesys.com website. Contact **Pubs Editors** if the correct version is not displayed.
  - For HTML RNs, the writer also posts a copy of the RN on \\Galaxy\tdoc\_final\Current\_RNs, and in Genesys Public on SharePoint per the reminders provided by Pubs Editors in the RN format check email replies.

# Restricted Release Note

#### Important

As of July 2021, all IX folks can submit Restricted RNs to Production Builds once they have been approved by your PCT, peer edited, and format checked by Pubs Editors. Steps 9 through 12 explain the process. Examples of the email to Production Builds are also provided after the procedure.

### Important

In May 2020, a new automated procedure for Internal Announcements was introduced that leverages the IP Test forms for IPs and CDs of the General and Restricted type. Sometime after QA publishes the associated form, the Project Manager (usually) completes various fields under the PA Planning section of the form, including the PA date. Based on this information the announcement email is generated and sent out. Previously, Project Managers created the email announcements manually. This change does not impact writers directly because writers only publish the documentation and RNs when they see the Software Delivery announcement.

#### PA Planning:

2 Jun 2020	PA or RA Plan Date:
No	PM Control for New orders:
No	PM Control for All orders:
	Custom PM Approver:
No	New Sellable Item:
	New Sellable Item Info:
	New Sellable Item(s) URL:

However, a few things are worth noting:

- For your Release Notes, if your team hasn't yet communicated the date, you can use the date in the IP Test form to begin with. You can later confirm the date with your team or from the Internal Announcement.
- Two other fields, called PM Control for New orders and PM Control for All orders (also usually populated by the Project Manager), indicate whether there is any PM control. Writers can use this information to determine if they need to indicate PM control in the Restrictions field of the RNs.

It is likely that the information in the form is not only tied to the automated Internal Announcement but to Software Delivery processes as well. Given this, if the information is not filled out in the form, it is possible

that neither the Internal Announcement or the Software Delivery will be generated, and you won't have the notification to publish your documents.

### Important

- Currently, restricted RNs are still delivered in HTML format.
- If you have a restricted component that is now becoming a General (PA) release, see the "Restricted Release Becomes General" section on the following page: Unusual Release Note Scenarios.
- A patch release for a restricted release is still a restricted release. The Hot Fix freeze type only applies to code that is General (PA) and intended for multiple customers.

A release can be classified by Product Management as restricted for a number of reasons; for example, the release can have limited testing, a limited customer base, or limited platform support. A restricted release does not go into the cumulative RN; it is a separate RN. For Technical Publications, a restricted release follows this process:

- 1. The PCT schedules and tracks the restricted release.
- 2. The software is frozen by the developer. The developer adds Release Notes comments in the Release Note field or as a Comment in the JIRA issues about each fix or change that is deemed relevant to customers by the PCT. A component freeze form is generated using the XING database that informs you of the version number of the component. Using that version in JIRA, you can also determine what issues are addressed in that restricted version. As part of the process, the developer or Development Manager updates the JIRA issue status for each issue to Resolved for QA to test. QA changes the status to Closed if the issue works as expected and can be documented in the release note. If an issue is not fixed or working as expected, it will be left open and Development and QA will let you know via the JIRA issue if it needs to be documented as a Known Issue.
- 3. The writer's next step depends on the nature the restricted release.
  - If the product and component are new, never released before, and its first release is restricted, you obtain the HTML template (link below) and start from scratch to create the RN.
  - If the product has been released before but as restricted, you get the previously created HTML
    restricted Release Note and add the new section for that later version to the top of the release note
    just as you would add a new section for a new release in a General (PA) Release Note. Note: This
    type of "cumulative" restricted RN is most often used for new products that have never been
    released as General (PA), Early Adopter customers for products or iterations that have a more
    limited release, and, in exceptional circumstances, for internal development (for example,
    Designer). Check with your PCT to confirm that this cumulative format is appropriate.
  - If the product/component has been released before as General (PA), you obtain the restricted HTML Release Note template and create the restricted RN *with only that restricted version*. You do *not* take the General (PA) release note and add a restricted section.

The HTML template is stored in SharePoint here.

4. For a new restricted RN, the writer decides on a reasonable name for the restricted RN. The file name

for a restricted RN mirrors the file name for the cumulative General (PA) release note with the release version number and, possibly, the client name added for identification. For example, "mm-gcld-dr-fb90rn\_9000307.vodafone.html". Confirm the file name with Pubs Editors.

5. The writer develops technical content based on the JIRA information for issues associated with this restricted release. The Technical Writer may contact the appropriate Development and QA engineers to request any needed information. See Release Note Content Details for details on the technical content of RNs.

**Note:** The content in the restricted RN is specific to that restricted release version. In other words, if there are no known issues, discontinued support notices, or internationalization issues introduced in this specific restricted release, refer readers to the main RN for that information. In other words, you don't have to copy the content from the main RN to the associated sections in the restricted RN.

- 6. If the restricted release includes documentation, how you handle it depends on the format and how the restricted content is being delivered.
  - If the restricted content is not online (whether the release is being delivered via FTP, physical CD, or CD image), non-wiki documentation is placed in the documentation folder within the build.
    - If delivery is by physical restricted CD or CD image, you provide them to Pubs Editors for format checking (after your team has approved them) and then, once approved by Pubs Editors, Pubs Editors (Kate, in this case) adds them to the same folder as the CD Readme. Only when the restricted and approved non-online documents are in place can the restricted and approved CD Readme be frozen in XING. (All of this has to happen prior to the CD or CD image being created).
    - If delivery is by FTP (which occurs most often these days), you provide them to Pubs Editors for format checking (after your team has approved them) and then, once approved by Pubs Editors, Pubs Editors send the restricted non-online documents to Production Builds to be placed in the documentation folder of the build.
  - For restricted online content, in the Additional Information section include login credentials and the URL to the restricted (that is, set to preview) online content. Or generate a PDF of the draft restricted content for delivery with the IP, as noted above. Insert a RESTRICTED watermark (20% opacity).
- 7. Typically, the writer provides a draft RN to Development for review first. After Development approves the technical content, the writer provides it to QA and a Customer Care person working on your product (if known) for their technical content approval. Approval is typically sent via email for tracking purposes.
- 8. When the RN is approved by the PCT, the writer sends it for a Peer Review (to another writer) to approve grammatical accuracy, quality, and clarity, and then for a final Format/Content Check (to Pubs Editors) to approve the style and the format of the RN. (**Note:** You can also combine the next step with this one.)
- 9. When the restricted release is ready for release, check the Component Freeze form in XING or with your team to see if the IP is frozen and if so, that the type is Restricted.
- 10. Email Production Builds with the attached RN, in a format described below.
  - Copy Pubs Editors, your Project Manager, and any others that typically want to be copied for your Restricted Release Notes.
  - If the IP has not yet been frozen, alert Production Builds of that in the email. They agreed to hold onto the RN and drop it in the IP when the IP is frozen.
- 11. After Production Builds has added the Restricted RN to the IP, Production Builds (likely Svetlana) will email you back accordingly. If you typically reply thank you when working with folks, remove the Production Build alias from your reply because the Production Builds process uses JIRA and including

the alias in your thank you email will result in reopening the associated JIRA ticket.

12. Upload your Restricted RN your product's Restricted Docs folder in Global IX SharePoint.

### Email Examples

#### Format for one Restricted HTML RN in the email

Subject: Restricted RN: <component name> <7-digit version>

Hello,

The attached restricted RN is approved for inclusion in the IP for <component> <7-digit-version>. Let me know if you have any questions regarding this file.

#### Format for multiple Restricted HTML RNs in the email

Subject: Restricted RNs: <product name> X.Y.z

Hello,

The attached restricted RNs are approved for inclusion in their respective IPs:

- <component 1> <7 digit-version>
- <component 1> <7 digit-version>
- <component 1> <7 digit-version>

Let me know if you have any questions regarding these files.

#### Tip

- The writer does **not** generate a Release Note Notification form for a Restricted RN.
- Restricted release notes are **not** included on the Documentation Library DVD.
- Writers do **not** place restricted RNs in the Genesys Public folder in the repository or add a link to it on the product documentation landing page. You also do not add it to the Genesys Release Notes page on our documentation site. You do add it to the appropriate product folder in the Restricted Docs folder in Global IX SharePoint > Restricted Docs.
- A hot fix for a restricted release is still a restricted release.

# Pre-release Notes and pre-release documentation

Pre-release documentation, consisting of a required Pre-release Note (PRN) and optional manuals and/or Help files for pre-release, will commonly not be later updated for the recipient of the prerelease, nor added to when the released General (PA) version is ready. In other words, this process and the PRN template apply only to the pre-release. It may be possible to reuse portions of the content for the released General (PA) manuals and Release Note (RN).

### Procedural Information

If your product is having a pre-release, you will need to create a Pre-release Note, in HTML format, for each component delivered as a pre-release. We do not support online pre-release or restricted release notes. The Project Manager is your key contact in this process. He or she will let you know when a pre-release document is needed. This process may not apply to all customers and it does not replace any software releases.

1. Contact Pubs Editors to alert them of the pre-release.

#### Notes:

- Technical Publications does not create pre-release notes for hot fixes. These early releases of hot fixes (sometimes referred to as an "untested hot fix") either do not require an RN because they are not tested, or they might require a restricted RN, per agreement with the team and Software Delivery.
- Pre-releases are delivered via FTP. No Readme is needed. Pubs Editors send the Pre-release Note to Production Builds for inclusion in the IP. Any associated non-wiki documentation (PDFs, HTML deployment procedures and the like) is also sent to Production Builds for placement in the Documentation folder within the build.
- We do not post the Pre-release Note on the Genesys documentation website.
- Pubs Editors stores Pre-release Notes by software family in the Restricted Docs folder in Sharepoint.

### Creating the Pre-release Note

Do the following:

- 1. Obtain the HTML Pre-release Note template from the Technical Publications HTML Templates folder in Box according to the version of your pre-release.
- 2. Rename the file name following the naming convention for the General (PA) release note, but with pr\_<releaseversion> in place of the rn in the file name. For example, a Pre-release Note for Genesys Info Mart supporting pre-release software build 8.5.000.25: gim85pr\_8500025.html

- 3. Replace <Name of Component> with the actual component name as it would appear in the RN.
- 4. If necessary, change the copyright year.
- 5. Provide the software build number and date, and ensure that the date is the shipping date of the software to the recipient of the pre-release.
- 6. Link to the cumulative General (PA) release note for the most recent version of this software, if applicable. For example, for 8.5 code, link to the cumulative 8.1 RN (or, possibly, the 8.5 RN if this is a pre-release of a product/component that is continuous delivery). If this is new code with no existing Release Note (RN), delete this link.
- 7. Delete all text in dark pink shown in the template file. This text is meant to be instructional only.
- 8. Do not change the Introduction section other than to do the following:
  - Replace [Product Name] with the actual name of the product.
  - Replace [intended date of delivery] with the expected shipping date of the pre-release software. This will usually be the same as the date in Step 4.
  - Replace [estimated release date] with the currently scheduled General (PA) date for the project.
- 9. New In This Release should include any new features added for this code drop. Do not elaborate. This is probably one or two sentences.
- 10. If necessary, add items to the Corrections and Modifications section. It should include anything fixed in this code since the previous release. Again, for brand new code, this will be deleted. Be as brief as possible, but reference JIRA issue numbers if applicable.
- 11. If required, add Known Issues. There is a hidden Known Issues and Recommendations section in the template, consisting of commented-out text just before the Additional Information section, plus a short commented-out link in the Contents section. Refer to the Known Issues and Recommendations tab in this process for more information.
- 12. Complete the Additional Information section. This should include anything the Product Manager or the Project Manager feels is needed for this code drop. Generally, this might be testing information, platforms, and so on. If you need to provide access to pre-release online documentation, include login credentials to the associated content (published in preview mode) and a link to the location. See the Pre-release Documentation tab for additional information about delivering pre-release documentation other than the Pre-release note. To create login credentials, see Restricted or Pre-release for instructions.
- 13. Use the normal process for getting the Pre-release Note reviewed and approved. Development and QA should see the document. However, since the pre-release implies a special non-revenue situation, the final pre-release documentation approval comes from the Project Manager and the Product Manager.
- 14. Once your team has approved the Pre-release note(s), as well as any pre-release content (see the Other Pre-release Documentation tab), attach them to an email and send them to Pubs Editors for format checking. Include the product name and component name and version. If you want team members notified when they are sent to Production Builds, please include the names of those people. Once the Pubs Editor approves the Pre-release Note and any other content, the Pubs Editor will send them on to Production Builds for inclusion in the IP.

#### Notes:

- As with a Hot Fix RN, any deployment procedures that are needed should be in a separate Deployment Procedure document and referenced from the Pre-release Note.
- All other standard RN information has been omitted (except for the hidden Known Issues and Recommendations section). This is intended to be an abbreviated version of an RN.

### Known Issues and Limitations

On occasion it may be necessary to document issues, limitations, or recommendations that specifically apply to the pre-release. The PRN template contains a hidden, modified Known Issues and Recommendations section. The "Found In" and "Fixed In" tables have been eliminated for the PRNs as this information is not relevant to a pre-release.

#### Notes:

- Do not include known issues that are documented in an earlier RN, even if they also apply to the prerelease because the Pre-Release Note contains a link to the previous RN.
- Do not allow this section to become a "catch all" for many issues and limitations the project team wants to incorporate to "help" the customer. Do not document an item in this Pre-release Note if:
  - 1. It is already documented in a previous Release Note, Product Alert, Release Advisory, or Deployment Procedure.
  - 2. It is an issue related only to the General (PA) version of the software and not specifically related to the pre-release.
  - 3. It is a new feature or a correction.
  - 4. It can more readily be documented in the Additional Information section.

#### To make the Known Issues section areas visible

To make this section visible, uncomment lines in two areas:

1. Find the commented lines in the template that begin with:

<!-

HIDDEN KNOWN ISSUES MARKER

And remove the comment tags surrounding the following three lines:

<a href="#issues">

Known Issues and Recommendations

</a><br/>

-->

2. Find the commented lines later in the template that begin with:

<! - -

HIDDEN KNOWN ISSUES AND RECOMMENDATIONS SECTION STARTS HERE.

And remove comment tags surrounding the following section: <!--

<a name=issues></a>

. . .

<hr class="section-divider">

--->

<!-- End of Known Issues and Recommendations section -->

Add content to your Known Issues and Recommendations section. The section will appear in your PRN just above the Additional Information section, and will be accessible from the appropriate link that you uncommented earlier in the Contents section.

### Other Pre-release documentation

On occasion, other documentation content may need to accompany the pre-release software and the Pre-release Note. The Project Manager (PjM) and Product Manager (PM), and more generally the Project Core Team (PCT), decide whether product manuals or a help file in a pre-release draft state need to accompany the software. The decision whether to include pre-release documents in a pre-release must be made as soon as possible after a pre-release is officially sanctioned for a product.

If you need to provide customers with pre-release documentation, like a manual (prior to the general release), the content can be delivered online (in preview mode) or as a PDF. Check with your team to determine if they have a preference. (Note: The trend seems to be towards online content.)

Final, approved, PA-ready versions will usually not be provided for a pre-release except under special circumstances (such as a pre-release close to the release date when approved documents are ready), and only upon agreement of all members of the PCT.

### Delivering online pre-release content

If you're providing online content for the pre-release, create login credentials and include them in the Additional Information section of the Pre-release Note, along with the URL to the content. To create login credentials, see the **Restricted or Pre-release** page for instructions.

- 1. Remove change bars or highlights from the document.
- 2. Add "PRE-RELEASE" to the title.
- 3. On either the restricted/pre-release landing page or on the first page of the restricted/pre-release documentation, add the following coding: {{PrereleaseDisclaimer}} The text that displays looks like this:

**Disclaimer:** The information contained here is not considered final and is managed under the terms and conditions found in the Pre-release Agreement. This document provides the most up-todate reference information available for this pre-release version and is restricted for use by those who have signed the Pre-release Agreement with Genesys to acquire an early version of the software.

- 4. Publish the content in preview mode.
  - If the content is part of a manual already published, you'll have to create a unique version of it so
    that it can be published in preview mode. Confirm the available options with our admins using the
    Tech Pubs Support email alias.
  - If you only want to have a page of content, consider adding it to the Pre-release note or creating a

Deployment Procedure (HTML format).

### Delivering non-wiki content or wiki content in a PDF

If you're providing pre-release documentation as PDFs, before sending it to Pubs Editors for transmittal to Production Builds, do the following:

- 1. Remove change bars or highlights from the document.
- 2. Add the following on the cover of the PDF:

**Disclaimer:** The information contained here is not considered final and is managed under the terms and conditions found in the Pre-release Agreement. This document provides the most up-to-date reference information available for this pre-release version and is restricted for use by those who have signed the Pre-release Agreement with Genesys to acquire an early version of the software.

- 3. Generate a PDF of the draft content, and insert a PRE-RELEASE watermark (20% opacity).
- 4. Provide this PDF to Pubs Editors along with the approved Pre-release Note. Pubs Editors will transmit the PDF to Production Builds with instructions that it accompany the pre-release within the documentation folder inside the build.

# Deployment Procedure

For some releases, you may need to create a deployment procedure if the procedure is different from a standard deployment that a customer would follow for a General (PA) IP. What you do varies a little depending on the nature of the release to which it's associated.

- For a hot fix:
  - If the RN is online, contact Tanya Ivanova for instructions on what to do to create a online deployment procedure.
  - If the RN is HTML, follow the Hot Fix procedure provided below.
- If the deployment procedure is needed for a pre-release or a restricted release:
  - Check with your team to see whether the deployment steps can go into the pre-release note or restricted release note.
  - If a separate deployment procedure is needed, it must be HTML. In that circumstance, follow the Pre-release or Restricted Release procedure provided below.

**Note:** If you situation differs from those described or you have questions, contact Pubs Editors.

Hot Fix - HTML Format - Version-specific Deployment Procedure

### Important

This method is phased out and replaced with the Cumulative Deployment Procedure for release 8.0 and higher.

The version -specific procedure is associated with a specific version of a hot fix. Using this format, for each new hot fix that requires a procedure, a new Deployment Procedure file is created.

- 1. Technical Writers receive draft content for a deployment procedure document from the Engineering Development team that is preparing the Hot Fix.
- 2. The writer creates a "dummy" Deployment Procedure (only containing the component title, version, and copyright) with a file name that includes the version (for example, gim81dp\_811007.html). Deployment Procedure templates are available in the IX (Tech Pubs) Production >Templates > HTML Templates > 8.5 HTML Templates > Deployment Procedures folder in the Global IX SharePoint site. (More recent HTML templates have not been created, given the move to online content.)
- If a dummy procedure is needed, and a link to the deployment procedure must be added to the RN, the writer adds the dummy procedure to the public folder in the Repository and obtains the URL link from the tool.
- 4. Using the Deployment Procedure template (from the IX (Tech Pubs) Production >Templates > HTML Templates > 8.5 HTML Templates > Deployment Procedures folder in the Global IX SharePoint site), the writer drafts the procedure. (Alternatively, the writer can use the most recent previous Deployment Procedure for the component as a template.) The writer works with the developer to clarify the draft of

the deployment procedure.

- 5. Development and QA review and approve the technical content of the procedure.
- 6. When the Deployment Procedure is approved, the writer sends it for a Peer Review (to another writer) to approve grammatical accuracy, quality, and clarity, and then for a final Format/Content Check by Pubs Editors to approve the style and the format of the procedure.
- 7. When the associated Hot Fix RN for this Deployment Procedure is published, the writer does the following:
  - Uploads the approved Deployment Procedure to the Repository to replace the "dummy" Deployment Procedure. There is no Release Note Freeze Form for a Deployment Procedure it is considered a document.
  - Using the Documentation Freeze Form type Deployment Procedure, freezes the Deployment Procedure in XING as Approved and includes the Repository URL and any comments if required.
- 8. The writer makes the Deployment Procedure available to customers from the appropriate location on the Product landing page on docs.genesys.com.
- 9. The writer archives the approved Deployment Procedure in Global IX SharePoint in the same location as the product documentation once the release has gone out to customers.

### Pre-release or Restricted release - HTML Format - Version-specific Deployment Procedure

- The writer obtains the Deployment Procedure template from the IX (Tech Pubs) Production >Templates > HTML Templates > 8.5 HTML Templates > Deployment Procedures folder in the Global IX SharePoint site.
- 2. The writer renames the file name for the component and the version (for example, gim81dp\_811007.html.
- 3. The writer drafts the procedure and works with the developer to clarify the draft of the deployment procedure.
- 4. When the Deployment Procedure is approved, the writer sends it for a Peer Review (to another writer) to approve grammatical accuracy, quality, and clarity, and then for a final Format/Content Check to a Tech Pubs Production Editor, via the Pubs Editors alias, to approve the style and the format of the procedure.
- 5. The writer also sends the Pre-release Note or Restricted RN to Pubs Editors for a format check.
- 6. Once both are approved, the writer, sends the Release Note and the Deployment Procedure to Production Builds for inclusion in the component IP.

Cumulative Deployment Procedure - HTML FORMAT

#### Important

As of 2021, Cumulative Deployment Procedures in an HTML format are rare if nonexistent.

The cumulative procedure is associated with hot fixes for the major release (for example, 8.0, 8.1,

and so on), following a similar approach as RNs, which are cumulative. The writer follows the same steps used for version-specific procedures with the exception of the file name, which does not include the version number.

# Translation Support

#### Important

**Online International release notes** for products (like Pulse Advisors, Genesys Mobile Services, GCXI, iWD 9.0, and Widgets) that do not use language packs (language support is integrated into the Installation Package, and there are no separate Language Packs to install) and only have a single international IP, do **not** utilize the Translation Support page. Instead, the supported languages are documented in the What's New section and in the Supported Languages section on the seven-digit release page of the RN. Here's an example from iWD: https://docs.genesys.com/Documentation/RN/9.0.x/iwd-manager90rn/iwd-manager9000705

This page describes the process and procedures for creating and publishing a Translation Support page associated with Language Packs. A Translation Support page is created based on the availability of individual Language Packs for specific product components.

The Translation Support page of an online release note replaces the individual HTML Language Pack release notes. Instead of having to create an individual HTML RN for each language, you generate one online Translation Support page that covers all languages and versions in a particular family (8.5.0, 8.5.1, or 8.5.2, for example). You then populate the rows and fields with the appropriate values. **Benefit:** Moving this task online and creating only one page for all languages saves a lot of time for writers, Pubs Editors, peer editors, and even your PCT, especially for those products that have multiple components with Language Packs available for numerous languages.

The RN generation tool has been updated to facilitate creation of the Translation Support page. Instructions for using the RN generator for this purpose are provided below.

#### Notes:

- The phrase "Translation Support" is a broader term than Localization and is used to identify the languages in which Language Packs are available for a particular Genesys component.
- Translation Support pages may be updated as part of a seven-digit English release note, or independently from a seven-digit English release.
- The process for the creation of a *new* Translation Support page and updating an existing Translation Support page *with a new 8.5.x Translation Support table* is the same.

### Language Pack Translation Support Workflow

 The PCT Project Manager creates the Packaging Specification for the release, which includes definitions for localization deliverables. These definitions include International CD Readme(s), International CD, Language Pack IPs, and Language Pack RNs. XING definitions are created based on the Packaging Specification, which enables XING freeze forms to be created and issued for the associated RNs and IPs.

#### Notes:

- Although the Translation Support page eliminates the need to create one Language Pack RN for each component language, individual XING definitions for Language Pack RNs need to be created to enable the release of each Language Pack as the language is made available (unless the English RN is associated with v9.0 and the RN has been decoupled from the IP).
- All XING release note freeze forms for a component's Language Packs will point to the same Translation Support page. For example, the XING freeze form for the Workspace Desktop Edition Language Pack Japanese release note will point to the same Translation Support page as the XING freeze form for the Workspace Desktop Edition Language Pack German release note.
- 2. The writer reviews the approved Packaging Specification to identify what components are being translated and into what languages. Optionally, he or she can confirm what's needed with the Project Manager.
- 3. The writer uses the RN generator, described below, to create a draft version of the Translation Support page that contains a table for the version being translated. The table automatically includes two English columns by default and rows for all possible supported languages.
  - Notes:
  - If this is the first time you are creating a Translation Support page, the generator creates the draft page and the associated table (for example 8.5.1).
  - If you already have a Translation Support page with a table (for example, 8.5.1) and you are working on the next release (for example 8.5.2), the generator adds a new table to the top of the Translation Support page.
  - If the table already exists and you are:
    - Adding support for additional languages, *do not* use the RN generator. Just go into the table and add the additional languages and versions to the appropriate fields. See Languages, Abbreviations, and Codes for the naming convention for each language.
    - Adding a new release for the an existing major version (for example, 8.5.0), you manually add the new column to the **left** of the existing columns rather than use the RN generator. **Important:** Order the specific table with the most recent English release in the most left column and then proceed to the right for earlier releases.
    - (Unusual Scenario) Adding a new release for an existing major version (for example, 8.5.0), and it's based on an English version that already exists in the table, manually add the latest version in the language row just before (or above) the previous one. For example, see the WFM Data Aggregator French (Canada) release, based on the English release 8.5.210.03.
- On the particular 7-digit English release page in which the Language Packs are based, the "Supported Languages" section must have a link to the appropriate Translation Support section. If the Translation Support page is created or updated concurrently with the 7-digit release note generation, the tool handles the link addition. With the Independent Update process, the writer must remove the hidden comment tags to make the "Supported Languages" section (automatically inserted by the RN generation tool) on the 7-digit release page visible and add a link to the appropriate Translation Support section. See Workspace Desktop Edition for an example. The "Supported Languages" section is located near the bottom of the page.
- If you only have one English release localized, remove one of the default columns and specify the 7-digit
  English version for which language packs are being introduced. (Note: The RN generator automatically
  populates the English version number with a generic version that you have to update.) If you have more
  than two English release localized, add columns as needed. Important: Order the specific table with the
  most recent English release in the most left column and then proceed to the right for earlier releases.
- After generating the Translation Support draft page, remove any language rows that are not supported for

the major release (X.Y.z) and enter the version of the associated Language Pack.

Notes:

- If your product has previous releases of Language Packs for the major release and you created HTML RNs, add columns and rows for those releases to the Translation Support table.
- If your Language Pack requires a hot fix, after the Language Pack version add HF.
- If your Language Pack has an Update release, treat it in the same way as General (just state the release number without any suffixes).
- If the Language Pack version requires the mention of a Known Issue, add a asterisk to the right of the release number.
- After completing the Translation Support page, go to the Known Issues page and verify that any Known Issues were added under the Localization section (for 8.5 releases, called Internationalization).
   Note: The Localization section contains known issues associated with the specific Language Pack translation and localization rather than issues related to developer tasks.
- After you finish updating the draft Translation Support page and confirming the Known Issues content, provide your team with a link to both pages so they can confirm that everything is correct. If this is the first time your team has received the Translation Support page, instruct them that this one Translation Support page replaces the many individual Language Pack HTML RNs previously created.

### Creating/Updating a Translation Support Page Draft with the RN Generation Tool

### Concurrent Update

To create a new Translation Support table at the same time you are creating a new seven-digit English release note draft, do the following:

1. Begin creating a release note according to the Release Notes with JIRA Process. When you come to the **Genesys Release Note Generator: Create Draft** page on the documentation site, you will see a **Translation Support** section:

-Translation Support-
Check this box and enter a Release Family to create a Translation Support table. Fill in this table with Langua corresponding English releases. Remove non-supported languages from the table.
If you have not previously created a Translation Suport page, the page will be created for you.
If a Translation Support page exists, that page will be updated with a Translation Support table example for th
Add Translation Support table 🖉
Release Family: 8.5.1

Check the **Add Translation Support table** box, fill in the **Release Family** field and click **Next**. **Note:** A three-digit table (such as 8.5.1) needs to be created only once.

After you complete the Known Issues part of the form and click Create Draft, you will see the following output related to Translation Support:

### Genesys Release Note Generator: Create Draft-Complete

Genesys Softphone 8.5.100.88 Release Note

Genesys Softphone 8.5.x Known Issues Page

Genesys Softphone 8.5.x Release Note Welcome Page

Genesys Softphone Known issues page, updated Internationalization biolerplate.

Genesys Softphone 8.5.100.88 page, added Supported Languages section.

Genesys Softphone Translation Support page

- 3. Review the layout of the Translation Support table and note the following:
  - The fields under the Language column is where you enter the supported languages.
  - Under the English (US) Release, in bold, is the version of the English component.
  - Under the English component version, in the respective language fields, is where you enter the Language Pack version of that language.

When you use the Translation Support form, the RN generation tool does the following:

- Adds a new 8.5.X table example to the Translation Support page of the selected component. At each new third-digit release, a new table is created. For example, 8.5.0, 8.5.1, and so on.
- Adds a **Supported Languages** section to the seven-digit English release note. **Note:** The writer

removes the hidden comment tags to make this section visible on the 7-digit English release note page and adds a link to the appropriate Translation Support section.

- If the Translation Support Page did not previously exist, the release note tool:
  - Creates the Translation Support page, populates the page with content, and adds the page to the TOC.
  - Updates the boilerplate of the Known Issues page's *Internationalization Issues* section. (**Note:** This heading may change to Localization Issues.)

### Independent Update

Do the following to create a new Translation Support table outside of a seven-digit English release note workflow:

1. Log in to the Documentation site and go to <a href="http://docs.genesys.com/Special:RNForm/Localization">http://docs.genesys.com/Special:RNForm/Localization</a>. You will see the following form:

### **Genesys Release Note Generator: Translation Support**

-Translation Support-
Select a component from the drop-down box. If the component is not listed, contact the Pubs RN Admin alia
Enter a Release Family and click Create to create a Translation Support table example. Fill in this table with available for corresponding English releases. Remove non-supported languages from the table.
If you have not previously created a Translation Suport page, the page will be created for you.
If a Translation Support page exists, that page will be updated with a Translation Support table example for
Component: Select a component
Release Family: 8.5.X
Create

2. Select your release note component and fill in the **Release Family** field. Click **Create**. You will see an output page similar to the following:

# **Genesys Release Note Generator**

Genesys Administrator Extension Known issues page, updated Internationalization boilerplate.

#### Genesys Administrator Extension Translation Support page

When you use the Translation Support form, the release note tool does the following:

- Adds a new 8.5.X table example to the Translation Support page of the selected component.
- If the Translation Support Page did not previously exist, the release note tool:
  - Creates the Translation Support page, populates the page with content, and adds the page to the TOC.
  - Updates the boilerplate of the Known Issues page's Internationalization Issues section.

**Note:** "8.5.x" has to be replaced with an exact three-digit number (such as 8.5.1). The writer only has to do this once unless the third digit changes, at which point a new Translation Support table (such as, 8.5.2) must be created.

### Publishing a Translation Support Page

1. When DR4 passes and the internal PA Availability Announcement for the International CD is sent via an email from Software Delivery, publish the Translation Support page by going to your draft page and clicking *publish localization*.

Notes:

- If Language Packs are not available until after the release, the timing of when you publish may differ. Contact Pubs Editors and they will work with you to determine what to do.
- If the Language Pack is not ready on the date of the release but will be released for the English version at some point, when the Language Packs are ready, use the Independent Update tool to generate the new table.
- 2. On the following page, click **Publish**. The release note tool updates the Translation Support page in the published (8.5.x) version of the Release Note with the content from the draft version of the page. If the Translation Support page did not previously exist in the published version, the release note tool creates it for you.

**Note:** The internal PA Availability Announcement email is automatically generated by Software Delivery when the physical media is ready for customers. Technical Publications WW is now one of recipients of this email. This announcement is the writer's trigger to publish the RNs and make them available on the Documentation website. (Be aware that "Internal DR4 Announcement" is an email alias in the "To" field of the email and is NOT the subject of the email – writers are often confused by this and overlook the announcement. In your email inbox, this announcement will be listed as from "noreply@genesys.com ". The key information is in the body of the email and is the signature of SOFTWARE DELIVERY. Other notifications are sent out by PMs and PjMs, but are NOT the trigger for publishing the RNs.) Here is an example:

FROM: noreply@genesys.com

TO: Internal DR4 Announcement

SUBJECT: PA: Availability Announcement: WFM Configuration Utility - 8.1.3 - German (Germany) D

Greetings,

R&D is pleased to announce GA Availability of WFM Configuration Utility - 8.1.3 - German (Germany) IP

Congratulations and thanks to the R&D teams involved.

OS GROUP: Windows 2008/Vista/7

VERSION: 8.1.300.09

COMMENTS: PA date: 11/21/2014 This IP is available via FTP only and should be used instead of the CD version of this IP.

The "Currently shipping releases" file has been updated.

Kind regards,

Software Delivery

- 3. The writer publishes a XING Release Note freeze form for **each** Language Pack release note, unless the English RN is associated with v9.0 and has been decoupled from the IP. **Note:** Fourteen languages going out equals fourteen language pack RN freeze forms, for a localized product not part of v9.0.
- 4. Following the release, the writer verifies that the Translation Support page is present on the Documentation website.

### Update Your Product's International Release Notes Page

After publishing your Translation Support page, if you have a dedicated International Release Notes page associated with your product documentation page on docs.genesys.com, update it with links to the Translation Support page.

# Converting HTML Release Notes to the Wiki

Currently, there is no internal tool or script for automated conversion of Release Notes from HTML to wiki. Such a script is still on the wish list because many Continuous Delivery products won't upgrade to the next major release. Contact the **Pubs RN Admin** email alias for guidance. At a high level:

- 1. RN Admins create wiki manuals for the RNs.
- 2. RN Admins or you use the RN tool to create wiki pages for the old releases.
- 3. You copy the contents of the release entries onto relevant wiki pages, changing HTML tagging to wiki markup as necessary.
- 4. You copy the contents of the Known Issues sections to the relevant wiki pages, formatting each KI entry as per RN tool standard.
- 5. You get a format check from Pubs Editors and ask them to take the old HTML RN files down.
- 6. You publish the RNs on the wiki.

On the process side, the Project Manager should update the Packaging Spec to indicate that Release Notes are now online. You might want to time the format change and publication with an iteration/ project release when the Packaging Spec is likely to have other changes.

# XING

### Important

- From 8.5 onward, RN Freeze forms are only required for Release Notes associated with older product versions with Packaging Specs (Excel version) that have not been updated. The Excel spreadsheet version includes a Docs tab with a "Freeze in XING" column. Most products with continued development have changed the value to N (meaning no) for all RNs in their spec. In the Spring 2021, the Packaging Spec was converted to an online tool and it was determined that the Docs tab was no longer necessary. Thus, it does not include a Freeze in XING column.
- If after publishing your RN, the IP is not available for download, it may be that your RN does have a RN freeze form that does need to be published. If so, the steps in this article apply.
- You do need to use XING to subscribe to Component and IP Test freeze forms. When you
  subscribe to them, you receive an email notification when one is published. The IP Test
  forms is especially important because when one is published as pass by a QA person,
  that's the indicator that you can publish the approved Release Note for Update and Hot
  Fix releases. For Update and Hot Fix RNs, you also use the publishing date for the IP Test
  form as the release date in the RN. For General releases, you publish the RNs on the day
  that the product is released.

### Accessing XING

If you don't have an account to publish RN Freeze Forms in XING, send an email to the Production Builds Request email alias asking them to provide you with access, and copy the Pubs Editors alias in your email. Note:

- The Global Help Desk doesn't have access to the XING database to handle this type of request.
- In December 2018, Pavel Melnik from Production handled granting permissions.

### Using XING

#### Overview

The XING database is the main repository for development information at Genesys. The information entered into the database drives a project through the build and CD creation process. XING forms are used by Development, QA, Technical Publications, and Production support for tracking component freezes, RN freezes, freezes for approved code libraries, installation package requests, tests, and approvals, and CD requests, and others.
#### What Documentation Deliverables We Freeze in XING

Here's a quick list of what we freeze in XING.

The Packaging Specification should reflect what's froze and not frozen. See the Packaging Specification Review/Approval for more information

#### Frozen in XING

- General Release Notes (HTML and Online), including those under shipping control.
- Hot Fix Release Notes (HTML and Online)
- Localized RN or Language Pack RNs (HTML and Online)
- Deployment Procedure
- Manuals and Help (Online manuals and Helps are not frozen in XING.)

Not Frozen in XING

- Pre-release Notes
- Restricted Release Notes

### Types of XING Forms

There are several types of forms in the XING database. The forms that are most commonly used by Technical Publications are defined below.

- Component Freeze Form Indicates that a development task has been completed and all source code has been checked into the source control system.
- Release Notes Freeze Form Notifies QA and Software Delivery/Order Management that an RN is available for a particular General (PA) installation package.
- Documentation Freeze Form Notifies subscribers that old style technical manuals, help files, software CD ReadMes, and documentation sets are frozen for review, testing, or approved. These freeze forms are generated by Information Experience and give Development, QA, and Production insight into the status of Technical Publications deliverables. These forms are not used for online documentation.
- Installation Package Freeze Form Notifies subscribers that installation packages are frozen. Installation packages can contain multiple software components.
- IP Test Form Notifies subscribers about the testing status for Installation Packages. For hot fix releases, writers look for this form to determine if the RN for the Update or Hot Fix type can be published. The release date of the RN must match the date that the IP Test form is frozen with a status of Pass. You only publish the RN if the IP Test form indicates Pass.

### Types of Software Releases

The software release type is included on every freeze form. There are six release types:

- **General** mainstream software, including planned releases and maintenance releases. A General release is available to all customers. Tech Pubs provides general Release Notes and a freeze form is published (if the RN is not associated with v9.0).
- **Update** an intermediary release following a General (PA) release, available only through the download system and might be limited to a sub-set of supported operating systems. An Update release is available to all customers. Tech Pubs provides update Release Notes and a freeze form is published (if the RN is not associated with v9.0).
- Hot Fix an unplanned emergency release of a component. Tech Pubs provides hot fix Release Notes and a freeze form is published (if the RN is not associated with v9.0).
- **Pre-Release** an early release of software to a customer who is deemed strategically important by Program Management and who has signed a letter of agreement to get this early release. Tech Pubs provides Pre-release Notes, but a freeze form is **not** published.
- **Restricted** a release with limited distribution, including custom projects or special branches of generally available software. Restricted software is not available for all customers. Tech Pubs provides restricted Release Notes, but a freeze form is **not** published. On-premises Software released as part of the Early Adopter Program uses the Restricted type.
- **Internal** an internal development freeze, where no customer delivery is planned. Build and test activities are initiated upon request. Release Notes are **not** prepared for an internal release.

## Subscribing to Freeze Forms

All software and documentation is frozen in the XING database. If you generate a freeze form in XING, you will receive auto-notification for that form. To receive auto-notification for forms that you do not generate, you must subscribe to the forms about which you need to be notified. To avoid being overloaded by the number of freeze forms that are available, Technical Publications uses the following guidelines for freeze form subscriptions:

- At a minimum, Technical Writers should subscribe to the component and IP Test forms.
- Pubs Editors will subscribe to documentation freeze forms and to IP and CD forms, as necessary, for their particular job functions.

### Notifications and Subscriptions

Notifications are emails that subscribed users receive automatically, informing them of an action that has taken place within XING; for example, that a Component Freeze form has been generated or an IP Test form published. Subscriptions allow users to receive notifications. Receipt of notifications is voluntary, and all users are not required to see all notifications.

This table describes the types of forms to which you can subscribe.

Tab Name	Function
component	Allows users to receive Component Freeze form notifications.
doc	Allows users to receive Document Freeze form

Tab Name	Function
	notifications.
ip	Allows users to receive IP Request, IP Build Report and IP Report notifications.
ip test	Allows users to receive IP Test notifications.
cd	Allows users to receive CD Image, CD Report, Physical CD Image and Physical CD Report notifications.
cd test	Allows users to receive CD Test Report notifications.
release note	Allows users to receive Release Note Notification forms.

#### To Subscribe

- 1. Go to Forms, and from the left menu, click **subscription**.
- 2. Click the tab associated with the item to which you want to subscribe.
- 3. Click Add. The selection pane appears.
- 4. From the drop-list, choose the desired item and click **OK**.

On the same location, you have the option to subscribe to all and unsubscribe to all based on type, and perform a bulk subscription.

#### Subscribing to "Update" notifications in Xing

As of early 2018, Genesys has a new release type called "Update." If you want to be notified when an IP Test form has been published, you need to add "Update" to your IP Test form subscriptions. This video shows you how:

#### Link to video

#### Documentation Names and XING

Documentation names in XING are added by Genesys Production based on the entries on the Doc tab in the approved Packaging Specification. Although the Project Manager owns the form, writers must review and/or assist the Project Manager in completing the Doc tab and the CD/DVD tab. See the Packaging Specification topic in the Writers Guide for more details about the specification.

Be aware of the following:

- The XING database must have entries for documents before the documents can be frozen.
- Documents are frozen according to the software release version. For example, product manuals are frozen at the major release version (for example 8.5.1 release are frozen as 8.5.1 documents). RN freeze forms are frozen for each 7-digit version released to customers. Therefore, for each incremental point release, the document names have to be added to XING.
- If your document name is not listed in XING, first check the Packaging Specification. If it's not included on the Doc tab, your Project Manager needs to update the specification and send it to the appropriate alias for approval. If your document name is included in the Packaging Spec, send an email to Pubs

Editors. They'll contact Genesys Production to resolve the issue.

#### Searching for Published/Unpublished Freeze Forms

On occasion a form may be created and not published. To find such a form:

- 1. Go to Forms and, from the left menu, choose the type of form you want to find.
- 2. In that window, click the **Created Unpublished** tab.
- 3. Use the search features to find the form.

# Publishing an RN Form

#### Important

- RN Freeze Forms are not required for RNs that are part of the v9.0 release where the Packaging Spec Freeze in XING value is set to N (indicating that the RN has been decoupled from the RN).
- If you encounter an RN freeze form with an unpopulated "alternative web path" field. Since writers cannot populate this field, please send an email to the Pubs Editors email alias explaining the situation and identifying the RN in question. A member of Pubs Editors will coordinate with the XING Admin to ensure that the field is correctly populated.

The Release Note Freeze Form is tied into various systems in Genesys. When published, it alerts Genesys people and systems that a release note is complete, approved, posted, and that the corresponding software is ready for shipping. In addition, publication of the RN freeze form notifies Software Delivery that the RN is available and that software orders can be filled. This process ensures that customers do not get the software before Release Notes are ready.

- 1. Go to Forms, and from the left menu, click Release Notes Freeze Form.
- 2. Click the new form tab in the upper right corner of the screen. A blank form appears.
- 3. By the Release notes by name item, click the magnifying glass.
- 4. In the page that appears, do the following:
  - 1. Enter the name of the release note in the Name field.
  - 2. Select a version from the Release drop-down list.
  - 3. Click Search.
  - 4. From the results, select the correct release note (if more than one displays) by clicking the hand under the Select column. You are returned to your entry form.

**Note:** If your release note is not listed, confirm that you have the correct name or version. Also, check the Packaging Spec to confirm that the release note you are looking for was listed there. If

not, the Project Manager will need to update the Packaging Spec with the RN name. If your release note is listed in the Packaging Spec, but a RN definition was not created, contact Pubs Editors. This person will check with Genesys Production.

- 5. Confirm that the entry form lists the selected RN and also lists the alternative web path. Note: If the entry form for the RN does not list the alternative web path, this means that the alternative web path field in the RN definition is not populated. Inform Technical Publications Production (Pub Editors alias). A member of that group will make a request to Genesys Production that the RN definition be updated.
- 6. From the Milestone drop-down list, select a milestone (Approved or Draft) **Notes:** 
  - When you are publishing an RN form following the release of a product (for a new release) or after an IP Test Form was published (for a hot fix), you select Approved.
  - To change the Milestone in a published form, go to the General tab and change the Milestone by clicking the **[Edit Record]** icon.
- 7. From the Release Type drop-down list, select the release type (General, Update, or Hot Fix, depending on the release type of the associated component being released. (Click the [Help] icon if you need more information about release types.)
- 8. From the Version drop-down list, select the version number that matches the version of the IP for the component being released.

**Note:** If the version of your component is not listed, be sure that you selected the correct release type. If the release type is correct, go into the XING forms for the component to determine the release type for the component. If your release type is different, contact the Project Manager to confirm the release type. If your release type is wrong, change it in the form. If the component release type is wrong, the Project Manager or Development Manager will have to change the release type for the component.

- 9. Click Continue.
- 10. Click the **IPS** form tab and confirm that the TF (Test Form) box is green for the Operating Systems supported by this version of the component and identified as supported in the RN you created. You will note that the RN box is red because you have not yet published the RN.
- Click the **Preview/Publish** form tab to see a summary of the RN Form information that you entered. (If changes are needed in any section of the form, click the appropriate tab and make the required changes.)
- 12. If all items are correct, click **Publish** at the bottom of the form.

**Note:** If the form requires changes and is not final, it can be kept in an Unpublished status. Do not click the Publish button unless you want the form to be published. The information in the form is saved automatically. The unpublished form will remain in the created unpublished category until it is published or removed.

13. When an RN Form is published, form subscribers receive an email notification.

# Removing an RN Form

If an RN form is not needed or is prematurely published, you can place it in the **Remove** status.

- 1. Open the form in XING.
- 2. Click **Remove** at the bottom of the Form screen. The Remove Form screen appears.

- 3. Select **Removed** from the drop-down list.
- 4. Enter a reason for removal in the **Reason** field.
- 5. Click **OK.**

**Note:** If an RN Form is removed, the form will continue to be stored in the database. If a new form is submitted with the same version as a form that is already in the database, an error message will appear: "This form already exists." In this case, go to the release notes link, find the form under the removed tab, correct the removed RN Form, and republish it. See the "Reinstating an RN Form" tab for step-by-step instructions.

## Reinstating an RN Form

To reinstate a form:

- 1. Go to Forms > Release Notes Freeze form and select the **Removed** tab.
- 2. Search for the removed form.
- 3. Click Edit.
- 4. Select the General tab.
- 5. Change the Status from Removed to Active and specify a reason.
- 6. Click **OK.**
- 7. Then you can update the form as needed and publish it.

## FAQ

Q: If I need to update an existing RN (online or html) that is not part of v9 (formerly G-NINE), do I also update the XING form to the next version up (that is, from version A to version B)?

A: Yes. If the update is of import to anyone that is subscribed to the RN freeze form, issuing a Version B of the freeze form is useful because they will receive notification that the RN has changed. On the Comments tab you can insert a description of the change in the Description box.

# Wiki Structure

Use this section to help you create the elements that organize your pages.

## Important

The articles in this section only apply to documents created on docs.genesys.com.

# Products/Product Landing Pages

## Important

This article only applies to content developed on docs.genesys.com.

A product is the main grouping container on the Genesys Documentation website. Each product has a landing page with links to its documents, release notes, help files, and more. Some examples of products are: Interaction Workspace (IW), Genesys Administrator (GA), and Genesys Info Mart (GIM).

A product contains a version scheme, manuals (each with a table of contents), and topics. You must define a product before you can create a version scheme for it and add content (manuals, topics, etc).

A product has a short name and a display name. The short name is used in all URLs for that product and cannot be changed once the product is created. The display name is the full name of the product and can be changed as desired.

# Creating a Product

You can use the following procedure to create a product:

### Important

You can email the TechPubs Support group for assistance.

If your product name changes, unless the existing short name clearly contradicts some aspect of the new product, the short name used in the URL will not change.

## Warning

Do not use underscores or any other special characters in product shortnames.

- 1. **Determine a short name for your product** This name is likely already decided. E-mail the TechPubs Support group for assistance, if needed.
- 2. **Request server update** Send an email request, specifying the finalized product short name, to the TechPubs Support group so that they can update the server with user permission groups for your

product. (**Note:** You do *not* need to wait for an admin response to continue defining, or creating content for, your new product.)

- 3. **Define your product in the wiki** The sub-steps below describe how to add define your product in the wiki.
  - 1. Ensure you are logged in to the Genesys Documentation site.
  - 2. Navigate to the Helpful Links box on the left of your screen.
  - 3. Click the Create or edit a product link to open a list of the products on the Genesys Documentation website.
  - 4. Edit this page to update the list and add your product. You **MUST** use the following syntax:

{{#product:productShortName|displayName}}

For example:

{{#product:IW|Interaction Workspace}}

- 4. **Edit the Quick Links dropdown** Add your product to the appropriate section in the Quick Links dropdown using the steps below:
  - 1. Ensure you are logged in to the Genesys Documentation site.
  - 2. Navigate to the Helpful Links box on the left of your screen.
  - 3. Click the Update quick links in the header link to open the page that defines quick links and headings.
  - 4. Edit this page to update the list and add your product under the appropriate section, using the same format described above:

{{#product:productShortName|displayName}}

This step is required to ensure that your TOC renders correctly. **Note:** your product will not appear in the Quick Links dropdown until at least one released version has been defined.

Your product is now added to the list of products on the wiki.

### Tip

For localized wikis, you need to add at least one version for the product before it will appear in the dropdown box.

# Populating the Doc Landing Pages

The documentation for each product has its own landing page. The landing page includes the following:

- What is <product name> section, which a description of the product.
- Tabs for each release. The standard is a two-digit tab like 9.x, 8.5, 8.1 down to the last two digit version that is still supported.

#### • Notes:

- Previously, we use to include the word "Release" in the far left tab.
- If you have a situation where the two-digit tabs won't work, please contact Pubs Editors. We have granted exceptions for three-digit and others as necessary.
- Each tab includes the following:
  - Links the the online Read Me, appearing like the following: READ release information: New in 8.5 Releases | Readme | Product Alerts (Note: Product Alerts replaces the HTML Release Advisory and is only needed if you need to communicate something to customers that is not specific to a component but applies to the product as a whole.
  - Blocks with links the manual-type documents part of the set for that two-digit version. There may be cases where you include an earlier two-digit (like 8.1) version on a later two-digit version (like 8.5) tab if the document is still part of the documentation set for the later version but was not updated to the later version.
- <product> X.Y Release Information section that includes information that was previously in the HTML Readme on the Product CD, including:
  - What's New in the Release (If your product has multiple Product CDs (like eServices), this section will be subdivided by the Product CD naming convention.
  - Additional Resources
  - Legal Notices
  - Product Alerts, if you have any.

**Note:** This entire section is auto-generated using the tool the Jose developed. See Managing Online Readmes in this Writer's Guide.

- Helpful Links section on the right which includes:
  - Release Notes subsection with links to all release notes for that version.
  - International Release Notes section (if the version was localized), with links to an International Release Notes page with links to those localized RNs. See eServices as an example.
  - International Help Files section (if the version was localized), with links to an International Help Files page with links to those localized helps.
  - Product Alerts, with link to Product Alerts if any.

There may be other links there depending on the product.

# Versions

## Important

This article only applies to content developed on docs.genesys.com.

A product must have a version scheme before you can create manuals within it. A version scheme means the product has to have one or more versions available to which content can belong, or apply. Version schemes can contain alphanumeric text, so you can have versions such as 8.1.1beta, or 8.1.1DRAFT, and so on. Typically, the versions defined for a product map to (or match exactly) the versions of the product or system being documented.

#### Important

The bottom version on the Versions page **must** be in released status. Sometimes, the legacy **land** version can interfere with link resolution. If you do have a released version for the product, you can remove the **land** version.

# Version Tags

Ponydocs uses version tags to denote what topics, manuals, and tables of contents belong to which version of the product. Version tags are a type of MediaWiki category tag.

The following is an example of a Version tag (spaces are added to prevent the wiki from registering the tag example on this page):

[[Category:V:IW:8.1.4]]

This tag denotes that this page belongs to the IW docset, and the 8.1.4 version of the IW docset.

## Warning

DO NOT DELETE THE VERSION TAG! This tag is used by the wiki to categorize and sort your pages. Without this tag, the page will be lost, although you can try the troubleshooting page for information on how to retrieve a lost page.

# Version State

To limit the access to certain versions of your documentation, Genesys Documentation uses the following version states: released, unreleased, preview, or closed:

- Released: Documents tagged with a version that is in the released state are visible to anyone who visits the site. Users do not have to be logged in to see this content.
- Unreleased: Documents tagged with a version of unreleased are only visible to logged-in users belonging to the docteam for the product—for example, IW-docteam.
- Preview: Documents tagged with a version of preview are visible to logged-in members of the preview group for the product, as well as the docteam—for example: IW-preview.
- Closed: Documents tagged with a version of closed are visible to logged-in members of employees group, or via special HelpLink entry points from the customer care portal, partner portal, or Confluence intranet access point. Closed content includes material that is not officially Genesys restricted, but that the product team wants behind a login so that it is not indexed by Google or available to non-customers. See example here.

You can change the state of a version. For example, over the course of a development/release cycle of the product you are documenting, you may want to transition the version of the documentation from unreleased to preview and then to released when the product ships.

#### The "Latest" Version

URLs in Genesys Documentation include a version string so that users can link directly to a specific version of a product's documentation. URLs that include version information might look like the following example:

#### http://docs.genesys.com/Documentation/IW/8.1.4/Dep/Deploying

However, you might want users to always go to the latest (released) version of the documentation. To do so, you can use the *latest* version to take users to the current released version of the page—for example:

http://docs.genesys.com/Documentation/IW/latest/Dep/Deploying

# Adding or Updating Versions

The general guidelines for creating versions are listed as follows:

- A version must be defined before any topics may be tagged with that version.
- The versions can be any text or numeric string, although generally the version of your document will match the product version (for example, 8.1.1).
- The versions should be listed in the release order; that is, the newest/latest versions should be closer to the bottom of this page.

- Change the status of a version by editing the Versions page and updating the version's status (from unreleased to released, for example).
- To edit the versions page for a given product, you must have docteam permissions for the specific product for which you are adding a version—for example, if you want to edit the versions page for Interaction Workspace, you must be a member of the IW-docteam group.

#### Prerequisites

Creating a Product

#### Steps

1.

Helpful links for writers	
Manage Ponydocs	^
Versions	
Manuals	
Current TOC	
All TOCs	
Helpful Links for Writers menu	

Ensure you are logged in, then navigate to the Helpful Links for writers box on the left-hand side and expand the Manage <Product Name> section.

- 2. Click the Versions link to open the special page.
- 3. Click Edit. If Edit is not visible, click Create.
- 4. Add a line for the version you wish to create, using the following syntax:

{{#version:<name>|unreleased}}

For example:

{{#version:8.5.0|unreleased}}

5. Click Save.

# Manuals

## Important

This article only applies to content developed on docs.genesys.com.

Once you have created a product and a version for the product, you can create manuals.

A product can have one or more manuals associated with it. Like products, a manual has a short name and a display name, to help keep URLs short. For example, the short name might be Dep and the display name might be *Interaction Workspace Deployment Guide*.

## Creating a Manual

## Warning

Do not use URL-unsafe characters such as : (colon), ? (question mark), / (forward slash), or spaces!

#### Prerequisites

Adding or Updating Versions

Steps

1.

	Helpful links for writers		
	Manage Ponydocs	^	
	Versions		
	Manuals		
	Current TOC		
	All TOCs		
Helpf	ul Links for Writers menu		

Ensure you are logged in, then navigate to the Helpful Links for writers box on the left-hand side and expand the Manage <Product Name> section.

- 2. Click the Manuals link to open the special page.
- 3. Click Edit. If Edit is not visible, click Create.
- 4. Use the following syntax to define a new manual:

{{#manual:<manualshortname>|<manual display name>}}

For example:

{{#manual:Dep|Interaction Workspace Deployment Guide}}

5. Click Save.

#### Pagination parameter

You can use the pagination parameter to add navigation buttons to the bottom of each page in your manual. These buttons allow readers to quickly navigate to the previous/next page of the manual without having to scroll back to the TOC.

To add the pagination parameter, edit the Manuals page and add the parameter to an existing manual entry, as shown below:

{{#manual:<manual\_shortname>|<manual\_display\_name>|pagination}}

Example

{{#manual:Help|Genesys App Automation Platform Help|pagination}}

# Library Books

#### Important

Library books likely only used on docs.genesys.com not all.docs.genesys.com.

# What are library books?

**Library books**, in our context, are content management containers, used to help maintain and track single-source content. Library books are unreleased Ponydocs manuals that you use to store feeder content that gets pulled into your regular docs. *In short, if you transclude a piece of content, that content belongs in a library book.* 

Typical transcluded content includes:

- Anything you want to use twice. So single-sourcing procedures, for example.
- Source pages for complicated navigation structures. For example, tabber or verttabber content.

# Why A Library?

# Why Build a Library At All?

There are many ways to slice and dice wiki content. Template transclusion, page transclusion, labelled section transclusion, are a few. This flexibility is a strength, and any number of strategies can be used all at once, with no impact on the user experience.

Long term, however, we need a consistent approach for two main reasons:

- Track how content is being used and re-used across the wiki. Queries will be added to every source page, letting you know how each page is being used across the wiki. General maintenance pages will also be created, letting you see a snapshot of source content from a particular release.
- Make it easier to hand off content from one writer to the next.

# About Library Books

# About Library Books (and How to Version Them)

All source content must be built inside of unreleased (or preview status) Ponydocs manuals. This takes advantage of Ponydocs left TOCs for navigating your source content, and lets us use Ponydocs versionning capabilities for maintaining your source content from release to release.

## Important

Going forward, please DO NOT use the Template namespace to store your transcludeable content. The Template namespace is reserved for formatting templates and query templates only.

### The Content Management Model in a Nutshell

The model as it stands now is:

- Create a manual called "'Library"' for your product. This will be the staging ground for all of your transcludeable content.
- Create versions for your library books, from two available types, according to release type:
  - Major Release Create a 2-point version for content that will be transcluded across an entire major release. For example, your CD Readme content goes into this version of the library book. Use the syntax: NNSource. For example, 85Source
  - Minor Releases Create a 3-point version for content that you will branch from minor release to minor release. For example, maintain your individual verttabber pages from this version of your library book. Use the syntax: NNNSource. For example, 851Source.

#### Sample Library Books for a Typical Release

If Genesys Media Server has 3 minor releases for the one major 85 release (8.5.0, 8.5.2, 8.5.7), you need four separate "Library" books, one for the pan-release content, and one for each minor release. The Welcome page URL for each of these library books will look like this:

- Documentation/MS/85Source/Library/Welcome This is the library book for your pan-release content, like CD Readmes.
- Documentation/MS/850Source/Library/Welcome This is the library book for your release-specific content for 8.5.0, like verttabber source material.
- Documentation/MS/852Source/Library/Welcome This is the library book for your release-specific content for 8.5.2.
- Documentation/MS/857Source/Library/Welcome This is the library book for your release-specific content for 8.5.7.

## How To Build a Library Book

# Creating Your Library Books

## 1. Build your book the usual way.

You build your library books the same way you do any other ponydocs books, in the usual Ponydocs order:

- 1. Create your version.
- 2. Create your manual.
- 3. Create your TOC.

## 2. Create your Welcome page.

Your Welcome page will not include any actual content to be transcluded. Instead, it will display results of queries, letting you know how those pages are being used inside your content — or anyone else's.

- 1. Create your Welcome page as the first page of your manual, as usual for Ponydocs content.
- 2. On your Welcome page, add these template calls:
  - 1. TBD
  - 2. TBD

## 3. How Is This Page Used?

At the bottom of every page, add the following lines: <noinclude> {{HowIsThisPageUsed}} </noinclude> This will print out a list of links, letting you know how the page is being used in the wiki. For example,

How Is This Page Used?	[edit]	Important
This list tells you all the places in the wiki right now, transcluding this page.	that are,	Any changes to this page will automatically be reflected in all of the pages in this list. Verify first! If it's not your page, go to the History, see who last edited it, and communicate.

### Important

Very Important! Part of building a more integrated content management system means that you need to **CHECK** before you make changes to pages that could be used elsewhere. Look in the History of any page that shows up in your **What Uses This Page** list, and follow up with the last person to edit.

## When to Version?

# So When Do I Create Versions, Exactly?

Similar to the NNDRAFT version recommended for handling draft material to go into published content, you will create NNSource or NNNSource content that also travels along with your releases, triggered at different stages.

It goes like this...

## Minor Release to Minor Release

Let's say you are moving from 8.5.1 to 8.5.7. Your Library book should already have TOCs for these versions in play:

- 85Source, for your pan-release content like CD Readmes.
- 851Source, for feeder content in your regular 8.5.1 Ponydocs manuals.

In this case, you need to branch only your 851Source into a new 857Source version of the Library book.

So your Welcome page URL would change from:

To:

# What About Hot Fixes?

If you have a hot fix raised against your content, and the fix applies to all product versions, then update your content in your current working version (ie., that version is not released yet, yah? you are currently drafting that content, yah?). Once you get this content approved, you can "publish" it back into the previous 851Source Library book. This update will then appear in any 851 content that transcludes from the Library book.

# Major Release to Major Release

Let's say you are moving from 8.5 to 9.0. At that point, you must:

• Branch your 2-point NNSource Library book. You may not have any content (for example, CD Readmes) to carry over. In that case, you can start your new major release TOC from scratch.

# Table of Contents

### Important

This article only applies to content developed on docs.genesys.com.

Once you have created a product and have at least one version and manual defined for that product, you can create and build a table of contents (TOC). The TOC for a manual defines what topics belong to that manual.

The TOC pages contain topics (the pages in your document) and a version tag. Topics can be arranged in a hierarchy to form chapters. There are three levels in this hierarchy:

- Chapter: The first page (that is, topic) in a chapter. This topic is usually a small landing page that describes the contents of the chapter and links to the popular content within that chapter.
  - Topic: The second-level topics that come after the chapter page. This topic is where most of your content resides.
    - Sub-Topic: The bottom-level topics that appear after a second-level topic in the TOC hierarchy.

Essentially, your TOC is a collection of topics that are grouped into hierarchies of chapters, topics, and sub-topics. This hierarchy exists to make the TOC more reader-friendly, as the hierarchy you define is visible to people who are reading your document.

Likewise, this grouping is superficial as the wiki stores all the topics for a manual in one container, so you can rearrange the TOC as much as you like. The wiki automatically adjusts the TOC and pagenumbering to accommodate the changes to the order of topics.

## Warning

**Do not comment out or annotate TOC items.** Links get broken, buttons don't work, and Sauron returns. If a page no longer belongs in the TOC, remove that line item from the TOC entirely.

# Important Notes About Topic Names

An example of a topic name is as follows:

{{#topic:Welcome}}

Where:

Welcome is the string that appears in the URL path for that topic (in addition to the product short

name, manual short name, and version—for example: http://docs.genesys.com/Documentation/ IW/8.1.4/Dep/Welcome).

Because the topic name is used in the URL, it can contain only alphanumeric characters, and any spaces you include are removed when the topic is created. However, once you set the topic name, you can edit and save the page to change its H1 to something more suitable for your content - the H1 does not have the same restrictions as topic names.

## Warning

You **MUST** adhere to the following conditions when creating topics:

- Topic names **MUST** be unique across the manual.
- Topic names **MUST** be short. Sometimes, long topic names do not appear in the TOC and you will not notice this until it is too late. The exact limit varies depending on other factors (the length of the related Product Short Name, Version, and Manual), so adhere to this pledge: **I promise to keep my topic names as short as possible**.
- Consider how the topic name appears in the URL. A few unsuspecting writers have shortened topic names to unfortunate acronyms or innocent-at-the-time four-letter words...
- Topic names must be composed of only alphanumeric characters, beginning with a letter. **DO NOT** use spaces or other special characters. Hyphens and underscores are strongly not recommended.
- Some writers prefer camel case for topic names (for example CamelCase), whereas others prefer topic names to be entirely lower-case (for example camelcase). There are no strict rules (yet) for capitalizing topic names.

# Creating a TOC

### Prerequisites

- Create at least one version for your product.
- Define at least one manual for your product.

#### Warning

**If you create or see a release-version TOC that's not ready for release, delete it.** Otherwise, the manual shows up in the Other Guides list in the left nav. You can, of course, create any draft TOCs you need.

#### Steps

1. Ensure you are logged in, then navigate to the Helpful Links for writers box on the left-hand side and expand the Manage <Product Name> section.

## Manuals Management - Ponydocs

Genesys Documentation Writer's Guide

Click manual to create TOC for current version (test2).

2.

Link to create new TOC from Manuals page

Click the Manuals link to open the special page.

This page will show a list of manuals that have been defined for your product, and give you the option to either view the TOC for the most recently viewed version of that manual or (if no TOC exists for a manual with the last viewed version) to create a new TOC.

- 3. Click the Manual name you want to create a TOC for.
- 4. Check the URL of the page you are currently viewing, and ensure that it points to the version you want to create a new TOC for. In some cases the link from the Manuals special page will take you to the TOC page for a version you don't want to work with. If the URL displayed doesn't show the correct version, then perform the following steps to fix this problem:
  - a. In the address bar of your browser, change the version to the desired value—for example, if the displayed TOC page was using version "land" but you wanted to create a TOC for version "8.1.4":

http://docs.genesys.com/Documentation:IW:DepTOCland

Becomes:

http://docs.genesys.com/Documentation:IW:DepTOC8.1.4

- b. Press Enter after editing the URL, and allow your browser to load the correct TOC page.
- 5. Click Create.



6. Delete the line to add a page title if it is shown on your TOC page—for example:

```
= Add your title here=
```

TOCs do not require a title; the only content on the page should be topic names and a category tag that defines which version the TOC belongs to.

7. Check the category tag at the bottom of the edit window uses the correct version and only occurs once on the page—for example:

[[Category:V:IW:8.1.4]]

8. In the wiki text editor, add a Welcome topic to serve as the landing page for your document.

{{#topic:Welcome}}

- 9. Insert a blank line after the Welcome topic and add topics to your TOC. Ensure that you follow the the rules for naming topics.
- 10. You can order your topics into chapters, topics, and sub-topics by using the following schema:

```
{{#topic:ImAChapterPage}}
*{{#topic:ImATopicPage}}
**{{#topic:ImASubTopicPage}}
```

11. When done, click Save. You can click the name of a topic on the TOC page to open and edit the topic page.

How to create a new TOC version when a TOC exists for another version

- 1. Open the existing TOC.
- 2. Copy the URL.
- 3. Paste URL in the Browser To field.
- 4. Change the version in the URL to the one you want and click enter.
- 5. Open the existing TOC and copy the content, with the exception of the Welcome topic TOC item.
- 6. Open the new TOC page and paste. The Category tag for the new version is already on the new TOC.

#### Sample TOC Contents

The following is an abbreviated sample of a completed TOC, showing what the wikitext should look like when you edit the page:

```
{{#topic:Welcome}}
{{#topic:0verview}}
*{{#topic:OverviewSD}}
*{{#topic:0verview0PM}}
*{{#topic:OverviewAuditing}}
*{{#topic:Architecture}}
*{{#topic:DatabaseSize}}
{{#topic:Deployment}}
*{{#topic:Deploying}}
*{{#topic:Modules}}
**{{#topic:ModulesSD}}
**{{#topic:ModulesOPM}}
**{{#topic:ModulesARM}}
**{{#topic:ModulesLUR}}
*{{#topic:Security}}
**{{#topic:DefaultAccount}}
**{{#topic:TLS}}
**{{#topic:TLSPreparingMF}}
**{{#topic:TLSConfiguringGAX}}
**{{#topic:ScriptingandCookies}}
**{{#topic:InactivityTimeout}}
*{{#topic:CleaningDatabase}}
{{#topic:ConfigurationOptions}}
*{{#topic:Mandatory}}
*{{#topic:COGeneral}}
*{{#topic:COASD}}
*{{#topic:COARM}}
```

{{#topic:ChangeHistory}}

[[Category:V:GA:8.1.3]]

# Page Content

## Important

This article only applies to content developed on docs.genesys.com.

Once you have created a product, a version for the product, a manual and a table of contents for that product, you can start creating content for your document.

Writing a document on the Genesys Documentation platform is almost as easy as working with any MediaWiki-based page, and many of the same rules and syntax apply. You can read more about general wiki topics at the MediaWiki website.

However, while this website uses MediaWiki as its foundation, there are some important differences to note, such as the use of docset permissions, product codes, manual names, TOC topics, and more.

# Page Creation

Adding a topic reference to a TOC page creates the topic. To access it for initial editing, click the topic name from the TOC file.

#### Topics and version tags

By default, when a topic is created by saving a TOC, the topic is automatically tagged with the same version as the TOC.

#### Page Title

The H1 is, by default, the topic name you used when you added the topic to the TOC.

You can change the H1 to something else (for example, to use a longer name or special characters) and this is also reflected in the left-hand navigation shown to the user.

A topic can only have one H1 in it.

#### Markup in Ponydocs

Ponydocs is built on top of a standard MediaWiki installation, and uses the standard MediaWiki markup.

# Page structure

Use a page structure that best fits your content. Here are a few tips.

# Headings

- Contextualize everything; add meaningful introductory sentences to your pages and tabs
- Don't use consecutive headings of any kind, including tabs
- Don't use more headings than you need
- Make your headings as precise and comprehensive as possible
- To be consistent with our new Cloud content and style, use sentence case (init cap on first word and lower case on everything else but proper nouns)

The **BEC Notes on language page** (targeted to Cloud, but useful for us all) includes a section on headings.

# Wiki Edit Buttons

When editing content, there are a number of custom buttons provided to make content generation easier. This page describes these buttons and gives examples of where and when they should be used, as well as any special considerations that should be noted.

# Standard MediaWiki Formatting Buttons

The standard MediaWiki formatting buttons are described below. Please note that some of these buttons are not supported or not useful for our purposes, but remain in the edit toolbar by default.

## Standard Buttons

Button	Description	Code	Result
В	Bold text	'''Bold text'''	Bold text
I	Italic text	''Italic text''	Italic text
Ab	Create an internal link to a wiki page.	[[Link title]]	Link title
<u>S</u>	Create an external link to a separate wiki/ website.	<pre>[http://www.example.co link title]</pre>	<sup>om</sup> link title
A	Create a level 2 header.	== Headline text ==	== Headline text ==
	Insert an image that has been uploaded to the wiki.	[[File:Example.jpg]]	
	Currently not supported. Insert media file that has been uploaded to the wiki.	[[Media:Example.ogg]]	Media:Example.ogg
$\sqrt{n}$	Currently not supported. Use TEX formatting for math formulas. See http://meta.wikimedia.org/ wiki/Help:Formula.	Insert formula here	Insert formula here
<b>100</b>	Ignore wiki code in the selected text.	<nowiki>Insert non- formatted text</nowiki>	Insert non-formatted text here

Button	Description	Code	Result
		here	
Gu	Insert your signature with timestamp. (Primarily intended for wiki commenting; not useful for us.)	~~~~	<mark>Edjamer</mark> 16:08, 7 March 2014 (UTC)
_	Insert horizontal dividing line.		

# Custom Genesys Buttons

To aid Genesys writers, we have created a number of custom buttons that allow you to drop in special formatting or pieces of code quickly and easily. These custom buttons are described below.

## Important

In some cases, the content displayed under the Result column is not an accurate representation of how the content will appear on the main <a href="http://docs.genesys.com">http://docs.genesys.com</a> site due to limitations or lack of appropriate context in this WriterResourceWiki. In these cases, a note is provided instead of showing the actual result of using the button.

### Conventions

- Parameters that should be modified are indicated with uppercase text. Example: EDIT\_THIS\_TEXT
- Optional parameters that can be added or removed are enclosed in angled brackets. Example: <OPTIONAL\_TEXT>

## **Custom Buttons**

Button	Description	Code	Result
tt	Code formatting (TT tag)	<tt>Insert text</tt>	INSERT_TEXT
	Applies source code formatting to the selected text. See Code Snippets for details.	<source lang="LANGUAGE"&gt;CODE SNIPPET</source 	CODE SNIPPET
<b>8</b>	Link format to Alfresco (cloud) content. Please use the Get links to repository content link under helpful links section to provide	{{Repository DOC_NAME	DDESCRIPESORIPTION}}

Button	Description	Code	Result
	DOC_ID.		
	Simple table format. See table examples for more information about creating tables in Genesys content.	{  ! '''COL_HEADING''' ! '''COL_HEADING'''  -   CELL_TEXT   CELL_TEXT  -   CELL_TEXT   CELL_TEXT  }	COL_HEADIQGL_HEADING CELL_TEXT CELL_TEXT CELL_TEXT CELL_TEXT
	Note formatting. Available styles: 1=Important, 2=Tip, 3=Warning. Default style is <i>Important</i> .	<pre>{{NoteFormat DESCRIPTI Important: {{NoteFormat DESCRIPTION}} Tip: {{NoteFormat DESCRIPTION 2}} Warning: {{NoteFormat DESCRIPTION 3}}</pre>	V [STYLE];         Read this!         Tip         This can help you be a better person.         Warning         LOOK OUT!!!
Tab	Add a new tab (ie: release) to your product landing page.	<pre> -  Release VERSION= {{TabStart}} ====Release Notes==== * {{Repository FILENAME FILE_1 * {{Repository FILENAME FILE_1  {{Template:ReadMeSectionLinh DIGIT_RELEASE prodshort=PROI ==Current documentation set for PRODUCT_NAME VERSION== <div class="itemcontainer"> {{Book LINK DESCRIPTION}} {{Book LINK DESCRIPTION}} {{Book LINK DESCRIPTION}} </div> {{Template:ReadMeEmbed  rel=TW0- DIGIT_RELEASE prodshort=PROI {{TabEnd}}</pre>	TO PESCRIPTION; TO DESCRIPTION; TO DESCRIPTION; (Vet Roslon OUCT_SHORT_NAME}; Helpful Links Release Notes • DESCRIPTION OUCT_SHORT_NAME;; • DESCRIPTION

Button	Description	Code	Result
Button	Description	Code	ResultREAD release information: New in TWO-DIGIT_RELEASE Releases   ReadmeCUrrent documentation set for PRODUCT_NAME VERSIONLINK DESCRIPTIONLINK DESCRIPTION{{{prodlong}}}
			DESCRIPTION LINK DESCRIPTION {{{prodlong}}} TWO- DIGIT_RELEASE Release Information Click below to see New in This Release and Readme information for TWO-
			DIGIT_RELEASE releases. [+] Show release information Documentation:PRODUCT SHORT NAME:Library:ReadMe:TWO- DIGIT RELEASESource
Book	Add a new book to your product landing page. The link is either an internal link pointing to a wiki	<ul> <li>Link to books in the wiki: {{Book [[LINK B00</li> </ul>	<ul> <li>{{Book [https://docs.genesys.c Documentation/FS/ latest/User/user</li> </ul>

Button	Description	Code	Result
	document or a link to the Alfresco repository. See Links for more information about creating links.	<pre>KTITLE]] BOOKDESC RIPTION}} • Link to books in Alfresco: {{Book AlfrescoRe positoryLink BOOK DESCRIPTION}}</pre>	User's Guide] Manage your voice mailbox and call settings.}} • {{Book {{Repository Genesys_V Voicemail Solution Configuration Note}} Configure SIP Feature Server for a voicemail solution.}}
	Creates an invisible anchor. Link to this location using: <tt>[[<topic>#UNIQUE_I</topic></tt>	{{AnchorDiv UNIQUE_ID} D LINK_TEXT]].	Tip No visible results, but you can now link directly to this part of the page.
PRE	Pre-release Disclaimer	{{PrereleaseDisclaimer	<pre>Important: This content is restricted and not viewable without a login supplied by Genesys. The information contained in this documentation is not considered final and is managed under the terms and conditions found in the Pre- release Agreement. *}}This documentation provides the most up- to-date reference information available for this pre-release version and is restricted for use by those who have signed the Pre- release Agreement with Genesys to acquire an early version of the software.</pre>
Ch	Change bars	{{Chgbar_open}}CHANGE	TEXTHAMOGDerEXTose}}
Ed	Add edit green to highlight changes	{{Editgrn_open}}HIGHL	[( <mark>HIGHLIGHTED_TEXT</mark> rn_close}}
G	Add glossary term lighbox popup.	{{Glossaryterm term=GL	0554RdomER244 text=DISPLAY_TEXT:

Button	Description	Code	Result
	<ul> <li>Important notes:</li> <li>'term=' parameter must match the spelling/spacing/ capitalization of the Glossary entry exactly.</li> <li>Use the optional 'text=' parameter to change the displayed text.</li> <li>'addlink=' parameter specifies whether the Glossary page includes a link back to this use of the term. Always include the addlink parameter and set the value to true (to create a link back) or false (to omit a link).</li> <li>This feature might not work in a wiki- style list. If the Glossary terms do not appear correctly, try switching your list to HTML (<ul> and <li>tags).</li> </ul></li></ul>		Tip Glossaryterm behavior in WriterResourceWiki is different than in the main documentation wiki.
[+]	Create a collapsible section.	<toggledisplay linkstyle<br="">font-size:larger showtext="[+] HEADING" hidetext="[-] HEADING"&gt; BODY </toggledisplay>	[+] HEADING BODY
NR	Create the New In This Release content for your CD ReadMe.	<pre><onlyinclude> {{{{TMPL8}}} Release=RELEASE_NUMBER Draft={{Chgbar_open}}DRAFT New=NEW_ITEMS }} </onlyinclude> [[Category:Status:Draft]]</pre>	Tip Continue requires additional context are}} will not display correctly in WriterResourceWiki.
2	Inserts an external link using the ExtLink widget code; opens content in a new tab. Typical use: linking to third-party content, and linking to Genesys pages when	{{#Widget:ExtLink link=http	: <mark>/ን‰ጵጵቶሏ፲፮፬አቭ</mark> ytext=DISPLAY_TEXT

Button	Description	Code	Result
	it's particularly important that a user not lose track of where they started (as in a long procedure). Use plain text, not URLs, for the display text.		

# Macros and Job Aids

A number of templates supplement the wiki edit buttons to help you format pages and generally assist you in managing and developing content.

# Format in columns

Use the following template call to format text in columns:

{{ColumnFormat|cols=<number of columns>|content=<content>}}

If you do not specify the |cols parameter, the template defaults to using three columns.

You can put the template call anywhere on any page, including inside tables. You can also fiddle with line/paragraph breaks within the content list to control where the columns break.

#### Usage examples

#### Markup 1

{{ColumnFormat|content=

- \* Item 1
- \* Item 2
- \* Item 3 \* Item 4
- \* Item 4 \* Item 5
- \* Item 6}}

#### **Resulting display**

• Item 1	• Item 3	• Item 5
• Item 2	• Item 4	Item 6

#### Markup 2

{{ColumnFormat|cols=2|content= Item 1 <br /> Item 2 <br /> Item 3 <br /> Item 4 <br /> Item 5 <br /> Item 6}}

#### **Resulting display**

Item	1	ltem 5
Item	2	ltem 6
ltem	3	
ltem	4	

# Links

## Important

This information in this article primarily applies to content developed on docs.genesys.com. The IX Writers Guide has a article on links added to all.docs.genesys.com: IX Writer's Guide - linking.

General formatting: do not add wiki formatting (such as italics or bold) within links.

# Internal Links

## Important

Never use external link syntax to point to an internal document. In other words, with very rare exceptions, no link should include "docs.genesys.com". Doing so causes nasty complications, including errors (that you will have to fix!) in localized and wikicicle topics.

## Tip

Easy method for adding full internal links: in the target topic, click **rename** on the wiki toolbar, copy the text in **To new title**, and paste it into your new link. Don't forget to include "Documentation:" and delete the version!

Use Ponydocs variables (such as {{PONYDOCSVERSION}}) **only** in transclusion.

#### Link to a Product Landing Page

Use the following syntax to link to a product landing page:

[[Documentation/ProductCode|Product]]

#### Example:

[[Documentation/GA|Genesys Administrator]]
### Important

For the purposes of linking, "product landing pages" are defined not by content on the page, but by the URL format of the target page.

Syntax described in this section only works for pages with the following URL format:

https://docs.genesys.com/Documentation/<Product Short Name>

### Link to a Specific Page in Another Document

In most cases, writers should use the following syntax to link to a specific page in another document/ manual:

[[Documentation:product:manual:topic|description]]

If you do not include a version parameter when linking to other documents, Ponydocs determines which version to use automatically based on the following checks:

- 1. if the target page exists with a version that matches the page you are linking from, open that page
- 2. otherwise, open the latest available version of the target page

For example, if you are viewing a page from version 8.5.0 and click a link that uses this syntax, then Ponydocs tries to open version 8.5.0 of the target page first. If the target page does not have an 8.5.0 version, then Ponydocs will open the *latest* version of the target page instead.

### Tip

**Bad Behavior?** The wiki admin team has received reports that automatic PonyDocs versioning for links isn't working correctly. We are currently investigating and intend to fix this problem. Please *do not* alter your links; the behavior described above will be restored soon.

#### Exceptions

1. **Linking to Latest**—You *always* want to link to the most recently released version of a target page, so use the "latest" keyword in the link syntax. In this case, the page version where a link is found and the target version that a link points to might not match, and link targets inside your document will change automatically any time the target page gets a new release.

Syntax: [[Documentation:product:manual:topic:latest|description]]

2. Linking to a Specific Version—You *always* want to link to a specific version of the target page, without checking to see if it matches the version of the page you are working on or if there are more recent versions available. In this case, the link will be static and will always point to the same version that you have specified.

Remember: you should specify a version parameter in links ONLY if the link needs to point to a specific

version of a target page, and the link you are creating won't need to change in future releases.

Syntax: [[Documentation:product:manual:topic:version|description]]

Contact Tech Pubs Support if you have questions.

#### Examples

For a document: [[Documentation:GA:Dep:Welcome|Genesys Administrator Extension
Deployment Guide]]

For online Release notes: [[Documentation:RN:gvp-rn85rn:gvp-rm85rn:8.5.x|Resource Manager]]

#### Link to a Specific Page Within the Current Document

Use the following syntax to link to a specific page within the current document (and version - use the syntax above to link to other versions):

```
[[topic|description]]
```

Example:

[[Deploying|Deploying Genesys Administrator Extension]]

#### Link to a place inside a page

1. Use the anchor button (or the following code) to insert an anchor immediately above the target header or text. Replace *unique\_ID* with a short string without spaces or special characters, such as *makedns* or *agentrpt*.

{{AnchorDiv|*unique\_ID*}}

(Note that because you place the anchor *above* an H2, the anchor code doesn't display when you edit only the targeted section.)

- 2. Add #unique\_ID to your link:
  - [[topic#unique\_ID|description]]
  - [[Documentation:product:manual:topic#unique\_ID|description]]

#### Examples

#### Anchors:

{{AnchorDiv|makeagent}}

====Create an agent====

{{AnchorDiv|agentrpt}}

```
====Agent status report====
```

### Links:

[[createobjects#makeagent|Create an agent]]

[[Documentation:GQ:Supe:reports#agentrpt|View the agent status report]]

## [+] OBSOLETE: Linking to headings

### Warning

Now that we're translating content widely, we can't link directly to headings. Use the anchor button/widget instead.

Use the following syntax to link to a heading (i.e. H2, H3, etc.) on a page:

```
[[topic#subheading|description]]
```

### Important

- You must replace any spaces in the subheading with underscores.
- You must replace any special characters (i.e. hyphens, brackets, etc.) with wiki character codes.
- You must specify the topic (aka: page) even if linking to the same page you are currently viewing. Using just [[#subheading]] doesn't work.

Use the following procedure to link to an anchor:

- 1. Edit the page and place the cursor where you want to place the anchor.
- 2. Click the anchor button above the wiki editor.
- 3. Edit the UNIQUE\_ID to the appropriate value. For example:

{{AnchorDiv|anchorID}}

- 4. Save the page.
- 5. Edit the page where you wish to place the link.
- 6. Insert the link, using the following syntax:

```
[[TargetPage#uniqueId|Link to the anchor]]
```

For example:

[[TargetPage#CfgOption|Read more about this configuration option]]

### Important

To link to an anchor in a different book or version, you must place the anchor after the version number: [[Documentation:product:book:pagename:version#anchorname

## Repository Links

To link to non-wiki documents stored in the repository, use this code format:

{{Repository|*filename*| |*display text*}}

Example:

{{Repository|81fr\_dep-gax.pdf| |Genesys Administrator Extension Deployment Guide}}

The link displays as "Genesys Administrator Extension Deployment Guide"

If you need to provide a repository link to someone working on an environment outside of the wiki, provide an absolute link.

Example: https://docs.genesys.com/Special:Repository/81fr\_dep-gax.pdf

To add files to be linked to, follow the instructions in Uploading files to the Production Server via the Repository Utilities tool.

## External Links

To link to an external, non-docs.genesys.com webpage, use the link button (or the following syntax):

{{#Widget:ExtLink|link=external\_link|displaytext=display\_text}}

Example

{{#Widget:ExtLink|link=http://www.genesys.com|displaytext=Genesys}}

## Transclusion

To insert the *content* of another page or part of a page automatically, use transclusion (see the mediawiki topic for the basic definition).

Because we use libraries and in-document topics (rather than templates) for transclusion, you must use the full link syntax, as you do with an out-of-document link.

To transclude just part of a page, surround the transcluded text with <onlyinclude> tags. A typical

scenario is when you don't want to include the H1 of the topic:

=H1 text=

<onlyinclude>

blah blah blah

</onlyinclude>

## Email Links

To create a link that generates an email to a target recipient:

[mailto:<email address> <Display Name>]

Example:

[mailto:orderman@genesys.com Genesys Order Management]

There will be a small icon showing up after the link to indicate that it is an email link.

## Linking from the Writers Guide to docs.genesys.com

#### Examples

[https://docs.genesys.com/Documentation/RN/8.5.x/gim85rn/gim85rn Genesys Info Mart RN] [https://docs.genesys.com/Documentation/IW Workspace Desktop Edition]

## Redirects

To redirect to another page (so that the first page never loads, just the redirect page), insert a string at the top of the page using this format:

#REDIRECT [[Documentation:<product>:<book>:<page>:<release>]]

#### example:

#REDIRECT [https://docs.genesys.com/Documentation/PSAAS/Public/RPRT/HRCallbackReports
Documentation:PSAAS:RPRT:HRCallbackReports:Public]

# Typography

Wiki typographical styles conform to three general rules that you can apply to categories that the table below doesn't explicitly cover.

- UI elements are in **bold**
- Code and user-enterable text are in monospace
- Variables and placeholders are in *italics*

Exceptions, as noted below, include option names and sections (bold) and state names (capitalized). Do not bold text in links. The general Tables rule (minimal formatting) overrides the other ones, as tables with <tt> tags tend to print off the page.

Category	Genesys Engage style	Example/Notes
Emphasis	Italicize	You <i>really</i> don't want to do that.
First-time mentions of terms and generically named items	Italicize	Use <i>themes</i> to vary the look of your interface. Use lower case for succeeding mentions.
Manual titles	Italicize	Framework Stat Server Deployment Guide
Configuration object types	Capitalize	Application, SIP Switch
Configuration option names and attribute names	Bold	num-sdn-licenses
Configuration option values and attribute values	Monospace	true
Configuration option section names	Square brackets, bold	[Link-Control] section
Variable/placeholder copy	Italicize	http://FQDN:port_number/admin Avoids nowiki tags; can be in <tt> tags or not; web standard Exception: inside code samples that use the <source/> tag, keep code verbatim (with brackets etc.)</tt>
UI navigation paths	Bold	GA > Application > section name

Category	Genesys Engage style	Example/Notes
Filenames/file paths	Bold	gcti\IVRIServer\run.sh
Script names	Bold	install.sh
Dialog box and Tab (UI) names	Bold	Click the <b>General</b> tab in the <b>Properties</b> dialog box.
Button and Field names	Bold	Use <b>Browse</b> to select the template that you are configuring.
Commands or Command Lines	Monospace	-host <i>host</i> -port <i>port</i> -app <i>application</i> [ -clean_batch   -batch ]
Agent states	Capitalize	Ready (NotReady)
Call modes and states	Capitalize	Busy
Permissions and privileges	Capitalize	Execute
Statistical category	Capitalize	ExpectedWaitTime2
Error message text	Monospace	TERR_NOMORE_LICENSE
Code samples	Monospace	<xs:attribute <br="" name="Name">type="xs:string" /&gt;</xs:attribute>
User data entry	Monospace	Type the port number.
URLs	None (autoformat)	<ul> <li>For URLs to actual internet pages, use an active link as specified in Links.</li> <li>For URLs that are not clickable but are enterable by the user, use monospace with no link</li> <li>For URLs that are not clickable and are not enterable by the user, use plain text with no link</li> </ul>
T-Library and SIP messages	None	INVITE or REFER

Category	Genesys Engage style	Example/Notes
Tables		Regular text except in the Notes/ Description column, and mono only where <i>absolutely needed</i> ; stylized text can extend tables beyond printable borders
Subscript	subscript tag	Use the <sub> tag to format text in subscript. For example: H<sub>2</sub>0 Becomes: H<sub>2</sub>0</sub>

# Cheat sheet

Shortcuts and formatting tricks for Ponydocs pages, all rolled into one neat package.

What?	How?
A useful JSON formatting tool for outputting proper JSON formatted code for APIs. It also supports providing proper code for XML, CSV, and YAML.	Link to the site/tool: https://jsonformatter.org/
Link to an external, non-docs.genesys.com webpage	{{#Widget:ExtLink link=external_link displaytext=display_text}}
Config Option Section Link (for sections that have their own page)	[[Documentation:XYZ:Deployment:sectionName [sectionName <n< td=""></n<>
Config Option Section Link (for sections that appear within a larger page)	[[Documentation:XYZ:Deployment:pageName#sectionName [sec
Specify red (or another color) text	<span style="color:red">This text will be red.</span>
To exclude an issue (example: GVP-nnnnn) from a JIRA Search, add the red text just before the end:	AND id!= GVP-nnnnn ORDER BY component ASC, key ASC
	lower case alpha <ol style="list-style-type:lower-&lt;br&gt;alpha"></ol>
How to start ordered lists	lower case numeric <ol style="list-style-type:lower-roman"> not step 1 numeric <ol start="2"></ol></ol>
How to create a complicated list	Sometimes you just have to use HTML. This page has some examples that might be helpful!
Link to an email.	[mailto:first.last@genesys.com First Last]
Codes	<pre>• (bullet) / checkmark &lt;</pre>

What?	How?
	® reg
	< (less than sign (<)) > (greater than sign (>))
	/ (/)
	$\lambda$ ( $\lambda$ )
	* *
	= =
	<pre>style="text-align:center;" X (Centered character for tables) style="text-align:center;" ✓ (Centered checkmark for tables)</pre>
	Less used stuff: ? (question mark)
	<  < > >
	: (colon)
	+ (plus sign)
I can't click the <b>Save Page</b> button because the General Disclaimer is blocking it.	Use the keyboard shortcut <b>alt+s</b> (or <b>control-</b> <b>option-s</b> on a Mac) to save your page or re-size the browser window.

# Lists

The MediaWiki formatting page has lots of tips for making lists using the wiki markup syntax. That is the place to start when you need help creating a list.

But sometimes it's hard to get the syntax just right. This page lists some of these cases.

## Retain list numbering after a source tag

This example allows you to retain the appropriate numbering in a list, even though it was interrupted by a <source> tag with a single line of content.

It also shows how to indent the source listing within a list.

#### The result

- 1. Create the /etc/init.d/cassandra startup script.
- 2. Edit the contents of the file:

#!/bin/sh

- 3. Make the file executable: sudo chmod +x /etc/init.d/cassandra
- 4. Add the new service to the list: sudo chkconfig --add cassandra

### Tip

Any time you add a normal line of text (that doesn't start with a \* or # character) the list ends. For multi-line code snippets using the source tag, you still need to use HTMLbased lists. You can include multiple, consecutive indented lines with either source or code tags applied *per line*, but the formatting will not be able to group those lines into a single block of text.

#### The code behind the result

```
# Create the '''/etc/init.d/cassandra''' startup script.
# Edit the contents of the file:
#:<source lang="bash">#!/bin/sh</source>
# Make the file executable: <tt>sudo chmod +x /etc/init.d/cassandra</tt>
# Add the new service to the list: <tt>sudo chkconfig --add cassandra</tt>
```

## Retain list numbering after indented text

We need to stick a properly indented note right before list item 3—here's how to do that with wiki markup.

This list also shows how to include second- and third-level bullets within a numbered list.

#### The result

- 1. Go to the directory where you installed your Cassandra node.
- 2. Edit **conf/cassandra.yaml**, using the following custom values:
  - cluster\_name: cluster name without spaces, for example WebMe\_Cassandra\_Cluster
  - seeds: <comma-separated list of fully qualified domain names (FQDN) or IP addresses of one or more Cassandra nodes> See the description of the seedNodes option for details. Note: This value must be the same for all nodes. Here are two examples:
    - 192.168.0.1,192.168.3
    - host1.mydomain.com, host2.mydomain.com



3. The list continues with the right number.

#### The code behind the result

```
# Go to the directory where you installed your Cassandra node.
# Edit '''conf/cassandra.yaml''', using the following custom values:
#* '''cluster_name''': ''cluster name without spaces, for example'' WebMe_Cassandra_Cluster
#* '''seeds''': ''<comma-separated list of fully qualified domain names (FQDN) or IP
addresses of one or more Cassandra nodes>'' See the description of the
[[cassandraEmbedded#seedNodes]seedNodes]] option for details. '''Note:''' This value must be
the same for all nodes. Here are two examples:
#** 192.168.0.1,192.168.3
#** host1.mydomain.com, host2.mydomain.com
#: {{NoteFormat}You can either create a note using text only, such as "'''Note:''' This is a
sample note," or you can use a NoteFormat template. But if you use the template, you're
'''limited to a single paragraph''' inside the note.}}
# The list continues with the right number.
```

## Indent an image within a list

#### The result

- 1. Open Genesys Administrator and navigate to **Provisioning > Environment > Application Templates**.
  - In the **Tasks** panel, click **Upload Template**.



Upload Template link in the Tasks panel

#### 2. In the Click 'Add' and choose application template (APD) file to import window, click Add.

### The code behind the result

```
# Open Genesys Administrator and navigate to '''Provisioning > Environment > Application
Templates'''.
#* In the '''Tasks''' panel, click '''Upload Template'''.
#*: [[File:GWE-GenAdminTaskUploadTemplate.png|center|frame|Upload Template link in the Tasks
panel]]
# In the '''Click 'Add' and choose application template (APD) file to import''' window, click
'''Add'''.
```

# Map Boxes

### Important

This article only applies to content developed on docs.genesys.com.

## Description

Map boxes are placed on your document *Welcome* page (and sometimes on the chapter landing page) to help direct readers to your most-popular content.

## Chapter Map Box

The chapter map box is the style used for the chapter landing pages. See the CSTA Connector for BroadSoft BroadWorks Deployment Guide chapter landing page as an example.

#### Syntax

<div class="map-box">

### Example

#### Overview

This chapter introduces you to the core features of GAX and its architecture.

Solution Deployment



Database Size Requirements

Manual-level Map Box

The manual map box is the style that is used for the product landing pages. See, the Genesys Adminstrator product landing page as an example.

### Syntax

Note: After the final map box on the page, insert the following code: <div style="clear:both;"></div>

### Example

Genesys Administrator Deployment Guide Use this guide to install and configure Genesys Administrator.

## DPL Map Box

The DPL map box is the style that is typically used in the cloud-based or Angel documents. The DPL functionality allows you to auto-generate a list of links. See, the SaaS Premium page as an example.

This type of map box automatically adds the following templates to your page:

- Template:End boxes
- Template:Repository
- Template:Start boxes
- Template:topiclist

#### Syntax

Since the syntax for this map box entails adding specific links, the syntax example below is a working code with the explanation of the DPL-specific templates and the links:

{{start boxes}}

```
<div class="itemcontainer" style="overflow: hidden;margin-right:0;">
```

```
<div class="item">
<div class="multiguideitem">
====Agent's Guide====
*{{Repository|GC Quick Starter Guide.pdf|4b2a0b63-3f32-46b4-9c25-9b686d9cf487|Quick Start
Guide}}
<!--*[https://docs.genesys.com/Documentation/PSAAS/latest/Administrator/UserAccounts User</pre>
Accounts]
</div>
</div>
</div>
{{start boxes}}
<!--{{topiclist|Agent's Guide|PSAAS:Agent|[[Documentation:PSAAS:Agent:Welcome:</pre>
v850|more >>]]}}-->
{{end boxes}}
Note: After the final map box on the page, insert the following code:
<div style="clear:both;"></div>
```

#### Where:

- {{start boxes}}: The template that opens up whatever HTML is used. It matches up with the {{end boxes}} template at the bottom to close whatever HTML is used.
- ====Agent's Guide====: The title of the map box.
- {{Repository|<filename>|<Alfresco ID>|<display text>}}: The link to our Alfresco repository.
- [https://docs.genesys.com/Documentation/PSAAS/latest/Administrator/UserAccounts User Accounts]:The wiki links—for example, this link is a PonyDocs link that is outside of the *current* product manual, so you need to specify all of the details: Documentation is the namespace, PSAAS is the product short name, Administrator is the Manual, and then you have the page and version details.
- {{topiclist|Agent's Guide|PSAAS:Agent|[https://docs.genesys.com/Documentation/PSAAS/v850/Agent/ Welcome more >>]}: This is a template. The <heading text> is the level 4 heading used at the top of the box. The <product and manual> should specify the product short name followed by a colon and then the manual short name (for example—PSAAS:Agent). The <final item> is the last link provided inside the automatically generated list of links. It should be a PonyDocs link to the *Welcome*page for that manual, with a text description of "more >>" (for example—[https://docs.genesys.com/ Documentation/PSAAS/v850/Agent/Welcome more >>]
- {{end boxes}}: The template that closes whatever HTML is used. It matches up with the {{start boxes}} template at the top to open whatever HTML is used.

Example

Agent's Guide

• Quick Start Guide

more >>

# Horizontal Tabber

#### **OBSOLETE:** Use stacked structure or separate into different topics

#### Description

The horizontal tabber is another way of presenting many pieces of information on one page. It is similar to the verttabber, except for the obvious layout difference.

### Syntax

```
<div class="cloud-tabberlive-wrapper">
<tabber>
First Tab Title=
<div class="cloud-wrapper">
<h2>First box title goes here</h2>
<div class="cloud-left">
Text (you can also add a Heading 3 for a title.)
</div>
</div>
|-|
Second Tab Title=
<div class="cloud-wrapper">
<h2>Second box title goes here</h2>
<div class="cloud-left">
Text
</div>
</div>
|-|
Third Tab Title=
<div class="cloud-wrapper">
<h2>Third box title goes here</h2>
<div class="cloud-left">
Text
</div>
</div>
</tabber>
<div style="clear: both;"> </div>
```

### Example

## Attributes

## Queue Statistics - Time Attributes

The attributes are the time intervals or context in which all the metrics are aggregated.

## Metrics

## Queue Statistics - Time Metrics

The metrics are individual elements of an attribute that can be measured as a sum total—for example, the number of calls sent to the contact center, depending on the attributes that are set.

## Additional Information

## Additional Information

### Talk Time Metrics during a Conference Call Scenario

In this scenario, Agent 1 received a call, and then initiated a consultation call followed by a conference call.

# Graphics

### Important

This instructions apply to on-premises documentation. Graphics used in Genesys Multicloud CX and Private Edition don't include captions.

The following are general guidelines. Refer to the other topics in this section for details about screens shots, formatting links, and more.

## Use of Captions

Any figure larger than a button should have a caption.

Captions should be short and concise whenever possible. Explanatory text should be included in the body, not in the caption.

## References to Graphics

Use the word *figure* (lowercase *f* if generic) to refer to a graphic in text.

For example, "See the following figure", or to use the figure title, use "See the figure Figure title."

## Ark Icons

Genesys is now using the Ark style for our UI designs. To achieve visual continuity, our docs can embed Ark style elements such as Fonticons.

## Use of Color

Full color is permitted in screenshots and architecture diagrams.

Use the PNG Optimizer in PaintShop Pro to reduce the file size of full-color images.

## Architectural Drawings

Architectural drawings are an important part of technical documentation. You must use industryunderstood icons in architectural drawings.

**Author's Note:** We need to decide on a tool and templates to use for these drawings. Some possibilities are Visio, OpenOffice Draw, Gliffy, and others. Tech Pubs must determine a standard.

# Formatting Image Links

### Important

- This article only applies to content developed on docs.genesys.com.
- The Writer's Guide wiki and the closed wiki do not contain the lightbox extension that the thumb attribute uses to open graphics in a modal window, and is the standard for opening graphics in our public wiki.

The following syntax codes allow you to format the image appearance.

## Basic Formatting

#### Standard Image Syntax

The following is our standard image format syntax:

[[File:"filename".png|"format"|"alignment"|"width"|"caption"]]

#### Where:

Name	Description	
filename	Name of image	
.png	The default image file format.	
format	The image display format. The default is <b>thumb</b> , which displays caption text below the image.	
alignment	The physical location of the graphic: left, right, or center.	
	The width of the thumbnail or image, for example: 500px	
width	For reliable results, use a maximum width of 800px. For standard image sizing, see http://www.fileformat.info/tip/web/ imagesize.htm.	
caption	Adds a caption to an image. Some formats, such as border, never display a caption.	

#### Example:

[[File:bbphone.png|thumb|center|200px|Big Phone]]

renders as:



#### Big Phone

## Formatting Syntax

The following table displays different effects of various formatting syntax:

Description	Code	Outcome
<b>Thumbnail:</b> Displays a smaller version of the graphic that can be enlarged by clicking on it, the Tech Pubs standard.	<pre>Syntax: [[File:filename.extension  thumb caption]] Example: [[File:bbphonesm.png thumb] Big Phone]]</pre>	FILE </th
Border: Adds a border around the image.	Syntax: [[File:filename.extension  border caption]] Example:	text text

Description	Code	Outcome
	[[File:bbphonesm.png border  Big Phone]]	text and more text
<b>Frameless:</b> Removes the <div> code and the CSS attributes, but keeps width and does not right-float the image.</div>	<pre>Syntax: [[File:filename.extension  frameless caption]] Example: [[File:bbphonesm.png  frameless Big Phone]]</pre>	text text text TELEPHONE TELEPH
<b>No formatting:</b> No format specified allows for floating text.	<pre>Syntax: [[File:filename.extension  caption]] Example: [[File:bbphonesm.png Big Phone]]</pre>	text text text

## Alignment Syntax

The default alignment is *right* for images using the *Frame* or *Thumb* format syntax. The following table displays different effects of various alignment syntax.

Description	Syntax	Outcome
<b>Center:</b> Centers the image in the middle of the text.	<pre>Syntax: [[File:filename.extension  center width caption]] Example: [[File:bbphonesm.png center  200px Big Phone]]</pre>	text text text
<b>Left:</b> Floats the image to the left allowing text to wrap around the image.	<pre>Syntax: [[File:filename.extension  left width caption]] Example: [[File:bbphonesm.png left  200px Big Phone]]</pre>	text text text text text text text text text

Description	Syntax	Outcome
		BIRDREALTELEPHONEOO<
	Syntax:	
Right:	[[File:filename.extension  right width caption]]	text text text text text text text text
Floats the image to the right allowing text to wrap around the image.	Example:	seeing if you're actually reading this text text text text text text
	[[File:bbphonesm.png right  200px Big Phone]]	lext lext

Description	Syntax	Outcome
	Syntax	Ext text text text text text text text t
<b>No alignment (default):</b> No alignment specified allows for floating block image and renders the image as inline.	<pre>Syntax: [[File:filename.extension  width caption]] Example: [[File:bbphonesm.png 200px  Big Phone]]</pre>	text text text



## Turning Off the Lightbox Extension

Lightbox is the extension that we use to overlay the images over the top of the current topic page. It is the default format layout for all graphics. If you have a small image, for example, an icon, you can turn off this extension by appending an empty link (link=) to an image.

Syntax:

[[file:filename.extension|link=]]

#### Example:

[[File:bbphonesm.png|link=]]



## Image Gallery

Places all of the images used into a gallery format. You can also used different formatting on the captions as well, such as adding links to captions. If there is enough interest, I can do up an example.

I'm not sure if we want to use this type of formatting, but it works and here's the code for it:

Syntax:

```
<gallery>
File:filename.extension|caption
File:filename.extension|caption
File:filename.extension|caption
File:filename.extension|caption
</gallery>
```

Example:

```
<gallery>
File:bbphonesm.png|Big Phone 1
File:bbphonesm.png|Big Phone 2 <br>Electric Boogaloo
File:bbphonesm.png|Big Phone 3
</gallery>
```



Big Phone 1



Big Phone 2 Electric Boogaloo



Big Phone 3

## Image Linking

To link your image to a web page:

[[File:filename.extension|caption|link=external link]]



## Extracting Embedded Images

If you need to extract images from a Word document or an email, save your document as a Web Page, Filtered HTML file. Saving your document this way extracts the embedded graphics as .png files into a folder. This folder name is the same as the document name.

# Visual Standards

This page will help get you started with Snagit and describe the standards we are using for adding visual enhancements to your images. Use them as a foundation to help maintain a consistent look and feel within the docs.

#### lcons

To maintain visual coherence with marketing and sales, use the icons from the linked PowerPoint (Genesys Presentation Corporate Icons) on the Genesys Branding Tools page.

### Important

The Branding Tools link is likely not the latest since the roll out of the One Genesys portal. Try to following link: Marketing department site. However, the Branding Tools link requires permissions beyond your Genesys credentials to access.

## Basic guidelines

The cloud template requires at least one image (or video) to accompany your text. The image is often going to be the first thing the reader sees, so we want it to be useful and not just a generic screen shot. The goal is for the reader to easily scan your image and understand the task at hand.

We want to reduce the need for "click this, click that" procedural text. The graphic and the text should complement each other, not just repeat the same info. Here's an example of how that might work:

## [+] Example: Making graphics and text work together



Here are a few things to keep in mind when planning your images:

#### General

- Do not use thumbnails or captions. Images are uploaded full-size and are re-sized by the template.
- Use **black** for your markup (callouts, arrows, circles, etc). If the native image (UI, line drawing, etc) contains color, that is fine.

#### Visual grammar

- Think of your image or video as another narrative tool.
- What can you tell the reader by just showing them an image?

### Simplicity

- Keep it as simple as you can. Avoid cluttering your image with too much detail. To the user, an overly busy graphic is like a wall of dense text. (They will just skip it.)
- Focus on the main idea, or the details you feel are most important. You do not need to show every step or movement of a task. Maybe just show the final step, or the trickiest one, and let the text carry the rest.
- Use markup sparingly. If it is easy to see the **Save** button, there is no need to circle it or point to it with an arrow. Use markup for elements that aren't easy to spot, such as a radio button in a sea of other radio buttons, or a checkbox in the bottom corner. You can also use the UI to help draw attention to menu items and active tabs by having them selected in your capture.

## Setting up Snagit

### Link to video

Don't have Snagit? See Lorraine about getting a license.

Snagit is easy. We've even pre-built some custom stamps and arrows that you can use to add meaningful things to your screenshots. The video will show you how to add these to Snagit, or you can follow these steps:

- Get the custom stamps and samples file.
- Under the **Stamps** folder in the Snagit installation directory, create a folder called **Genesys** and extract or copy the the \*.png files to it. **Note:** You might need to have administrator rights to add or extract files to the installation folder.

The custom circles and numbers are automatically added to the Stamps QuickStyles. For the Arrows:

• Open one of the sample \*.snag files included with the zip file. Right-click any of the arrows and select **Add to Quick Styles**.

You can now click the **Stamp** tool and browse to **Genesys** to use the custom stamps, or click the **Arrow** tool to select the custom-styled arrow from your Quick Styles.

## Snagit Tips and Tricks

- You can stop Snagit from automatically expanding the canvas when you move an object near the edge
  of the canvas. Just click File > Editor Preferences then on the Editor tab, clear the Automatically
  expand the canvas to fit objects checkbox.
- ALWAYS save your work as a \*.SNAG file first before saving the \*.PNG version. This makes it easy to make changes later.
- After you have defined a style for an effect (like for the wave edge effect), you can add it to your
  personal library of Quick Styles. Depending on the effect, you can either right-click and select Add to
  Quick Styles, or save it to your Quick Styles while adjusting the effect settings.
- Need whitespace? Expand the background canvas by pulling the square handles around the edges of your image.
- If you've captured an image to the clipboard, add it to the Snagit editor by selecting File > New from clipboard.
- Capturing a UI? Use the interface as another way to highlight menu items, tabs, text to enter, or options to select. For example, be on the active tab, select the target option, or mouseover the target menu item before capturing the screen. Paths appearing in the UI are also useful.

### [+] Example: Active tabs and highlighted menu options

General				
Call Settings	'Active" t	ab -		
Email Notifications		¥		
Web Service Notifications	😂 Designer	Applications	Shared Modules	Αι
E-mail QA Request	Lida	lighton	1 antion	
Phone Model	Fligh	lignied	option	
Special Discount on monthly Subscription	<i>e</i>	• •	,	~
Last Name*	– (mouse	point	er bonu	s!)

 Want to share a capture of the Snagit UI itself? If pressing Fn + PrntScrn immediately minimizes the Snagit Editor, you'll need to open the Snagit 13 Capture tool (ie: not the Editor) an then select File > Capture Preferences... then click the Capture tab and uncheck "Hide Snagit when capturing". This allows you to grab a capture of the Snagit UI.

## Adding callout text

### Link to video

Callouts are a great way to tell the reader something about what they are looking at. For example, "Here's the file you uploaded" or "Don't forget this". Use in combination with a border-free callout box.

- Use the **SEGOE PRINT** font in Snagit. This style stands out from the UI and is meant to simulate a marker-on-a-whiteboard effect.
- The wiki will re-size your images, so try to use a large font size to allow for some shrinkage. (36-point seems to work well.)
- We're not just *labeling*, we're *talking*. For example, instead of saying "Send button", say "Send your message".
- Try to avoid using callouts to label obvious things or repeat what is already in the text. For example, you don't need to point at a **Save** button and say "Click here to save".
- Be concise. Instead of saying "When you are finished, click here to send the file", say "Send the file".

### [+] Example: Adding useful callout text



## Wave edging

### Link to video

Use this when cropping a section of a larger screen. It tells the reader there is more to the image, but they don't need to see it right now.

- To apply it, go to Image > Edges > Wave Edge Options.
- Use an effect-size around **8** and remove any drop-shadow.
- Select Add to Quick Styles to have it ready for next time.

## [+] Example: Applying wave edging

Pr	ompts	)	ł
Re	ply to prompts before running the query.		١
	Pre-set Day Filter: Last Friday		
•	Report Date: 5/1/2015 12:00:00 AM		
•	From Hour: 0		1
•	To Hour: 24		1
•	Agent Group: ALL	/	
•	Agent: ALL	/	
•	Reason Code Type: SOFTWARE	/	
•	Media Type: ALL	1	
•	Tenant: ALL		
	Refresh Values 📀	Pre-set Day Filter:	
	Day Date Range	> Last Friday	
	None		١
	Today	<	١
	Yesterday		
	Last Sunday		
	Last Monday		ł
	Last Nedecaday		1
	Last Wednesday	/	1
	Last Friday	/	
	Last Saturday	/	
		1	
		ļ	
	April 17, 2015 6:37:31 PM GMT+00:00	1	
	Enter your search pattern here		
مر مار مر مار مر مار مار مر مار مار مار			

## Circling (custom oval stamps)

### Link to video

The custom oval stamp can be re-sized and stretched to satisfy the most discriminating of item circlers.

- Circle things that might not be obvious. You do not need to circle things that the reader can easily see or figure out. Most will already know about **Apply**, **Save**, or **Next** buttons. They might *not* easily notice the tiny checkbox in the corner.
- Use them to focus reader attention on an important (or interesting) element or detail, not the generic stuff.
- ᆇ Go easy. Too much circling can quickly cause clutter.

## [+] Example: Circling an item with oval stamp



## Spotlight and magnify

### Link to video

Sometimes you need to show a full-screen, but want to focus attention on a particular detail. Use the Spotlight and Magnify tool to create a magnifying glass effect.

• We use a two-step process for this tool: First, we apply the effect. Then we use the shape tool (circle) to
add a black border around it. (Watch the demo at left.)

### [+] Example: Applying the spotlight and magnify effect

GAX dit Pers	System Dashboard sonality	Agents Configuration	Routing Parameters	Reports	Administration	
Perso	onality Name *		Lar	Internet		
en-u	s					
Perso	onality Description		Gend	er * Male		
This	is the English language	e personality.		Female Not sp	e becified	
м	essage				_/	
E	Emergency This is the message to	be played in case of emerge	tney.			
E	Special Day This is the message to	be played if today is on the	special dates list.			
E	Welcome This is the welcome g	reeting.				

## Blurring

### Link to video

Your capture might contain confidential or sensitive information that belongs to actual customers. This information must be obscured to prevent any legal troubles or breaches of privacy.

• Select a section of the image and apply the tool, using an amount of blur that looks right for the situation. You can blur a large area, or select more specific portions.

### [+] Example: Blurring sensitive details



# Numbering (custom number stamps)

#### 1

The original idea behind using the numbering stamps was to show an order to a multilayered flow or sequence, not to correspond with procedural steps in the text. But this is how most people seem to interpret them.

- 😤 We recommend these be used sparingly, if at all.
- Too many number stamps can be distracting, especially if they are not visually in order.
- Instead of numbering, maybe try an alternative. Layers can be arranged to convey a logical order (overlapping, stacked in descending order, etc). Otherwise, maybe it's best to let the text specify the order of the flow.

## Adding layers

### Link to video

Sometimes you want to combine several captures into one image flow. You can do this by adding them as layers to an existing image or background.

- Create a new image in Snagit using a large canvas size (such as 1200 x1200) and a transparent background.
- Capture (or open) your images in Snagit and apply any cropping or edge effects you want to them. Tip:

It's usually best to wait until you have arranged the images on the new canvas to add arrows and text callouts.

- Copy and paste each image onto the canvas and arrange as needed, adding any additional callouts or visual enhancements.
- Trim the extra whitespace.

## Questions, comments, concerns?

@TP-CloudCT

# File Name and Type

### Tip

Almost all documents have legacy graphics that do not meet the standards (format, naming, and file type) that are set in this topic. Writers must decide with their team whether legacy content should be updated to the standards.

If you have graphics that act as a source for the images that you publish in Ponydocs, you should ensure that these source graphics are backed up the Graphics folder in Global IX SharePoint.

### Graphic File Name Format

When you create a new graphic, use a file name of the following format when you save the file:

<product>\_<description>

Use all lowercase in file names. Use underscores or hyphens only; no spaces allowed in file names. In the following example, the product is Performance Management Advisors. The description should clearly identify the subject matter of the graphic.

For example, pma\_adminconsole or pma\_admin-console are both correct. Do not use pma\_admin console.

If, in a later release, you must update this graphic to address changes in the administrator console, add the version number to the file name to distinguish it from the original.

The file name now uses the following format:

<product>\_<description>\_<release#>

For example, pma\_adminconsole\_815.

## Graphic File Type

Save all source files in the native file format used by the application in which you created the graphic.

For example, save all source files created in PaintShop Pro in .psp format. Save all source files created in Visio in .vsd format.

When you have completed the source graphic, save or export the file in .png format for use on the Wiki. All graphics files must be in .png format for use in Wiki pages.

# Resolution

### Important

Do not resize a bitmap image (the .png file) in an image processing application (such as PaintShop Pro). An image, when viewed at 100% in Ponydocs, should be full resolution. You can use the thumb keyword or px keyword to resize the display of the image without resizing the original image.

Use the following guidelines when creating your graphics:

- A graphic should always be as small as possible, showing only what is absolutely necessary to convey the required information.
- A graphic should be displayed no wider than 500 pixels. A graphic will be 'cut off' if it is wider than 500 pixels and is used on a page with horizontal tabs. If you must insert a graphic that is more than 500px wide, use the *thumb* or *width* parameter to resize the graphic on the Ponydocs page.
- A graphic should be no higher than 900 pixels. Height is not typically an issue with Ponydocs pages, but try to avoid graphics that require a lot of scrolling to see the entire image.
- A graphic used inline with text should be no more than 20 pixels high. More than 20px, and the graphic starts to interfere with text alignment, particularly in bulleted lists.
- A graphic should be 96 pixels per inch.
- In online Help documents, avoid the use of graphics that include text. Help files are localized and localization of graphics increases costs. Show only buttons. Use screenshots that include text only if absolutely necessary.

# Troubleshooting

Writers have reported the following issues when working with graphics. A fix or workaround is provided for each issue.

PNG graphic is missing content

If you use 'Save As' to save a PaintShop Pro source file as a .png, the .png file sometimes 'loses' content. If this happens, use File > Export > PNG Optimizer to create the .png file (accept all default settings in the PNG Optimizer window).

Graphic is missing on the Wiki page although I uploaded it

Refresh your browser (click the Refresh button, or use Ctrl + F5).

Graphic is missing on the generated PDF although it looks fine on the Wiki page

You may have separated 2 or more graphics by <br/> tags:

[[File:gwe-event\_sequence1.png|800px]]<br/>[[File:gwe-event\_sequence2.png| 800px]]<br/>[[File:gwe-event\_sequence3.png|800px]]

If so, only the first graphic will display in the PDF. To fix this problem, separate the references by line breaks instead.

# Error messages

One of our responsibilities is to edit UI error messages. Ideally, we should be involved from the beginning of the design process, so make sure to let your PCT know that you'd like to be in the loop.

Our error message standards are basic: what we call "Cloud style", direct and minimalist. Thus:

- Use second person and/or imperative, when necessary.
- Give users the precise info they need to correct the issue.

To do so, writers must be aware of the exact triggers for the message.

For example, you might see the draft message "The name is required."

Does the error come up only when the (required) field is empty? Or does the code also check for uniqueness? In either case, it would be a good idea to use something like "Enter a unique user name." So even if the code doesn't check for uniqueness, we still let the user know that their user name needs to be unique.

However, if the code runs a *separate* check for uniqueness, then "You must enter a unique user name." works well for the empty-field scenario. In the uniqueness scenario, then use something like: "The user name you entered is already in use. Enter a unique user name."

Note that I changed "name" to "user name". That's a design issue, and if we writers do get an invitation to the design table, we should be watching field prompts like hawks. "Name" is never a good field prompt, because the user doesn't know whether they're supposed to enter their family name, their company user name, or, for that matter, the name of their dog. However, if a weak field prompt does get by (as they often have), then we can at least use the error message to help correct the weakness. In fact, when we lack field-level help (such as rollover), we can even add formatting info to the error message: "Enter your full name, in the format 'Surname, Given Name'."

### Sample messages

- Enter a campaign name.
- The campaign name is too long; the maximum length is 50 characters.
- Campaign names can use only: a-z, 0-9, " ", "\_", "-" and ".".
- Timeout values must be between 0 and 360,000,000, inclusive.
- Event names must be unique.
- Trigger names must be unique within an event.

# Lightbox

Lightboxes are modal pop-up windows that you can use to display graphics or text such as glossary terms.

Standard graphics display in a lightbox. For format details, see Formatting links.

Using the **PrettyPhoto** Extension, you can put four kinds of content into a lightbox:

- transclusion you can use regular mediawiki transclusion to show content in a lightbox. We have many plans to leverage this feature to layer or simplify our docs. For example, config option descriptions, repetitive procedures or steps-within-procedures, and so on.
- videos you can set up your video link so that it opens in a lightbox, in cases where you do not want (likely due to space concerns) to embed a video directly on a page
- straight text you can also directly add text from the page into the lightbox
- iframes opens another webpage inside of the lightbox. We use this for the marketing forms that you may have run into while navigating the site.

#### Transclude to Lightbox

This is an example of transcluded content within a lightbox, transcluded from Test transclusion from template

You can put links to the content inline with the text.

The string to use to invoke is:

{{#ppin:{{Download\_Tips}}|Test transclusion from template}}

Plain Text in a Lightbox

Besides transcluded content, you can also put text inside a lightbox: {{#ppin:Blah.|Blah}}

#### Iframe in a Lightbox

{{#ppif:http://go.genesys.com/2013\_Q3\_GLOBAL\_WS\_WC\_TechPubsTPLPs\_website-gate-template.html?page=SIPS SIP Server|400|700|Genesys Form}}

{{#ppif:http://go.genesys.com/2013\_Q3\_GLOBAL\_WS\_WC\_TechPubsTPLPs\_website-gate-

template.html?page=SIPS SIP Server|400|625|Genesys Form}}

Autoenscrollinization

If the content is too large to fit inside the lightbox, it will be scrollable.

Scrollable Content

{{#ppin:{{Documentation:GC:Agent:CallActions:latest}}|Scrollable Content}}

Conservostylification

All styling is applied to content within a lightbox. Styled Content

{{#ppin:{{Download\_Tips}}|Styled Content}}

Video Content in a Lightbox

#### Tip

You can (and should) now upload your videos to Vimeo, not Youtube. For help, contact the video group: Lorraine, Devon, Richard, or Joel (alias coming soon)

To get your video to appear in the lightbox, you need 2 things:

- An ID for your video from the hosting platform (Vimeo).
- A dummy image that will server as your thumbnail. If the size is right, you can use one of the following:

Video\_mockup.png



Video\_mockup\_200px.png

Genesys	and the second second		
Annes Carlos	Generys Into Wart B	usiness Carrinuly Deployment Go	da Transa -
		-	-

Or create your own mockup by copy-pasting a video PLAY button over your screenshot, and size the image according to your needs.

You can choose any picture to act as your thumbnail......



{{#ppvd:vimeo|8758454|`image`Video\_mockup\_200px.png}}

#### Or just plain text

{{#ppvd:vimeo|8758454|Or just plain text}}

### Important

The prettyphoto extension is not moved to this WriterResourceWiki, so do not expect these lightbox links to work as expected. This will get fixed eventually. In the meantime, you can copy and try this markup on a public wiki page.

# Using the StepNav template

This template is used to build a chevron-style navigation bar for captureing sequential flow between separate, but tightly linked pages. See an example here: Sample StepNav Widget

Screenshot of sample



### Rules

This widget is meant to capture tightly sequential pages in a given manual. The navbar is versionned, and will work within a particular version TOC. It is not intended to provide sequential flow across different manuals/products.

### How to Use Stepnav template

- 1. Identify the pages you want to tie together using the widget.
- 2. Determine the order of your pages. You will assign each page a **node** an integer used to determine its place in the sequence.
- 3. Pick an ID for this collection of pages. Check the template page Template:StepNav to view a list of all IDs currently in use. Important: Make sure your ID is unique within your manual.
- 4. Add the following template to each page in your sequence:

```
{{StepNav
  |ID=Unique identifier for this sequential flow. Check the table below to make sure your ID is
  unique.
  |node=A number used to identify this page in the sequential flow.
  |display=An override to choose how this page will show up in the chevron navbar. By default,
  the regular H1 for the page will show up in the navbar.
}}
```

5. Check how the display renders. The template will use the H1 of your page by default, but sometimes these will be too long: use the display parameter to manually override the H1 title of your page with something shorter and more useful.

# Using the CloudStep\_Stack template

This template is used to create a left-aligned image or video, and text on the right. You can add several images that will be displayed as miniatures below the image.

# How to Use CloudStep\_Stack template

- 1. Identify the images or vimeo video that you want to tie together with your text.
- 2. Determine the order of your images or videos if you plan to add more than one.
- 3. Add the following template to your page:

```
{{AnchorDiv|<anchorID to simplify links>}}
{{CloudStep_Stack
|title= H2 title
text=Your text describing the video
video=<ID in VIMEO>
}}
{{AnchorDiv|<anchorID to simplify links>}}
{{CloudStep_Stack
|title= H2 title
|text=Your text
|medial=<main image file>
<u>}</u>}
{{AnchorDiv|<anchorID to simplify links>}}
{{CloudStep_Stack
|title= H2 title
|text=Your text
vertical=vertical
[fullwidth|medial=<main image file>
j}
```

Check the template page Template:CloudStep\_Stack for further details.

# Video

Congratulations! You're ready to create your very own video! This Video Writer's Guide will walk you through all the information necessary to add your very own masterpiece to our growing video library. Our video team will be happy to help answer any questions you may have as you get started. Contact Tanya Ferrera, Peter Chaplin, or Monique Gionet with questions.

Generally, you will be responsible for writing a script and capturing the video using Snagit and the video team will take care of the rest! Send your video capture and script to Tanya Ferrera along with any special requests and she will mobilize the video crew!

If you're new to the video team, this guide will walk you through using Camtasia, Adobe Audition, and Videoscribe.

### Getting Started

Often the most difficult thing is knowing where to start. Follow these steps and you'll be well on your way!

#### For the writer:

- 1. Choosing a topic
- 2. Accessing a demo environment
- 3. Writing a script
- 4. Recording with Snagit
- 5. Embedding your video in the documentation

#### For the video team:

- 1. Learning Camtasia
- 2. Learning Adobe Audition
- 3. Learning Videoscribe

# For the writer

- 1. Choosing a topic
- 2. Accessing a demo environment
- 3. Writing a script
- 4. Recording with Snagit
- 5. Adding the video link to your product page

## Choosing a topic

This is where many people get stuck. Remember back in high school when the teacher told everyone to write/research on a "topic of your choice" and you spent days (weeks?) trying to figure out what to write on? Here are a few suggestions to make your life easier by narrowing down the world of possible video topics:

- Do a video on what you know (a corollary to "write what you know"). And use the following list of video types to get you started on what kind of format you want the video to have.
- A **procedural video** describes how to use the product based on a decision-making process or workflow. The narration follows the action onscreen. Usually the procedure involves more than 3 consecutive steps. This can be as simple as a description of the UI. It is helpful to demonstrate something that others might find confusing or need to troubleshoot.

Here is an example of a procedural video: Workspace Desktop Edition: Workspace Contact Assignment

 An explainer or conceptual video can be an overview of the product and what it does, may describe when to use the product, can be a high-level overview of how the product integrates with other products, or may describe hypothetical business scenarios. Animation software like Videoscribe or PowerPoint works well for explainer videos.

Here is an example of an explainer video: Genesys Web Engagement: A First Look

- Here is an example of a **business scenario video**: Outbound Dialing Modes: Business Scenarios
- A new-in-this-release video describes the newest features added to a release. Here is an example of a new release video: New Features of the Knowledge Center Plugin for Genesys Administrator Extension
- **Micro-videos** are the easiest videos of all. They last anywhere from 5 to 30 seconds and don't have intros or outros—or even a soundtrack! You can mix them in with brief bursts of text or they can stand on their own.

Here's a page with about a dozen micro-videos: GEM Studio User's Guide: Rules

## Accessing the Demo Environment

For the purpose of creating videos, the software in the G-Demo environment usually includes the latest releases. However, if you're planning a video to highlight new features, the developers may need to give you access to a testing environment.

For an overview of G-DEMO, watch this tutorial: G-Demo Overview

To get started using the G-DEMO environment, watch this tutorial: G-DEMO Basic Settings

The steps below will walk you through the process for accessing the Gdemo environment:

#### Log in and set up your account

After creating your account and logging in, the customer account page will open automatically. This can be accessed again during future logins from the menu bar, "My Live Env" and selecting "My Customer". To set up your account, enter the required settings including:

1. The phone number you're planning to use in the demonstration. Typically this is your iPhone or Android mobile. This must be a working number and preferably a mobile phone. If you use your own personal number, it will have to be covered with a callout in Camtasia.

2. Canadians must enter the country code (not including a plus)

3. Entering a customer pin is optional

4. Enter an email for the customer. Please Note: You may want to set up an email account to use for this purpose. Otherwise, similar to your phone number, you will have to block the information with a callout in Camtasia.

5. If you're working on the Genesys Social Media Engagement Solution, add Facebook and twitter accounts, if not, skip it.

6. The AN 1 and AN2 fields can be used to specify alternate numbers that can be used by the customer in the demo.

After updating, G-Demo will associate a set of agents with these accounts. This isolates your demo. From the menu bar, select "My Live Env" and choose "My Agents."

1. SIP endpoint- Interaction Workspace embedded SIP phone will be used for the audio and will allow you to use the computer sound card for the voice channel.

2. Auto Answer functionality- if you log in with your phone number plus "\_auto", interaction workspace will be automatically configured to auto respond to an incoming interaction

3. External Phone Function- If you log in with a phone number plus "\_ext" you will be able to use an external phone as the agent phone and have the ability to enter the external phone number to use in the second login screen of Interaction Workspace.

Your customer and agent are now ready and waiting to be used in your video!

### Writing a script

### Choosing a title

The title of the video should include both the name of the product and a specific indication of the contents. Think about using a verb in the title so that the viewer knows what action they will take. For example, "Transfer a Chat" or "Upload the main menu prompt." Include numbers in the title if it is part of a series and should be watched in a particular order.

### Content

The script for a video can be as elaborate or minimal as needed. Often, it's a good idea to be as concise as possible to make the video more accessible and palatable. Minimally, a script is needed for the audio, however, some prefer to create a storyboard that also includes the action that will happen onscreen during narration. To maintain the viewer's attention, keep the video short, between 1 and 3 minutes, and no more than 5. The typical rule of thumb is 150 words per minute. If your topic is broad or has many steps, you may want to develop a video series to break information down into logical chunks.

A complete script should include:

1. An introduction to let the viewer know the objectives of the video. For example, "Hello. This video will demonstrate xyz."

2. The content presented in logical steps.

3. Second person references. You can also choose to leave out personal pronouns and use commands to describe actions or instructions.

4. A conclusion. For example, "Thanks for watching! We hope you've enjoyed this presentation describing xyz by Genesys Technical Publications."

Additionally, it may be appropriate to give the reader context for the video. For example "This video is the first video in a series explaining xyz" or "For further information on xyz, see the xyz section of the documentation."

After writing the script, test it by doing a practice run through with the software to make sure all the points have been covered and your audio matches what is happening onscreen.

Camtasia has a tutorial that deals, in part, with writing the script. That tutorial is located here:

#### Camtasia Studio Pre-Recording Tips

As a strong suggestion, have someone else on your PCT review your script to be sure it works well from a customer point-of-view, particularly a customer who may not know the product and its idiosyncrasies as well as you do.

# Recording with Snagit

We have a departmental subscription for Snagit. If you don't have it, please contact Lorraine Lannoye. You can download Snagit here: Snagit Download

Watch this video to learn the video capture basics: Snagit Intro to Video

First, make sure that any personal information is removed from the capture area. If you get any meeting alerts or email notifications, disable them or use an external monitor to capture the video.

After opening Snagit, select the video tab.

All-in-One	Selection:	Region	- ¢	Preview in Editor		<b>)</b>
	Share:	File	× 0	Capture Cursor		Capture
Image	Citate:	File	· ₩	Record Microphone	On >	
Video	Webcam:	Off >		Record System Audio		Print Screen

Select "Region", Share "File". Keep your webcam turned off. We will record the audio separately, so turn off your microphone.

After clicking the capture button, crosshairs appear. Click and drag to capture the region of interest. When you let go, the capture region is highlighted and the background is darkened. A strip appears outside of the capture region containing the capture controls. Change the capture resolution to 1920x1080 or 1280x720. You may have to change your monitor resolution to accommodate or use an external monitor. Don't worry if the browser doesn't fit inside the capture area, you can adjust the window to fit after the video starts and cut out that portion later or restart the recording. Make sure to capture only the relevant area. For example, you probably don't need to include the tabs, bookmarks, or address bar in your capture.

If they aren't already, turn the system audio and microphone off (they will be dark when off and green when on). Click the red button with the circle in it to start capturing. Click the curved arrow to restart the recording. Click the blue button with the square in it to stop capturing.



The video opens in the Snagit Editor. Click the play button or use the playhead to scroll through the video. Use the handles on either side of the playhead to select a portion of the video to cut.



Once you're satisfied with the video, click the share button and choose "file." Name the file and choose a location. Click save.

#### A few notes on taking a video capture

This goes without saying, but if you want a professional quality video, it's critically important that you rehearse the mouse movements and screen changes until they are completely smooth. Some things can be corrected in post-production, but it's much better if the entire sequence can be done smoothly. Avoid "talking with the mouse." For example, you don't need to circle the area being described, it can be highlighted in post-production using a callout. The video should follow the script exactly. Time can always be cut out during editing, so if you need more time to orient yourself, leave the mouse in one location until you're ready to move on to the next action. Before you click a button, pause a few moments with the cursor on the button to orient the viewer.

### Adding the video link to your product pages

After the video team has finished editing your video, they will send you the Vimeo ID and you can add that link to your product landing page. To do that, add the following code: You can use the Vimeo widget code:

{{#widget:Vimeo|id=107170326}}

#### Video

#### Link to video

And you can use the following code to set height and width (example):

 $\{ \# widget: Vimeo | id=107170326 | height=500 | width=500 \} \}$ 

#### Link to video

# For the video team

Please go to our current Video Program Central page for updated information.

# Downloading Camtasia

Camtasia is the software we use to create and edit our videos.

#### Download Camtasia

If you are part of the video team, order Camtasia through the GSD tile in Okta.

Note that when you download Camtasia, it will automatically add a widget to your PowerPoint application that will allow you to record your PowerPoint presentation as a video. You can access the widget by clicking Add-Ins in the top menu bar.

### Rehearsing

This goes without saying, but if you want a professional quality video, it's critically important that you rehearse the mouse movements and screen changes. This is the time to tweak the script if necessary, so the script reflects the actual movements that are going to be done.

**Important Note on Voice-over:** Several people in the department, specifically Peter Chaplin, Ed Crabtree, Kate Breckenridge, Jeff Erickson, Tanya Ferrera, Richard Pfeiffer, Monique Gionet, and Lorraine Lannoye have volunteered to do the voice-over for any video.

**Note:** The video and voice-over are preferably done as separate tracks that will be merged in postproduction, so you don't need to worry about getting the screen movements and voice perfectly at the same time.

# Recording in Camtasia

All right! You're ready to go. It's time to record. Before you start, remember:

- Do not include any personal or private information in the capture such as login information or client's names.
- Hide bookmarks, the address bar, and tabs.

If you're recording a demo (as opposed to a PowerPoint slideshow) use the following steps to do your recording:

1) Click the Camtasia icon.

2) Close the Welcome page that displays.

3) Select the "Record" button in the top left of the interface. Camtasia minimizes and the recorder opens.

4) Click the drop-down next to "custom." Choose either 1280x720 or 1920x1080 depending on the size of your capture area. 1920x1080 will capture a larger area. You may need to use an external monitor to capture video. Laptop displays may not have the required resolution. If necessary, set your browser to full-screen mode to get rid of bookmarks, tabs, and the address bar.

5) The capture area will be highlighted with a green dotted area at the borders. Adjust the region you want to capture to fit within the highlighted borders. Unless it is necessary for the viewer to see the website address, do not include it in the capture area and make sure your bookmarks are either hidden or also outside of the capture area.

6) Under Recorded Inputs, click the icons to turn the Webcam and Audio off.

7) Click the "record" button or "F9." A three-second countdown will commence on your screen. After the countdown, everything is being recorded.

8) When you are finished recording, click the "stop" button on the recorder or "F10."

9) Save the recording. Give it a file name. Find a location to save the Camtasia file and click "save."

10) Camtasia will open for editing. The .trec file will be located in your Media Bin. Drag and drop the clip to your timeline for editing.

#### If you are recording a PowerPoint slideshow:

1) Open PowerPoint

2) Open your presentation

3) Click Add-Ins. This will open the Camtasia toolbar in the upper-left corner of your screen.

4) Click the Record button. Your presentation will automatically go into slideshow mode and the Camtasia controls will be in the lower right corner.

5) Do your presentation. Note that you can add on-the-fly callouts and change slides in PowerPoint with the controls that display when you hover over the lower-left corner when the presentation is in slideshow mode.

6) A preview of the recording will appear.

- 7) When you are finished recording, click "Ctrl+Shift+F10."
- 8) Click "Save & Edit." Be sure and save the file as an MP4.
- 9) Give it a file name
- 10) Find a location to save your Camtasia file and click "save." Camtasia will open for editing.

# Creating Audio

Remember that we are doing separate tracks for video and audio. When you've recorded your video, use the following instructions to make the sound file that can be merged into your production. Be sure the area you're working in is free of sound distractions and the usual white noise – system audio, air conditioning, doors closing, pets, children, etc. Use a high-quality microphone.

### Creating a WAV file in Camtasia

1) In Camtasia, choose Voice Narration.

Elle	Edit Modify V	ew Share Help				
ecord						
	Media	Voice Narration				
•	Annotations	Microphone (Parallels Audio Con 🔹 🔨				
		Mute timeline during recording				
4	Behaviors	Paste or type script text here				
-+-	Animations					
٩	Cursor Effects					
Ā	Voice Narration					
Ð	Audio Effects					
Ń	Visual Effects					
Ę	Interactivity					
сс	Captions					
		Start Voice Recording				

2) Test your microphone by speaking into it and adjust the input level slider so the meter peaks out in the upper green range. In addition to the input slider in Camtasia, you can also adjust the audio input in your sound settings (this is assuming you are on a Windows computer). In the "recording" tab, choose your recording device and click "properties." Go to the "levels" tab and increase or decrease your microphone input as needed.

3) Click "Start Voice Recording" to record the script. Leave about 5-10 seconds of silence before you

begin to speak. This will allow the background noise to be captured so it can be removed later. Speak clearly and at a normal pace. If you mess up, don't worry! You can do it as many times as you need to.

- 4) When you click "Stop", save the WAV file.
- 5) It appears on the timeline.

#### Editing a WAV file in Camtasia

1) To edit the audio in Camtasia, select Audio Effects.

2) Drag and drop "Volume Leveling" to the audio clip to level out the volume. This compresses the audio, bringing the lower portions up and the louder portions down to even out the sound. This is especially useful if there is a lot of variation in volume. Click the audio clip to highlight it and, in the properties section to the right of the canvas, choose either Medium or Low from the drop-down. High may compress the audio too much and you may lose some of the natural sounding vocal inflections. To get rid of the effect, click the "x" next to Volume Leveling in the properties pane.

3) Drag and drop "Noise Removal" onto the audio clip. Camtasia will analyze the selection to determine what is background noise and will remove it from the rest of the audio. Click the audio clip to highlight it. in the properties section to the right of the canvas, adjust the sensitivity and amount of the noise removal property. Make sure to listen to the audio again to ensure that your voice over was unaffected. To get rid of the effect, click the "x" next to Noise Removal in the properties pane.

#### Creating a WAV file in Adobe Audition

Adobe Audition is a professional recording program that has many options for editing your audio. Talk to Lorraine Lannoye if you would like a subscription to the Adobe Creative Cloud Suite.

1) First, make sure your audio hardware is set up. On a windows computer, choose File>Preferences>Audio Hardware. On a Mac choose Adobe Audition CC>Preferences>Audio Hardware.

- 2) Click the dropdown next to Default Input and choose your microphone.
- 3) Click the dropdown next to Default Output and choose your speakers.
- 4) Click OK.
- 5) Create a new file. Choose File>New>Audio File...
- 6) Name the file.
- 7) Change the Sample Rate to 44100, the channels to Mono, and the Bit Depth to 16.
- 8) Click OK.
- 9) You're ready to record!
- 10) Click the red record button. Wait 5-10 seconds to capture background audio and begin speaking.
- 11) Click the red record button again to stop.

12) Now you're ready to begin editing your audio.

#### Link to video

#### Editing a WAV file in Adobe Audition - Speech Volume Leveler

The first thing you want to do is level out your audio. This will compress the audio by making the softer portions a little louder and the louder portions a bit softer. This is important for listenability. You don't want your audience to strain to hear or be surprised by sudden spiking audio.

1) Choose Effects>Amplitude and Compression>Speech Volume Leveler. A box appears.

2) Set the Target Volume Level and Leveling amount to -20 and 0 respectively.

3) Highlight a softer region and begin to increase the leveling amount slider until the Levels indicator at the bottom of the screen shows the input level peaking at -12 to -6 dB.

4) Next, highlight a louder region and adjust the Target Volume Level slider until the Levels indicator shows the input level peaking at about -6 dB. If you can't get the peak volume down low enough, don't worry, we'll use another method to make sure we don't get loud spikes in the audio.

5) Set the Target Dynamic range. This minimizes the background noise while amplifying and leveling only speech. For best results usually set this value to between -45dB and -60 dB.

6) Optionally, click the arrow beside Advanced to set the Compressor and Noise Gate. The Compressor sets the threshold above which compression occurs. The noise gate eliminates background noise by reducing the output level when the signal drops by the amount specified.

7) Listen to your audio again and make sure that the output still sounds natural. Once you're satisfied, click "Apply."

Here is an example of the Speech Volume Leveler dialog box:

000 E	ffect - Speech Volume	Leveler	
Presets: (Custom)		≛ ©   ★	¥ (i)
Target Volume Level:	-2015		-17.9 dB (RMS)
Leveling Amount:	°o	100	42.7%
Target Dynamic Range:	<u></u> 0.		56.6 dB
	Boost Low Signals		
~ Advanced			
Compressor			
Threshold:	-9 -8 -7 -6 -5 -	4 -3 -2 -1	-7 d8
Noise Gate			
Noise Offset:	°		11.2 dB
🔟 🕨 🖻		Close	Apply

Next, we'll get rid of the background noise. This is why it is important to leave at least 5 seconds at the beginning of your recording to get a good sample of the background noise for Audition to analyze.

1) Choose Effects> Noise Reduction/Restoration> Noise Reduction (process)...

2) Capture a noise print by selecting an area of background noise on the timeline and clicking the "Capture Noise Print" button.

3) In the Noise Reduction slider, adjust the percentage that you want the noise to be reduced.

4) In the Reduce by slider, choose the number of decibels you want the noise reduced by.

5) Listen to your audio and adjust settings as needed for a natural sound.

6) You may also have to adjust the advanced settings. Set the Spectral Decay Rate between 40-75%, the Smoothing up to 2, the Precision Factor between 5-10, leave the Transition Width at 0 dB, set the FFT Size to either 4096 or 8192.

Here is an example of the Noise Reduction dialog box:



#### Editing a WAV file in Adobe Audition - Hard Limiter

Sometimes after performing Speech Volume Leveling there will still be spikes in the audio. Usually, we don't want audio to spike higher than -3 dB. To force audio to conform to that level, you can use a Hard Limiter.

- 1) Go to Effects > Amplitude and Compression > Hard Limiter...
- 2) Set the Maximum Amplitude to -3.0 dB and Input Boost to 0.0 dB

3) Leave the other default settings.

Here is an example of the Hard Limiter dialog box:



#### Editing a WAV file in Adobe Audition - Autoheal Selection and Silence

The final order of business is to silence pauses and heal blemishes during speaking.

To silence the audio:

- 1) Use the time selection tool and select the region you want to silence.
- 2) Right click and choose "Silence."

3) Another way to silence audio is to select it in the Spectral Frequency display using the Marquee Selection tool, Lasso Selection Tool, or Paintbrush Selection Tool (found in the upper left) and press the "delete" button.

To use Auto Heal Selection:

1) Highlight the area to be healed using either the Time Selection tool or the others (I prefer to use the Marquee Selection tool for healing audio within the Spectral Frequency display).

2) Right click and choose Auto Heal Selection. Or use the shortcut Command (Mac) or Control (Windows) + U.

3) Alternatively, Use the Spot Healing Brush Tool and brush over the spot to be healed.

Watch this video showing how to use Silence and Auto Heal (Note that several ways are shown to go about doing the same thing).

Link to video

# Camtasia Editing

Camtasia has an entire series of video tutorials to help with everything from learning the basic interface and recording your video to some of the more complex editing tasks. The tutorials can be accessed through the Camtasia interface Help system or directly through this link:

#### Camtasia 9|3 tutorials

When you're finished recording both video and sound portions, it's time to merge and edit them.

As always, if you run into difficulties and need a bit of help, drop a note to Technical Publications Video and someone will be available to work through any issues with you.

#### Creating your introduction

Videos over 30 seconds long should use an introduction and ending.

The assets you need to create your introduction and ending can be found here: Intro and Outro.

Background music tracks can be found here: Background Music Tracks.

Watch this video to learn how to create your introduction:

#### Link to video

#### Adding callouts

Callouts are used to draw the eye to a particular feature on screen. For consistency, we use the sketch motion callouts in black, unless you're demonstrating something on a dark background, in which case you'll use white.

- 1) Click Annotations
- 2) Choose the "Annotations that draw on screen over a period of time" tab.
- 3) Drag and drop the callout onto your canvas.
- 4) Delete the drop shadow
- 5) Change the color of the callout to black

6) Adjust the size and rotation. You can do this either by grabbing the handles and stretching (notice that the aspect ratio remains the same) or by changing the properties in the properties panel. To make the arrow wider (and bypass the aspect ratio), hold shift while you stretch it out.

#### Link to video

# Producing your Video in Camtasia

Produce & Share for Mac:

- 1) Click the "Share" button
- 2) Choose Local File.
- 3) Name it and choose a destination folder.
- 4) Click "Export."

Produce & Share for Windows:

- 1) Click the "Share" button. The Production Wizard opens.
- 2) Choose "Custom production settings" and click "Next."
- 3) Choose the file format MP4 Smart Player (HTML5) and click "Next."
- 4) In Smart Player Options, go to the "Video settings" tab and adjust the quality slider bar to 75%. Click "Next."
- 5) In Video Options, click "Next."
- 6) Name your video and choose a destination folder. Click "Finish."

# Post-Editing Process

When you are finished editing your video, put it into Alfresco and send the link to "Technical Publications Video"

The Video Production Admins will do any necessary tweaking and upload it to Vimeo.

Once uploaded, you will be sent the Vimeo ID to add to the appropriate page.

# Tables

### Important

This article only applies to content developed on docs.genesys.com. Although the instructions will work if you worked in the source coding on all.docs.

### Tip

If your column heading in a table has two or more words, only the first word should be capitalized, per the Microsoft Manual of Style. There may be exceptions, for example if lower case doesn't look right. Please keep this in mind when developing tables.

This section provides a brief discussion of how to use tables in your wiki docs, and gives examples of various tables you can create.

The code required to create tables is very simple—tables are built upon these tags:

WikiMarkup Code	Meaning
{	Start Table
+	Table Caption
-	Table Row
!	Table Header Cell
1	Table Data Cell
}	End Table

So, for example, the following code:

{	- Creates a new table
! '''Example Heading'''	- Contains a column heading
-	- Creates a new row
Example row content	- Creates a cell in the row
}	- Closes out the table

...produces this table:

**Example Heading** 

Example row content

And there's not much more to the coding than that. (You can see example code below.)

## Table templates

We've set up some template classes (options) to handle special situations.

**Sorting**—to make your table sortable, add the sortable class:

```
{| class="sortable"
! '''Heading 1'''
! '''Heading 2'''
|-
|one
|two
|-
|two
|-
|three
|four
|}
```

Producing this output:

Heading 1	Heading 2
one	two
three	four

Landscape—to make your wide table display in landscape mode in a pdf:

```
{| class="pdf-table-landscape"
|one
|two
|-
|three
|four
|}
```

To use **multiple classes** within a single table, enclose the options within the double quotation marks, separated by a space:

```
{| class="sortable pdf-table-landscape"
! '''Heading 1'''
! '''Heading 2'''
|-
|one
|two
|-
|two
|-
|three
|four
|}
```

## Special considerations

If you are concerned about the amount of screen real estate your tables occupy, there are several steps you can take:

• Do I need this table?—Consider whether a table is really needed. Esp. during conversion, you may

find that some legacy tables are not really that useful to the user, or that you can reference the information elsewhere.

- Move the table to the bottom of the topic—To avoid breaking up the flow of a procedure, you can move a table to the bottom of the topic, and link to and from it.
- External tables—As a last resort, where a very large table is needed, some writers have provided a downloadable XLS file.

## MediaWiki Table CSS

This is the main table style CSS for our site:

### [+] More information

```
genesystable CSS
table {
  height : 30px;
  font-size: 100%;
                color: black;
                /* we don't want the bottom borders of <h2>s to be visible through
                 * floated tables */
                background-color: white;
                margin:lem lem lem 0;
                border:solid 1px #474747;
                border-collapse:collapse;
                valign:top;
                empty-cells:show;
                spacing:0
                padding:3px 7px 2px 7px;
}
th, td {
 width: 25%;
  text-align: left;
  vertical-align: top;
  border: solid 1px #474747;
  border-collapse: collapse;
  padding: 3px 7px 2px 7px;
  caption-side: bottom;
}
caption {
  padding: 3px;
  color: #000000;
  background: #BEBEBE;
}
th {
  background: #BEBEBE;
}
```

New table class genesystable to differentiate our table format with our own brand.

*prettytable* is just a generic wiki class name for a mediawiki table. *mediawiki* is also another generic class name for tables.

### Table examples

The following examples show the code used to achieve various table styles:

### One column and row example

### [+] More information

Column 1 Heading			
text			
{  ! '''Column 1 Heading'''  -   text  }			

### Two columns and rows example

### [+] More information

Column 1 Heading	Column 2 Heading
text	text
text	text

```
{|
! '''Column 1 Heading'''
! '''Column 2 Heading'''
|-
| text
| text
| text
|-
| text
| text
| text
| }
```

Three columns and rows example

### [+] More information

Column 1 Heading	Column 2 Heading	Column 3 Heading
text	text	text
text	text	text
text	text	text

```
{|
    ! '''Column 1 Heading'''
    ! '''Column 2 Heading'''
    ! '''Column 3 Heading'''
    .
    text
    text
```

### Four columns and rows example

### [+] More information

Column 1 Heading	Column 2 Heading	Column 3 Heading	Column 4 Heading
text	text	text	text
text	text	text	text
text	text	text	text
text	text	text	text

{|

1		
! '''Column	1	Heading'''
! '''Column	2	Heading'''
! '''Column	3	Heading'''
! '''Column	4	Heading''
-		
l text		
l text		
l text		
text		
-   +ov+		
Lext		
text		
text		
-		
text		
-		
text		
i text		
i text		
text		
13		
11		

### Colspan example with two colors

### [+] More information

Column 1 Heading	Column 2 Heading	Column 3 Heading	Column 4 Heading	
Colspan Heading 1				
text	text	text	text	
text	text	text	text	
	Colspan H	leading 2		
text	text	text	text	
text	text	text	text	
texttexttexttext{ {'''Column 1 Heading''''''Column 2 Heading''''''Column 3 Heading''''''Column 4 Heading''''''Column 4 Heading'''-colspan=4 style="background-color:#F5F5F5"   '''Colspan Heading 1''''text				

Rowspan example with four columns, one straddled row (without color)

### [+] More information

Column 1	Column 2	Column 2	Column 2
text	text	text	text
	text	text	text

Column 1	Column 2	Column 2	Column 2
	text	text	text
	text	text	text
<pre>{                  '     '''Column 1'''     '''Column 2'''     '''     text     '''     text     '''     text     '''     text     '''     text     ''''     text     ''''     text     '''''     text     '''''''''''''''''''''''''''''''''</pre>			
l text			
l text			
text  }			

Rowspan example with four columns, one straddled row (with color)

### [+] More information

Column 1	Column 2	Column 2	Column 2
text	text	text	text
	text	text	text
	text	text	text
Column 1	Column 2	Column 2	Column 2
--	---------------------------	----------	----------
	text	text	text
<pre>{       -     ! '''Column 1'''     ! '''Column 2'''      - valign="top"       rowspan=4 style="backgr</pre>	ound-color:#F5F5F5"  text	t	
text			
text			
text  - valign="top"			
text			
l text			
 text  - valign="top"			
text			
l text			
 text  - valign="top"			
text			
l text			
l text  }			

# Colspan and rowspan example

# [+] More information

Column 1		Column 2	Column 3
Subcolumn 1	Subcolumn 2		
text	text	text	text
text	text	text	text
text	text	text	text

Colu	mn 1	Column 2	Column 3
text	text	text	text
<pre>{ </pre>	:#F5F5F5"   '''Subcolumn :#F5F5F5"   '''Subcolumn	1 <sup>1</sup> · · · · 2 <sup>1</sup> · · ·	
}			

Colspan with two colors with straddled rowspan example and one subcolumn heading

# [+] More information

Column 1 Heading	Column 2 Heading	Column 3 Heading	Column 4 Heading	
Colspan Heading 1				

Column 1 Heading	Column 2 Heading	Column 3 Heading	Column 4 Heading
text	text	text	text
	text	text	text
	text	text	text
	text	text	text

-	[  !   '''Column 1 Heading''' !   '''Column 2 Heading''' !   '''Column 3 Heading''' !   '''Column 4 Heading'''
	colspan=4 style="background-color:#F5F5F5"   '''Colspan Heading 1'''
	-
	rowspan=4  text
	text
	text
	text
	-
	text
	text
	text
	text
	text
	text
	text
	Text
	TEXT

Colspan with two colors with straddled rowspan example (in color) and one subcolumn heading

# [+] More information

Column 1 Heading	Column 2 Heading	Column 3 Heading	Column 4 Heading	
	Colspan H	leading 1		
	text	text	text	
toyt	text	text	text	
lext	text	text	text	
	text	text	text	
<pre>{  ! '''Column 1 Heading''' ! '''Column 2 Heading''' ! '''Column 3 Heading''' ! '''Column 4 Heading'''  - ! colspan=4 style="background-color:#F5F5F5"   '''Colspan Heading 1'''  -   rowspan=4 style="background-color:#F5F5F5"  text   text</pre>				

| text | text

Colspan with two colors with straddled rowspan example and two subcolumn headings (for legacy tables only)

# [+] More information

For new documentation, try to have separate tables for separate rows.

Column 1 Heading	Column 2 Heading	Column 3 Heading	Column 4 Heading
	Colspan H	leading 1	
	text	text	text
toyt	text	text	text
lext	text	text	text
	text	text	text
	Colspan H	leading 1	
text	text	text	text
	text	text	text
	text	text	text
	text	text	text

	text text			
	-			
	text			
	text			
	text			
	-			
ļ	colspan=4	<pre>style="background-color:#F5F5F5"   '''Colspan</pre>	Heading	1'''
	-			
	rowspan=4	ltext		
	text			
	text			
	text			
	-			
	text			
	text			
	text			
	-			
	text			
	text			
	text			
	-			
	text			
	text			
	text			
	}			

Colspan with two colors with straddled rowspan example (in color) and two subcolumn headings (for legacy tables only)

# [+] More information

For new documentation, try to have separate tables for separate rows.

Column 1 Heading	Column 2 Heading	Column 3 Heading	Column 4 Heading
	Colspan H	leading 1	
	text	text	text
toxt	text	text	text
lext	text	text	text
	text	text	text
	Colspan H	leading 1	
	text	text	text
toxt	text	text	text
lext	text	text	text
	text	text	text
{			

!'''Column 1 Heading'''
! '''Column 2 Heading'''
! '''Column 3 Heading'''
! '''Column 4 Heading'''
! '''Column 4 Heading'''
|! colspan=4 style="background-color:#F5F5F5" | '''Colspan Heading 1'''

```
rowspan=4 style="background-color:#F5F5F5" |othertext
 text
 colspan=4 style="background-color:#F5F5F5" | '''Colspan Heading 2'''
 rowspan=4 style="background-color:#F5F5F5" |moretext
 text
 text
|}
```

Borderless table example

# [+] More information

Borderless tables can be used as a way to display two graphics side-by-side. I am also working on a multiple image template where we can display multiple images vertically or horizontally: http://en.wikipedia.org/wiki/Template:Multiple\_image.

You must add the table class "no-border" for this table to work.

```
text
text
{| class="no-border"
text
-
text
}
```

#### Collapsible table

Not working yet.

## [+] More information

**Displayed Header Text** 

Hidden Text.

Notes

### Table footnotes

Use footnotes for *reference* information types and not for *procedure* information types.

Table Footnote Example: T-Library Functionality

The mediawiki tables page: Wikimedia Help:Footnotes.

Adding captions to tables

## [+] More information

To add a heading to a table use the following tag |+ between the table start tag and the first table row tag.

The Table Heading does not take on the background color on the regular PonyDocs pages; this is most likely due to a difference in the CSS on the playground and on the regular Ponydoc pages. Example of a table heading without the column color bleeding through: http://docs.genesys.com/ Documentation/TS/8.1.1/TSCSTA/CSTADNNoConfig#Supported\_Configuration

Also, the caption heading has a default center align, and I'm not sure if it's possible to change the alignment.

Table Heading

#### Column 1 Heading

text

{
! '''Column 1 Heading'''
+ Table Heading
-
text
}

#### Negative numbers

Insert a space before a negative value with a minus sign (| -6). If you do not insert a space inbetween the | (pipe) and the - negative sign, the characters |- are parsed as the wiki markup for the table row.

#### How do I align text within a table cell?

You can align text vertically (vertical-align) and horizontally (text-align) in a cell (including in headings). For example:

Here's an example of a heading, centered horizontally, but forced to the bottom of the cell: ! style="vertical-align:bottom; text-align:center;" | **Dimension Tables**, which produces this output:

#### **Dimension Tables**

Q: And while we're at it, here's a specific case: how about if I want to center a check mark in a table cell? A: First, find the symbol you want here: [1] -- then center it using text-align, like so (this example adds a check-mark): | style="text-align:center;"|/, which produces this output:

1

#### Possibly using templates?

One recommendation on the technical side of things: anywhere you specify a style in the table examples, you might want to replace that hard-coded value with a template. This would make it easier to update existing table appearance without having to do a site-wide search and replace later.

For example:

Colspan with Two Colors with Straddled Rowspan Example and One Subcolumn Heading

## [+] More information

Here, we could turn the *style="background-color:#F5F5F5"* string into a template called {{lightbackground}}. You also might want to add a template for dark-background if that is something that writers will add manually to table cells.

(Note that I have actually gone ahead and created the template on this wiki - all that means is that I clicked on the broken link for {{light-background}} and pasted in *style="background-color:#F5F5F5"* as the content for that page.)

Column 1 Heading	Column 2 Heading	Column 3 Heading	Column 4 Heading	
Colspan Heading 1				
text	text	text	text	
	text	text	text	
	text	text	text	
	text	text	text	

```
{|
   '''Column 1 Heading'''
į
  '''Column 2 Heading'''
Į.
  '''Column 3 Heading'''
1
   '''Column 4 Heading'''
! |
.
! colspan=4 {{light-background}} | '''Colspan Heading 1'''
  rowspan=4 |text
  text
  text
  text
 text
  text
  text
  text
  text
  text
 text
  text
  text
|}
```

# Fixed-width columns

I'm trying to mix up text and graphics in separate table columns, but the text column always expands and squeezes the graphics to the point where they're unreadable, and so, pointless. Is there a way to lock the width of columns, within our current wiki setup? I tried the mediawiki markup but can't get it to do anything meaningful.

Try this code:

```
{| class="genesystable"| width="100%"
! width= "20%"|'''Date'''
! width= "80%"|'''Feature'''
|-
| text
| }
```

... which produces this table:

Date	Feature	
text	text	text
text	text	text

Or you can set a specific number of pixels (be sure to put it in a separate compartment from the cell's

text.)

| width="100px" |

# Converting tables from Frame

There are a number of techniques writers have developed to convert tables from Frame to the wiki. For small tables it is probably just as easy to manually set up the table based on one of the examples below, and then manually copy and paste data into each cell. This gets tiresome in larger tables, so there are several other methods you can consider:

- (TO DO: we need to develop a list of the best conversion methods here, and recommendations)
- Save each frame file as an RTF, then use another editor (such as Word) to clean it up and format it for the wiki. You can use the find and replace tools, and other Word features, to construct the table more quickly than you could in ponydocs. Lots of folks do this in Notepad++, UltraEdit, etc.
- Save each frame file as an RTF, then convert that to HTML (for example, using http://word2cleanhtml.com/), and finally convert the HTML to wiki using http://bmanolov.free.fr/ html2wiki-tables.php

# Notes and the NoteFormat template

## Important

The NoteFormat template is used both on docs.genesys.com and all.docs.genesys.com.

## Description

Note boxes are used to highlight important information for readers. Note boxes can be headlined with one of the following terms:

- Important
- Tip
- Warning

**Use notes sparingly, especially in Cloud topics.** Since everything we write should be important (rather than exhaustive), save notes for critical items. For multiple gotchas in a section, you can use a "Restrictions" or "Limitations" list.

#### Syntax

```
<!-- Available styles: (default)-Important, 2-Tip, 3-Warning -->
{{NoteFormat|<description>|<style (optional)>}}
```

#### Example

<!-- Available styles: (default)-Important, 2-Tip, 3-Warning --> {{NoteFormat|Click the Save button often to ensure you do not lose your work.|2}}

## Tip

Click the Save button often to ensure you do not lose your work.

#### **Equals Sign Issue**

Including the equals sign ( = ) in the text of a note makes the text appear as a numeral nested inside of three sets of curly brackets, like this:

WikiText	Result	
{{NoteFormat a=b}}	Important {{{1}}}	

To avoid this, use = for the equals sign inside a note.

WikiText	Result	
{{NoteFormat a=b}}	Important a=b	

# Glossary Links

# Important

This feature might not work if it is used in a wiki-style list (for example If you use # or \* instead of <Ii> for list items). If the Glossary terms do not appear correctly, try switching your list to use HTML.

# Overview

Tech Pubs maintains a Glossary at the following location: http://docs.genesys.com/Glossary.

Glossary terms are listed alphabetically on one page, allowing you to do a term search by using your browser's search function (such as *Ctrl-F*). On top of all letter sections, there is an alphabetical list of letters that link to other sections of the Glossary.



On the left side of the Glossary, there are widgets that provide additional useful information such as the most popular terms, recently added terms, and recently changed terms. There is also a **Suggestions** box that lets users email us directly.

# Using Glossary Terms in Documents

You can link terms in your documents to the Glossary. This creates an active link that, when clicked, shows a definition of the term in a lightbox.

	lear	
Local Control Agent	mework as described in the Management Layer User's t your option, Deployment Wizards. If you intend to onents of this Framework layer, such as Local Control (SCI), before deploying ORS. Refer to the Framework k components.	
Ide 21 Thi ontor or co gent (LCA) 1 Deployme		
nen deployi	t or later are required.	
Glossary ABCDEFGHIJKLMNOPQRSTUVWXY	, [edit]	
a monitor the second seco	nstance of Local Control Agent (LCA) on every host tatus of any of these components.	
ersistent CLOSE	× [edit]	
etermine whether you will use persistent storage (Apache Cassandra). If you chose to do so fore you deploy ORS. See the Cassandra Installation/Configuration Guide.	o, then installing Cassandra should be done as the first	
or the list of operating systems and database systems supported in Genesys releases 8.x. r apported Operating Environment Reference Guide and Interoperability Guide on the Genes		
isk Summary: Prerequisites for ORS Deployment		

**Note:** If your term is not in the Glossary, please add it, per the instructions in Glossary Updates.

To link a Glossary term to a word in your document, edit the page, highlight the word, and click <u>G</u>. This adds the following text to your page:

{{Glossaryterm|term=yourterm}}

For example: {{Glossaryterm|term=Voice over Internet Protocol}}

You must use the exact spelling of the term as it appears in the Glossary; otherwise, the link will not work. If you do not want to use the exact Glossary spelling, you can use the text= parameter to specify a display name for the Glossary link. For example, consider if you want to link to the Glossary term for **Voice over Internet Protocol**, but:

- In the context of your document, you don't want the first letter of this term to be capitalized, as it appears in the Glossary.
- You want to use the acronym, VoIP.

In these cases, use the text= parameter to specify a display name. For example:

{{Glossaryterm|term=Voice over Internet Protocol|text=VoIP}}

See the information about the Glossary button on the Wiki Edit Buttons page for more tips about

adding glossary entries on your pages, including using the addlink parameter to control whether the page to which you're adding the glossary entry should appear in the auto-generated list of "For More Information" links that appears on the Glossary page for the term in question.

# Code Snippets

# Description

Highlight code snippets by using the <source> tag. Doing so will preserve code spacing and add colored highlights to the code.

An example of proper usage is below (note the use of lang="xml" to tell the wiki that it needs to highlight codes relevant to an XML file). If you are having issues with text wrapping, try using the enclose="div" command (i.e. <source lang="xml" enclose="div">...</source>).

Find more information at http://www.mediawiki.org/wiki/Extension:SyntaxHighlight\_GeSHi.

#### Syntax

```
<source lang="<language type>">
```

Code goes here.

</source>

### Example

Due to formatting reasons (i.e. the source tag is hard to turn on and off selectively), the following example does not have a closing source tag. You must use your imagination to pretend it is there.

</solutionDefinition>

# Footnotes

Do not use footnotes, which are an academic style, not a business style.

Either the information is important enough to include in the main text, or it's not important enough to include at all. On the rare occasions when you need to include a large chunk of info in a table cell, use standard anchors to a section below the table, or even, in some cases, to a separate topic, if the info is that voluminous or important. You don't have to expose the topic in the TOC.

# Highlighting Changes

# Description

You can use change bars or text-block highlighting to track changes to your document.

## Procedure

- 1. Click Edit.
- 2. Highlight changed text.
- 3. In the toolbar of the editing window, click the Change Bars button or the Edit Green button.
- 4. Click Save.

### Example

#### Change Bars

If you clicked the Change Bars button, the following is displayed with the text:

This didn't change.

But this did.

And this did.

And this did.

But not this.

Edit Green

If you clicked the Edit Green button, the following is displayed with the text:

This didn't change. But this changed. This didn't change, though.

# Find/Change Text

# Warning

The find/change text strings apply to the whole document, including wiki markup. Do not use a text string that will inadvertently mess up category tags or wiki markup. However, if you do make a mistake, it is always possible to go to the History of each page to revert a find/change edit.

To find and change text across a document or documents:

- 1. Go to the Special Pages page. Ensure you are already logged in to the wiki, and then scroll down to find the Toolbox box on the left. Click the Special pages link.
- 2. On the Special Pages page, scroll down to the Other special pages section. Click the Search and replace text across your product link.
- 3. A console opens to enable you to define the parameters for the find/change operation. Enter the following information:
  - Choose a Product-Select the product in which to find/change text.
  - Choose your Version-Select the version of the product (selected above) in which to find/change text.
  - Text to search-Enter the text string to find. Note that this operation will search the entirety of each page, including wiki markup. Take care to ensure that this operation will not alter category tags (unless desired) or other wiki markup.
  - Replace with-Enter the text string to replace the text string specified above.
- 4. Click the Continue to Manuals button.
- 5. In the Choose Manuals... field, select the manuals in which you want to find/change text. You can select one or more manuals.
- 6. In the Choose Default Action... field, select whether the default action for all affected pages will be Ignore (do nothing) or Replace (replace the text as specified in the previous screen. For example, if the text string is repeated on several pages in your document, but you only want to replace the text string on a couple of pages, choose Ignore so the find/change operation will by default skip all pages, unless specified otherwise in the next step.
- 7. Use the drop-down menus to select the action for each page that matches the find/change criteria that you defined in the previous steps.
- 8. Click the Process Request button.
- 9. A results screen displays to show you the result of the find/change operation. It will report which pages were changed, and how many instances of the text string were changed on each page.

# Revert to an earlier version of a page

You can revert to an earlier version of a page using the History tab. However, be aware if there are other versions made after the version to which you want to revert, you will lose those changes and you'll have to make those changes again.

To revert to an earlier page

- 1. On the History tab, click the date version that you want to revert to.
- 2. Click Edit to open the markup.
- 3. Click Save. A warning may appear indicating that there are later versions. The page is now reverted.

# Deleting Content

## Important

If you are looking for instructions on removing content associated with a product/ version reaching end of support, see End of Life (EOL)/End of Support (EOS) Process.

Sometimes it is necessary to delete a page, TOC, manual, or version. The process for doing so is similar to how these elements were created, but in reverse.

The following procedures offer a short summary of the creation/deletion processes. For a more detailed explanation, see Deleting a Page, below.

#### Creating

To create a page, you would:

- 1. Create a version.
- 2. Create a manual.
- 3. Create a TOC (which creates the page).
- 4. Create the content on the page.

#### Deleting

To delete a page, you do the page-creation process in reverse:

- 1. Delete the page.
- 2. Delete the page topic in the TOC.
- 3. If it is necessary to also remove the manual and version:
  - a. Delete the TOC.
  - b. Delete the manual from the manuals page.
  - c. Delete the version from the versions page.

# Deleting a Page

- 1. On the page to be deleted, click Delete. The page deletion screen appears to confirm the deletion.
- 2. Click Delete page. The page is deleted.
- 3. Go to the TOC page.

- 4. Click Edit to edit the TOC page, and delete the topic that corresponds to the page you just deleted.
- 5. Click Save to save the change to your TOC.

# **Optional Procedures**

Normally, you only need to delete a page. However, if you need to delete a TOC, manual, or version, follow one or all of these procedures.

## Deleting a TOC

- 1. On the TOC page, click Delete. The page deletion screen appears to confirm the deletion.
- 2. Click Delete page. The page is deleted.

### Deleting a Manual

- 1. Go to the manuals page.
- 2. Click Edit to edit the manuals page, and delete the manual that corresponds to the TOC you just deleted.
- 3. Click Save to save the change to your manuals page.

#### Deleting a Version

- 1. Go to the versions page.
- Click Edit to edit the versions page, and delete the version that corresponds to the manual you just deleted.
- 3. Click Save to save the change to your versions page.

# Retrieving a Deleted Page

Although the page has been deleted, it can be easily recovered by following the procedure below.

- 1. Click my contributions in the top-right corner of any wiki page. The **User contributions** page opens.
- 2. Click deleted user contributions, which is above the page heading. The **Deleted user contributions** page opens and displays a list of pages that you have deleted.
- 3. Identify the page you want to restore. To the left of the page name, click view. The **View and restore deleted pages** page opens.
- 4. You can choose to restore the latest version of the page with full page history, or just an earlier version of the page with one or two associated revisions, or a mix of the two.
  - 1. In most cases, writers choose to restore the latest version of the page and the full page history. To

do so, ensure no check boxes are selected and click Restore.

2. To choose which version of the page you want to restore, and which revisions, scroll down and click the check box beside each version of the page you want to restore. Click Restore.

# Formatting shortcuts for the Closed wiki

# Important

- We use these shortcuts in the Closed wiki as we don't have all the macros that were implemented in the open wiki. DO NOT USE unless you are authoring in the Closed wiki environment.
- As of May 2021, there is no Closed wiki content on docs.genesys.com.

Format Name	Syntax		
Edit	{{Editgrn_open}} HIGHLIGHTED_TEXT {{Editgrn_close}}		
Graphics	[[File:name of graphic   style  center  pixel size]]		
Bold	<tt> INSERT_TEXT </tt>		
Source Code	<source lang="LANGUAGE"/> CODE SNIPPET 		
Alfresco link	{{Repository   DOC_NAME   DOC_ID  DESCRIPTION}}		
	COL HEADING	COL HEADING	
Table	_ CELL_TEXT	CELL_TEXT	
	CELL_TEXT	CELL_TEXT	
Note	{{NoteFormat  DESCRIPTION < STYLE>}}		
	{{Chabar open}} CHANGED TEXT		
Change bars	{{Chgbar_close}}		
Toggle	<toggledisplay font-size:larger<br="" linkstyle="">showtext="[+] HEADING" hidetext="[-] HEADING"&gt; BODY </toggledisplay>		
Repository Link	{{Repository  DOC_NAME  DOC_ID  DESCRIPTION}}		

# Microstyle

How to write better sentences (and sentence fragments).

# Passive Constructions

Passive constructions--the passive voice, expletive openers ("There is", "It is", etc.), and weak main verbs (be, have, do, get)--increase wordiness, decrease precision, lead to misplaced modifiers, and generally create dull prose that's hard to read.

#### Passive voice

The passive voice (a conjugated form of "be" plus a past participle) poses a big challenge to clear technical writing, largely because of its historical and habitual use by engineers and scientists, who consider it "objective" because it often omits the sentence subject--the "agent" that performs the action of the verb:

The boy was bitten [by the dog].

Note that the active version of the sentence (The dog bit the boy) reduces the number of words in the sentence by 2, a 28% reduction--not an unusual difference.

Typical bureaucratic language employs the passive because it avoids the assignment of responsibility:

#### Mistakes were made.

We, however, cannot afford to ignore agency, since we frequently must distinguish between actions the user must take and actions the application performs automatically. Likewise, one of the thorniest issues we face involves oscillations among audiences; identifying the switches among end users, system administrators, and implementers would go a long way toward resolving reader confusion.

Incorrect: If the option is set to Yes ....

Correct: If the system administrator set the option to Yes....

Fortunately, since the natural syntax of English follows the subject-verb-object pattern, correctives to the passive voice abound. The three primary alternatives:

**Add or identify the subject and place it first in the sentence.** Usually, a noun that follows a preposition (especially "by" or "in") is or can serve as the subject.

Incorrect: In this module, people are listed as objects.

Correct: This module lists people as objects.

#### Use the imperative.

Incorrect: This software should not be used as the sole method of assessment....

Correct: Do not use this software as the sole method of assessment....

#### Replace a passive verb with an active one.

Incorrect: The process flow is shown in the figure below.

Correct: The process flow appears in the figure below.

#### Expletive openers

Sentences and clauses that begin with "there is" or "it is" end up weak and wordy, because they include only one piece of information without revealing an interaction between two elements.

Incorrect: In this module, there are two configuration options:

Correct: This module contains two configuration options:

#### Weak main verbs

The verbs be, have, do, and get share two features: they serve as helping verbs in various tenses and constructions, which weakens their impact, and they carry a wide variety of meanings, which renders them vague and imprecise. Whenever possible, replace them with more precise and active verbs, reserving "be" for occasions where a simple identity works best.

Incorrect: If you do not have Windows installed ....

Correct: If your enterprise does not run Windows....

# Terminology

### A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

# А

A-law Initial cap and hyphen. Used in GVP documentation.

AM, PM

Lower case, no periods, space before: 11:00 am, 8:30 pm

For 24-hour times, use a leading zero when appropriate: 08:30

#### A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

# В

back end and back-end

Open compound as noun; hyphenated as preceding adjective

#### back up, backup

Open compound as verb; closed compound as noun or adjective

#### backward compatible and backward-compatible

As a predicate adjective backward compatible is an open compound; as an adjective preceding the noun it modifies, it is hyphenated.

#### bar graph

Not bargraph or Bar graph

#### based on

Do not use the International English formation "based upon."

#### beta release

Lowercased

#### bit

A contraction of the words binary digit, a bit is the smallest unit of information a computer can process: a 1 or a 0 (zero). A bit is to a byte what a single letter is to a word. The abbreviation for bit is b. See also byte.

#### blocksize

One word

#### Boolean

Capitalize.

#### boot

Use in references to starting up (bootstrapping) a physical computer. In references to launching a software process (including an operating system), use start.

#### box

Avoid using the word box alone; always be more descriptive. For example, "In the Name text box in the Properties window, ...". For a check box, use the complete term: check box.

#### byte

Abbreviated as B, this is a set of bits (1's and 0's (zeros) that represent a particular value in a computer-coding scheme. A byte is to a bit what a word is to a single letter. See also bit.

#### A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

С

## cachable

Not cacheable.

call

See interaction.

#### call back and callback

Two words as a verb; one word as a noun or modifier

#### call center

Avoid using the phrase call center except when the product name requires it. Use contact center instead. (See also contact center.) Lowercase.

#### can

Use "must" to denote required actions, and "can" to denote optional actions. Avoid "should", an ambiguous weasel word that creates wordiness; possible replacements include:

- "can" when something is optional; avoid redundant phrases such as "If you want"
- "might" to denote a possible event or outcome
- "Genesys recommends": own the "should"!
- imperatives: "Set the option to true."
- delineate alternatives to help your readers make decisions
- "when you do x, y happens. If it doesn't...." (replaces "when you do x, y should happen")

#### cancellation, canceled, canceling

Note the spellings.

#### capture, enter, type

Use *capture* to refer to information that is recorded by a machine such as a phone number that is captured by an automated dialer. Use the word type or enter in talking about information the end user must enter into a field. Do not use key in or input.

#### Caution!

Use the Warning Paragraph tags in describing actions that can cause software to lock up or that may

lead to data loss. See also Important!, Note:, Tip:, and Warning!

#### check box

Check box is two words, generally preceded by its label, as in "Select the Font check box".

#### checklist

Noun

check mark and checkmark

Two words as a noun; one word as a verb

#### choose and select

Use select when needed, but use click and double-click for commands and buttons that carry out commands. See also highlight and select, selected, selection.

#### clean up and cleanup

Two words as a verb; one word as a noun or modifier

#### clear and select

Use in discussing operations on check boxes. Do not use deselect or unselect.

#### click

Do not use click on. For example: Click the Save button rather than Click on the Save button.

#### CME

Do not use. See Configuration Management Environment.

#### CO

Most compounds formed with the prefix co are closed up, not hyphenated. Exceptions in Genesys documentation: co-browse, co-browsing, co-navigation (these terms all refer to the same feature, as does web collaboration).

#### combo box

Do not use. Use the label instead.

#### component

At Genesys, a subset of a product.

#### component names/product names

Generally speaking, spell out the Genesys product and product component names the first time in a topic, then use the acronym. For example, Genesys Administrator (GA).

#### computer-telephony integration

Hyphenate as adjective and noun

#### **Configuration Database**

One of two mandatory components in the Genesys Framework Configuration Layer (the other is Configuration Server), Configuration Database stores all configuration data.

#### Configuration Layer

The Configuration Layer (one of five layers in Genesys Framework architecture) processes all configuration data required for running Genesys solutions in a particular environment. It also controls user access to a solution's functions and data. The Configuration Layer has two mandatory components: Configuration Database and Configuration Server. An interface element, either Configuration Manager or Genesys Administrator (the latter a part of the User Interface layer) is also used to complete the layer. Use only when discussing architecture, not functionality.

#### **Configuration Management Environment**

Do not use as a proper noun. For all Genesys releases, replace this phrase with framework, the configuration, or anything else that is contextually appropriate. Often referred to as CME.

#### Configuration Manager

Formerly the third mandatory component of the Genesys Framework Configuration Layer, with Configuration Server and Configuration Database. Starting in release 8.1, it is an optional component, with Genesys Administrator (part of the User Interface Layer) recommended in its place. Configuration Manager provided a user-friendly interface for administering contact-center configuration data in Genesys solutions. It is removed from all Management Framework documentation effective release 8.5.

#### **Configuration Server**

One of two mandatory components in the Genesys Framework Configuration Layer (the other is Configuration Database), Configuration Server is accessible only through Genesys Administrator or Configuration Manager, and:

• Provides centralized access to the Configuration Database,.

- Maintains the logical integrity of configuration data.
- Notifies clients about changes made to the contact center configuration.
- Controls validation and authentication of users.

#### contact center

Because more and more of the interactions between a business's customer service agents and its customers occur online rather than over the phone, use contact center rather than call center. Lowercase. Exception: The Contact Center object in the database.

**Note:** Do not hyphenate "contact center" when it appears before a noun. For example, "Contact Center Customer Relationship Management (CRM) is a **contact center** software solution that provides employees with access to account information and history..." (What Is Contact Center CRM?)

#### context(ual) menu

Do not use. When referring to the right-click menu, use "Right-click and select x".

#### contractions

Contractions are permitted and even encouraged.

#### crash

Do not use this word in talking about a problem with a Genesys product or in technical documentation in general. Acceptable alternatives to crash include malfunction, system lockup, system freeze, shut down, unanticipated shutdown, hard halt, core dump, and so on. Call out any action or event that might cause a system to lock up or to lose data with a Warning Paragraph tag. See also fail, failure and Warning!

#### cross-platform

A program or device that can run on more than one operating system

#### cross-reference

Hyphenate as a verb, noun, or modifier.

#### CTI

Initialism for computer-telephony integration

#### **Customer Interaction Management Platform**

Capitalize as shown, and always spell it out—do not abbreviate to CIMP or CIM Platform. You are not required to put Genesys in front of this phrase, but you have that option. After the first reference in a given chapter or help topic, you can abbreviate this to the Genesys platform. See also platform.

### cut off and cutoff

Two words as a verb; one word as noun or modifier

#### A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

## D

#### daemon, daemon applications, UNIX daemons

Daemon applications—used to handle low-level operating-system tasks— run in the background; they have no user interface. See also services.

#### data

Always use the singular form. For example, The data is no longer available.

#### Data Aggregator

Workforce Management component

#### database

One word

data flow

Two words

data link

Two words

#### Data Mart, Data Mart database, and Data Mart Services

Data Mart and Data Mart Services are components in the Reporting product. Because the Data Mart is a database, it is redundant to refer to the Data Mart database.

#### dataset

One word

#### data type, data typing, data-typing

Open as noun and verb; hyphenated as preceding adjective

#### daylight saving time

All lowercase, and spelled saving, not savings. The acceptable initialism is DST. See also GMT and Pacific time.

**DB** Server

Not Database Server

#### depend on

Do not use the International English formation "depend upon."

#### deselect

Do not use deselect or unselect in discussing operations on check boxes. Use clear instead. See also clear and select.

#### dialog box

Not dialogue box. Some writers have asked for "rules" about when to use dialog box versus window, page, or screen. As a general guideline: A dialog box typically contains set of controls whose values the user must set or confirm, plus a set of buttons (often labeled OK and Cancel) from which the user must select one button to close the dialog box. Also, note that: 1. If the display is merely informational—that is, the user is not required to interact with it—then generally speaking, use window. 2. A very simple window containing only some message text, an icon, and an OK button is commonly known as a message box. 3. Use page rather than dialog box or window when you are writing about segments of a wizard. 4. Use screen in talking about the display area of a monitor (rather than display or monitor).

#### DMA

Initialism for Data Modeling Assistant, a Reporting component

#### double-click

Verb. Note the hyphen. Do not use double-click on.

#### drag and drop, drag-and-drop

Open compound as verb form; hyphenated as preceding adjective

drop-down menu, drop-down list

Do not use. Instead, name the list or menu, as in "the Connections menu".

DST

Initialism for daylight saving time

#### A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Е

#### e.g.

Do not use (it's Latin). Use "for example" or "such as".

email

No hyphen. Exception: the product name E-Mail Server retains its hyphen.

end user, end-user

Open compound as noun; hyphenated as preceding adjective. Avoid using end user; substitute user, customer, or you. Exception: Use end user to differentiate between a supervisor or administrator and an ordinary user of the software.

endpoint and end point

Endpoint normally refers to a communications endpoint. In that context, it is always one word.

#### environment

An acceptable shortening of the phrase operating environment, which is typically thought of as both the hardware and the software operating system. However, you can use the word environment in talking just about the operating system. Occasionally, you may be tempted to use the word platform as a synonym for operating environment or environment. Resist. Platform refers only to hardware architecture and is also ambiguous. See also operating environment, operating system, and platform.

etc.

Do not use (it's Latin). Better to use "and so on".
# Ethernet

Cap it.

# ETL

Initialism for extraction, transformation, and loading

ETL Assistant

Reporting component

ETL Runtime engine

Reporting component

# External Routing Point

Note the initial capitals.

extranet

Note lowercase.

# A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

# F

# fail, failure

Sometimes you simply cannot avoid using these two words in talking about a product, particularly in release notes. But try to substitute some other wording whenever possible. Suitable alternatives include malfunction, system lockup, system freeze, shutdown, unanticipated shutdown, unexpected shutdown. Use a Warning Paragraph tag to call out any user action or software event that might cause a system to fail or to lose data. See also crash and Warning!

# failover

Noun, adjective.

# field, fields

Useful terms for referring to a mixture of controls within a dialog box (such as a mix of text boxes, check boxes, and list boxes). For example: Fill in the fields in the User Information window.

#### file name

Two words except when you are describing the GUI element

#### fine-tune

Verb. Note hyphen.

follow up, follow-up

Open compound as verb; hyphenated as noun and adjective

#### frameset

Noun, one word

#### Framework

The software foundation supporting Genesys products

#### front end, front-end

Open compound as noun; hyphenated as preceding adjective

full screen, full-screen

Open compound as noun, hyphenated compound as preceding adjective.

#### FTE

See full-time equivalent.

#### full time, full-time

Open compound as noun. Hyphenated compound as preceding adjective, predicate adjective, and adverb.

#### full-time equivalent

An enterprise budgeting/scheduling term that indicates the number of hours per week full-time employees are supposed to work. FTE is the initialism.

#### A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

# G

# GA

Initialism for Genesys Administrator. Do not use for General Availability, which is jargon.

# garbage

Avoid except in SDK topics. If the unreadable element is text, use indecipherable text instead, or random and inaccurate data.

# GΒ

Abbreviation for gigabyte. GB is always capitalized and follows a space, as in 1 GB not 1GB.

#### GDI

Initialism for Graphics Device Interface

# General (PA)

Used to indicate the XING build type "General" and the release type Product Availability (PA).

#### GMT

Initialism for Greenwich mean time. In the CTI field, GMT is typically referred to as Universal Time Coordinated or UTC.

#### graceful close or graceful shutdown

Avoid except in RN Corrections.

#### grayed, grayed out

Do not use to refer to unavailable options or commands. Use unavailable or dimmed.

## grayscale

Closed compound

## group box

Avoid; use box. Name the box when possible. For example: In the Effects box, select Small Caps.

GUI

Acronym for graphical user interface

# A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

# Н

# hamburger

Use Menu Icon when referring to a hamburger menu icon.

handset

One word

hang up, hang-up

Open compound as verb; hyphenated as noun

hard phone

Avoid. Use phone or handset.

#### hard coded, hard-coded, hardcoded

Open compound as verb; hyphenated as modifier

head start

Noun, open compound

Help file, Help system

The words file and system are lowercased. Note that starting with 6.0 releases of Genesys products, the word File has been deleted from the titles of all Help documents. For example: Interaction Routing Designer Help not Interaction Routing Designer Help File

## host name, hostname

Open compound unless it is in a code stream or you are writing about the hostname option

## housekeeping

Closed compound, noun and adjective

# A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

#### 

# ID

Abbreviation for the word *identifier*, which is typically a common field name in product database tables. No periods are used with this abbreviation.

## i.e.

Abbreviation for the Latin *id est*, which is translated as *that is*. Do not use *i.e.* or the original Latin in your documents, even within parenthetical constructions. Use the English translation instead.

#### IIS

Initialism for Internet Information Server, a Microsoft product

#### in/on

Use "in the field," "in the dialog box," "in the window," "in the pane," and "on the screen."

**Correct:** Change the information in the Operator field in the top half of the pane.

**Incorrect:** Change the information on the top half of the pane on the Operator field.

#### input

Use the word *type* or *enter* in talking about information the software user must enter in a field, at a command line, and so on. Do not use *input*.

#### InstallShield

Note the spelling of this third-party software program used to create wizards that guide users through

software installation tasks.

#### interaction

Because more and more communications between a business's customer service agents and its customers occur online, the word *interaction* is now used as an umbrella term for the more-specific *call, chat,* and *email* in writing about these communications. For example:

A *strategy* is a set of decisions and instructions on how to handle and direct interactions.

Note that the word *strategy* in the example is italicized because the writer is defining it.

Internet

Always capped

#### intranet

Lowercased

## **IP Media Exchange**

Later name for the product previously called Voice over IP Option

#### IRD

Initialism for Interaction Routing Designer

#### I-Server

Abbreviation for Interface Server

#### IVR

Initialism for Interactive Voice Response

#### **IVR** Interface

A Genesys product with many vendor-specific flavors

#### A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

J

# JavaScript

Capital J capital S

# A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

К

K, k, K bit, Kbit, Kbyte

See kb and KB.

kb

Accepted abbreviation for kilobit (1,024 bits). Always lowercase kb. This unit of measurement is always spelled with a space between it and the number preceding it: 1 kb, not 1kb. These are not acceptable abbreviations of kilobit: K, k, K bit, and Kbit.

# KB

Accepted abbreviation for kilobyte (1,024 bytes). Always capitalize KB. This unit of measurement is always spelled with a space between it and the number preceding it: 1 KB not 1KB. These are not acceptable abbreviations of kilobyte: K, k, K byte, and Kbyte.

# keep-alive

As in keep-alive protocol. Adjective, hyphenated preceding and following the noun it modifies.

#### key in

Use the word *type* or *enter* in talking about information the software user must enter in a field, at a command line, and so on. Do not use *key in*.

#### key-value pair

Note the hyphen. The initialism is KVP.

keyword

One word

KVP

Initialism for key-value pair

# A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

## label

Text attached to any button, toolbar icon, check box, list, and so on. Refer to these items by their labels. For example, select Arial from the Font list.

#### layer

In terms of Genesys software, a layer refers to the historical and logical collection of software components that represent a particular functional unit in the deployment of a Genesys system. Thus, for example, the Configuration Layer is the collection of components that enables users to perform configuration tasks for their specific environment.

*Layer* has other meanings, of course. For example, see the definitions of the seven levels of interconnection—Physical layer, Data Link layer, Network layer, Transport layer, Session layer, Presentation layer, and Applications layer—of the Open Standards Interconnection communications model as described in Newton's Telecom Dictionary, 20th ed.

# LCA

Initialism for Local Control Agent, which is a Framework component

#### left-click

Verb. Note the hyphen. Do not use left-click.

# library

"A file that stores related modules of compiled code" (from Newton's Telecom Dictionary, 20th ed.). A library presents an API and some internal, unexposed core features.

License Manager Framework component life cycle, life-cycle Open compound as noun; hyphenated as modifier lineside Closed compound, modifier link set, link-set Open compound as noun; hyphenated as modifier load balanced, load-balanced Open compound as predicate adjective; hyphenated as preceding adjective load time Two words Log Database Capitalize when it refers to any database created with a script. Lowercase generic uses. log file Two words, not one log in, log into, log out, log out of Verb forms. Two (or three) words. No hyphens. Do not use log on or log off. login, logout Nouns, adjectives logoff, log off Archaic. Use logout, log out.

logon, log on

Archaic. Use login, log in.

loop back, loop-back

Open compound as verb; hyphenated as modifier

lowercase

One word as noun, verb, adjective

#### A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

# М

## MAC

Initialism for moves, adds, and changes. Initialism for Media Access Control as in MAC address. A MAC address is a synonym for an Ethernet address, which in turn is a number that uniquely identifies an Ethernet interface hardware device.

main menu, main window

Use lowercase spelling.

#### Maintenance Release

See "Maintenance Releases of Documents" on page 228.

#### Management Layer

The Management Layer (one of four layers in Genesys Framework architecture) controls:

- A solution's startup and monitoring.
- Logging of maintenance events.
- Alarm generation and processing.
- Fault management.

Customer installation of the Management Layer is optional. Do not confuse the functions of the Management Layer with those of Configuration Layer or Configuration Manager. See also

Configuration Layer, Configuration Manager, Media Layer, Reporting, not Reporting Layer, and Services Layer.

#### man-hour

Do not use. Use person-hour instead.

#### manual procedures

Clearly indicate those procedures users must perform manually. For example: Correct: You must manually update the configuration. Incorrect: You must update the configuration.

#### may

A weasel word; avoid. Use:

- "can" when something is optional; avoid redundant phrases such as "If you want"
- · "might" to denote a possible event or outcome

#### MB

Abbreviation for megabyte, which is equal to 1,048,576 bytes or 220. MB is always capitalized. This unit of measurement is always spelled with a space between it and the number preceding it, for example, 1 MB not 1MB.

#### Media Layer

The Media Layer (one of four layers in Genesys Framework architecture) enables Genesys solutions to communicate across media, including traditional telephony systems, VOIP, email, and the Web. This layer also provides the mechanism for attached data distribution within and across solutions. See also Configuration Layer, Management Layer, Reporting, not Reporting Layer, and Services Layer.

#### medium, media (medias)

A form of communication. In the contact center, those forms may include voice, email, web cobrowsing, web chat, and so on. The preferred plural form is media not medias. Unlike the word data, the word media is not yet widely enough used as a mass noun to merit a singular verb. Correct: The various media are not available at this point in the configuration process. Incorrect: The various media is not available at this point in the configuration process. Incorrect: The various medias are not available at this point in the configuration process. Incorrect: The various medias are not available at this point in the configuration process.

#### menu bar

*Menu bar* describes the list of options running across the very top of the main window of any given application. See also toolbar.

## menus, naming of

See context menu, drop-down menu, pop-up, pull-down menu, right-click menu, and shortcut menu.

# MHz

Abbreviation for megahertz (one million Hertz; that is, one million cycles per second). This unit of measurement is always spelled with a space between it and the number preceding it, for example, 8 MHz not 8MHz.

#### microsecond

One millionth of a second. See also millisecond (msec) and msec.

#### Microsoft SQL and Microsoft SQL Server

Do not abbreviate these product names to MS SQL or MS SQL Server.

#### might

Use "might" to denote a possible event or outcome, and "can" when something is optional.

#### millisecond (msec)

One thousandth of a second. No period is used with the abbreviated form. See also microsecond.

#### mind-set

Noun. Note the hyphen.

#### mode

Capitalize mode names, for example, Primary mode, Backup mode. Mode names set in Crystal.

#### msec

Abbreviation for millisecond (not microsecond); no period is used. One msec is 1 thousandth of a second. See also microsecond.

#### Mu Law

Used in GVP documentation. Newton's Telecom Dictionary recommends this capitalization and open treatment (not mulaw, mu-law, or other forms).

#### multi

Do not hyphenate ("multisite" is correct). Exceptions: "multi-tenant" and "multi-channel".

# must, can, might, should

Use "must" to denote required actions, and "can" to denote optional actions. Avoid "should", an ambiguous weasel word that creates wordiness; possible replacements include:

- "can" when something is optional; avoid redundant phrases such as "If you want"
- "might" to denote a possible event or outcome
- "Genesys recommends": own the "should"!
- imperatives: "Set the option to true."
- delineate alternatives to help your readers make decisions
- "when you do x, y happens. If it doesn't...." (replaces "when you do x, y should happen")

#### A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

# Ν

#### N/A

Abbreviation for not available as well as not applicable. Do not use N/A, even in tables. Spell out whichever form you intend: Not available or Not applicable.

#### namespace

A document at a specific website that identifies the names of particular data elements or attributes used within the XML file.

#### nanosecond

One billionth of a second. The abbreviation is ns.

#### nonagent, noncompatible, nondistributed, nonempty, nonstop, nonworking,

#### nonzero, and so on

Most compounds formed with the prefix non are closed up, not hyphenated. See also "Prefixes Forming Compound Words" on page 204 and Table 13 on page 205.

#### Note:

Use the Note Paragraph tags to highlight information that constitutes an exception to what you have just been discussing or when you believe that a reader skimming a page may not notice the information any other way. Use the Warning Paragraph tags in describing actions or procedures that may cause software to fail or that may lead to data loss. The Note and Warning Paragraph tags bold the words Note and Warning and the punctuation following them. Note: Capitalize the first word following either tag. See also Caution!, Important!, Tip:, and Warning!

ns

Abbreviation for nanosecond (one billionth of a second)

NT

See Windows NT.

## A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

0

OBR

Out of Boundary Review

# ODS and ODS database

Initialism for Operational Data Storage, a Reporting component. ODS is a database; therefore, it is redundant to write ODS database.

off-hook, on-hook

Modifier, always hyphenated

offline

Adjective, adverb; one word, not two

# offload

Verb; one word, not two

# off-site

Adjective, adverb, noun; always hyphenated

#### onetime

Adjective, adverb; one word, not two

#### ongoing

Adjective, adverb; one word, not two

on-hook, off-hook

Modifier, always hyphenated

online

Adjective, adverb; one word, not two

on-screen

Adjective, adverb; always hyphenated

on-site

Adjective, adverb; always hyphenated

on the fly

Do not use this expression, which someone who reads English as a second language may not understand. Try substituting some form of improvise.

#### operating environment

This term typically is used to mean both the hardware and operating system software. Use the term *operating system* only in talking about software. Use the prepositions *with, on,* or *under* in talking about an operating environment, but do not use *run against.* For example, "WordPerfect runs under the Macintosh operating environment," not "WordPerfect runs against..." See also environment, operating system, and platform.

#### operating system

Reserve this term for discussions of software only. In talking about both hardware and software use the term operating environment or environment. (Reserve the use of the word environment except in the technical meaning as described here.) Use the prepositions *with, on,* or *under* in talking about an operating environment, but do not use *run against.* For example, "WordPerfect runs on the Windows NT operating system," not "WordPerfect runs against..." See also environment, operating environment, and platform.

#### out of the box

Do not use this expression, which someone who reads English as a second language may not understand. Further, this expression amounts, more or less, to an evasion. So unless you can be very specific about the benefit behind a product that works "out of the box," avoid using such phrasing. Substitute a neutral substitute such as "under default configuration," or "as preconfigured," or "as initially installed."

#### overview

Noun only, do not use as a verb.

#### A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

#### Р

#### PA

Abbreviation for Product Availability, a release type defined by Release Management. The product has completed all required Engineering, Quality Assurance, and Documentation activities and has met the criteria corresponding to its Engineering TR-DR4/Delivery milestone.

#### Pacific time

Name of a time zone. Note that time is lowercased.

#### page

When you are writing about the windows within a wizard, use *page* rather than *screen* or *dialog box* or *window*.

#### panel

Obsolete, do not use. See dialog box, page, screen, and window.

#### path name (pathname)

Two words unless it is in a code stream or describing the pathname variable

# PATROL SNMP Master Agent

Note the spelling and capitalization.

#### percent

Not per cent. Always spell out this word in text. You may use the percent sign (%) in tables and figures if space is at a premium.

#### person-hour

A unit of one hour's work by a person. Do not use man-hour.

#### phone set

Noun; open compound. See also handset.

#### platform

See especially Customer Interaction Management Platform. Here are some general usage notes for the generic term:

"Platform can be used in content for software developers if necessary to distinguish differing behaviors of a function or other API element in various operating systems, but whenever possible use operating system for clarity.

"Cross-platform is acceptable in content for software developers or information technology professionals to refer to a program or device that can run on more than one operating system.

"Use *on* to refer to a hardware platform: [']on the Macintosh,['] but [']in Windows XP.[']" (Microsoft Manual of Style for Technical Publications, 3d ed., page 321)

#### plugin

One word, no hyphen.

#### PM/AM

Abbreviation for the Latin *post meridiem* (translated as 'after noon') and *ante meridiem* (translated as 'before noon'), respectively. Use uppercase spelling with no periods. Do not use the Latin expressions themselves.

#### pop-up

Hyphenated as noun and modifier. Open compound as verb. Use pop-up only when you are writing about a display that pops up on a contact-center agent desktop. A pop-up typically notifies an agent about an incoming interaction. Do not use *pop-up menu*. See also context menu, drop-down menu, pull-down menu, right-click menu, and shortcut menu.

precompiled, preinstall, preconfigure, predefine, prestart, but pre-release

Most compounds formed with the prefix *pre* are closed up, not hyphenated. See also "Prefixes Forming Compound Words" on page 204 and Table 13 on page 205.

#### premises

Use "on-premises", not "on-premise".

#### prepend

To prefix. Used as a verb by analogy with append. Prepend is still jargon but edging into respectability, particularly in the developer community where it is sometimes used in discussions of naming strategies for various identifiers in code.

#### product names/component names

Generally speaking, spell out Genesys product and product component names. For example, write "Configuration Server" and not "Conf Server." Do not abbreviate product names to acronyms, or to internal shorthands, in customer documentation. On first reference to a given product name in a given chapter or help topic, precede the product name with "Genesys." For example: Genesys E-mail, Genesys Voice Platform, Genesys Workforce Management, Genesys Express. After the first reference in a given chapter or help topic, you can omit "Genesys." Do not append "solution" to the end of product names. For products that are available in different packages, use the term "edition," as in: Genesys Voice Platform: Developer Edition. For further details, see "Names of Genesys Products" on page 55.

#### Product Availability (PA)

A release type defined by Release Management. The product has completed all required Engineering, Quality Assurance, and Documentation activities and has met the criteria corresponding to its Engineering TR-DR4/Delivery milestone.

#### pull-down menu

Do not use this wording in writing about a menu that drops down from a higher-level menu. Use dropdown menu instead. See also context menu, drop-down menu, pop-up, right-click menu, and shortcut menu.

#### A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Q

#### queue

If you have just referred to a specific queue—for example, "the virtual queue"—you can shorten the phrase to "this queue" or "the queue" in subsequent sentences.

## A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

R

read-only

Modifier; always hyphenated

read/write permission

Use the slash; do not hyphenate.

real time and real-time

Open compound as noun; hyphenated as modifier. For example, "The conversation occurred in real time." "It was a real-time conversation."

#### reboot

Use in references to restarting (re-bootstrapping) a physical computer. In references to restarting a software process (including an operating system), substitute restart.

#### release

See "Is It Solution or Suite, Version or Release?" on page 57.

# Reporting, not Reporting Layer

Do not refer to the Reporting product as one of the layers in Genesys Framework architecture. Reporting is now represented as a product in its own right. The Reporting product generates real-time and historical reports for Genesys solutions. See also Configuration Layer, Management Layer, Media Layer, and Services Layer.

#### restart

Use in references to relaunching a software process (including an operating system). In references to starting up (bootstrapping) the physical computer that runs the software, use reboot.

#### **RG** Assistant

Do not use. Use CC Analyzer RG Assistant.

#### right-click

Verb. Note the hyphen. Do not use right-click.

#### right-click menu

Do not use. Use shortcut menu instead. See also context menu, drop-down menu, pop-up, pull-down menu, and shortcut menu.

ring back, ringback

Open compound as verb; closed compound as noun, modifier

roll back, rollback, roll-back

Open compound as verb; closed compound as noun; hyphenated as modifier

roll out, rollout, roll-out

Open compound as verb; closed compound as noun; hyphenated as modifier

roll over, rollover, roll-over

Open compound as verb; closed compound as noun; hyphenated as modifier

round-trip

Noun, modifier; hyphenated

**Route Point** 

See Routing Point.

#### **Routing Point**

Use Routing Point except when you are writing about a Route Point entry in a product GUI.

# runtime

Noun, modifier; one word

# A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

S

# scalable, scalability

Note spellings.

SCI

Initialism for the Solution Control Interface, a Framework component

#### screen

Use screen (rather than display or monitor) in talking about a monitor or other visual output device. Use page rather than screen when you are writing about segments of a wizard. See also dialog box and window.

#### screen pop

Use this term only in the context of discussing a screen pop on an agent desktop in a contact center environment that alerts the agent to some imminent customer interaction that he or she must handle. Do not use screen pop when you mean shortcut menu.

#### select, selected, selection

"Use select to refer to marking text, cells, and similar items that will be subject to a user action, such as copying text. Items so marked are called the selection, selected text, selected cells, or whatever. "Use select to refer to adding a check to a check box or to clicking an item in a list box or combo box. Do not use select as a general term for clicking options in a dialog box." (Microsoft Manual of Style for Technical Publications, 3d ed., page 339) See also choose and select and highlight.

#### sequel, squeal

Common pronunciations of the acronym SQL (Structured Query Language). Therefore, you would refer to "a SQL file" not to "an SQL file." Note: Microsoft would have you do otherwise in this matter, but it has already lost this battle outside of its own documentation.

#### serial comma

Use the serial comma for items in a series; for example, "You must generate the document version number, the front cover, and the document title." However, if all items in the series are joined by and or or, do not use commas to separate them. For example, "You must generate the document version number and the front cover and the document title."

#### services

With respect to operating systems, services and daemons are synonymous terms. Telnet, FTP, HTTP, and other communications protocols are implemented as services in the application layer of the TCP/ IP protocol stack. In UNIX systems, daemon is used to describe such software provided with the operating system, and service may be used for similarly functioning software that other third parties create. Windows systems use the term services. With respect to Genesys software architecture, services refers to access to logically related features such as email, outbound campaign, voice callback, and so on. Genesys Marketing wants to emphasize the use of services over older descriptions of servers and any companion software. See also daemon, daemon applications, UNIX daemons.

#### set up, setup

Open compound as verb; closed compound as noun, modifier

#### shortcut menu

Use shortcut menu not context menu in referring to a menu that you open by right-clicking an object or by right-clicking within an area of a GUI. A shortcut menu lists commands that pertain only to the item (or area) that you right-clicked. Outside of a programming context, you should not need to use a term for the shortcut menu. If you must, then use shortcut menu, but not context menu, right-click menu, or pop-up. See also context menu, drop-down menu, pop-up, pull-down menu, right-click menu, and shortcut menu.

#### should

Avoid "should", an ambiguous weasel word that creates wordiness; possible replacements include:

- "can" when something is optional; avoid redundant phrases such as "If you want"
- "might" to denote a possible event or outcome
- "Genesys recommends": own the "should"!
- imperatives: "Set the option to true."
- · delineate alternatives to help your readers make decisions
- "when you do x, y happens. If it doesn't...." (replaces "when you do x, y should happen")

#### shut down and shutdown

Open compound as verb; closed compound as noun, modifier

## slider

Indicator on a gauge. For example, Move the slider to the left.

# snapshot

One word, no hyphen, as in snapshot view

# soft phone

Noun, open compound. A software device that functions as a telephone.

# spell check

Do not use as noun or verb. Rather, write, "Run the Spelling Checker," "Check the spelling," and so on.

# Spelling Checker

The correct name of this feature. Not Spell Checker. You are not Hermione Granger.

#### spin box

Do not use in documentation. Name the box. For example: Select Tuesday in the Date box.

# SQL

Acronym for Structured Query Language. See also sequel, squeal.

# SSO

SSO stands for Single Sign-On.

(At the moment, Dec 18, 2019, the capitalization is not unified in Genesys docs: all upper cases, all lover cases, mixed. So, adding to Terminology with the all caps spelling as in the Internal Delivery Announcement - v900 Genesys Customer Experience Insights (GCXI) Iteration #13 from Kirill Chapchikov on Dec 18.)

#### stand-alone

Note the hyphen.

#### standby

Modifier; not hyphenated

#### start

Use in references to a software process (including references to launching an operating system). In references to starting up (bootstrapping) a physical computer, use boot.

#### start up, startup

Open compound as a verb; closed compound as a noun or adjective

#### Stat Server

Framework component

#### Step

Use initial cap when referring to a step in a procedural list; for example, "See Step 1 above." Also, it is reader friendly to create a link to the referenced step.

#### such as

The phrase such as usually does not take surrounding commas.

## suite

According to the companywide naming guidelines circulated in November 2005, suite refers to the whole collection of software that Genesys offers for sale.

#### superuser, superqueue

Most compounds formed with the prefix super are closed up, not hyphenated. Exception: Super Administrator.

#### switch over, switchover, switch-over

Open compound as verb; closed compound as noun; hyphenated as modifier

#### A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Т

# tab

Lowercased, for example, Change the configuration setting from the Configurations tab.

# tabbed page

Dialog boxes often have more than one "page." Each page in a dialog box is called a "tabbed page."

Technical Release (TR)

Use the term Product Availability Release rather than Technical Release. For a definition of the former, see Product Availability (PA) release. See also "Categories of Documents" on page 226.

# Telnet

Not TELNET. Telnet is one of the TCP/IP protocols.

## TEvents

Not T-Events.

TExtensions

Not T-Extensions.

third party, third-party

Open compound as noun; hyphenated as modifier

timeout, timesaving, time-saver, time line, time frame, time zone, timestamp,

#### timestep, time-consuming, time slot

Note the spellings of these nouns and adjectives.

# Tip:

Do not create a Tip Paragraph tag. Weave this sort of information into the text itself. Use the Note Paragraph tags for information that you believe deserves particular attention. Use the Warning Paragraph tags in describing actions or procedures that may cause software to lock up or that may lead to data loss. See also Caution!, Important!, Note:, and Warning!

# T-Library

Abbreviation for Telephony Library, a Framework component

# tool

"Use tool to describe a feature that aids in accomplishing a task or set of tasks. Do not use utility as a synonym for tool .... By using different terms for the same thing, [you]...encourage users to look for differences where none exist." (Microsoft Manual of Style for Technical Publications, 3d ed., page 358) See also toolbox, toolkit, toolset, and utility.

# toolbar

A toolbar is "the standard term for the various rows below the menu bar that contain buttons and commands for commonly used tasks." (Microsoft Manual of Style for Technical Publications, 2d ed., page 276) "Not command bar except in documentation for software developers. In referring to a toolbar by name, do not capitalize toolbar. The main toolbar that is on by default and contains buttons for basic tasks, such as opening and printing a file, is called the [']standard toolbar[']." (Microsoft Manual of Style for Technical Publications, 3d ed., page 358) Refer to toolbar buttons by the name that appears when you hold the cursor over the button. Toolkit and toolset are more generalized terms. Do not use toolkit or toolset when you mean toolbox or toolbar. See also toolbox.

# toolbox

"Generically, a toolbox is a collection of drawing or interface tools such as paintbrushes, lines, circles, scissors, and spray cans. In programming applications like Visual Basic, the toolbox also includes controls that users can add to programs, such as command buttons and options. Tools in a toolbox differ from the commands on a toolbar in that [users can often drag] the shapes or controls...to a document and [manipulate them]...in some way. "Treat elements in a toolbox like any other options in dialog boxes. That is, in procedures tell users to click a particular option [from the toolbox]....Do not capitalize toolbox except to match the interface or if it's a specifically named product feature." (Microsoft Manual of Style for Technical Publications, 3d ed., page 359) Toolkit and toolset are more generalized terms. Do not use toolkit or toolset when you mean toolbox or toolbar. See also toolbar.

# toolkit

Noun, one word. A generalized term. Do not use toolkit when you mean toolbox or toolbar. See also toolbar and toolbox.

#### toolset

Noun, one word. A generalized term. Do not use toolset when you mean toolbox or toolbar. See also toolbar and toolbox.

# ToolTip

Proper noun, note spelling and capitalization.

# touchtone

One word, no hyphen

troubleshoot, troubleshooter, troubleshooting

Note the spellings.

T-Server

Abbreviation for Telephony Server, a Framework component

# A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

# U

# uninstall

Do not use deinstall.

# Unix or UNIX

Formerly, you were given leeway to spell this word with only an initial capital. However, the legally registered name is UNIX. Please use all caps.

# unselect

Do not use unselect or deselect in discussing operations on check boxes. Use clear instead.

#### uppercase

Noun, adjective, verb; no hyphen

#### URS

Initialism for Universal Routing Server, a Routing component

# U.S.

Adjective. Note periods. Do not use this form as a noun; that is, as shorthand for the United States.

# user-friendly

Adjective. Hyphenate as preceding and following modifier.

User Interaction Layer

#### [NEW]

utility

Do not use unless you are referring to a specific utility that is available in a Genesys product. Use tool instead. Treat utility names as proper nouns. See also tool.

#### A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

# $\bigvee$

version

See "Is It Solution or Suite, Version or Release?" on page 57.

vice versa

Note the spelling.

voicemail

One word, always

#### Voice over IP Option

Pre-6.0 Genesys product; note the spelling and capitalization. This product is now called IP Media Exchange.

#### VOIP

Acronym for Voice over Internet Protocol

# VoIP Option

Acceptable abbreviation for the pre-6.0 Voice over IP Option product

#### A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

W

wait time

Noun, open compound

#### Warning!

Use the Warning Paragraph tags in describing actions or procedures that may cause software to lock up or that may lead to data loss. Use the Note Paragraph tags to highlight information that constitutes an exception to what you have just been discussing or when you believe that a reader skimming a page may not notice the information any other way. The Warning and Note Paragraph tags bold the words Warning and Note and the punctuation following them. Note: Capitalize the first word following either tag. See also Caution!, Important!, Note:, and Tip:.

#### web, web browser, website

All web terms are lower case. Note that website is closed up.

#### WFM

Although you should generally resist using this initialism in talking about the Workforce Management product (or Workforce Manager 6.5 and earlier), lapses are often forgiven, particularly when unwieldy wordings are the alternative.

#### whether

Conjunction, used as a function word with correlative or. Use whether when expressing a choice between two alternatives. Do not use whether or not to indicate the choice because this phrase means "in any case." For example: Correct: Indicates whether the selected statistical type collects historical or real-time statistics. Incorrect: Indicates whether or not the selected statistical type collects historical or real-time statistics.

#### wide-area

Adjective, hyphenated

#### window

If a GUI display is merely informational—that is, the user is not required to interact with it—then use

window rather than dialog box or screen. See also dialog box, page, and screen.

#### Windows NT

A Microsoft product. Never use NT or WinNT as an abbreviation for Windows NT.

#### WinNT

See Windows NT.

#### wizard

Typically lowercase this word, as in "Programmers design wizards." However, capitalize wizard when used with the proper name of a wizard, for example, "the InstallShield Wizard" and "the Routing Wizard."

#### Wizard Manager

Framework component

#### wordspace

One word, no hyphen

		1.0				1 1 1
workaround	workday	WORKTIOW	workaroup	WORKSheet	workniace	workstation
workaroana,	workduy,		workgroup,	workSheet,	workplace,	WOrkStution

Nouns; note the spellings.

# workbin

One word

#### wrap up and wrap-up

Open compound as verb; hyphenated as noun and preceding adjective

#### write-only

Modifier; always hyphenated

#### A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Х

# XML

Initialism for Extensible Markup Language, an adjunct to HTML. XML enables users to create custom tags for greater flexibility in web-page design.

Ζ

-

Y

# Publishing Content

# Important

This article only applies to content developed on docs.genesys.com.

In most cases, publishing your content is as easy as going to the Versions page and changing the version status to released. Or, if you are working in a DRAFT version, you need to publish those changes to a version that will be released to customers.

If you made a mistake, it is also just as easy to change the status back to unreleased to hide the version from customers.

# Tip

If this is your first time publishing a wiki document, email the Tech Pubs Support group for help.

This page provides an overview of the review process. Read the Special Cases page for information on how to handle special-case scenarios.

- Preparing Your Document for Review
- Review Checklist
- Publishing Your Document

# Preparing Your Document for Review

Reviewers need specific permissions to view unreleased and preview documentation. If they have not done so, reviewers must create individual accounts and provide you with the usernames. Then contact your manager, and he or she can provide access privileges to those reviewers.

The following is an example of an email to send to your reviewers:

Because the <your product here> guides are unreleased, you need to log into docs.genesys.com to see them. Some of you already have an account, but if you don't you need to create one:

Go to http://docs.genesys.com/Documentation.
Scroll to the bottom of the page and click Log in/create account.

3) Create your account, then email your writer your username and s/he will obtain permission for vou.

4) Access the guides at <your URL here>.

If your reviewers already have a login, they must ensure they are already logged in to

docs.genesys.com before they try to access restricted content. Otherwise, if they are not logged in, the wiki will send them back to the site homepage after they pass the login screen.

In this scenario, you can use the following email:

Because the <your product here> guides are unreleased, you need to log into docs.genesys.com to see them.

 Ensure you are logged in. If not, go to http://docs.genesys.com/ index.php?title=Special:UserLogin and log in.
Access the guides at <your URL here>.

Using the returnto Parameter

# Important

As of 2021, all Genesys employees have access to view draft documentation content. The only requirement is that they first go to OKTA and click the Information Experience icon. You don't need a distinct documentation account to view the draft. If your writer is asking you to add comments directly into the draft document, contact your writer to find out what's needed.

Alternatively, you can use the returnto parameter in the URL to direct your reviewers to a login page. After they log in, they will proceed to the target page that you specify.

The following is an example:

http://docs.genesys.com/index.php?title=Special:UserLogin&returnto=Documentation/SIPC/8.1.1/Solution/Welcome

# Important

The returnto parameter forces your reviewers to visit the login page before accessing content - even if they are already logged in. If you are providing a list of pages to review, you might not want to use this approach.

# Using Email Templates in Outlook

Email templates are a handy way to send review emails. The template provides standard content that you can modify for each review email.

Creating an Email Template

In Outlook, create a new message as you normally would. Fill out whatever content you want to be part of the template – subject line, some or all of the message body, addresses you want included. Instead of sending the message, click the Windows icon in the upper-left hand corner and select **Save As...** Fill out the name you want to use for that template, select **Outlook Template** as the file

#### type, and click Save.

# Tip

Do not include your signature in the template. It will be added to the message later.

#### Using an Email Template

Instead of creating a new message as usual, click **File > New > Choose Form**. Select **User Templates** in **File System** from the dropdown to see a list of templates you have available. Select the desired template and click **Open**.

#### Removing a Template

Templates created this way are stored (by default) in your user folder. An example location is shown below:

#### C:\Users\username\AppData\Roaming\Microsoft\Templates

# Review Checklist

Once the reviews are complete, it's time to ask for a peer review within Tech Pubs. A draft version of the publication checklist is underway.

# Publishing Your Document

To publish your document, you must change the version status to released. Or, if you are working in a DRAFT version, you need to publish those changes to a version that will be released to customers.

# Warning

When a version status is changed to released, **ALL** documents that belong to that version are made available to readers. If you want to selectively publish documents, read the Special Cases page.

- 1. Ensure of the required reviews and editing processes are complete.
- 2. Generate a PDF of your document and note any bugs or glitches. If you find errors, post them here on JIRA.
- 3. Go to your product's TOCs page and verify which documents will be released with this version. For example, if you are publishing version 8.1.2, ALL version 8.1.2 documents will be published at once.

- 4. Go to your product's Versions page and change version status to released, like so: {{#version:8.1.2|released}}
- 5. Go to your product's landing page and update links to the latest version of your document. For new documents, add a link.

# Important

To ensure customers have the latest version of a document if they choose to generate a PDF: After you update/publish the document, click **Refresh PDF** under the **Manage content** section of the **Helpful links for writers** menu.

# Special Cases

# Important

This article never advanced beyond the idea stage. If it had it would only apply to content developed on docs.genesys.com.

This page will talk about special-case scenarios for publishing content, and how to overcome them.
# Restricted or Pre-release

### Important

These instructions likely only apply to content on docs.genesys.com. If a scenario arises that you think merits this approach, talk to Tanya Ivanova and Barry Grenon. They may have other ideas about how to handle your scenario on all.docs.genesys.com.

For content that you want to expose to customers - but in a limited, password-protected way - you should use the Ponydocs version status of preview.

# Publishing Restricted/Pre-Release Content to a New Version

Use this process if you are publishing content to a new version.

If you are publishing content to an existing restricted version, proceed to the next section.

The process goes something like this (please modify if you know more details):

- 1. Go to the Versions special page for your product, find the version you want to expose, and change status to preview.
- 2. Go to the login page and click "Create an account". Or use this direct link: Create account
- 3. Create a general account for all users to use. Examples: SIPServer\_8.1.5\_PR/genesys

GVP\_8.5.000.25\_Restricted/genesys

4. Contact your Tech Pubs team lead, manager, or an admin person to add this new user to the preview group for your product on the User rights management page.

### Important

Any account in this "preview" bucket will now have read-only access to any "preview" content in your product. Handle this accordingly: for example, by limiting links from public-facing product landing page, and so on. The risk of users stumbling on content we do not want them to find is lessened if:

1) Use only direct links to online restricted manual(s) when sending to customers (for example, in a restricted release note or pre-release note) rather than links from the product landing page.)

2) Do not use special naming for your versions, but manage this using normal, existing versions, and ponydocs version statuses through the lifecycle.

5. Provide your users with instructions on how to access the content. After they open the docs.genesys.com homepage, they have established a session and can use *returnto* links to directly access content (a *returnto* URL enables the person to login and be taken to the page after logging in).

For communications via email, you could provide something like:

To view the Pre-Release content for <your product>:

- 1. **MANDATORY** Go to the docs.genesys.com homepage.
- 2. After you have opened the homepage, use the following link to login and access the documentation: http://docs.genesys.com/index.php?title=Special:UserLogin&returnto=<url to your content>.
- 3. Use the following credentials:
  - Username: SIPServer\_8.5.0\_PR
  - Password: genesys

### Important

If required, add a prerelease disclaimer at the top of the topic, using the following coding: { {PrereleaseDisclaimer } }

# Publishing Restricted/Pre-Release Content to an Existing Version

If you are publishing content to an existing version that is already restricted, the process is much easier. Use the Update tool and publish the content as you would normally.

# Publishing Closed Content

## Important

As of May 2021, there is no Closed content on docs.genesys.com.

Closed content includes material that is not officially Genesys restricted, but that the product team wants behind a login so that it is not indexed by Google or available to non-customers.

Documents tagged with a version of closed are visible to logged-in members of the employees group, or via special HelpLink entry points from the customer care portal, partner portal, or Confluence intranet access point.

- 1. Go to the Versions special page for your product, find the version you want to expose, and change status to closed.
- From the welcome page/main topic, add the closed product note to the top of the page using the following coding: {{ClosedProductNote}} which displays as:

### Important

To access this content:

- Customers: Log in to My Support and select Documentation.
- Partners: Log in to Partner Portal and select Genesys Technical Docs.
- Employees: Go to the internal access point.
- 3. When necessary, provide your users with instructions on how to access the content. See Genesys Designer for a live example.
- 4. When adding a link to the manual under the **Documentation** heading of your product landing page, be sure to include "(login required)" to the manual name.

## Important

If your entire product is closed, then feel free to add a link to the Access Point for Closed Genesys Engage Technical Content for convenience/ease of access.

# Managing Content

Topics in this chapter include:

- Working with Configuration options, the model, and reference pages
- Managing online ReadMes
- Updating published content
- Updating documents outside of a project release
- Responding to customers
- End of Life (EOL)/End of Support (EOS) Process

# Working with Configuration Options

Genesys Engage on-premises customers use more than 10,000 configuration options to control our software. And IX documents all of them.

## Important

This only applies to Genesys Engage on-premises products and Ponydocs content.

In the past, we had to do this twice:

- In XML metadata files that deliver the information to the Genesys Administrator user interface
- And then once more on docs.genesys.com, where the options were normally housed with their individual products

Because of this fragmentation, the two versions could easily get out of sync with each other—and if a customer wanted to use options from more than one product, they'd have to look for them in several different places.

All of that is changing.

The Tech Pubs Support team is importing the Gen Admin files into one big config options warehouse that's available from the Quick Links dropdown. As we do this, we will also find ways to keep the warehouse and the Gen Admin files in sync.

e GENESYS <sup>®</sup>		PureEngage 🗸 Workspace Desktop Edition		
l	SYSTEM GUIDES / RELEASE NOTES / OTHER Best Practices and White Papers Genesus Configuration Options	Gplus Adapters Interaction Workspace Web Services and Applications	Genesys WebRTC Service intelligent Workload Distribution Knowledge Center	
	Genesys Glossary Genesys Use Cases Release Notes System-Level Guides	Workspace Desktop Conton Workspace Web Edition FRAMEWORK Genesys Administrator	OUTBOUND CX Contact Engage	Gener
	GENESYS CLOUD CX Analytics	Management Framework Multimedia Connector for Skype for	Outbound Contact Outbound for Cloud	Genesy
	CX Builder PureEngage Cloud Designer	Business SIP Cluster SIP Feature Server SIP Sector	REPORTING AND ANALYTICS CC Analyzer/CCPulse+ Genesys Decisions	

# What our readers see

The options warehouse shows several different faces to our readers:

- People can access the whole warehouse...
  - Go straight to the options for a specific product...
    - To a specific XML metadata file...
      - Or to one of the sections within a file.
- You can also give them information on a specific option from anywhere in your docs, using an optionspecific link: replicationStrategy

For more information from a customer perspective, check out this overview video:

Link to video

# What you need to do

This page describes how to create and edit configuration options information.

### Linking to a single option

### authenticator

Default Value: AllowAllAuthenticator Valid Values: AllowAllAuthenticator, PasswordAuthenticator Changes Take Effect: After start or restart

The authentication backend, as described at http://docs.datastax.com/en/cassandra/2.1/cassandra/security/secure\_about\_native\_authenticate\_c.html.

### Tip

Writers: to add a link to this option in your content, copy the following syntax and paste in your page.

{{Optionslink|link=Options:Data\_Processing\_Cluster:cassandraEmbedded:authenticator}}

1

### Manage this Option

>> Back to Top

Once you've created your options, you can use the **OptionsLink** template to link to individual options from anywhere in your docs:

- 1. Go to the **draft** version of the **Options Reference** section that contains the option you want to link to.
- 2. Find your option and look for the blue Tip.
- 3. Select the embedded **Optionslink** template code and copy it.
- 4. Paste the template code into your doc page.

### But first, it's time to set things up...

Your options are displayed in a product-specific *Options Reference* page, but each option also has its own page, which is where you do the actual work on the individual options.

• The Draft version of the **Options Reference** page lists the options, and each one has a **Manage this Option** link below its description. Click this link to switch to the edit page for that option:

authenticator
Default Value: AllowAllAuthenticator Valid Values: AllowAllAuthenticator, PasswordAuthenticator Changes Take Effect: After start or restart
The authentication backend, as described at http://docs.datastax.com/en/cassandra/2.1/cassandra/security/secure_about_native_authenticate_c.html.
Tip Writers: to add a link to this option in your content, copy the following syntax and paste in your page. {{Optionslink link=Options:Data_Processing_Cluster:cassandraEmbedded:authenticator}}
Manage this Option

• When you are finished editing and publishing an option, click the **View in ref guide** link at the top of the page to return to the Draft **Options Reference** page:

Options:Data Processing Cluster:cassandraEmbedded:authenticator			
View in ref guide.			
Edit this option Publish this option Cle	ar draft content		
Published Option	Draft Option		
authenticator	No draft option		
Default Value: AllowAllAuthenticator			
Valid Values: AllowAllAuthenticator, PasswordAuthenticator Changes Take Effect: After start or restart			
The authentication backend, as described at http://docs.datastax.com/en/cassandra/2.1/cassandra/s y/secure_about_native_authenticate_c.html.	ecurit		

• You can manually create new options by clicking the **Create new option** button at the top of any section page.

# Creating a new option

Creating a new option means adding a new page in the Options Warehouse. It is expected that most options will be created in the first place in bulk by conversion from the XML metadata file in the component's IP (see Converting the XML file). You will need to create options manually in situations in which you cannot or do not wish to use the XML file. For example:

- An option can be configured at different levels DN level, Switch level, etc. The XML file contains the application-level option, but you must manually create the equivalent option configured on other objects.
- An upcoming release is introducing a new option and you want to draft the description in advance of the new release. Even if the new option(s) and description(s) have been added to the XML file, you cannot use the conversion script to capture the new option(s) because the script puts the content in the published part of the Options Warehouse page, which means the new option(s) would be published prematurely.

### Manually creating an option

Manually creating an option is a two-stage process: Use the OptionCreate form to create the page in the Options Warehouse; then edit the Options Warehouse page to actually save the option description in the database.

Documentation Edit History Delete	Rename Watch Pu	irge cache Update
- Interaction Server Progla settings		Draft
Create new option	Create OptionCreate	2
	Define your option Comp	plete all fields
internal-interactions-sorting     internal-interactions-sorting	Component Error the same of your component, it should match your 755, filename. For example, if your 755, filename is ChatServersent, enter ChatServer in this field	Component Short Name If your component name is long, use the productived photor alias. Otherwise, just electric the same Component name as allows. If using an aliae, USE THE MOUNT ONE: Comis News.
interaction-cache-size	Product Short Name	Section
Default Value: 10000 Valid Values: Any integer from 100 to 10,000,000	Enter the shortname for your product. See this page for a list of all oursently defined products.	Enter the name of the configuration section your option belongs to. Note: URL-unsafe characters are skay. They will be handled silently in the background.
Remember to set the	Option Name  Enter the name of your option. Note: URL:	Configuration Object Agreeter :: 1. post sease, just leave the default selection
correct configuration object	tackground.	3) Save

- 1. Open the **OptionCreate** form by clicking the **Create new option** button at the top of any Section page in the Draft version of any **Options Reference** manual.
- 2. Populate all fields on the form. Be careful to enter correct values in the component, component short name (compshort), and product short name (prodshort) fields. Depending on your product, they may or may not duplicate each other. For non-application-level options, also specify the configuration object (configobject); the default is Application. These values are used to construct page names in the main Options Warehouse and the **Options Reference** pages. The templates will not work if these values are not consistent.



3. Save the page. You will automatically be taken to the new, effectively blank page in the Options Warehouse. Do not be disconcerted if the section or parameter (option name) part of the URL is different from what you entered; URL elements may have been modified to render them URL-safe, but the section and option will still display on the page as you intended.

4.

Click the **Edit this option** button. The editing form will open, with the Draft section expanded.

Edit publishe	d option? (not recommended	) [Expan	
Draft (edit)		(5) Complete all field	
Hidden:	$\mathrm{O}_{None}  \mathrm{O}_{true}  \odot_{false}$	complete all field	
Default:	Select or add custom	×	
	(See formatting tips)	Some wiki markup	
Valid:	Select or add custom	not accepted!	
	(See formatting tips)		
Changes Take Effect:	Select or add custom	×	
Shortdesc			
	*Populate	d from the XML file when	
	the optio	n is created by XML	
	conversio	n. The shortdesc displays	
	in lighth	in lightbox calls when you use the	
	in lightor		
mmary:	Optionsli	nk template to refer to	

- 5. Populate all the fields in the Draft section on the **Basic** tab.
  - If you identify the option as hidden (hidden = true), the option will not display in the **Options Reference**. TBD how we will make these available for internal use.
  - Drop-down lists of the most common values are provided for convenience. Simply type in the field if the value you need is not in the drop-down list, then click in the resulting blue text box to select the custom value.
  - Valid values are expected to be a comma-delimited list, without explanation. Descriptions of the meaning of the valid values should go in the **Shortdesc** field.
  - The **Shortdesc** field is intended to be a short description of the option, providing essential

information suitable for display in a configuration GUI like Genesys Administrator. You are encouraged to provide detailed discussion and usage examples in the **More description** (moredesc) field on the **Extended** tab.

• There are restrictions on the wiki markup you can use. See Wiki markup notes and More on links.

Basic Extend Edit published Draft [edit Dependencies: Introduced:	I option? (not recommended) [Expand] Complete only those fields that apply Can be a link to another option Five- or seven-digit release number			
Modified:	Be How the form fields relate to the page display			
Discontinued:	Release nu     link-msf-userdata_Draft       Default Value: True       Valid Value: True			
Feature:	Can be use Changes Take Effect: Immediately Dependencies: Can be a link to another option			
Mandatory:	O None O Introduced: Five- or seven-digit release number Modified: Release number (with short summary of the change)			
Mode:	e.g., Runtim Discontinued: Release number Related Feature: Can be used to generate faceted lists by feature Related Octions: Full Desidence field exected with DONNEDCONFERCION			
More description:	Moredesc o Related Uptions: Full Ponydocs link syntax with PONYDOCSVERSION Related Links: Full Ponydocs link syntax with hard-coded version			
	This option is mandatory.			
	Moredesc content starts here.			
Related Options:	Full Ponyde Sink syntax with			
Related Links:	Full Ponydocs link syntax with hard-coded ve			
Custom Group:	For generating faceted lists			
Summary:				
	This is a Watch this page			
Save pag	Save pag Show preview Show changes Cancel			
Options:I	nteractionServer:settings:delay-updates			
View in ref guide.	8			
Edit this option	Publish this option Clear draft content			

- Populate fields on the **Extended** tab as required. Do not put anything in fields that do not apply to your options. You are strongly encouraged to populate the **Introduced** field for all options, but especially new ones going forward. Note the following:
  - Start **Introduced, Modified,** and **Discontinued** entries with the release number. You can add a brief explanation in parentheses or after an em-dash if you wish. See further tips in Tracking option changes.
  - Use regular Ponydocs syntax for links, but there are potential issues. See More on links.
  - There are restrictions on the wiki markup you can use. See Wiki markup notes.
  - The **Mode** and **Custom Group** fields as well as **groupname**, which is captured during XML conversion are behind-the-scenes grouping parameters you can use to generate faceted lists in different contexts.
- 7. Save the page. The option does not really exist in the database until you do so.
- 8. Follow the **View in ref guide link** at the top of the Options Warehouse page to verify formatting and links on the customer-facing page.

If the new option is in a configuration section that already exists in the **Options Reference** manual, the section's page will update to automatically include the new option in the Draft version. The Current version will not update until you manually publish the option by clicking the **Publish this option** button on the Options Warehouse page.

If the configuration section is new as well, you will have to create a new section page in the **Options Reference**.

# Modifying an existing option

There are two ways to modify the content of option descriptions:

- Prepare or obtain an updated XML file and rerun the conversion, as described in Converting the XML file.
- Go to the page in the Options Warehouse by clicking the Manage this Option link at the end of the entry in the Draft Options Reference. Then follow the instructions about manually creating an option, starting from step 4. It is your responsibility to ensure that any changes you make to fields on the Basic tab are carried back to the XML file; otherwise, not only do you risk undoing your edits if the conversion is subsequently rerun, but the configuration GUI does not benefit from your updates.

### Important

You cannot modify the component, section, option name, or configuration object information after the Options Warehouse page has been created. If your option was created with incorrect values for any of these fields, you must re-create the option and delete the incorrect page.

# Tips 'n Tricks

The following tips 'n tricks should help you avoid the most likely "gotchas". See also Troubleshooting **Options Reference** pages.

General editing

Options Event Edit History Delete Rename Watch Purge.cache

Always use the **Edit this option** button on the Options Warehouse page to access the editing form. Do not use the **Edit with form** button in the menu ribbon at the top of wiki pages.

- There is limited real-estate in the text fields on the editing form. If your descriptions are long or have complicated formatting, use a User page, Notepad, or other text editor to draft the markup, and then paste it into the text field (the blue text field if there's a drop-down) on the form.
- Always follow the *View in ref guide* link at the top of the Options Warehouse page to see how the content will display to users. Because of current formatting limitations with Cargo, the wiki or HTML markup might be visible in the descriptions on Options Warehouse pages, or content might be truncated, or links might appear to be broken but will resolve correctly on the rendered **Options Reference** page (or, worse, vice versa).
- It is not possible to enforce consistency in presenting boolean values, because developers have not been consistent in their coding. However, consistency is always desirable, and you are encouraged to raise this issue with your PCT if you notice new options diverging.
- Be aware that clicking the **Edit this option** button to open the editing form causes the Options Warehouse page to be saved with baseline draft content. Do not be misled by the version history into misidentifying whether and when edits occurred. A planned enhancement will add more explanatory version comments.
- Simply resaving the Options Warehouse page sometimes fixes broken links or apparently empty display.
- See also the **formatting tips** on the editing form.

### Tracking option changes

- The **Options Reference** must always reflect the situation as of the latest released software, while retaining information about previous behavior for use by customers who have earlier releases. Therefore, if option values or behavior change:
  - Update the required fields accordingly. The usual fields that are impacted are **default**, **valid**, and/or **shortdesc**.
  - In the **Modified** field, note the release(s) in which changes occurred, along with a very brief indication about the type of change.
  - If behavior changed, in addition to describing the new behavior in the **shortdesc** field, retain the

description of the previous behavior, using a phrase like "In releases earlier than <release>,..." to introduce it.

- Consider the content of the **Introduced, Modified,** and **Discontinued** fields as input for sortable *Migration Guide*-type tables. Start the entries with the release number, following the usual *Migration Guide* conventions about when to specify five, seven, or even three digits. You can add a brief explanation in parentheses or after an em-dash or comma if you wish. (The templates will be able to break the entry at this predictable punctuation, if we want to split the content between table columns for, say, type of change, release in which the change occurred, and comment.) For example, in the **Modified** field: 8.5.001 (default value changed from 600 to 900).
- If an option is renamed and you are creating the page for the new name, add a note after the release number in the **Introduced** field for example: 8.5.001 (renamed from previous-option-name). At the same time, edit previous-option-name to add information in the **Discontinued** field for example: 8.5.001 (renamed to new-option-name). If you're really ambitious, make the option names links.

#### Wiki markup notes

• Fields on the **Basic** tab of the editing form, which are populated from the XML file (which is used to display option descriptions in user interfaces outside the wiki), use HTML markup. Continue to use HTML markup as far as possible for these fields. Since you cannot use <nowiki> tags for URLs, escape one of the characters in order to avoid having the URL display as a link. For example, you can escape the colon, like this: http://localhost:9200.

Do not use the following on the **Basic** tab, because they cause display problems we cannot work around in some templates:

- or <source> These tags will display correctly in the option description on the Section page and in the **Optionslink** lightbox, but not in the summary on the Component/Welcome page.
- HTML table markup Tables aren't suitable for display in the GUI context anyway, nor is the type of detail that would require a table. If you use tables (for example, in the extended description), use wiki markup (but see below about the pipe character).
- HTML link markup (<a href>, etc.).
- Incomplete or incorrect HTML tags Visible HTML markup without desired formatting on the Options Reference pages invariably means closing tags are missing (for example, 
   or 
   for lists), or <\br>
   has been used for line breaks, and so on.
- Only use the unescaped pipe (|) character inside templates. For field values on the **Basic** tab, use the HTML entity |. For table markup or other non-template fields on the **Extended** tab, use {{!}}.
- In the Default or Valid Values sections, do not use:
  - The unescaped hash (#) character. Use the HTML entity # in field values on the **Basic** tab.
  - The unescaped open square bracket ([) character. Use the HTML entity [ in field values on the **Basic** tab.
  - An asterisk as the first character. Use \* instead.
  - <tt> formatting.
- Aside from the consideration of using HTML markup, the fact that the short description and other fields on the **Basic** tab display inside a lightbox when the option is referenced from other documents (via the **Optionslink** template) means that you cannot use certain wiki markup in these fields. Do not use:
  - The Repository widget for Alfresco links.

- The External Link widget for other external links.
- The {{Optionslink}} template to reference other options. Instead, link to them directly (see More on links).
- Do not use <nowiki> unnecessarily to escape wiki markup. For example, you do not need to use it
  around single square brackets, but you do need to escape double square brackets to avoid an apparent
  broken link. You can use <nowiki> in any content that does not display in the summary tables on the
  Component/Welcome page and the Options product landing page, for which cases (for example, the
  default value) use HTML entity markup instead: [ (left bracket) and ] (right bracket).
- The **Optionslink** template might cause an unwanted line-break in tables in your other docs. To fix this, start the cell contents on a new line. For example:

|-

The {{Optionslink|link=<link to Options Warehouse page>}} option does such-and-such.

• The **Optionslink** template might also cause an unwanted line-break in bulleted lists with wiki markup. To fix this, use HTML markup.

#### More on links

- In the short and extended descriptions, you must use the full syntax for links, including a version element. For links to other configuration options, specify {{PONYDOCSVERSION}} as the version. Unfortunately, for links to other documents, unless the link target also has only "Draft" and "Current" versions (in which case you can use {{PONYDOCSVERSION}}), this means you must hard-code in the version to the latest published document. In other fields, you can leave out the version or use "latest", but in the short and extended descriptions, you cannot.
- Remember, if you are linking to another configuration option, the link must go to the option on the Section page (or the configobject page) in the **Options Reference**.
- As noted in the wiki markup notes, above, do not use the repository or external link widgets in the short description or other fields on the **Basic** tab.

# Configuration Options: The Model

## Important

This only applies to Genesys Engage on-premises products and Ponydocs content.

This page describes the elements of the model for providing information about the 10,000+ options used by Genesys applications. A complicated series of query and formatting templates control the display of the options information. You do not need to understand the behind-the-scenes plumbing, but you do need to understand the model at a conceptual level.

• Related Content: Working with Config Options

# Architecture

The model consists of a single-source repository (the Options namespace, referred to as the Options Warehouse) and query and formatting templates, which populate the pages of product-specific *Options Reference* manuals.

	Options:Component:Section:Parameter	
	Options:Component:Section:Parameter	•
	Options:Component:Section:Parameter	
	Options:Component:Section:Parameter	
	Options:InteractionServer:log:enable-thread	
	View in ref guide.	•
	Edit this option Publish this option Clear draft content	
	Published Option Draft Option	
	enable-thread enable-thread_Draft	_
	Default Value: false Default Value: 0	•
	yes, no Changes Take Effect:	
	Changes Take Effect: Immediately	
	Modified: 8.5.1 (default and valid values format changed)	•
	Specifies whether to enable	
	or disable the logging Specifies whether to enable or thread. If set to true (the disable the logging thread. If	
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	the logs are stored in an is enabled), the logs are internal gueue	•
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# **Options Warehouse**

# **Ponydocs Reference Manual**

Configuration Options overview

### The Options Reference manual

The *Options Reference* is the customer-facing manual in Ponydocs. Similar to the architecture for RNs, for Ponydocs purposes there is a product called "Options", and within Documentation/Options, each Genesys product has its own *Options Reference*. There are only two versions of the *Options Reference*: Current (released) and Draft (unreleased). The title is *product Options Reference*.

While you can interpolate additional discussion pages in your *Options Reference* if necessary, the basic structure of each *Options Reference* is fixed, and the content of each page is almost totally generated by template. For details about the default pages and the wiki markup for their template-generated content, see *Options Reference* pages and templates summary.

There are very strict naming conventions for the default *Options Reference* pages. For example, the page for an individual configuration section is Documentation:Options:cyrodshort>:<compshort>-<urlsection>:<version>, where <urlsection> is the name of the configuration section expressed in URL-safe characters. So a typical address is Documentation/Options/Current/ES/ InteractionServer-settings. For the conventions for all the pages, see the "URL pattern" entries in the *Options Reference* pages and templates summary table.

Since there is only one released version of the *Options Reference*, it is cumulative, and you must handle any changes in option behavior in the writing. In particular, options are never deleted; if they are removed from the software, you simply identify them as discontinued as of a particular release.

### The Options namespace

The Options namespace (a.k.a. the *Options Warehouse*) is the single-source repository for the configuration options content. Each option has its own page, which is the only place you edit content for that option. There is a very strict naming convention for Options Warehouse pages — Options:<component>:<urlsection>:<urlsection>:<urlsection>:matches the XML file name in the IP, <urlsection> is the configuration section expressed in URL-safe characters, and <urlsecter> is the option name expressed in URL-safe characters.

 
 Options
 Edit with form
 Edit
 History
 Dates
 Remens
 Unwelch
 Purge cache

 Options:InteractionServer:settings:collect-esperror-counters
 Fillow
 Fillow



Each Options Warehouse page is divided into two parts: Published and Draft. Content on the Published side populates both Current (released) and Draft versions of the *Options Reference*, while content on the Draft side appears only in the Draft version. Buttons at the top of the page enable you to move content between the parts:

- If there is no content on the Draft side when you click **Edit this option**, content is copied from the Published side to the Draft side. However, existing Draft content is not overwritten.
- When you click **Publish this option**, content is pushed from the Draft side to the Published side; any existing Published content is overwritten, and Draft content is cleared.

### Options at multiple levels

Some options can be configured at different levels (Application vs. Switch vs. DN, and so on); in other words, the non-Application-level options are actually configured on other objects. In these cases, each option on each object has its own page in the Options Warehouse. A <configobject> suffix added to the <component> part of the URL identifies the non-Application configuration object on which the option is configured.

In the *Options Reference* manual, each of the other objects has its own page, on which there might be multiple configuration sections. A <configobject> suffix added to the <compshort> replaces the <urlsection> part of the URL.

## [+] Example

In GIM, the **[gim-etl].q-answer-threshold-voice** option can be configured at the level of the application, Switch, or DN. In the Options Warehouse:

- Options: Genesys\_Info\_Mart\_ETL: gim-etl: q-answer-threshold-voice is the application-level option
- Options: Genesys\_Info\_Mart\_ETL-Switch:gim-etl:q-answer-threshold-voice and Options: Genesys\_Info\_Mart\_ETL-DN:gim-etl:q-answer-threshold-voice are the equivalent options configured on the other objects.

In the *Genesys Info Mart Configuration Options Reference*, the respective options are on the following pages:

- Documentation:Options:GIM:GIM-gim-etl:<version>
- Documentation:Options:GIM:GIM-Switch:<version>
- Documentation:Options:GIM:GIM-DN:<version>

### Behind the scenes

The system is built on a MediaWiki extension called Cargo, which describes itself as a lightweight way to store and query the data contained within calls to templates. Because of formatting limitations with Cargo, some of the queries use another MediaWiki extension, Dynamic Page List (DPL), a report generator for MediaWikis. A third extension, Page Forms (previously known as Semantic Forms), provides the form interface for working with the highly structured content. The query and formatting templates also make extensive use of various MediaWiki parser functions.

If you are interested in developing expertise with this kind of wiki technology in general, and in helping support the Configuration Options project in particular, contact Barry or José.

# Referencing options from other locations

Within an *Options Reference* manual, which includes links entered on Options Warehouse pages, use regular Ponydocs links to link to other options. See More on links for some potential "gotchas" you need to be aware of.

In all other documents, use the {{Optionslink}} template to provide a lightbox link to the option. In Release Notes or other "What's New"-type locations where the whole point of mentioning the option is to describe what it does, you can add a |display=yes parameter to the template call, so that the option description displays visibly on the page instead of in a lightbox.

A tip at the bottom of each option description in the Draft version of the *Options Reference* provides the syntax to use for the lightbox link — for example:

{{Optionslink|link=Options:ChatServer:settings:limits-control-enabled}}; for visible display in an RN, add the display parameter:

{{Optionslink|link=Options:ChatServer:settings:limits-control-enabled|display=yes}}.



The Optionslink lightbox

The Optionslink display reproduces key information from the *Options Reference*, such as default and valid values and the short description, and includes a link to the full option description in the *Options Reference*.

## The XML metadata file

The configuration options metadata file is an XML file that resides in the **Templates** folder of component IPs. It was developed to provide a form of contextual help in Genesys Administrator. It has usually been "owned" by Development, but writers on some teams have worked out ways to collaborate with Development in editing the descriptions and maintaining the file. While the future role of the XML file in its current form is uncertain, there will presumably always be some kind of help inside the configuration UI, based in some way on the XML file. It makes sense for us to single-source this content as far as possible, in as automated a way as possible. Accordingly, the baseline content of the bulk of the options in the Options Warehouse is provided by conversion from the XML file.

### Converting the XML file

#### PLACEHOLDER for the instructions while the script is under development.

The XML file conversion populates default and valid values, when changes take effect, the short description, and whether the option is hidden. (These are the fields that appear on the **Basic** tab of the editing form — see step 5 in the instructions about manually creating an option.)

- If the option already exists in the Options Warehouse, running the conversion will overwrite these fields on the published side.
- If the option does not yet exist in the Options Warehouse, a page will automatically be created and populated with content from the XML file.
- If a new option is in an existing section, the Section pages in **both the Current and** the Draft versions of the *Options Reference* will automatically update to include the new option.
- If a new option is in a new section, a new Section page will automatically be created and populated in the Draft *Options Reference*. You will have to manually update the Current TOC and create the page in the Current version when you are ready to publish.

Note that, after running the conversion, you will still need to edit the Options Warehouse page manually to populate content on the **Extended** tab (see step 6 in the instructions about manually creating an option).

# Configuration Options: Managing *Options Reference* Pages

## Important

This only applies to Genesys Engage on-premises products and Ponydocs content.

From the point of view of page management, there is nothing special about the *Options Reference* manual. There is a Draft TOC for the Draft version and a Current TOC for the Current one. On initial conversion of the XML file, the Draft version of the *Options Reference* manual will be created for you, with all the default pages populated with the default template calls. You are responsible for creating the Current version — which you do in the usual way by pushing content from the draft to the released version when you are ready to publish — and for adding new pages to both versions on an ongoing basis, as required. See *Options Reference* pages and templates summary for an outline of the structure and content of *Options Reference* pages.

The only difference between the *Options Reference* and usual wiki docs is that, once you have set up the pages with the correct template calls, the content that is generated and controlled by the templates maintains itself, based on what you do in the Options Warehouse.

• Related Content: Working with Config Options

# Creating pages in the **Options Reference**

You will need to create new Options Reference pages under the following circumstances:

- Newly added options are in new configuration sections. In this case, you must create a new Section page and populate it with the template calls described in the templates summary below.
- You need to add a page for a non-application configuration object, such as a DN or DAP. See the templates summary below for the required template calls you must put on the page. You must also add an {{OptionsSummary}} template call, specifying the configobject. See the Interaction Server component page or the Genesys Info Mart Welcome page for examples.
- A new component has been added to the product. In this case, you must create a new Component page as well as the required Section pages, populating them with the template calls described in the templates summary, below. You must also add a link to the new Component page on the Welcome page.
- You can also add pages that are not required by the model to provide additional information about using configuration options. There are no restrictions on or requirements for these pages.

You create pages in the usual way by adding a topic to the Draft TOC, then clicking the link to create the page. For the topic name, follow the naming conventions shown in the "URL pattern" entries in

the templates summary, below.

# Options Reference pages and templates summary

Contact Barry or José if the existing templates do not provide queries and formatting that suit your purpose.

Page	Wiki markup	Comment
	For single-component products: {{OptionsWelcome}} Show resulting display	The next item is expected to be the {{OptionsSummary}} template call (see below). You can manually insert additional free-form content between or after the template calls if necessary.
	For multiple-component products: {{OptionsWelcome multi=yes}} Show resulting display	After the template call, insert a list of manually constructed links to the individual component collector pages. You can also manually insert additional free- form content on the page if necessary.
Welcome page Topic name: Welcome	Optional override parameter (can be combined with others): {{OptionsWelcome override=yes}} Show resulting display	The override parameter has been provided so that the template does not become an unworkable straitjacket. However, for a consistent look and feel, it is preferable for you to use the templated boilerplate if possible.
Documentation:Options: <prodshort>:Welco H1: <product> Configuration Options Reference</product></prodshort>	m <b>@ptvorsionparameter (can be combined with others):</b> {{OptionsWelcome altComponent= <compor or product&gt;}} Show resulting display</compor 	The altComponent parameter has been provided in case the peonydocs product name is not suitable in the context — for example, because of incorrect capitalization.
	Optional parameter (can be combined with others but not with relatedInfo): {{OptionsWelcome additionalRef= <link/> Show resulting display	The additionalRef parameter has been provided as an interim "soft redirect" until the product's sy <i>Options Reference</i> has been made comprehensive and up to date.
	Optional parameter (can be combined with others but not with additionalRef): {{OptionsWelcome relatedInfo= <comment Show resulting display</comment 	The relatedInfo parameter has been provided as a way to add a consistent note that displays automatically on the Welcome -and Section pages. For example: "For information about how to use these options to configure Product X functionality and

Page	Wiki markup	Comment
		behavior, see <link/> ."
Component collector pages Topic name: <compshort> URL pattern: Documentation:Options:<prodshort>:<com <customer-friendly="" component<="" h1:="" td=""><td>For multiple-component products: {{OptionsSummary}}         For single-component products, where the entry is on the Welcome page: {{OptionsSummary compshort=<compshort< td="">         Show resulting display         Optional parameter: {{OptionsSummary]intro=<additional material before the sentence that introduces the bulleted list&gt;}         Pforteactrefion-Application configuration object:</additional </compshort<></td><td>There is one page for each component of the product. In the TOC, each component page is followed by its Section pages (see below). For single- component products, the Welcome page serves as the component collector page, and t&gt;{{0ptionsSummary}} immediately follows {{0ptionsWelcome}}. For an example of use of the optional intro parameter, see the Chat Server page. Provide an {{0ptionsSummary}} template call for each</td></com></prodshort></compshort>	For multiple-component products: {{OptionsSummary}}         For single-component products, where the entry is on the Welcome page: {{OptionsSummary compshort= <compshort< td="">         Show resulting display         Optional parameter: {{OptionsSummary]intro=<additional material before the sentence that introduces the bulleted list&gt;}         Pforteactrefion-Application configuration object:</additional </compshort<>	There is one page for each component of the product. In the TOC, each component page is followed by its Section pages (see below). For single- component products, the Welcome page serves as the component collector page, and t>{{0ptionsSummary}} immediately follows {{0ptionsWelcome}}. For an example of use of the optional intro parameter, see the Chat Server page. Provide an {{0ptionsSummary}} template call for each
name>	<pre>{{OptionsSummary configobject=<config or (for single-component products on the Welcome page): {{OptionsSummary compshort=<compshort Show resulting display Optional parameter: {{OptionsSummary configobject=<config alternative to introductory boilerplate&gt;}} or {{OptionsSummary compshort=<compshort alternative to introductory boilerplate&gt;}}</compshort </config </compshort </config </pre>	<pre>configuration object. For easier inhavigation, use an H2 or H3 to separate them. t&gt; configobject=<configobject>}} The value you specify for <configobject> must exactly match the value specified on the Options Warehouse pages. The optional level parameter gobjables yewtd=mpaifyitHe sentence introducing the summary table if straightforward use of the <configobject> value is not suitable in t&gt;theonontypeti for accontigobj set-thevel=<pre>configobject&gt; value is not suitable in t&gt;theonontypeti for accontigobject&gt; value is not suitable in to accontigobject&gt; value is not suitable in t&gt;theonontypeti for accontigobject&gt; value is not suitable is not s</pre></pre></pre></pre></pre></configobject></configobject></configobject></pre>
Section pages Topic name: <compshort>-<urlsection> URL pattern: Documentation:Options:<prodshort>:<com <urlsection="">:<version> H1: <section> Section</section></version></com></prodshort></urlsection></compshort>	<pre>{{OptionsHeader section=<sect. {{optionsprint section="&lt;section">}} Show resulting display Note: If the configuration section contains hundreds of options, such that the page loads very slowly, use {{OptionsPrintCached}} instead of {{OptionsPrint}}. See also tips about refreshing the cache. psptiepal parameters:     customgroup — Enables you     to specify a value of the     customgroup parameter to     use as the criterion for     inclusion in the list.     header — Enables you to</sect.></pre>	<pre>ion&gt;}} There is one page per configuration section, containing all the options for that section, based on content you provide in the single-source repository (see The Options namespace). You can manually insert additional content between or after the template calls if necessary. If the section name includes URL-unsafe characters, the section part of the URL (<urlsection>) will not exactly match the value of the <section> parameter that you specify in the template call. Check the {{OptionsSummary}} list to verify the value to use.</section></urlsection></pre>

Page	Wiki markup	Comment	
	<pre>suppress the "PDF this page" header. For example: {{OptionsHeader section=<section> cus related header=no}}</section></pre>	stomgroup=DB-	
Other configuration objects pages <b>Topic name:</b> <compshort>- <configobject> <b>URL pattern:</b> Documentation:Options:<prodshort>:<com <configobject>:<version> <b>H1:</b> <configobject> Options Change History page</configobject></version></configobject></com </prodshort></configobject></compshort>	=== <section> Section=== {{OptionsHeader configobject=<configo {{OptionsPrint configobject=<configo pshort&gt;- Template under development; supported parameters may</configo </configo </section>	There is one page for each non- Application object on which component-related options are configured (see Options at oppedtiplectavels)ection>} oject> section= <section>} Repeat both template calls for each configuration section for that configobject.</section>	
Topic name: ChangeHistory URL pattern: Documentation:Options: <prodshort>:Change H1: Options Change History</prodshort>	<pre>change, depending on demand. {{ChangeHistory since=<release>}} cAlternative sybraueries:     {{ChangeHistory changeType=Introduced     {{ChangeHistory changeType=Modified s     {{ChangeHistory changeType=Discontinu     {{ChangeHistory compshort=<compshorts< pre=""></compshorts<></release></pre>	provide cumulative summaries of configuration option changes, by release. It's possible that, in the end, this page will reside only in the Draft version of the Options Beference to serve as a job aid since approxime to the lect ment version and for the Migration Condel.	
Any page in any document	Template under development; supported parameters may change, depending on demand. {{OptionsList}} with the following optional parameters, which can be combined: • prodshort = <prodshort> • compshort = <compshort> • section = <section> • group = <groupname> • customgroup = <customgroup> • feature=<feature> • mode = <mode> • hidden = true • orderby=<parameter by<br="">which to group the output&gt;</parameter></mode></feature></customgroup></groupname></section></compshort></prodshort>	The template will enable you to generate automatically maintained, hyperllinked lists of options that satisfy the criteria you specify. For example, {{OptionsList feature=Callback}} will generate a list of all options that have been tagged as related to the Callback feature (in other words, the Options Warehouse pages include   feature = Callback).	

# Troubleshooting *Options Reference* pages

See also Tips 'n Tricks for information about content and editing issues.

### Component page issues

(Only multi-component products will have Component pages. Single-component products have the equivalent template calls on the Welcome page.)

- If the {{OptionsSummary}} query returns "No results", verify that the topic name part of the Component page URL exactly matches the compshort parameter for that component. If necessary, replace the page with a correctly named one.
- If you get no results on a correctly named Component page, try specifying the compshort parameter in the template call.
- Verify that the topic name part of the Section page URLs have the correct compshort prefix, consistent with the compshort parameter specified in the template call.

#### Section page issues

 If expected options are not showing up on the Section page, it is usually because the option was created with incorrect information. Open the Options Warehouse page in Edit mode to verify the parameters specified for the OptionCreate template. You can modify the prodshort and compshort values if necessary, but if any of the other values are incorrect, the Options Warehouse page itself will need to be renamed, so you must re-create the option from scratch.



Refreshing the cache

If the configuration section has hundreds of options so that, for performance reasons, the Section page in the *Options Reference* uses {{OptionsPrintCached}} instead of {{OptionsPrint}} (see the note in the Section page row in Pages and templates summary), the query results are cached for 24 hours and the page that loads might not contain the latest information from the Options Warehouse pages. To view the results of edits, look for the link on the Section page that enables you to refresh the cache and reload the page (current location is between the OptionsHeader and OptionsPrint content, but this might change). When you are satisfied with your edits, repeat the action on the Current version of the page, to refresh the cache for all customers.

# Managing Online Readmes

Starting as soon as possible, but no later than release 8.5, HTML CD Readmes will no longer be included on the product CDs. Instead, the information will be available in a Readme section on the product landing page.

Follow the instructions below to build the Readme content, embed it on the landing page, and update it as required.

### Important

The process described below is effective July 2016, following a redesign to give more prominence to "What's New" information on the landing page. It supersedes all previous information about preparing online ReadMes. Change bars indicate changes to the instructions as a result of the redesign.

You do not need to master the behind-the-scenes architecture. It is multi-layered and designed to shield writers from the complexity. For illustrative purposes, a diagram summarizing the now-outdated architecture for the original implementation is available from the Wiki IA site in Alfresco.

A recording of the training session is also available from the Wiki IA site (Document Library > Videos > 2014-03-14 14.05 Ponydocs office hour.wmv).

# Creating Online Readmes

The online Readme is constructed from pages in a product-specific "feeder" book (called Library), pages in a system-wide "feeder" book (also called Library), and templates. The compiled Readme elements are transcluded from the product-specific Library book onto the product landing page.

## [+] Show visual summary

The following diagram has not been updated to illustrate the July 2016 redesign. However, it still applies conceptually.

Using a hypothetical Readme for Media Server (MS) 8.1.x as an example, the following diagram summarizes the writer side of the Readme architecture. The diagram shows the architecture for a single product; the architecture for products that have multiple subcomponents, and therefore multiple Readmes on the same landing page, extends this approach. See the legend at the bottom of the diagram for the meaning of the different font colors.

#### PONYDOCS



The compilation process relies on predictable Library page names, versions, and content. Therefore, it is important that you observe the naming and content conventions described in the following instructions.

There are separate instructions for:

- Creating the Readme for a Single Product on the Landing Page
- Creating Readmes for Multiple Products on the Same Landing Page

### Creating the Readme for a Single Product on the Landing Page

**1.** If you have not already done so, create the version, manual and TOC for the "feeder" content for the two-digit release of your product.

a. On the Versions special page for your product, create the version. The version must be named twodigit\_releaseSource; you must include the dot in the release number. Add this version before the first three-digit version for that release family. For example: {{#version:land|released}}

{{#version:8.1Source|unreleased}}
{{#version:8.1.2|released}}
{{#version:8.1.2draft|unreleased}}
{{#version:8.1.3|unreleased}}

- b. On the Manuals special page, create a Library book to serve as the repository of unpublished source material for your product. The manual must be named Library. For example: {{#manual:Library|Library}}
- c. From the Manuals special page, create the TOC. Follow the instructions in Creating a TOC to change the URL so that you're creating the TOC for the version you created in substep (a)—for example, LibraryTOC8.1Source.

2. On the TOC, add the Readme-related topics and version category.

Your TOC must include the following pages:

- ReadMe—This is the page that used to be transcluded to your landing page. Since the redesign, it is used more indirectly to populate certain content. It can also serve as a useful reference for you to see all the published ReadMe-related content on a single page.
- ReadMeDraft—This is the page you use for reviews. It is the same as the ReadMe page, except that it also includes content in draft status.
- NITR—This is an internal collector page for the "What's New" and "Product Alerts" markup. The template that you call on this page spits out the wiki markup you need to copy to your landing page. Since the NITR page is not transcluded directly onto the landing page, it's not strictly necessary that the page be named "NITR". However, this is a best practice to set things up robustly for possible future template changes.
- three-digit\_releaseNew—For example, 8.1.0New. Each page contains the "New in This Release" ("NITR") material for a single three-digit release. Add as many three-digit relNew pages as you require.
- 3rdParty—This page contains your product-specific third-party licensing information.
- (If applicable) PA—This page will be referred to as "Product Alerts"; it contains the release-wide warnings and known issues that used to be contained in the Release Advisory.
- (Optional, not recommended) ReadMeNotes—Include this page only if your PCT requires you to include additional notes in the Readme.

As for all manuals, your Library book TOC must also include a Welcome page. The content of this page is up to you.

Using the usual syntax ([[Category:V:product\_short\_name:two-digit\_releaseSource]]), your TOC must also specify the version category for the version you created previously.

### Example

The following TOC is an example for Genesys Info Mart 8.1.x, which does not use the optional ReadMeNotes page:

{{#topic:Welcome}}

{{#topic:ReadMe}}

{{#topic:ReadMeDraft}}

{{#topic:NITR}}

{{#topic:8.1.3New}}

{{#topic:8.1.2New}}

{{#topic:8.1.1New}}

{{#topic:8.1.0New}}
{{#topic:3rdParty}}

{{#topic:PA}}

[[Category:V:GIM:8.1Source]]

3. Create and populate the individual three-digit "New in This Release" (re/New) pages.

### Important notes

- The query that constructs the final "What's New" uses the timestamp of the last edit to order the three-digit releases for the NITR section. Therefore, ensure that you create, edit, and save the *rel*New pages in the correct sequence, starting with the earliest.
- A status category on each *rel*New page determines whether that three-digit release is included in the final, live "What's New" or only in the ReadMeDraft page. [[Category:Status:Released]] means that it will be included in the live "What's New." Until you have at least one *rel*New page in Released status, the NITR and ReadMe pages will show a DPL error message.
- To support reuse, the formatting surrounding the *rel*New detail has been separated from the content, and the content has been minimally structured. Supplementary formatting templates present the content in alternative formats in different contexts. Contact José if you want to reuse the content with a different presentation in another context.

#### Тір

• For formatting that uses the pipe character (|) to display correctly, you must replace the pipe character with the following template call: {{!}}

For example, to set up a table, use the following syntax:

```
{{!}}
{{!}}+ Table caption
! Usual syntax for header rows
{{!}}-
{{!}}-
{{!}} Cell content row 1
{{!}}
```

The preceding example yields the following table:

#### Table caption

#### Usual syntax for header rows

• Because the "What's New" content is now presented in a lightbox, you cannot use the Repository and other widgets, because they don't survive in the lightbox: They get converted to a cryptic "ENCODED\_CONTENT" statement. See the step about populating the PA page for the syntax to use instead of the Repository widget.

#### Steps

To set up a *rel*New page:

- a. Create the page in the usual way by clicking on the topic in the TOC. The default H1 will be *three-digit\_release*New. You can modify this if you wish, since the Readme process does not use this H1.
- b. With your cursor immediately below the H1, click the NR button on the editing ribbon. All the required syntax is automatically entered on the page.
- c. Complete the |Release= line by entering your three-digit release number (for example, |Release=8.1.3).
- d. The NR button automatically inserts a |Draft= line. Ignore this line for now. (It is used only for subsequent updates within a three-digit release.)
- e. Starting in a new line immediately after the |New= line, enter your NITR content. The template that controls formatting automatically inserts a boilerplate introductory sentence (as of September 2014, "The following new features were added in the *x.x.x* release:").
- f. If you are converting an existing CD Readme with a number of three-digit releases that you want to be included in the final Readme as soon as you publish it, you can change the [[Category:Status:Draft]] category to [[Category:Status:Released]] at this stage. Going forward, you change the category only on the day of release, when you want that *rel*New page to become public.

Do not be concerned if the page does not display cleanly when you view it directly. It will display correctly when it is embedded in the ReadMe and ReadMeDraft pages.

- **4.** Create and populate the 3rdParty page.
- a. Create the page in the usual way by clicking on the topic in the TOC. Again, you can modify the default H1 if you wish.
- b. Between <onlyinclude> and </onlyinclude> tags, enter the product-specific third-party licensing items you have to include, per your packaging specs. Do not add any introductory material. The template that constructs the Readme automatically appends your product-specific content to system boilerplate that includes an introductory sentence (as of March 2014, "The following list describes specific third-party code and functionality for this product:").
- 5. Create and populate the PA page.
- a. Create the page in the usual way by clicking on the topic in the TOC. Again, you can modify the default H1 if you wish.
- b. Between <onlyinclude> and </onlyinclude> tags, enter the release advisory-type items in a bulleted list. Do not add any introductory material. The template that constructs the Readme automatically inserts system boilerplate that includes an introductory sentence (as of June 2014, "The

following information applies to Genesys <rel>.x software and is important for you to note."). Also note that the RAs used to include a boilerplate item about third-party redistribution policies that is already stated in boilerplate in the Legal Notices; do not repeat this item on your spiffy new PA page.

c. At the bottom of the page, outside the list, add a link to the previous Release Advisory/Product Alert, either:

[{{SERVER}}/Special:Repository/<HTML file>?id=<Box ID> Link to <previous two-digit
release> Product Release Advisory] or:
[[Documentation/<previous two-digit release tab number>|Link to
<previous two-digit release> Product Alerts]]

## Tip

- On the assumption that Product Alerts, 3rd party info, etc. wouldn't be updated very often, we didn't make the templates provide separate handling for draft vs. published. Please put your draft content outside the tags on the PA page, and send your reviewers directly to the page. Then just move it inside the tags when you want to publish.
- Because the PA content is now presented in a lightbox, you cannot use the Repository and other widgets, because they don't survive in the lightbox: They get converted to a cryptic "ENCODED\_CONTENT" statement. See the {{SERVER}} link, above, for the syntax to use instead of the Repository widget. In July 2018, the company switched to using Box instead of Alfresco as the document repository. You do not need to go back to update repository links that used the Alfresco ID, because the link is remapped to the Box ID programmatically.

#### 6. If necessary, create and populate a ReadMeNotes page.

The purpose of this page is to house additional miscellaneous information that your PCT decides is necessary. Do not create this page if you don't have to.

- a. Create the page in the usual way by clicking on the topic in the TOC. Again, you can modify the default H1 if you wish.
- b. Between <onlyinclude> and </onlyinclude> tags, enter the additional information, including any introductory material, subheadings, toggle displays, etc. that you deem necessary. The template that constructs the Readme simply transcludes the content of this page without any further additions.

7. Create and populate the ReadMe and ReadMeDraft pages. The only difference between the ReadMe and the ReadMeDraft pages is that they call different templates. The templates for the ReadMeDraft page do not filter out unreleased (or draft) *rel*New content.

- a. Create the pages in the usual way by clicking on the respective topics in the TOC. Again, you can modify the default H1 if you wish.
- b. Between <onlyinclude> and </onlyinclude> tags, enter the following template calls, specifying values for the rel, prodshort, prodlong, and copyright parameters:
  - For the ReadMe page

{{Template:ReadMe|rel=<mark>two-digit\_release</mark>|prodshort=<mark>product\_short\_name</mark>|

prodlong=product long name|TMPL8=NITR TGL|copyright=copyright date}

#### For the ReadMeDraft page

```
{{Template:ReadMeDraft|rel=two-digit_release
prodlong=product_long_name
TMPL8=NITR_TGL_Draft|copyright=copyright_date}}
```

On both pages, the copyright date or, more likely, date range refers to the software copyright and covers the entire period of the two-digit release. Once you have set up these pages, the only time you need to update them is if there is a new three-digit release in a new year.

#### Examples

#### ReadMe Example

The following is the complete writer input for the Genesys Info Mart 8.1.x ReadMe page: <onlyinclude> {{Template:ReadMe|rel=8.1|prodshort=GIM|prodlong=Genesys Info Mart|TMPL8=NITR\_TGL|copyright=2011-2014}} </onlyinclude>

#### ReadMeDraft Example

The following is the complete writer input for the Genesys Info Mart 8.1.x ReadMeDraft page:
<onlyinclude>
{{Template:ReadMeDraft|rel=8.1|prodshort=GIM|prodlong=Genesys Info
Mart|TMPL8=NITR\_TGL\_Draft|copyright=2011-2014}}
</onlyinclude>

**8.** Create and populate the NITR page. The template spits out the wiki markup you'll need to copy to your landing page for the "What's New" section. The template filters out unreleased (or draft) *rel*New pages and/or content.

- a. Create the page in the usual way by clicking on the topic in the TOC. Again, you can modify the default H1 if you wish.
- b. Between <onlyinclude> and </onlyinclude> tags, enter the following template call:
   {{Template:NITREmbed}}

Once you have set up this page, you never need to update it, although the content the page displays (in other words, the visible markup) will update as you add new *rel*New pages.

#### Example

The following is the complete writer input for the NITR page: <onlyinclude> {{Template:NITREmbed}} </onlyinclude>

**9.** Obtain required reviews and technical and TechPubs Production approvals. Notify Pubs Editors that an online Readme is ready for format review, and provide a link to the content. Direct reviewers to your ReadMeDraft page. For the required approvals, see Readme Review Process (includes Product Alerts).

**10.** When the Readme is ready to be published, transclude the "What's New" and other Readme content onto your product landing page.

- a. Verify that all *rel*New pages to be included in the published "What's New" have [[Category:Status:Released]]. If you need to add or edit the category on any *rel*New pages, ensure that you save the pages in the correct sequence, so that the timestamp of the last edit does not interfere with the order in which the pages display in the "What's New" section.
- b. Copy the visible wiki markup from the NITR page, and paste it onto your landing page. The wiki

markup is divided in two:

- The first part is the markup for the "What's New" section. Paste this markup immediately below the tab divider and above the "Release Notes" section.
- The second part is the markup for the Product Alerts. Paste this markup in the "Release Notes" section, immediately before the last </div> in that section.
- c. After the last </div> in the tab (or, if you used the Tab button in the editing ribbon to create the release section, immediately before the {{TabEnd}} line), add the following template call: {{Template:ReadMeEmbed2|rel=two-digit release}}
- d. If you are modifying a pre-redesign landing page, or if you use the Tab button to add a new tab, delete the {{Template:ReadMeSectionLink}} and {{Template:ReadMeEmbed|...}} template calls.
- e. Depending on when you last modified your landing page, you may need to remove links in the Helpful Links section to the old CD Readme PDF or the previous Product Alerts (formerly Release Advisory) page.
- f. Verify that the "What's New" lightbox links show up in the correct order and that content displays correctly in the lightboxes. If your Library book content was created before the redesign, you might need to replace repository or external-widget links with straightforward external ones.

### Example

The following sample markup is from the GI2 landing page. Red font indicates markup copied from the NITR page in the GI2 Library book.

```
<tabher>
Release 8.5=
===What's New===
<div class="itemcontainer">
<div class="item">
{{Documentation:GI2:Library:8.5.0New:8.5Source|TMPL8=NITR}} </div>
</div>
===Release Notes===
<div class="item">
[[Documentation:RN:gi2-85rn:gi2-85rn:8.5.x]Genesys Interactive Insights 8.5.x Release Note]]
</div>
<div class="item"> {{#ppin:===Genesys Interactive Insights 8.5 Product
Alerts==={{Documentation:GI2:Library:PA:8.5Source}}8.5 Product Alerts}}
</div>
</div>
{{Template:ReadMeEmbed2|rel=8.5}}
```

### Creating Readmes for Multiple Products on the Same Landing Page

In a single Library book, you create individual Readmes for each component or subproduct, which you combine on a page that you transclude onto the landing page.

**1.** If you have not already done so, create the version, manual and TOC for the "feeder" content for the two-digit release of your product.

a. On the Versions special page for your product, create the version. The version must be named *two-digit\_release*Source; you must include the dot in the release number. Add this version before the first three-digit version for that release family. For example:

{{#version:land|released}}
{{#version:8.5Source|unreleased}}
{{#version:8.5.0|released}}
{{#version:8.5.1|released}}
{{#version:8.5.1draft|unreleased}}
{{#version:8.5.2|unreleased}}

- b. On the Manuals special page, create a Library book to serve as the repository of unpublished source material for your product. The manual must be named Library. For example: {{#manual:Library|Library}}
- c. From the Manuals special page, create the TOC. Follow the instructions in Creating a TOC to change the URL so that you're creating the TOC for the version you created in substep (a)—for example, LibraryTOC8.5Source.

2. On the TOC, add the Readme-related topics and version category.

Except for the final page that combines the individual Readmes, all of the topic names must start with a prefix that identifies the component or subproduct. You can use any prefix you wish. In these instructions and in the templates, this prefix is referred to as <subprod>.

Your TOC must include the following pages:

- CombinedReadMes—This is the page that used to be transcluded to your landing page. Since the redesign, it is used more indirectly to populate certain content on the landing page. It can also serve as a useful reference for you to see all the published ReadMe-related content on a single page.
- NITR—This is an internal collector page for the "What's New" and "Product Alerts" markup. The template that you call on this page spits out the wiki markup you need to copy to your landing page. Since the NITR page is not transcluded directly onto the landing page, it's not strictly necessary that the page be named "NITR". However, this is a best practice to set things up robustly for possible future template changes.
- OtherPrep—This is an internal collector page for the other Readme-related markup ("More Release Information"). The template that you call on this page spits out the wiki markup you need to copy to your landing page.
- For each component or subproduct:
  - <*subprod*>ReadMe—This page is transcluded to the CombinedReadMes page. Since the redesign, it is used indirectly to populate certain content on the landing page.
  - <*subprod*>ReadMeDraft—This is the page you use for reviews. It is the same as the ReadMe page, except that it also includes content in draft status.
  - <subprod><three-digit\_release>New—For example, MF8.5.0New. Each page contains the "New in This Release" material for a single three-digit release. Add as many three-digit relNew pages as you require. You must include the dot in the release number.
- <*subprod*>3rdParty—This page contains your product-specific third-party licensing information.
- (If applicable) <*subprod*>PA—This page will be referred to as "Product Alerts"; it contains the release-wide warnings and known issues that used to be contained in the Release Advisory.
- (Optional) <*subprod*>ReadMeNotes—Include this page only if your PCT requires you to include additional notes in the Readme (for example, see GVP).

As for all manuals, your Library book TOC must also include a Welcome page. The content of this page is up to you.

Using the usual syntax ([[Category:V:product\_short\_name:two-digit\_releaseSource]]), your TOC must also specify the version category for the version you created previously.

#### Example

The following TOC is an example for Management Framework 8.5.x, which has separate Readmes for Management Framework and Security Pack on UNIX. The Security Pack Readme does not use the optional ReadMeNotes page.

```
{{#topic:Welcome}}
{{#topic:CombinedReadMes}}
{{#topic:NITR}}
{{#topic:OtherPrep}}
{{#topic:MFReadMe}}
*{{#topic:MFReadMeDraft}}
*{{#topic:MF8.5.2New}}
*{{#topic:MF8.5.1New}}
*{{#topic:MF8.5.0New}}
*{{#topic:MF3rdParty}}
*{{#topic:MFPA}}
*{{#topic:MFReadMeNotes}}
{{#topic:SPReadMe}}
 {{#topic:SPReadMeDraft}}
*{{#topic:SP8.5.2New}}
*{{#topic:SP8.5.1New}}
*{{#topic:SP8.5.0New}}
*{{#topic:SP3rdParty}}
[[Category:V:FR:8.5Source]]
```

3. Create and populate the individual three-digit "New in This Release" (re/New) pages.

#### Important notes

- The query that constructs the final "What's New" uses the timestamp of the last edit to order the three-digit releases in the NITR section. Therefore, ensure that you create, edit, and save the *rel*New pages in the correct sequence, starting with the earliest release.
- A status category on each *rel*New page determines whether that three-digit release is included in the final, live "What's New" or only in the ReadMeDraft page. [[Category:Status:Released]] means that it will be included in the live "What's New." Until you have at least one *rel*New page in Released status, the NITR and ReadMe pages will show a DPL error message.
- To support reuse, the formatting surrounding the *rel*New detail has been separated from the content, and the content has been minimally structured. Supplementary formatting templates present the content in alternative formats in different contexts. Contact José if you want to reuse the content with a different presentation in another context.

Тір

For formatting that uses the pipe character (|) to display correctly, you must replace the pipe character with the following template call: {{!}}

For example, to set up a table, use the following syntax:

```
{{{!}}
{{!}}+ Table caption
! Usual syntax for header rows
{{!}}-
{{!}}-
{{!}} Cell content row 1
{{!}}
```

The preceding example yields the following table:

#### Table caption

#### Usual syntax for header rows

 Because the "What's New" content is now presented in a lightbox, you cannot use repository links and other widgets, because they don't survive in the lightbox: They get converted to a cryptic "ENCODED\_CONTENT" statement. See the step about populating the PA page for the syntax to use instead of the Repository widget.

#### Steps

To set up a *rel*New page:

- a. Create the page in the usual way by clicking on the topic in the TOC. The default H1 will be <subprod><three-digit\_release>New. You can modify this if you wish, since the Readme process does not use this H1.
- b. With your cursor immediately below the H1, click the NR button on the editing ribbon. All the required syntax is automatically entered on the page.
- c. Complete the |Release= line by entering your three-digit release number (for example, |Release=8.5.0).
- d. The NR button automatically inserts a |Draft= line. Ignore this line for now. (It is used only for subsequent updates within a three-digit release.)
- e. Starting in a new line immediately after the |New= line, enter your NITR content. The template that controls formatting automatically inserts a boilerplate introductory sentence (as of September 2014, "The following new features were added in the *x.x.x* release:").
- f. If you are converting an existing CD Readme with a number of three-digit releases that you want to be included in the final Readme as soon as you publish it, you can change the [[Category:Status:Draft]] category to [[Category:Status:Released]] at this stage. Going forward, you change the category only on the day of release, when you want that *rel*New page to become public.

Do not be concerned if the page does not display cleanly when you view it directly. It will display correctly when it is embedded in the ReadMe and ReadMeDraft pages.

- **4.** Create and populate the *<subprod*>3rdParty page.
- a. Create the page in the usual way by clicking on the topic in the TOC. Again, you can modify the default H1 if you wish.
- b. Between <onlyinclude> and </onlyinclude> tags and within a {{3rdParty}} template call, enter the product-specific third-party licensing items you have to include, per your packaging specs. Use

the following parameters: {{3rdParty |prodlong=<the full component name> |copyright=<copyright date/range> |content=<component-specific third-party content> }} Do not add any introductory material. The template that constructs the Readme automatically appends your product-specific content to system boilerplate that includes an introductory sentence (as of March 2014, "The following list

describes specific third-party code and functionality for this product:")

Security Pack Example for Management Framework

<onlyinclude>
{{3rdParty
|prodlong=Security Pack on UNIX
|copyright=2014
|content=
\* This product contains software developed by the OpenSSL project for use in the OpenSSL Toolkit.... }}
</onlyinclude>

**5.** Create and populate the *<subprod*>PA page.

- a. Create the page in the usual way by clicking on the topic in the TOC. Again, you can modify the default H1 if you wish.
- b. Between <onlyinclude> and </onlyinclude> tags and within a {{ProductAlert}} template call, enter the release advisory-type items in a bulleted list. Use the following parameters: {{ProductAlert

|prodlong=<the full component name>
|content=<component-specific product alert content>
|linkToPrevious=<link to previous PA or RA, formatted as a full Ponydocs internal or
external link>

}} Do not add any introductory material. The template that constructs the Product Alert automatically inserts system boilerplate that includes an introductory sentence (as of June 2014, "The following information applies to Genesys <rel>.x software and is important for you to note."). Also note that the RAs used to include a boilerplate item about third-party redistribution policies that is already stated in boilerplate in the Legal Notices; do not repeat this item on your spiffy new PA page.

#### Genesys Chat Example for eServices

<onlyinclude>
{{ProductAlert
|prodlong=Genesys Chat
|content=
Enabling the ADDP protocol on the connection to Chat Server's webapi (flex-chat) port ...
/ul>
|linkToPrevious=[{{SERVER}}/Special:Repository/8leS\_chat\_read\_me.pdf?id=bcd6e58f-099f-478f-a884-6d3dc55e6cfe
Link to 8.1 Product Release Advisory]
}}
</onlyinclude>

6. If necessary, create and populate a <*subprod*>ReadMeNotes page.

The purpose of this page is to house additional miscellaneous information that your PCT decides is necessary. Do not create this page if you don't have to.

- a. Create the page in the usual way by clicking on the topic in the TOC. Again, you can modify the default H1 if you wish.
- b. Between <onlyinclude> and </onlyinclude> tags, enter the additional information, including any introductory material, subheadings, toggle displays, etc. that you deem necessary. The template that

constructs the Readme simply transcludes the content of this page without any further additions.

7. Create and populate the <*subprod*>ReadMe and <*subprod*>ReadMeDraft pages. The only difference between the ReadMe and the ReadMeDraft pages is that they call different templates. The templates for the ReadMeDraft page do not filter out unreleased (or draft) NITR content.

- a. Create the pages in the usual way by clicking on the respective topics in the TOC. Again, you can modify the default H1 if you wish.
- b. Between <onlyinclude> and </onlyinclude> tags, enter the following template calls, specifying values for the rel, prodshort, prodlong, subprod, and copyright parameters:

#### For each ReadMe page

{{Template:ReadMeMultiple|rel=two-digit\_release|prodshort=product\_short\_name|
 prodlong=product\_long\_name|subprod=subproduct\_prefix|TMPL8=NITR\_TGL|copyright=copyr
ight\_date}}

#### • For each ReadMeDraft page

{{Template:ReadMeDraftMultiple|rel=two-digit\_release|prodshort=product\_short\_name|
 prodlong=product\_long\_name|subprod=subproduct\_prefix|TMPL8=NITR\_TGL\_Draft|copyright
=copyright\_date}}

The prodshort parameter is the product identifier used in Ponydocs URLs; it will be the same for all the subproduct Readmes. The prodlong parameter is used in the heading that displays for the subproduct Readme; it will be different for each subproduct Readme, as will the subprod parameter.

On both pages, the copyright date or, more likely, date range refers to the software copyright and covers the entire period of the two-digit release. Once you have set up these pages, the only time you need to update them is to change the copyright date if there is a new three-digit release in a new year.

#### ReadMe Examples

The following is the complete writer input for the Management Framework 8.5.x and Security Pack 8.5.x ReadMe pages, respectively: <onlyinclude>

{{Template:ReadMeMultiple/rel=8.5/prodshort=FR/prodlong=Management
Framework/subprod=MF/TMPL8=NITR\_TGL/copyright=2013-2014}}
</onlyinclude>

<onlyinclude>
{{Template:ReadMeMultiple|rel=8.5|prodshort=FR|prodlong=Security Pack on
UNIX|subprod=SP|TMPL8=NITR\_TGL|copyright=2013-2014}}
</onlyinclude>

#### ReadMeDraft Examples

The following is the complete writer input for the Management Framework 8.5.x and Security Pack 8.5.x ReadMeDraft pages, respectively: <onlyinclude> {{Template:ReadMeDraftMultiple|rel=8.5|prodshort=FR|prodlong=Management Framework|subprod=MF|TMPL8=NITR\_TGL\_Draft|copyright=2013-2014}} </onlyinclude> <onlyinclude> {{Template:ReadMeDraftMultiple|rel=8.5|prodshort=FR|prodlong=Security Pack on UNIX|subprod=SP|TMPL8=NITR\_TGL\_Draft|copyright=2013-2014}} </onlyinclude>

8. Create and populate the CombinedReadMes page.

- a. Create the page in the usual way by clicking on the topic in the TOC. Again, you can modify the default H1 if you wish.
- b. Between <onlyinclude> and </onlyinclude> tags, insert the HTML syntax for an unordered list, with an entry for each component or subproduct. You must use HTML syntax for the bulleted list; otherwise, formatting within the template does not display correctly.

For each bullet, enter the following template call, specifying values for the rel, prodshort, prodlong, and subprod parameters:

{{Template:ReadMeCombinedItem|rel=two-digit\_release|prodshort=product\_short\_name| prodlong=product\_long\_name|subprod=subproduct\_prefix}}

The reason for the repeated template calls is to enable you to control the order in which the individual Readmes will display on your landing page.

#### Example

The following is the complete writer input for the combined Management Framework 8.5.x Readmes: <onlyinclude> {Template:ReadMeCombinedItem|rel=8.5|prodshort=FR|prodlong=Management Framework|subprod=MF}} {{Template:ReadMeCombinedItem|rel=8.5|prodshort=FR|prodlong=Security Pack on UNIX|subprod=SP}}

</onlyinclude>

**9.** Create and populate the NITR page. The template spits out the wiki markup you'll need to copy to your landing page for the "What's New" section. The template filters out unreleased (or draft) *rel*New pages and/or content.

- a. Create the page in the usual way by clicking on the topic in the TOC. Again, you can modify the default H1 if you wish.
- b. Between <onlyinclude> and </onlyinclude> tags, enter the following template call:
   {{Template:NITREmbedMultiple}}

Once you have set up this page, you never need to update it, although the content the page displays (in other words, the visible markup) will update as you add new *rel*New pages.

#### Example

The following is the complete writer input for the NITR page: <onlyinclude> {{Template:NITREmbedMultiple}} </onlyinclude>

**10.** Create and populate the OtherPrep page. The template spits out the wiki markup you'll need to copy to your landing page for the "More Release Information" section.

- a. Create the page in the usual way by clicking on the topic in the TOC. Again, you can modify the default H1 if you wish.
- b. Between <onlyinclude> and </onlyinclude> tags, enter the following template call:
   {{Template:ReadMeEmbedCombined}}

Once you have set up this page, you never need to update it, although the content the page displays (in other words, the visible markup) will update if you add new <*subprod*>3rdParty pages.

#### Example

The following is the complete writer input for the OtherPrep page:

<onlyinclude> {{Template:ReadMeEmbedCombined}} </onlyinclude>

**11.** Obtain required reviews and technical and TechPubs Production approvals. Direct reviewers to your <*subprod*>ReadMeDraft pages. For the required approvals, see Readme Review Process (includes Product Alerts).

**12.** When the Readme is ready to be published, transclude the "What's New" and other Readme content onto your product landing page.

- a. Verify that all *rel*New pages to be included in the published "What's New" have [[Category:Status:Released]]. If you need to add or edit the category on any *rel*New pages, ensure that you save the pages in the correct sequence, so that the timestamp of the last edit does not interfere with the order in which the pages display in the "What's New" section.
- b. Copy the visible wiki markup from the NITR page, and paste it onto the applicable tab on your landing page. The wiki markup is divided in two:
  - The first part is the markup for the "What's New" section. Paste this markup immediately below the tab divider and above the "Release Notes" section.
  - The second part is the markup for the Product Alerts. Paste this markup in the "Release Notes" section, immediately before the last </div> in that section. The markup will include all PA pages that use the {{ProductAlert}} template.
- c. Copy the visible wiki markup from the OtherPrep page, and paste it onto your landing page immediately after the last </div> in the tab (or, if you used the Tab button in the editing ribbon to create the release section, immediately before the {{TabEnd}} line). The markup will include all 3rdParty pages that use the {{3rdParty}} template.
- d. If you are modifying a pre-redesign landing page, delete the {{Template:ReadMeSectionLink}} and {{Template:ReadMeEmbedMultiple|...}} template calls. If you use the Tab button to add a new tab in the future, similarly delete the {{Template:ReadMeSectionLink}} and {{Template:ReadMeEmbed}} template calls.
- e. Depending on when you last modified your landing page, you may need to remove links in the Helpful Links section to the old CD Readme PDF or the previous Product Alerts (formerly Release Advisory) page.
- f. Verify that the "What's New" lightbox links show up in the correct order and that content displays correctly in all the lightboxes. If your Library book content was created before the redesign, you might need to replace repository or external-widget links with straightforward external ones.

#### Example

The following sample markup is from the Management Framework (FR) landing page. Red font indicates markup copied from the NITR and OtherPrep pages in the FR Library book.

<tabber>

Release 8.5=

===What's New===

<div class="itemcontainer">

```
<div class="item"> {{#ppin:{{Documentation:FR:Library:MFReadMe:8.5Source}}|Management Framework}} </div>
```

<div class="item"> {{#ppin:{{Documentation:FR:Library:SPReadMe:8.5Source}}|Security Pack on UNIX}} </div>

</div>

===Release Notes===

<div class="itemcontainer">

<div class="item">

[[Management\_Framework\_Release\_Notes#t-0|Management Framework Release Notes 8.5.x]]

</div>

<div class="item">

[[Management\_Framework\_International\_Release\_Notes|Management Framework International Release Notes 8.5.x]]

</div>

```
<div class="item"> { { #ppin:
```

===Management Framework 8.5 Product Alerts===

```
<toggledisplay showtext="[+] Management Framework" hidetext="[-] Hide Management Framework"> {{Documentation:FR:Library:MFRA:8.5Source}}
```

```
</div>
```

</div>

••••

===More Release Information===

<div class="itemcontainer">

<div class="item">

{{#ppin:{{Documentation:System:Library:ReadMeResources:8.5Source}}|Other Genesys Resources}}

</div>

<div class="item">

{{#ppin:

===Management Framework 8.5 Legal Notices===

{{Documentation:FR:Library:MF3rdParty:8.5Source}}

{{Documentation:FR:Library:SP3rdParty:8.5Source}}

Legal Notices}

</div>

</div>

## Updating Readmes for a New Three-Digit Release

1. On the TOC of your Library book, add a *three-digit\_release*New topic for the planned release.

2. Create and populate the new *rel*New page.

The steps are the same as when you first set up the Readme, except that you must be sure not to change the [[Category:Status:Pratus:Draft]] category to [[Category:Status:Released]] at this stage.

- a. Create the page in the usual way by clicking on the topic in the TOC.
- b. With your cursor immediately below the H1, click the NR button on the editing ribbon. All the required syntax is automatically entered on the page.
- c. Complete the |Release= line by entering the new three-digit release number (for example, |Release=8.1.4).
- d. Starting in a new line immediately after the |New= line, enter your NITR content.

**3.** If necessary, draft updated third-party licensing information, product alerts, or miscellaneous information on the 3rdParty, PA, and ReadMeNotes pages.

Updating this kind of information for a three-digit release is expected to be a very unlikely occurrence. Therefore, to avoid overloading the architecture, no direct provision has been made for parallel draft and live pages. The following workaround enables you to update a live page, or create a new page, while shielding the unapproved content from public view.

- Outside the <onlyinclude> and </onlyinclude> tags, enter the new information. Because the Readme is cumulative, you must clarify release applicability within the wording—for example, "(Starting with release 8.1.10) New item" or underneath H4-level subheadings. To make the draft material very obvious, it is strongly recommended that you use the change-bar or text highlighting (Editor green) buttons to flag the text under development.
- b. Because the unapproved content is outside the <onlyinclude> tags, the unapproved content will not be visible from the ReadMe or ReadMeDraft pages. You will have to direct your reviewers to the 3rdParty or ReadMeNotes page itself.

{{NoteFormat|If yours is a multi-component product and you're adding a new Product Alert or 3rd Party page for the first time, do not use the template markup (for example, {{ProductAlert..}}) while the new page is under development and review; otherwise, the page(s) will be included prematurely in various lists. In other words, draft content for the new pages as straight text, and add the template markup and <onlyinclude> tags only when you are ready to publish.

**4.** Obtain required reviews and technical and TechPubs Production approvals. Direct reviewers to your ReadMeDraft page. If you also updated the 3rdParty or ReadMeNotes pages, direct reviewers separately to those pages as well. For the required approvals, see Readme Review Process (includes Product Alerts).

**5.** On the PA date of the release, when the release note is published, publish the "What's New" and other Readme-related updates.

- a. On the *rel*New page, change [[Category:Status:Draft]] to [[Category:Status:Released]].
- b. If you also updated the 3rdParty, PA, or ReadMeNotes pages, remove any special formatting and

then move the new content from outside the <onlyinclude> and </onlyinclude> tags to inside. For a multi-component product, if you're adding a new Product Alert or 3rd Party page for the first time, also add the required template markup, as described above.

- c. Copy the updated wiki markup from the NITR page to the "What's New" section of the landing page. If you're also adding a Product Alerts page for the first time, there will also be updated markup for the "Release Notes" section.
- d. For a multi-component product, if you're adding a new 3rd Party page for the first time, copy the updated wiki markup from the OtherPrep page to the "More Release Information" section on the landing page.

6. Verify that the "What's New" and, if applicable, "Product Alerts" and "Legal Notices" lightboxes have updated correctly.

## Updating Readmes for an Existing Three-Digit Release

The primary use case for this scenario is expected to be Continuous Delivery projects—for example, if NITR Readme updates are required for, say, releases 8.1.401, then 8.1.402, and then 8.1.410, given that there is a single *rel*New page for release 8.1.4.

To avoid overloading the architecture, no direct provision has been made for parallel draft and live *rel*New pages. Therefore, as for mid-release updates to the 3rdParty and ReadMeNotes pages, you must employ a workaround to update a live *rel*New page while shielding the unapproved content from public view.

- **1.** Draft the *rel*New page update.
- a. Between the |Release= and the |New= lines, insert a new line and type |Draft=. (**Note:** The NR button automatically inserts this line. If you left this line in when you first created the *rel*New page, you do not need to add it again.)
- b. Starting on a new line immediately below |Draft=, insert the new material. It is strongly recommended that you use the change-bar or text highlighting (Editor green) buttons to flag the text under development.

#### More information

The |*Text*= syntax acts as a kind of metadata tag that is passed as a parameter to other templates to control output. You can have more than one instance of Draft and New content on the page (for example, to interpolate new content within an existing entry), and all content will be visible if you view the page directly. However, the template that controls formatting on the ReadMeDraft page outputs only the first instance of each parameter. Also, the Draft content displays first on the ReadMeDraft page, even if you add it after the New content on the *rel*New page itself.

Please create a PUBSWIKI enhancement request in Jira if the formatting and output options that the ReadMeDraft templates provide do not meet your requirements.

**2.** If necessary, draft updated third-party licensing information or miscellaneous information on the 3rdParty and ReadMeNotes pages.

a. Outside the <onlyinclude> and </onlyinclude> tags, enter the new information. Clarify release applicability within the wording. To make the draft material very obvious, it is strongly recommended that you use the change-bar or text highlighting (Editor green) buttons to flag the text under

development.

b. Because the unapproved content is outside the <onlyinclude> tags, the unapproved content will not be visible from the ReadMe or ReadMeDraft pages. You will have to direct your reviewers to the 3rdParty or ReadMeNotes page itself.

**3.** Obtain required reviews and technical and TechPubs Production approvals. Direct reviewers to your ReadMeDraft page. If you also updated the 3rdParty or ReadMeNotes pages, direct reviewers separately to those pages as well. For the required approvals, see Readme Review Process (includes Product Alerts).

4. On the PA date of the release, when the release note is published, publish the Readme updates.

- a. On the *rel*New page, remove any special formatting from the |Draft= content and then move the content inside the |New= parameter.
- b. If you also updated the 3rdParty and ReadMeNotes pages, similarly remove any special formatting and then move the new content from outside the <onlyinclude> and </onlyinclude> tags to inside.

The live content on the landing page will update automatically as soon as you save the pages.

5. Verify that the "What's New" and, if applicable, "Product Alerts" and "Legal Notices" lightboxes have updated correctly.

## Updating Readmes for an International Release

Previously, in the "old-style" HTML world, Pubs Editors used to create separate Readmes for localized CDs in advance of the release. Now, once you have moved your Readme online in the new wiki world, you (the writer) are responsible for adding localization information to your online Readme, making the localization information public when the localized release occurs. Your English Readme has now become an **International Readme**.

For more information about the localization process, see International Online Readmes (Adding Localization Support Information in Online Readmes or, more generally, Localization. The following comments relate only to the Readme-specific parts of the process.

Follow the instructions above for creating or updating a Readme, managing draft vs. approved status as applicable. Include the following localization content:

• On the three-digit *rel*New page for the release that is being localized, add an item for "Localization support"; specify the exact seven-digit release(s) and language(s) that apply.

Example

#### New in Release 8.1.101

Some of the primary new features added in the 8.1.101 release are:

• ...

- Localization support Business Edition Premise supports the following localizations:
  - English: 8.1.101.22

- French: 8.1.101.22
- German: 8.1.101.22

```
• ...
Sample Syntax
The syntax on your re/New page to produce the above display is:
...
Release=8.1.101
New=
*...
*'''Localization support''' - Business Edition Premise supports the following localizations:
**English: 8.1.101.22
**French: 8.1.101.22
**German: 8.1.101.22
```

- \*\*Germa \*\*...
- (FUTURE ENHANCEMENT DO NOT DO UNTIL THESE INSTRUCTIONS ARE UPDATED) Add a page that summarizes localization support.

## Updating the copyright date

The copyright date (or date range) displays in the Legal Notices under the "More Release Information" heading on the landing page. How you update it differs for single-component and multicomponent products:

- **Single-component product:** Modify the |copyright parameter in the {{ReadMe}} and {{ReadMeDraft}} template calls on the ReadMe and ReadMeDraft pages, respectively.
- **Multi-component product:** Modify the |copyright parameter in the {{3rdParty}} template on the applicable <*subprod*>3rdParty page.

The copyright date is usually a range, starting with the year the product or component was first released and ending with the year of the latest release.

# Updating Published Content

### Important

This only applies to content on docs.genesys.com.

Use a draft version to create updates for content that has already been published: for example, 8.1.3 and 8.1.3Draft. The 8.1.3 version would be marked as "released" and contain published content. The 8.1.3Draft version would contain the same content, but would be marked as "unreleased" and used to edit and review any changes that need to be made. When your content in the 8.1.3Draft version is approved and ready to be published, use the branch tool to copy that new content into the 8.1.3 version – making your changes available to the public.

- Confirm the draft version exists and is up to date. (If not, create it and use the branch tool to copy your published content into that version.)
- Edit content in the draft version and send it for approval from your reviewers.
- Once approval is received, use the branch tool to move your changes from the draft version into the published version.

See The Draft Version for details on working with a DRAFT version of your document.

Schedule a Wiki IA meeting to get help with these steps.

# Updating Documents Outside of a Project Release

For any number of reasons, requests may be made to update documentation outside of a project release (after DR4 or post iteration delivery checkpoint), whether it's because a defect is found, information is missing, an enhancement is requested, or a feature is removed.

**If your document is online, you can update it at any time.** You do not need to wait until the next project or iteration. Historically, for documentation in PDF and CHM format, Tech Pubs' policy only required immediate updates associated with any critical or major defects discovered. Any other defects could be noted in a release note. Otherwise, the writer scheduled the correction of the defect in the next release of the document. The primary reason for not immediately updating PDFs and CHMs was the extensive overhead associated with those formats.

## Enhancements or Feature Changes

**Enhancements:** You may receive requests for enhancements to existing documentation. If such requests come from the customer, and if they do not require technical verification by your team, you can make them immediately. If they do require technical verification, bring them to your PCT for evaluation. If the enhancements are justifiable, it's up to you and the team to determine when to implement them based on the effort involved. Use your common sense.

**Feature Changes:** For Cloud products, features may be pulled or changed after the release which will require changes to the existing documentation. This situation is considered a blocker/critical issue as defined in the Priority Classifications Table presented below and should be addressed immediately.

## Handling Documentation Defects

- **During the Documentation Development period** (prior to release): It is expected that you will make changes as you send out versions for review, peer editing and, ultimately, sign-off. Prior to release, a document must not contain any blocker, critical, or major defects.
- Post-release:
  - For blocker, critical, or major priority defects, all documentation (online or PDF) must be updated ASAP. Do not wait until the next project release or iteration (see the Priority Classification table below).
  - For lesser priority defects (**minor, trivial**), the timing depends on who found the defect, the writer's effort, and the format of the document (online versus PDF or CHM). For example, if a customer discovered the defect, unless it requires a great amount of effort, the writer should make the change as soon as possible. However, it is important to use common sense when determining when to update.

For online documents, lean toward making updates ASAP. Minor format issues, typographical

or grammatical errors should be addressed immediately. Updates that require investigation and review by your team may take longer.

**Note:** Defects are not limited to incorrect documentation, but may also be due to information that isn't clear or information that is incomplete.

#### **Priority Classification**

Disclaimer: The definitions below were taken from process documents previously approved some years back.

<b>Priority Classification</b>	<b>Engineering Definition</b>	Technical Publications Definition
Blocker/Critical	<ul> <li>Any one of the following conditions qualifies as a blocker/ critical severity defect:</li> <li>The product comes to a hard halt and needs to be restarted</li> <li>Data is lost</li> <li>Data is erroneous</li> <li>System response degrades to the point that the system appears to be halted</li> </ul>	<ul> <li>Any one of the following conditions qualifies as a critical severity defect:</li> <li>Using the documentation: <ul> <li>Causes the product to come to a hard halt and need to be restarted</li> <li>Causes the product to lose data</li> <li>Causes the product to display erroneous data</li> <li>Results in degraded system response that makes the system appear to be unusable</li> </ul> </li> <li>Instructions in the documentation error that could cause a service outage for a customer that results in a loss in revenue.</li> <li>Omitted information that results in the customer as it is currently documentation is not supported by the product.</li> </ul>
Major	conditions qualifies as a major severity defect:	conditions qualifies as a major severity defect:

<b>Priority Classification</b>	<b>Engineering Definition</b>	Technical Publications Definition
	<ul> <li>A feature or function is not working or is not working properly.</li> <li>The product exhibits intermittent failure.</li> <li>System response degrades such that the product cannot be used as intended.</li> <li>No stable workaround is available.</li> </ul>	<ul> <li>A feature is misidentified as being available in a product release, for example Cloud, but is only available in the premise version. In this example, the writer should either move the content to an on-premises section and delete it from the cloud section, or clearly delineate that it is for on-premises customers only.</li> <li>A typographical or formatting error that is obvious to the customer and embarrassing to the company.</li> <li>Documentation is listed on the Documentation Library DVD, but the files for the documents are not included on the DVD.</li> <li>Incorrect instructions in the documentation makes certain product features unusable or negatively impact the production environment.</li> </ul>

## Customer Requests

Enhancements or corrections that come from customers (via Customer Care, Disqus, or the Technical Publications Administrator alias) should have high priority.

- For technical changes, always confer with your PCT to determine if the requested change is correct and makes sense.
- Requests to add new sections or reorganize information may require more effort and take more time. If the request makes sense to you and the team, such changes may have to be scheduled for the next release, depending on the effort involved and the product's priority.
- Your PCT (primarily someone in Development and QA) should review any changes made to technical content (as opposed to typographical, grammatical, and format corrections).

## Responding to Customers

#### Important

Be prompt, be courteous, be friendly, and take the customer's side while being respectful of Genesys. Respond **immediately** (within 24 hours) to acknowledge the comment and if it cannot be addressed immediately, inform the customer of when to expect a response.

Key to making this work well is a prompt reply to customers. We're building direct relationships with customers that we've never had before. We are also raising our value to customers and Genesys as a whole and reflecting the Genesys commitment to a great customer experience. So, it's important that our replies are responsive, professional, complete, and help resolve the customer's problem.

**Who are your customers?** Genesys' Customers, Customer Care, PS, or other folks within Genesys. Your customers might not contact you directly. For example, a customer might post a Disqus or a Fennec comment on one of your topics. Or, a customer might send a question to the Tech Pubs Administrator alias or another department alias and it ends up being directed to you. There are many ways that questions and comments might come to you, and you must be prepared to respond right away.

**Recording link about responding to customers:** This recording provides an overview about how to respond to customers, which supplements the process described in this topic.

## What do I do if someone contacts me about my docs?

Our department mandate is to respond in less than 24 hours.

However, ideally, you should respond immediately, so customers know that they have been heard and that we are working on their request.

- A good model for the timeliness of replies is:
  - If you or someone can address/fix it within a few minutes, don't reply until you do so.
  - If you or someone can address/fix it *within an hour*, respond immediately that you are working on it, then respond again when you have the answer.
  - If it takes some investigation and might require more time, reply to the customer indicating that you're investigating it and provide an estimate of when you will get back to him or her.

#### Important

- Always follow up with the customer as soon as the issue is resolved.
- Always thank the customer for taking the time to contact Genesys Information Experience (IX).
- If the change requires Development's input, work with the Developer to obtain the correct wording and, once revised, request that both Development and QA review and approve the revised text before you publish the changed content.

## What do I do if I can't answer the question?

Customers often ask questions that you can't answer by yourself. Sometimes, you might need to contact your developers. Or, you might be filling in for the product's writer when they are out of the office. If that happens, keep your response general. Something like, "Thanks for your question. We'll investigate and get back to you as soon as possible."

Avoid mentioning that someone is out of the office or giving a timeframe for the response, unless it will take a while to respond. In that case, you might want to mention a rough timeframe for when we can respond.

# What do I do if someone contacts me or IX about an issue that is not doc related?

On occasion, customers might contact us about something that is not specifically documentation related. For example, they might ask about whether a specific feature is in the product roadmap. They might also ask how to implement something specific to their environment. Or they might ask about something about which they need to contact their local administrator who set up the application.

For requests like these that you can't answer or address, follow these guidelines:

- Be as timely in your response to customers as you would if the issue was doc related.
- If the issue is associated with the product roadmap or something that the Product Manager has to answer, inform the customer accordingly and then email the Product Manager, passing them the information so that they can deal with it directly.
- If the customer asks about a feature that is not available, and there is no plan to include it in a future release, you can direct them to the Product Ideas Lab, so they can make feature requests, which is found in the Genesys Community: https://community.genesys.com/home.
- If the question comes in via an email, forward the email to the Product Manager and then let the customer know that you have directed their inquiry to the Product Manager. It's a good idea to alert the PM that this is the approach you are going to follow if those type of questions do come your way to make sure he or she is OK with it.

• If the issue concerns a problem they are experiencing with our software or a request for help configuring the software for their environment, explain to them that their type of question requires that they work with Customer Care and ask the customer to contact them.

#### Important

- When referring customers to Customer Care, do not suggest they email Customer Care. Instead, use something along the lines of the following in your replies: "See the Customer Care Contact Us (https://genesyspartner.force.com/customercare/ CustomerCareContactUs) page for details about how to contact Customer Care." That page includes a link to the Customer Care portal, contact phone numbers, and the explanation that customers should only email when requesting an update on an existing case.
- Be aware that although the person who posts a question may be an employee of the company that has a Genesys product, they may not be the designated contact to Customer Care for their company and therefore wouldn't be able to login to the Customer Care portal. When redirecting the person to Customer Care, write something along the lines of the following: "Please have your designated contact reach out to Genesys Care on your behalf."

## Do's

When you respond to a customer's inquiry, you are representing Genesys. The customer will judge the Genesys CX based on what you say and do. Here are a few suggestions for what you should DO when a customer contact is directed to you:

- Do begin replies with a thank you of some sort. It makes it a bit more personal/conversational. For example, "Thank you for raising the question," or "Thank you for letting us know about this problem."
- Do let the customer know that you will look into the situation and get back to them, even if you think they might be mistaken.
- Do be proactive by trying to solve the person's problem. If there is an issue with the documentation, fix it right away. If the issue is development related, engage the developers immediately and follow up to ensure that you get an answer.
- Do be of service to the customer by trying to do the work for them, if it's within our purview.
- Do try to locate the information if the customer is having problems finding something:
  - If it exists as an online wiki document, provide a link to that page and maybe even provide the information in the email or Disgus reply. Try to determine why they could not find it and fix the page so that the next person who searches for the term/feature/function finds it.
  - If it's in standalone document that is not in our Repository, attach the document to a separate email and provide it to the customer. If it is in Disqus or Fennec, provide the customer with your email address so that you can mail them a copy of the document. If you don't wish to post your Geneys email in Disqus, invite them to use the Tech Pubs Administrator email alias directed to you.
  - If a link is broken to a document, you can alert the associated writer. If it's an HTML RN, you can attach it to the email to provide it to the customer in the meantime. If the link is to an online

document, provide the URL to the online document to which the link goes.

## Don'ts

To ensure good CX, DON'T do these things:

- Don't just reply with the information, engage with the customer.
- Don't presume that the issue raised by the customer is a mistake. Are they misreading the document? Is the document unclear? Why has the customer identified this problem?
- Don't write things like: "I don't know what's going on." Or "You could try this or that to resolve the problem."
- Don't ignore the request.

## What do I do if the question is not Doc related?

Sometimes you might get questions that are not specific to documentation. For example:

- You might receive a question about a particular feature that they would like. Check with the Product Manager if there are any plans to introduce that feature. Suggest to the PM that she or he even respond to the customer. Do not commit to a specific release or feature, because features can be descoped or deadlines might change, and you don't want to create an expectation.
- You might receive a question about another product, even outside of Genesys, like a third party product. Check with the writer for that product, and get him or her to ask their PM how to handle it. It might require a PS involvement or Customer Care.
- Seek out the appropriate contact, and if it's an email, forward it to them, and copy the customer. And if possible, provide a little help if you can.

## Best Practices for handling Disqus comments

#### When to refer customers to Customer Care

Here are a few scenarios that warrant a referral to Customer Care. (These aren't hard and fast rules - they're simply guidelines.)

- The customer needs troubleshooting help (i.e. everything in the documentation is valid).
- The customer continues asking more questions that require significant investigation (in this case, they might need hands-on training.)
- The customer followed your directions but still can't figure it out.
- The customer is looking for an alternative to what's currently supported and tested (and documented).

- You need help from a developer but he/she is too busy to get you an answer right away.
- If the answer to a customer's question is 'no, that option is not available", you can suggest that they follow up with Customer Care to explore alternative options.
- The customer's question or comment involves the exchange of sensitive information.
- The customer advises of potential security alerts.

#### Important

When referring customers to Customer Care, do not suggest they email Customer Care. Instead, use something along the lines of the following in your replies: "See the Customer Care Contact Us (https://genesyspartner.force.com/customercare/ CustomerCareContactUs) page for details about how to contact Customer Care." That page includes a link to the Customer Care portal, contact phone numbers, and the explanation that customers should only email when requesting an update on an existing case.

#### Sample referral responses

Please contact Customer Care for help with this. "See the Customer Care Contact Us page for details about how to contact Customer Care.

Please contact your Genesys Customer Care Representative or visit our Customer Care communications portal at https://genesyspartner.force.com/customercare/GenesysCommunityLogin. See the Customer Care Contact Us page for details about how to contact Customer Care.

#### Disqus response guidelines

When you prepare a response, consider the following:

Link to the right page	The customer might ask a question on Page X but the answer is on Page Y in the manual.	Sample response from a writer: The position of the connection ports cannot be changed. You can use the Arrange and Align options from the Diagram Menu to arrange the blocks and links. Refer to https://docs.genesys.com/ Do for more information on this.
Link to the right manual	The customer might ask a question in Manual X but the answer is in Manual Y. If it's possible, link to the applicable page in that manual.	Sample response from a writer on a product other than the one mentioned in the comment: This should be set to true to receive external messages asynchronously or synchronously using the <receive> tag. For more information, please refer to the GVP VoiceXML Help (https://docs.genesys.com/Sp</receive>
Create new content if there's a need	If a customer identifies a significant gap in the documentation, consider creating new content based on that	

	feedback - for example a new article or video. Before you invest the time, talk to your manager to determine if the new content is warranted and if you have the time to invest.	
Proofread your comments!	Don't hit Send before you proofread!	
Avoid jargon, slang, emojis, etc.	Keep responses neutral and free of any jargon or slang.	For example: Yeah, Ping, Docs, etc.
Reply directly to the customer - don't start a new thread	To reply to a customer, click the Reply button directly under the customer's post. Otherwise, the customer won't be notified when you post a reply.	
Let the customer know you're investigating	If you need PCT input to answer the customer's question and you know for certain it will take a few days before you get a response, let the customer know you're investigating. If you think you'll get the response in the same day, however, it's OK to respond to the customer only when you have the answer.	Example response from a writer: We are investigating this and will respond when we have an answer. Thank you.
Avoid "the developer said"	It's not necessary to tell the customer who gave you the answer. It's OK to get straight to the answer.	Avoid "The developer said to configure the option" Write: "Configure the option"
Don't provide your contact information	Do not give your personal phone number or email address. You will undoubtedly become a technical support representative as a result.	
Be direct	Get right to the point. Avoid "You might want to consider" or "Perhaps"	Avoid: "You should consider configuring the option" Write: "Configure the option"

#### Dispositioning comments

If a Disqus comment or question required a doc update, respond to the comment as you normally would and include the following disposition code in your response: **(DOC)**.

If you believe that your response prevented the person from contacting Customer Care, resulting in a possible deflection, include the following disposition code in your response: **(DEF)** 

- Deflections can be the following:
  - Questions where the writer has to confer with the Project team, and including Product Management (for roadmap questions for example).

- Questions about the product or related that require the writer to do a little investigation and that would have required Customer Care's involvement if the writer had not handled it.
- Questions where the writer has to direct the customer to site locations, like the developer forum or community forum, to get more information.
- Questions about the product or what's supported that is already documented, but the customer is looking in the wrong location. As this could be considered a documentation issue, i.e. that the content can't be found, this type of deflection is less frequent. The associated writer should be alerted for those questions that are specific to improving the customers' ability to find content on our documentation sites.

The disposition code should be separate from the response to avoid the risk of it being interpreted as part of the response. Insert a break between your response and the disposition code.

If you respond to a customer more than once, only include this disposition code in the email that explains your action (Thanks - the page now includes X information). Do not include the code on more than one response in a single chain. This will skew the count.

#### Guidelines for deleting comments

It's OK to delete comments in some scenarios. Here are a few examples:

- The comment is vulgar
- The comment can lead to confusion for other customer. For example: Customer A asks a question. Customer B responds with the wrong instructions. You can delete Customer B's comments in this scenario to keep customers from following the wrong instructions. Instead, respond to Customer A with the correct response.
- The comment contains sensitive information (passwords, for example)
- The comment can look bad on the company (for example, the customer claims that there's a security breach, when an investigation shows that there isn't!)

#### Disgus comment examples

The following are examples of best-practice responses to queries received through the Disqus commenting feature. Review these to get a feel for how you can respond to comments.

#### Important

- If your Disqus reply includes a link, a Disqus moderator (a Tech Pubs Manager) must approve in Disqus before the comment appears on the site.
- Remember, what you write in Disqus is visible to ANYONE who visits the documentation topic, including customers, potential customers, competitors, Genesys management, and your own manager. Both you and Tech Pubs will be judge on the quality and timeliness of your response.

#### Example 1

Disqus Post:

Hello, there were 2 functions: active-recording.screen-recorder-executable and activerecording.screen-recorder-host. Tell, please, is it working in Interaction Workspace 8.1 with QM Screen Recording?

#### Genesys Reply:

Reply 1: I will contact the team responsible for this part of Interaction Workspace and get the answer for you. Reply 2: I verified with the team that this functionality is not yet available for screen recording, but this functionality is planned for an upcoming release.

#### Example 2:

#### Disqus Post:

general.configuration-update-notification The information here is a bit ambiguous. Should the spelling of 'ThisAplication' be 'ThisApplication'? I have seen a response from Tech Support where a recommended option is 'Transaction' yet on this site it is listed as 'Transactions' what is accepted by the application? What are the impacts of the various options in the csv list.. for example if I have ThisAgent enabled but not skills, what information about my own skills will be updated?

#### Genesys Reply:

Thank you for your question. For the "general.configuration-update-notification" configuration option, the values "ThisAplication" and "Transactions" are correct. The value "ThisAplication" was inadvertently coded into the Interaction Workspace application and the typo was not noticed until after the application was delivered to customers and it was too late to correct it.

Regarding your third question, when the value 'ThisAgent' is assigned to this option, all updates that are directly related to the Person object that represents the logged in agent in Management Framework are reported, including Skills. When the value 'Skills' is assigned, all modifications in the global skill set are reported (create, update, delete). If the value 'ThisAgent' is assigned, but the value'Skills' is not assigned, then a newly created skill that is added and attached to the agent will not be reported in the Team Communicator. However, it is still possible to access the new Skill programmatically from the Agent object.

#### Example 3

Disqus Post:

I love the new format for documentation. I find it easy to navigate and use. No longer, have to download documentation when new features are added or modified. Good Job!

#### Genesys Reply:

Hi Robert, thank you for your kind words. We are working every day to make the Genesys Documentation wiki better and better. Feel free to send feedback any time or share your own experiences with other Genesys users. We will be adding this commenting feature to the rest of our documents soon to enable the Genesys community to share with each other and communicate with us.

#### Customer Reply:

Please add a section regarding Corporate Address Book and deployment. Currently, I use the internal address book, created within Interaction Workspace but I would like to see some other ways incorporate existing Address Books, like from Exchange into Interaction Workspace.

#### Genesys Reply:

I will share your comment with the Interaction Workspace developers to determine if this functionality currently exists.

#### Customer Reply:

Thanks for your feedback. The feature I am referring to is option corporate-favorite file with the Team Communicator configuration of IW. More information on it can be found @ https://c.na12.visual.force.co...

#### Genesys Reply:

I am glad to see that you found the page that defines the XML format for corporate favorites (http://docs.genesys.com/Doc.... I discussed your initial question with the developer in charge of Interaction Workspace, and he said that Lightweight Directory Access Protocol (LDAP) is planned for a future release but has not yet been committed for development. Knowing that this is "on the books", I will let the Product Manager know that we have specific requests for this functionality.

Example 4: (from same customer as Example 3 but on a different page)

Disqus Post:

I should have searched first; this is a good reference to the existing functionality of the corporate favorite option/file. Curious to know if anyone is using this option(s) and your experience with it.

I would be interested in creating a procedure to convert a personal or corporate address book from exchange (or other email platforms) to this supported XML format.

#### Genesys Reply:

Good to know. We don't have specific statistics on who uses different features, but this might be something we start to track. We want to "bubble up" content that people find particularly helpful. So knowing this section is useful gives us a start with that project. Thanks.

#### Example 5:

#### Disqus Post: Includes referral to Customer Care

We have recently migrated from IW 8.1.3 to WDE 8.5.103. We have added application templates for Workspace Desktop Edition from the installation package. Following the migration, our agents are complaining that they are no longer prompted that the customer has entered a new line in the chat window (the chat window with that customer does not blink anymore in the taskbar). Is there a configuration option to set this?

First Genesys Reply: If you have not changed your configuration between 8.1 and 8.5, and you have set your chat options as described in this topic, then that sounds like a bug, but let me contact the developers to confirm. You might also wish to ask this question of your Genesys Care representative

as they often have this type of migration information on hand.

Follow up Customer Comment: Hello and thanks for the ultra fast response! Yes, we have taken care of having the same configuration set in both app templates, old and new. i thought this could be a bug since i do not find any corresponding option for this kind of alerting, not even in the old, functional template.

Second Genesys Reply: Hello Andrei, I have continued to follow up on this issue. I think that the best thing for you to do is to open a new case with Customer Care so that we can gather more information about your configuration and environment and engage in troubleshooting. Technical Publications is not equipped to handle a detailed case such as yours. Thank you again for your request.

Example 6:

Disgus Post: Includes referral to Customer Care

I am a member in ANSV partner. Besides issuse about [speechminer] post\_url i mentioned. i also found a problem on : Deploying Interaction Recording Web Services (RWS) section, gir.jar file seems is not combined correctly.

If you run this default gir.jar file, jetty log file will inform bellow error: Caused by: org.elasticsearch.index.mapper.MapperParsingException: Analyzer whitespace\_lowercase] not found for field [CR.userName]

I decode gir.jar and i found that default-mapping.json file is included gir.jar is a cause for above error.

default-mapping.json has parameter: "analyzer": "whitespace\_lowercase", i think the value : whitespace\_lowercase is not correct, it should be : "analyzer": "whitespace. I tried this solution and it susecced on my Lab.

So, Could you check with Development Team again ?

First Genesys Reply: The Genesys Interaction Recording Options Reference has been changed according to your original comment. But, you will only see the changes in a few days.

I will now contact the Development Team in regards to the problem you found in the Deploying Interaction Recording Web Services (RWS) section.

You can be confident that I am taking care of this and I will update you as soon as I have more information.

Thank you for taking the time to let us know what you found. Your input is very helpful and appreciated.

Second Genesys Reply: Hello. I have continued to follow up on this issue. I think that the best thing for you to do is to open a new case with Customer Care so that we can gather more information about your configuration and environment and engage in troubleshooting. Technical Publications is not equipped to handle a detailed case such as yours. Thank you again for your request.

## Technical Publications Administrator or Tech Pubs Wiki Examples

Often questions are directed to the Technical Publications Administrator or Wiki Administrator aliases.

Here are some examples of how to respond to issues with the documentation website.

#### Example 1

Customer Question:

Hi, I've got a Genesys account (jdomenech@plusnetsolutions.com) that worked until a couple of days ago, now it looks like the password is not correct. Could you please check this out?

#### How to Handle:

Respond to customer, asking him/her to contact Customer Care: "Thank you for contacting Genesys IX. Please see the Customer Care Contact Us (https://genesyspartner.force.com/customercare/ CustomerCareContactUs) page for details on obtaining your password."

#### Example 2

#### Customer Question:

Hi, Having problem accessing the 'Combined Log events Help' files. Raised as an Admin Service request and be re-directed to yourselves. Go to Genesys Site as follows:-http://docs.genesys.com/ Documentation/FR Select the 'Combined Log Events Help' box and get the 'Open' or 'Save' option. Whichever I select I get the same result, as demonstrated in the following screen shots: (Joe – first screen shot is of opened zip containing chms. Second screenshot was of opened chm with TOC display but no text displaying in the content pane.) Same result whatever Release I use (need 8.1) My colleagues have had the same problem as me. Please could you advise what I am doing wrong, or why it isn't working

#### Genesys Reply:

Hi, This usually results from the source files being on a non-local host. Are files themselves on the host you are personally using? This is a known Microsoft issue for .chm files, which are considered executables. Could you please copy the files to your own host and try again? It that does not solve the problem, please let us know.

#### Example 3

Customer Question:

Fyi – error on your deployment guide – 8.1 outbound deployment ASM is not answering machine mode; it is active switch matrix

Genesys Reply:

Thanks for the keen eyes. We will fix as appropriate.

Follow-up Reply by the Writer:

Thanks for drawing this to our attention. This was already fixed in the wiki version of the Deployment Guide. The PDF will no longer be updated. Kindest regards.

#### Example 4: (From Genesys employee)

#### Customer Question:

This was received in the Case Queue this afternoon: Please see the following shortcut. http://docs.genesys.com/index.php?title=Documentation:GMS:API:Welcome:8.1.1~tion=pdfbook This document is blank and we are trying to win a new logo and new customer.

#### Tech Pubs Reply:

Ann, We are currently working to resolve this issue and should resolve it soon. It's associated with the PDF generator that we use to create PDFs from wiki content. In you weren't aware, the customer can still access the content from the site: http://docs.genesys.com/Documentation/GMS/8.1.1/API/ Welcome

Follow-up Tech Pubs Reply:

Ann, We've fixed the issue for this document. The customer can now generate the PDF. We are continuing to test this PDF creation tool. If you receive any further reports for other documents with this problem, please let us know. Thanks for contacting us.

#### Example 5: (From Genesys employee)

#### Customer Question:

Hello, Let me ask you for your kind assistance. Our customer requested us to provide some marketing and technical information in concern to Genesys WFM 8.x. Earlier we used TOI (transfer of information) which completely satisfied the mentioned need. But now I cannot find this documentation. Please advise me how I could get TOI, or what can essentially substitute this. We need comparison of new features between WMF versions 7.6-8.0-8.1, like Feature and Benefit List for Genesys Workforce Management 8.0 and 8.1.1. Also it would be nice to have all any other relative documents about the products related to Genesys WFO.

#### Tech Pubs Reply:

We don't produce TOIs per se. Where did you get your earlier one? In terms of differences in features by release level, Mary can likely point you to places in the docs that list these. Also, every documentation Readme lists the new features for a given product. Have you looked at the Readmes available at http://docs.genesys.com?

#### Example 6: (From Genesys employee)

#### Employee Question:

I don't have access to download documents (PDF) from the documentation site. As an employee I have tried my corporate login details and also used my email address but apparently I am not recognised. Can this be resolved ASAP as I require access to the documents.

#### Tech Pubs Reply:

No login needed. What do you need to download from http://docs.genesys.com?

#### Example 7: (From Genesys employee)

Employee Question:

How Does PS Download the Documentation Library DVD Now?

Tech Pubs Reply:

The library DVD is still available through orderman@genesys.com. But the latest version of all content is only available via <a href="http://docs.genesys.com">http://docs.genesys.com</a>. That site includes both online content and links to the full collection of PDFs and RNs and other files.

#### Example 8: (From Support)

Support Question:

Customer reports problem on docs site. See below. Another problem with GVP 7.5 Deployment Guide. I tested it with IE8 and Firefox. Please fix.

Tech Pubs Reply to Support:

Fixed (had the wrong link there). Thanks for letting us know.

## Standard Responses

There are recurring issues on the documentation website. Here are some examples of text that you can use when responding to these situations.

#### Internal Request for SpeechMiner Access

At the request of Speech Analytics team, SpeechMiner content is stored in Alfresco, to which all employees have access: https://alfresco.genesys.com/share/page/site/customer-documentation-limited-availability/documentlibrary#filter=path%7C%2FSpeechMiner%7C&page=1

I also granted you "employee" permissions on the doc site, which should give your access to internal or restricted content for other products. You may have to log out and log back in for the access rights to take effect.

#### Unblocking CHM Files

In most cases, customers unable to view the contents of CHM files find their problem is related to some Windows security features:

- HTML-based help files (CHM) Network Limitations CHM files cannot be accessed over a network, so
  please be sure the file you are attempting to open is stored locally on your computer before trying to
  read it.
- 2. Windows File Permissions Downloaded CHM files may be blocked by default. Please right-click the file, select Properties from the context menu, and click the "Unblock" button.

For most people, these troubleshooting tips will fix the problem you describe.

If you still cannot access the file contents, please let us know and we'll look for an alternate way to get these files to you.

# Working with Disqus Comments

User comments are allowed on the Genesys Documentation site using Disqus, a third-party commenting tool. This page describes the basic responsibilities writers and managers will have related to managing and responding to comments for their content.

## Creating a Disqus Account

## Important

Disqus forums are commonly used in many websites, and it's possible you already have one or more active accounts. When responding to online comments on the Genesys Documentation site or elsewhere, please double-check to ensure you are using the correct account *before* posting to maintain a professional appearance.

#### Prerequisite: Allowing Email from Disqus

1. Log in to Okta and view your apps.



- 2. Open the Mimecast Portal v3 app.
- 3. Open the Advanced tab (displayed as an ellipsis on the left side of the page) and select the list of Permitted addresses.
- 4. Click Add Permitted to create a new exception for emails coming from Disqus.



5. Enter "disqus.com" in the Email Addresses or Domains field, then click Add and finally click Permit to allow email traffic from the Disqus domain to be received.

Add Permitted Senders and Domains	×
Permit email senders and domains by typing or pasting email addresses ar domain names into the text box below. Separate multiple entries with a spa	nd ice.
Email Addresses or Domains	Add
Permit Car	ncel

## Creating and Configuring Your Disqus Account

Sign up for a new **Disqus account** using these recommendations:

- Use your first name only, but if desired (and possible), you may include your last initial, too.
- Email should be your official Genesys email address. **Important:** If you already have a Disque account associated with your Genesys email address but with a different username, change your username to match the required format. It's a two-step change:
  - On the Account tab, specify the new username. Do not include spaces or parentheses, and use all lower case. For example, for the equivalent to Edward J (Genesys IX), specify: edwardjgenesysix
  - You will update your username in the Profile section, as per instructions in step 2, below.
- Password should be distinct from what you use for Genesys, to avoid security concerns between sites if passwords ever end up being leaked or hacked.

Yourfirstname	
firstname.lastname@gen	esys.com
I'm not a robot	reCAPTCHA Privacy - Terms

Edit your account settings:

- Account Verify your email address. This is required before you can leave comments using this account.
- Profile Change your display name to include the Genesys department you work for. The Name field should use one of two approved formats: *First name* (Genesys IX), for example: Edward (Genesys IX). Alternatively, you may include your last initial, too, provided there is enough space: *First name & last initial* (Genesys IX), for example: Edward J (Genesys IX). Keep in mind the maximum character length is **30**. For Genesys employees from other departments, for example Dev or QA, the department title changes accordingly. For our doc group, it is no longer *Technical Publications (Tech Pubs)*. The current department title is *Information Experience (IX)*. However, there are character length restrictions (30 max), so we will now use *Genesys IX* for our new department title in Disgus profile names.
- Use the current Genesys logo as your avatar, which you can download below.

Profile		
Control your profile informa across all Disqus sites. To un	tion, both what it iderstand what's	says and what other people see. User profiles are shown acceptable to display on profiles, please see these rules.
Avatar		Choose a method 🗸
	പ്	Choose a method
	Ö	Upload from computer
		Default
Name	Yourfirstname	
	If blank, your usern	ame will be shown instead. To change your username, go to Account.

- Email Notifications Disable weekly digest reports, enable emails when someone replies to you, and subscribe to discussions that you comment on.
- Opt Out of Data Sharing Disable data tracking that collects information about your browsing and shares it with Disqus partners.

The last step required to finish setting up your Disqus account for commenting is to watch for the verification email coming from Disqus and confirming your email address. Once that is done, you should be able to visit any wiki page and respond to customer comments or discussion.

#### Download Genesys Logo

Click the image to get a full-size version available for downloading:



#### Example of Name and Logo appearance

This is an example of what a Disqus signature will look like, using only the first name, including the current logo:



## Responding to User Comments

A full page on Genesys Documentation policy for responding to customers, including some standard responses and specific examples of Disqus commenting replies, is maintained separately.

## Using Disqus Moderation Tools

There is a Disqus account directed to the manager email alias, which provides email notifications when comments are made and also allows for comment moderation. It is up to the manager to review incoming email notifications for comments related to products they oversee. It is up to the designated moderator to consistently and regularly filter and distribute comments to product writers (and delete inappropriate comments) via the moderation panel. It is important that only the moderator approves/deletes comments, because this is only part of the process, and comments could get lost. If you have any questions or issues regarding Disqus, please contact the current moderator: chrissy.forrest@genesys.com.

# Working with Usabilla Feedback

## Important

Usabilla was replaced with an in house (IX created) tool called Fennec. Marudhu oversees Fennec comments and is most familiar with that tool. For information on Fennec, refer to this topic in the Minty Docs Writer's Guide.

Genesys documentation pages are powered by Usabilla for obtaining real-time feedback from users visiting our **docs.genesys.com** and **help.genesys.com** domains. This page provides an overview of the different types of Usabilla widgets we are using, how feedback is routed to the appropriate writers, and the writers' responsibilities in acting on the feedback they receive.

## Usabilla Feedback Widgets

Currently there are two types of Usabilla widgets on our documentation pages, through which feedback is obtained.

## Button Widget

n this article	
Creating a Role and lowing a Workspace rivilege and assigning a ole to an agent or agent roup	
Optimizing the Login Indow	
Provisioning Workspace or the Voice channel	
Provisioning a Hybrid pice Agent	
Enabling Workspace to ay ring tones	edbac
Declaring and using new ot-Ready Reason codes	Fe
Storing the agent profile n a controlled shared host	
Enabling Accessibility eatures	
Enabling Security eatures	
0. Creating Corporate avorites	
ack to top	
<mark>ଟ</mark> ି GENESYS <sup>™</sup>	
How would you rate this page?	
☆ ☆ ☆ ☆ ☆	
Powered by Usabilla	

 $\times$ 

Irrespective of the number of stars selected:
OLINEOTO	
How would you rate this page?	
★ ★ ★ ☆ ☆	
Why did you choose this rating?	
This page is great - it has all the information I need.	
<ul> <li>This page doesn't have the information I need.</li> </ul>	
<ul> <li>The information is wrong.</li> </ul>	
<ul> <li>This page is hard to understand.</li> </ul>	
<ul> <li>This page does not function properly.</li> </ul>	
Would you like to share anything else with us?	
If you'd like us to follow up, please provide your email.	
If you'd like us to follow up, please provide your email.	
If you'd like us to follow up, please provide your email.	
If you'd like us to follow up, please provide your email.	

# In-Page Widget



Feedback			
Did you find this page usefu			
Yes No	,		

If Yes:

Feedback	
Did you find this page useful?	
Yes No	
Great! Anything else you'd like to share with us?	
Submit	

If No:

Did you find this page useful? Yes No
Why didn't the information help you?
The information is wrong.
<ul> <li>This page is hard to understand.</li> <li>This page does not function properly.</li> </ul>
What can we do to improve this page?
If we can follow up for details, please provide your email.
Submit

# Usabilla Feedback Notification Process

Writers will receive periodic email notifications on feedback received for their pages.

### Button Widget email notification format:

Hi Santhosh,

You have got some feedback for one of your pages. A user found the following page helpful. Please see email below.

The option that the user selected was - Opt1: This page is great - it has all the information I need.

Thanks, Marudhu

> From: Usabilla <<u>no-reply@usabilla.com</u>> Reply-To: Usabilla < no-reply@usabilla.com > Date: Tuesday, 11 August 2020 at 18:13 To: Marudhu Pandian <<u>Marudhu.Pandian@genesys.com</u>> Subject: New Usabilla Live response available



### Now Usabilla Live feedback

New	Usabilia Live feedback		
0			•••
•			
	URL: https://docs.genesys.com/Docume tion/CloudDrivers	entation/GSE/8.5.4/SMSolu-	
	Platform: Android		
	Browser: Opera Mobile 50.0.2254.1491	82	
	Viewport: 360x415		
	Language: en-US		
	Custom variables:		
	Why Did You Choose T: opt1		
	Button: PE - Mobile Feedback		
	Email: abuchigodwin77@gmail.com		
View <mark>dashboa</mark>	rd with all stats		
POWERED BY USA	BILLA	Click here to change your mail notification se	ttings

### In-Page Widget email notification format:

Hi Matt,		
You have got some feedback for one of your pages. A reader found the following page useful.		
Page URL: https://docs.genesys.com/Documentation/TW/8.5.1/Help/Notepad		
		×
October 2, 2018 14:03 on page: https://docs.genesys.com/Documentation//W/8.5.1/Help/Notepad	☆ <b>③</b> ✓	
Site: docs genesys	Desktop	
Widget name: Feedback in-page	🚑 Win7	
Did_you_find_thi: Yes	Firefox 47.0	
comment: :)	🖵 1366 x 768	
	a en-US	
< Previous		Next >
Thanks, Marudhu		

#### JIRA tickets:

In addition to the email notifications, for all actionable feedback, JIRA tickets are logged and assigned to the corresponding writers.

# Writers' Responsibilities

#### For generic feedback:

In most cases where the feedback is generic, i.e. user has selected one of the given options but has not left any comment to elaborate or email address to follow-up, there isn't much the writer can do. In those instances:

- Check if any improvement is possible.
- File the notification for future reference, to help identify trends. For example, if the same page keeps receiving a negative rating, maybe there is scope for improvement even though the user has not left any specific comment. Consider reorganizing content on the page to improve readability, filling in gaps, and/or placing links to related topics.
- If an email address is available, you can email the user for more details.

### Important

Please send all email responses to Marudhu Pandian. The responses will be sent out using the **IX Feedback** group alias to avoid giving out individual email addresses.

#### For specific actionable feedback:

- Coordinate with your product team to make the necessary updates.
- If a JIRA ticket has been opened for the same, update the ticket with details on action taken.
- After analysis, if it turns out that no action is required on the writer's part, please mark as **Not a Bug** or **Will Not Fix** as is the case, when changing the status of the ticket to **Resolved**.
- If there is an email address for follow-up, send a response to the user.

### Important

Please send all email responses to Marudhu Pandian. The responses will be sent out using the **IX Feedback** group alias to avoid giving out individual email addresses.

In the event that a JIRA ticket has not been created already and you happen to create one to track an actionable item based on a Usabilla response notification email, ensure that you add the label, Usabilla, to the ticket, and attach a screenshot of the feedback from the notification email you received.

### For likes and positive ratings:

• If you receive a like, be happy and take a short break. Get yourself a treat. :)

## Important

See also, the **Responding to Customers** topic in the Writer's Guide for guidelines on drafting responses to customers.

# Usabilla FAQs

**Q**: I have received some feedback that is too generic, with no additional comments or email address for follow-up. How do I act on this?

**A**: This does happen often. In these cases, check if any improvement is possible and file the notification for future reference, to help identify trends.

**Q**: I have received some feedback with additional user comments, but no email address for follow-up or an associated Jira ticket. Should I act on this?

**A**: Yes. Please follow the same procedure you would for any actionable feedback. If the feedback is actionable, log a Jira ticket and add the 'Usabilla' label. Alternatively, you can respond to the notification email requesting for a Jira ticket. If the feedback is not actionable, please respond to the notification email confirming the same.

Q: I have received some feedback for which we already have a video that provides an answer (or) I

am planning to make a video that addresses the feedback. Should I do anything else in addition to indicate this?

**A**: Yes. Please add the label **Video** to the associated Jira ticket or please respond to the notification email providing a link to the video or stating that you will be making one.

Q: Can't the email address be made mandatory for users leaving feedback?

**A**: An essential part of the feedback mechanism is to keep open the option of submitting feedback anonymously. Making contact details mandatory might have an impact on willingness to leave feedback in the first place.

**Q**: I have received feedback on a blank/non-existent page. But I don't know how users are landing on this page. I am not sure if I have linked to this page elsewhere. What do I do?

A: If it is a blank page with just a title and was created in error, verify and delete the page.

As a best practice, always specify the reason when deleting a page. This might come in handy if you must troubleshoot again at a later point.

#### But before deleting the page:

Use the What links here Ponydocs special page to trace these dead links and update them.

You can also use the following URL to find inbound links: <a href="https://docs.genesys.com/">https://docs.genesys.com/</a> Special:SpecialDocumentLinks?t= (where <page\_name> is the complete link to the page you are troubleshooting).

If required, contact the **Tech Pubs Support** email alias for additional help.

**Q**: Why are Jira tickets being logged?

**A**: Jira tickets are being logged for actionable feedback to make it easier for tracking and obtaining metrics on these items. Also, in many instances, follow-up with the product teams is required to address the issue. Having a ticket makes it easier for writers to follow-up with their product teams.

**Q**: On analysis, a ticket assigned to me is more to do with a lack of understanding on the user's part or more to do with training. It is not a documentation actionable item. What do I do?

A: Mark the ticket as Not a Bug or Will Not Fix as appropriate and change the status of the ticket to Resolved.

Send out an appropriate response to the user if an email address has been provided.

If it is a feature request, bring it to your product team's attention.

If it is a feature request for the documentation platform, notify the **Tech Pubs Support** email alias so that the IX Dev team can add it to their backlog if required.

**Q**: I see different labels associated with these tickets. What are these for?

**A**: Labels are added to these tickets to identify that they related to Usabilla, which of those are content improvements or links/blank pages related, and if an actionable item is a result of a negative rating or a positive rating. These labels are only for obtaining monthly metrics for reporting purposes.

**Q**: What do I do if I have a generic response for which I can make a change to the page as it might help, but no Jira ticket has been logged for this?

**A**: Log a Jira ticket under your project, add the label, **Usabilla**, and attach a screenshot of the feedback from the notification email you received.

**Q**: The time taken to update the Jira ticket is less than what it took to fix the issue. Do we need a Jira ticket for this?

**A**: Yes. The few extra steps ensure we do not miss any actionable item and are able to report on the numbers every month. Also, it makes sense to have all this on Jira if the response traffic increases, as it is more efficient to track your actionable items from Jira than from your Usabilla email notifications.

**Q**: Can I send a reply to a user directly from my inbox?

**A**: Replies for Usabilla responses are sent using **IX Feedback** group alias to avoid giving out your individual email addresses. This helps ensure you don't receive support queries directly from users. Having users email you directly will add to your workload and might not be an efficient way of handling things. However, there could be exceptions and it can be decided on a case-by-case basis.

**Note**: We do provide customers with our email addresses if the questions come through the **Tech Pubs Administrator** group alias. However, as Usabilla is a bit more visible than that email alias, we use the **IX Feedback** group alias for sending out the Usabilla replies.

**Q**: Is there a time frame on sending replies to users who have left an email address for follow-up?

**A**: Yes. It is good to send out an initial acknowledgement or response within 24 hours. For easily addressable concerns, a turnaround of 5 days is acceptable. For issues that might take longer to fix, you can let them know you are looking into it and follow-up with another email once you have addressed the concern.

**Q**: Do we have any specific guidelines on drafting responses to users?

**A**: Yes. Refer to the Responding to Customers page in the Writer's Guide for guidelines on drafting responses.

# End of Life (EOL)/End of Support (EOS) Process

# End of Life and Program Management

The EOL program is managed by Fahiza Hussain in Product Operations. (Up until August 31, 2021, that person is Chris Lee in Program Management handled it.) As part of this process, Fahiza creates an EOL announcement document and sends it to all those included in the EOL - Internal Announcement email alias. The announcement indicates that the item has entered the EOL track and includes such dates as End of Maintenance and End of Support.

Just prior this announcement being sent to customers, the Fahiza adds this EOL item (for example, a product/version or a component/version) to the Genesys EOL Life Cycle Table: Genesys<sup>™</sup> Products and Components EOL Life Cycle Table. This online document was set up for Program Management at the end of 2020 for them to maintain/update.

### Important

The EOL Life Cycle Table is referenced in three locations: the Systems page (https://all.docs.genesys.com/System), the System Level Guides page (https://docs.genesys.com/Documentation/System), and the Genesys Care/Support Managing Software page (https://docs.genesys.com/Documentation/ST/current/ Premise/ManagingSoftware). If the link/reference needs to be updated, be sure to do so in these locations.

# Add Notices to product landing pages

Starting in January 2022, writers will add the notices to the landing page or revise the existing per the process described. Previously, Kate handled adding these notices.

### Suggest process for tracking, adding or revising notices

As writers take this on, go to your product doc landing pages to see if any or all versions of your product is on the end of life track. If it is, review the date that the product/version reaches end of support and add an appointment in your Outlook calendar to update the notice to reflect that the product reached end of support.

Add the notice when the product/component/version first enters the EOL track

- 1. The IX Contact, Monique, will forward you the email from the EOL Internal Announcement email alias that contains a document identifying that your product/version is entering the EOL track.
- 2. Review the document for the dates.
- 3. To the respective product landing page, add a Important note using the NoteFormat wiki coding. Use the format in this example:

Important! Genesys App Automation Platform (GAAP) 3.5 entered End of Life (EOL) on July 31, 2020. It enters End of Maintenance on December 31, 2021, and reaches End of Support on July 31, 2022. If you have questions, contact your account representative.

- 4. Comment out the text until the date that the product enters EOL is reached. (Suggestion: You might add a reminder to your Outlook calendar on the EOL date to "uncomment" it out.)
- 5. When the EOL date is reached, remove the commenting out coding so that the notice appears.
- 6. Alert the sender of the EOL Internal Announcement email that you've added the notice.

On rare occasions, you may see a Product Technical Advisory that only includes the end of support date. For example, once came in in 2021 for GCXI versions 9.0.009 and below. For that, the wording you use different wording. Use the following example as a model: "As of May 15th, 2021, Genesys is announcing the immediate End of Support of GCXI versions 9.0.009 and below. Genesys recommends current GCXI customers to update to the latest release, version 9.0.019.00. Updates are available via Software Download Center from the My Support portal.

### Revise the EOL on your product page when EOS is reached by your product

- 1. When the End of Support (EOS) date is reached, revise the notice that you previously added using the format in these examples:
  - Interaction Workspace 8.0 reached End of Support (EOS) on May 31, 2021. It previously entered End of Life (EOL) on May 31, 2019 and End of Maintenance on November 30, 2020. If you have questions, contact your account representative.
  - All versions of Genesys Express reached End of Support (EOS) on November 19, 2019. They previously entered End of Life (EOL) on November 19, 2017, and End of Maintenance on May 19, 2019. If you have questions, contact your account representative.
  - Genesys Voice Platform 7.6 and Genesys Studio 7.6 reached End of Support on May 31, 2021. They previously entered End of Life (EOL) on May 31, 2019 and End of Maintenance on November 30, 2020. If you have questions, contact your account representative.

At this point, do not remove the associated documentation. In working with Chris Doyle in Customer Care, we agreed to keep the documents available for customers on our site for at least 12 months from the date that end of support is reached.

## Remove documentation for our docs site

Per guidance from Chris Doyle in Customer Care, the documentation for products/versions that reached end of support should remain available to customers on our site for at least 12 months after the end of support date.

Before starting to remove documentation, confirm that your product/version has met the following criteria:

- Your product/component/version reached EOS.
- 12 months has passed since your product/version reached EOS.
- Ask Monique Gionet, the IX contact, to confirm with Chris Doyle, in Customer Care if it's OK to remove the documents You should also let your Product Manager know about this, as the Product Manager may be aware of a reason not to remove the content.

If these criteria are met, you can remove the content from our docs site. The process for doing so varies with the situation, as described below.

### Important

- Prior to starting to remove content, send an email to Multicloud Writers informing them that you will be removing content in case they have links to any of the content you are removing.
- Email RN Admins using the Pubs RN Admin email alias when you are preparing to remove content, as one of them will remove the RNs and related files on the Genesys Engage on-premises Release Notes pages.
- Some content may be a combination of online-content and non-online content.

### Remove non-online formatted documents

For documents that are HTML (including HTML Release Notes), PDF, Help (chm for example), and the like, do the following:

- 1. Go to the Global IX SharePoint site.
- 2. In the Documents folder, go to the Genesys Public folder and navigate to the folder in which your documents are located.
- 3. Download any associated non-online documents from Genesys Public.
- 4. Upload the same documents to the associated product folder in the EOS Docs folder in Global IX SharePoint. If the folder does not exist in the EOS Docs folder, create it using the same naming convention that exists in Genesys Public.
- 5. Delete the files from the Genesys Public folder in Global IX SharePoint that you just added to the EOS Docs folder.
- 6. Go back to your product landing pages and remove the text/sections for the documents you removed.
- 7. If your documentation included HTML files for Release Notes, Release Advisories, Wizard Advisories, or Deployment Procedures, contact email Pubs RN Admin and ask one of them to remove the coding for the associated HTML files from the Genesys Multicloud on-premises Release Notes page (https://docs.genesys.com/Documentation/RN). For releases 8.5 and earlier, those Pubs RN Admin folks will also go to the Other Resources section on the right of the RN page to get to the RAs WAs, and Deployment Procedures pages, to see if there are any HTML files for the associated product/version that reached EOS and remove them.

8. Alert someone in Pubs Editors to ask them to move the files from the Public folder in the repository (https://docs.genesys.com/Special:RepositoryUtils) to the respective folder in the endofsupport folder. Writers do not have the rights to do that. If the folder is not created in the endofsupport folder, the Pubs Editor should create it. Then, the Pubs Editor needs to Refresh the Map.

### Online documents

Remove one or more online documents for a particular version but not all documents

This process is for the scenario where one or more manuals can be removed for a particular version but other documents for the same version need to be retained.

- 1. Check to see in any other document or page links to the document you want to remove. Use the WhatLinks feature on the Special pages to determine that. If any pages link to it outside of the associated product pages, notify the writer of the page impacted to tell them that the content is being removed and that they need to remove the link.
- 2. Generate a PDF of the manual(s) that are no longer needed.
- 3. Place the PDFs in Global IX SharePoint > EOS Docs > [PRODUCT] > [version]. If the version folder doesn't exist, create it. If the folder exists, create a folder within it called Online docs.
- 4. In your manual, go to Helpful links > Manage [PRODUCT]> Versions.
- 5. Add a new version called Archive (unreleased). For example: {{#version:Archive|unreleased}}
  - If more than one version needs to be archived distinctly, create an archive version for each of them.
  - If only the latest released version needs to be archived, generate PDFs of the earlier versions for which you are not creating an online archive version.
- 6. For each manual for which you are creating an online archive, publish the entire X.X.X manual to the Archive version, per the usual process (see Publishing Content).
- 7. Manually delete all released pages for each EOS document. When you delete each page, add an explanation in the Summary field. For example: "Deleting because the page reached EOS."

This Archive approach enables us to handle a scenario if we ever need to republish the archived version so that it's available, since the coding is all there and it's a simple task or republishing.

Remove an entire version for a product

This process is for the scenario where an entire version of a product reaches EOS and the documentation the documentation removal was approved.

- 1. Check to see in any other document or page links to the documents you want to remove. Use https://docs.genesys.com/Special:WhatLinks. If any pages link to it outside of the product pages, notify the writer of the page impacted to tell them that the content is being removed and that they need to remove the link.
- 2. Generate a PDF of the manual(s) that are no longer needed.
- 3. Place the PDFs in Global IX SharePoint > EOS Docs > [PRODUCT] > [version]. If the version folder doesn't exist, create it. If the folder exists, create a folder within it called Online docs.
- 4. In your manual, go to Helpful links > Manage [PRODUCT]> Versions.
- 5. For the version that reached EOS support and can be removed, change "(released)" to "(unreleased)". If

you have a preview version for the same EOS version, change that text to unreleased too.

6. On your product landing page, with the exception of the EOL notice, remove all other text. Unless instructed by your PM, leave the version tab for a little while longer.

### When an entire product reaches EOS and can be removed

This process is for the scenario where an entire product (all versions) reaches EOS and the documentation can be removed.

- 1. Check to see in any other document or page links to the documents you want to remove. Use https://docs.genesys.com/Special:WhatLinks. If any pages link to it outside of the product pages, notify the writer of the page impacted to tell them that the content is being removed and that they need to remove the link.
- 2. Generate a PDF of the manual(s) that are no longer needed.
- 3. Place the PDFs in Global IX SharePoint > EOS Docs > [PRODUCT] > [version]. If the version folder doesn't exist, create it. If the folder exists, create a folder within it called Online docs.
- 4. In your manual, go to Helpful links > Manage [PRODUCT]> Versions.
- 5. For all versions, change "(released)" to "(unreleased)". If you have a preview versions, change that text to unreleased too.
- 6. On the product landing page, delete all content but the EOL notice that you previously revised.
- 7. Go to the following page: https://docs.genesys.com/Documentation. Remove the product name from the list.
- 8. Under Helpful links > Manage content, click **Update quick links in the header**, and remove the product name from the section in which it appears.

### Videos for products/versions that reached EOS

Videos are already stored in Vimeo, there is no need to archive them elsewhere. Forward any queries regarding videos to the IX Global Video email alias.

# End of Platform Support

When a third-party or partner platform reaches End of Support, Fahiza Hussain (or someone from Program Management) will provide an EOPS announcement.

- 1. Review the announcement to determine what products are affected. If it's unclear, check with Fahiza.
- 2. Once it's clear what products are impacted, determine where the notice should appear within the respective documentation.
- 3. The writer then adds appropriate wording to their product documentation, with a link to the announcement. For example, see the Apple Notification (deprecated as of March 31, 2021) section of https://docs.genesys.com/Documentation/GMS/8.5.2/API/PushNotificationService. The result may be that the writer will have to add a notice, with a link to the announcement on specific pages.
- 4. Separately, for a non-product specific notice:
  - An IX Manager will use standard wording on affected documentation pages, like a landing page and/

or the welcome page of a book. Although the exact wording may vary depending on the item reaching end of support, here is an example of wording:

- As of March 31, 2021, Genesys announced the End of Platform Support for Skype for Business Online. It will reach End of Platform Support on July 31, 2021. This impacts Multimedia Connector for Skype for Business 8.5 and 9.0. If you have questions, contact your account representative.
- An IX Manager adds the wording on the respective pages, but comments it out, until the date indicated in the announcement.

# (Pubs RN Admin only) Removing RNs and related files from Genesys Engage on-premises RN page

This RN page contains links to all Genesys Engage on-premises Release Notes for product/ component/versions that are still supported and/or reached end of support but have not yet been approved for removal from our site. It is laid out with tabs for each two-digit version from 9.1 down to 5.x with an Other tab that includes versions that didn't merit a tab on its own.

### Tip

Igor's Production team adds a link to this RN page in the IP Readme for on-premises customers seeking the associated RN. As on-premises customers are used to this location for Release Notes, a link was added to the Premise Edition Release Notes.

Looking at each tab, you see the following:

- The RNs are presented in columns.
- RNs are grouped under the product heading. To be consistent, even those products that only have one RN have a heading.
- You'll have two types of updates.
  - Adding a link to a new RN, with the possibility of having to add a new section. Although, this is
    probably not likely.
  - Removing a link to an RN or related HTML files, like RA, WA...
- Click Edit source to edit the page. It's all wiki markup. And if you scroll through you will see that it uses the tabber coding to create the tabs.
- At the top, you see that there's coding for an old video I created about how to navigate through these pages.
- For the wiki coding Julie set up templates looking at 9.0, see
  - <div class="three-columns-rn"> this wraps all items in this tab to fit into columns. You will note that there more than 3 columns. So, Julie must have changed the template definition after she created it. Some years back, I had to manually create the columns.

- For each section you see <div class="group-rn"> the template Julie set up for this page ====Billing Data Server==== - the section heading
  - Billing Data Server a bullet with a link to the RN, in this case it's online.
- </div> closing the div template.
- This same structure is used for all RNs.

### Adding a new RN

This should be rare but in October 2021, Joe added an Outbound Contact Server Lite RN to the Outbound Contact section under the 8.1 tab. If a new RN needs to be added, Joe suggests adding it after it's first released, as opposed to adding it before it's released and commenting it out. What you do is:

- 1. If you are adding a new RN under to an existing section, simply add a bullet to that section and the link to the RN. Place it where it would go alphabetically.
  - If it's online, use the standard link formatting for RNs on the docs site, like the BDS example.
  - If the RN is in the HTML format, get the link from the Repository tool.
- 2. Then save the page.

If you need to add a new section, say a new 9.1 product was released with one or more RNs, you add a new section, following the BDS example. You add the section where it would be alphabetically.

### Removing RNs and associated HTML files

Per the EOL process, when a product/version reaches end of support, it's more than a year past the EOS date, and Customer Care has okayed removal the content from the page, the writer follows the documented process to follow to remove the content. For this work, you need to remove the links from these pages either at the same time or after the writer has done so to the product landing page.

Do the following:

- For a particular product version, if all components for that version are passed eos, remove that section including the RNs. And save the page.
- For the tabs 9.0, 8.5, 8.1, 8.0, 7.6, 7.5, 7.2, 6.x, and Other, you will note that at the far right there is an Other Resources section. (Note: Be aware that in reviewing some of the Other Resource pages, tabber was not working correctly for Genesys Release Advisories, Wizard Advisories, and International Release Notes. As a result, Joe change the sections to level 3 headings.)
  - For 8.0 and below, before we moved RNs online, the links are to pages for Release Advisories, Wizard Advisories, Deployment Procedures, and International Release Notes.
  - From 8.1 onward, there may be links to those pages but also there are links to associated files on the RN page. Updating these pages became a lower priority. That meant the Resource section and pages were only updated if a customer complained. That never happened.
  - Looking at the pages, you will see they are also set up with tabs. Some have more tabs than others.
  - So, after you removed the section/RNs for the product, look to this section and the associated Resources pages to see if there are links to related resources there. If so, remove them too.

- Another note, about the International Release Notes page. That page is no longer updated, thankfully as it took a lot of manual work to create. However, if something reaches EOS, per what I described, you can delete the associated entries under both columns.
- When you're done, alert the writer that you have removed their files from this page.

#### Notes

- If after removing everything from a tab, there are no sections/links on the page, you can add a notice to the tab about those versions reaching EOS support. And sometime later, you can just delete that empty tab.
- Be aware of product name changes. In some cases, a product might be called something else in previous versions. For example, Pulse Advisors was the new name used for Performance Management Advisors starting in 9.0. So, previous tabs use the old name because that's what the product and IPs were called for that version.

# End of Support and SOE-type information

Until August 31, 2021, Chris Lee manages End of Support for SOE-type information. Previously, it was Sunil Shah. As such, Chris creates the associated announcements and provides them to various folks Ginger Alford (Program Manager) via the EOL - Internal Announcement email alias. From an email on 1/27/20, it seems that Chris places the announcements in Genie and My Support. Ginger, in turn, adds the links to the NewsCenter, CX Insider, and Partner Newsletter so people and presumably customers are notified.

# Next Release

## Important

This article only applies to content developed on docs.genesys.com.

After you have published a wiki document, it is probably time to start thinking about how to handle the next release.

What parts of the process worked smoothly? Which parts of the process need work? E-mail the Wiki IA group and share your feedback so we can help to improve the wiki for everyone.

To start working on the next version of your document, it is highly recommended that you work in the DRAFT version. This workflow has several advantages:

- You can selectively publish documents to a released version, without having to publish all documents at once.
- You do not need to worry about making inadvertent changes to a document that is released to customers.

Read the following pages to learn more:

- Working With The Draft Version and Updating Published Content
- Generating a Change History Page
- Receive email alerts when changes are made to a page

# The Draft Version

### Important

This article only applies to content developed on docs.genesys.com.

It is highly recommended that you work in a **DRAFT** version of your document. When ready, you can publish the **DRAFT** version to a version that is available to customers. If you did not create a **DRAFT** version yet, you can do so by following the instructions on the Versions page.

The Update Tool copies selected pages or an entire document from the source version (for instance, draft) on top of the history of the target version (for instance, the latest 8.1.3 release).

To use the Update Tool to publish the **DRAFT** version:

- 1. Ensure you are logged in to the wiki, and then navigate to **Manage Content > Update and inherit** on the left side of your screen.
- 2. The Update Tool opens. Ensure your product is selected in the **Choose a Product** drop-down menu.
- 3. Select **Update** as the default action.
- 4. Select the source version from which pages will be copied (i.e. **DRAFT**).
- 5. Select the target version to which the pages will be copied (i.e. **8.1.3**).
- 6. Click **Continue to Manuals**.
- 7. The page refreshes to show a list of manuals for your product. Select the manuals you wish to update.
- 8. Click **Continue to Topics**.
- 9. The page refreshes to show a list of topics for the manual(s) you selected. If you want to update all topics, ensure the drop-down menus below the manual name are set to **update**.

## Tip

It's easy to miss the drop-down menu to update the TOC. Ensure you set the TOC to **update** if you have new topics.

### 10. Click **Process Request**.

11. The operation can take some time. Once it is done, the tool displays a report of the update.

Once the operation is done, check that the TOC is correct. The tool could duplicate updated topics by mistake. Often, new topics are put at the end of the doc and have to be manually moved to the proper location.

# Important

- Each affected page will have an **Update** message in its History, so you can roll back changes, if desired.
- If the tool does not manage to fetch topics or manuals, refresh your browser cache, reload the special page, and retry. If the issue persists, your TOC is likely to be non-existent or incorrectly formatted. Check your TOC and retry.
- If the tool is updating a large number of pages, the operation can last a few minutes.
- If your TOC does not display properly, click **Edit** and then **Save**. This should force the TOC to update to the proper format.

# Change History Page

### Important

This article only applies to content developed on docs.genesys.com.

You can generate a Change History page for your document that will show the differences between versions.

This is useful if, for example, you recently updated your document from version 8.5.0 to version 8.5.1 and you want to show readers which sections were changed. The Change History page lists all the differences between the two versions (new/deleted/modified pages and sections).

To generate a Change History page:

- 1. Ensure you are logged in to the wiki, and navigate to the **Helpful Links** toolbox on the left side of your screen and click **Update and Inherit Special Page**.
- 2. Ensure the correct product is selected in the product drop-down menu.
- 3. Select the source version (for instance, 8.5.0).
- 4. Select the target version (for instance, 8.5.1).
- 5. Click Continue to Manuals.
- 6. Select the manuals to include in the operation.
- 7. In the Choose Default Action For Topics section, select History and then click Continue to Topics.
- 8. Choose the Generate History option for the book or some topics.
- 9. Click **Process request**.
- 10. Once the operation is done, the tool displays a report of the update and a ChangeHistory page is added to the TOC of the book.
- 11. Edit the ChangeHistory page:
  - Some links may appear broken although they are correct. Save the page to solve the issue.
  - Fix incorrect links: Some characters may break section links, due to heading formatting in the source wiki pages.

# Watch Pages

## Important

Although all.docs.genesys.com supports the ability to Watch pages, the specifics here only apply to docs.genesys.com. For all.docs,the Watch option is located within the Page Actions drop-down.

You can use the Watchlist feature to receive an email notification when a watched page is updated.

To see which pages you are watching:

• When logged in, visit this link: http://docs.genesys.com/Special:Watchlist

To change which pages you are watching:

- Use the Watch link located just to the right of the Edit and History links at the top of any page to add that single page to your list. (Note: If you are already watching a page, then this link instead offers the option to Unwatch.)
- Remove pages with this link: http://docs.genesys.com/Special:Watchlist/edit
- Edit (add and/or remove) pages in bulk using this link: http://docs.genesys.com/Special:Watchlist/raw

### Advanced

Using Option 3 is the easiest way to make bulk changes, but how can you quickly get a list of all the pages you want to add (or remove)?

Try the Export pages feature found here: http://docs.genesys.com/Special:Export. Use the version category found at the bottom of a wiki page (for example, release 8.1.2 of Platform SDK uses this category: [[V:PSDK:8.1.2]]) to generate a list of related pages. You don't actually need to export anything - just copy and paste the generated list into your text editor and/or a spreadsheet program for sorting. This allows you to quickly compare the results against your list of currently watched pages and make the required changes.

# Troubleshooting

## Important

This article only applies to content developed on docs.genesys.com.

The following pages provide troubleshooting tips and list Known Issues. When in doubt, email the Wiki Admin group for help.

# To Search on Templates

- 1. Go to http://docs.genesys.com/Special:Contributions
- 2. Type in your user name, and under the Namespace dropdown, choose "Template"

# Recovering a Lost Page

## Important

This article likely only applies to content developed on docs.genesys.com. Reach out to IX Developers using the IX Support email alias to find out if this applies to all.docs.genesys.com too.

You're busy, it's late, and the unthinkable has happened - you've lost the contents of an entire wiki page to the ether.

Usually, this is due to the Ponydocs-specific category tag (i.e. Category:V:GA:8.1.3) being inadvertently removed from the page.

Fear not! Use one of the two methods below to recover your page and get back to work.

# Option 1: Page History

- 1. In your browser, go to the page that is missing content.
- 2. Click the History button at the top of the wiki page.
- 3. A new page shows the revision history for this page. Each line entry is a different revision instance and shows who made the change, and when. You can use the radio button toggles to compare changes between pages. To open a revision instance and review the page as it existed at that time, click the timestamp. Usually, you are looking for a time BEFORE the problem occurred.
- 4. Do one of the following:
  - If you open the page and see the missing content, click the wiki Edit button. This will open the wiki markup for this page. Review the content, and click the wiki Save button. This will commit the changes to the latest version of the page.
  - If you open the page and do not see the missing content, try returning to the revision history list and selecting another timestamp. If you still cannot find your missing content, proceed to Option 2 below.

# Option 2: User Contributions

- 1. In your browser, open any wiki page on the Genesys Documentation website. Ensure you are logged in to the wiki before proceeding.
- Click the my contributions link in the top right corner. (Note: For Wiki admins, you can access user contribution pages through a special page - http://docs.genesys.com/Special:Contributions. Just provide the user name in the form.)

- 3. The User Contributions page lists all of the changes you have made on the wiki. Each line item represents a change to a page, and includes information on when the change was made, and to which page. Scan through the list to identify the time and page. Usually, you are looking for a timestamp BEFORE the problem occurred. Once you have found the appropriate line, click the hist link to open the page history.
- 4. For those who followed Option 1, you are now looking at the history for this page. However, there may be more line items here than what you saw using the method in Option 1. The process is the same as Option 1. Identify a timestamp before the problem occurred and click the timestamp to open the page. If this page has the missing content, click the wiki Edit button. Review the wiki markup, and then click the wiki Save button to commit the changes to the latest version of this page.

If you are still having trouble, email the Technical Publications Wiki Admin group for help.

# Where are my updates?!

## Important

This approach can likely be followed for content on all.docs.genesys.com. Given it a try and if your issue doesn't resolve, contact IX Support.

Wiki updates, especially graphics updates, sometimes don't show up as you'd expect them to.

What to do? Try these in order:

- 1. Hit ctrl-F5 to trigger a hard page refresh. To check a link that's not resolving properly, click the link while holding down the shift key.
- 2. In Chrome, open the page in an Incognito window (Chrome sometimes ignores page refreshes). If the page renders properly, the problem is merely cache-related, so #4 should take care of it.
- 3. Wait an hour or so. Databases have off days too. Feeling impatient? You can purge the MediaWiki server cache by selecting the page History tab, then replacing "history" in the URL with "purge". The page asks if you want to purge the page cache. You say OK.
- 4. Empty your browser cache and restart your browser.
- 5. If all else fails, drop a note to Technical Publications Wiki Admins.

# Performance problems

## Important

This only applies to content on docs.genesys.com.

If you are experiencing performance problems (speed or access) with the wiki, see Jira issue PUBSWIKI-280 to see if anyone else is currently experiencing the same problem and to record your problem to alert the wiki admins.

Use the short template provided in the description field – you can copy, paste, and then update your comment with details about the problem you are experiencing.

Getting this information documented consistently in Jira is the best way that you can help the wiki team to learn about what's happening and to provide a better platform for you to work with.

# Known Issues

## Important

The scenarios and workaround in this article likely only apply to content developed on docs.genesys.com.

This page lists common Known Issues with the Genesys Documentation website. If you do not see your issue listed here, email the Technical Publications Wiki Admin group for help.

### 10/18/13

### ISSUE

Sometimes a special character on a wiki page will not display properly in a generated PDF. The generated PDF shows a question mark (?) in place of the character.

### WORKAROUND

Use the character's HTML code to ensure the character is displayed properly on the wiki and in the PDF. See here for a list of HTML codes: HTML Codes.

### 10/11/13

### ISSUE

Sometimes the text of a note will not display properly due to symbols or special characters in the note text. For example, the note will not display if you were to use the following text:

"This note will not display because of =."

Important
{{{1}}}

### WORKAROUND

Review the note text and identify any symbols or special characters, and then try replacing the symbol/character with the equivalent HTML code. For example:

=

Should be ...

=

The note should now display properly, as seen below:

## Important

This note will not display because of =.

### 9/3/13

ISSUE

When you save edits to a page, you are redirected to http://docs.genesys.com/Documentation.

There are three scenarios that can cause this to happen:

- 1. Your page name is too long.
- 2. The category on your page doesn't match the name of your page.
- 3. You edit a page in one browser tab and then navigate to a different product/version in another browser tab. Ponydocs tracks the product/version you're viewing using session, so when you try to save your edits in your original tab, ponydocs thinks you have a different product/version selected.

### RECOMMENDATION

- Confirm that your page name is not too long. To do this, edit your page and look at the URL. It should follow this format: http://docs.genesys.com/index.php?title= Documentation:<product\_shortname>:<manual\_shortname>:<page\_name>:<version>~tion=edit If your page name is too long, your version, or even part of your page name, will be cut off. For example, the version in this URL should be 8.5.0 but only 8. is visible: http://docs.genesys.com/index.php?title= Documentation:HTCC:IWWDep:EnablingInternalAndExternalCommunications:8.~tion=edit
- 2. Confirm the category on your page matches the category in the URL. To do this, edit your page and look at the URL. The version in your URL should be the same as the version category on your page. If it is not, contact the Technical Publications Wiki Admin group for help.
- 3. Close the other tabs in your browser window and try again.

### 6/13/13

ISSUE

Branch and Inherit special page: Cannot switch to a different product.

After you select a different product from the Choose a Product menu, the version menus don't refresh, effectively inactivating the ability to switch products. Refreshing the browser page doesn't help.

### RECOMMENDATION

Before opening the Branch and Inherit special page, navigate to the branch page from within the product you want to branch.

### 5/2/13

ISSUE

Long link display names may not resolve correctly. For example:

[[Contact\_Record#Finding\_Contacts|Manage or call contacts by using contact actions]]

### RECOMMENDATION

Shorten the link display name until the link resolves correctly. Sometimes, it is possible to change the link display name back to the original version, once the link resolves correctly.

[[Contact\_Record#Finding\_Contacts|Manage or call contacts]]

5/2/13

ISSUE

Using an internal link and an in-line graphic on the same line can break the graphic link. For example:

'''Note''': You choose to change the transfer to a conference by clicking the '''Instant Conference''' button ([[File:IW\_Instant\_Voice\_Conference\_Icon.gif]]), selecting the consultation target from the Team Communicator, and clicking '''Instant Voice Conference'''. Refer to [[Voice\_Consult#Completing\_the\_Conference|Completing the Conference]].

### RECOMMENDATION

Separate the elements with one hard return.

'''Note''': You choose to change the transfer to a conference by clicking the '''Instant Conference''' button ([[File:IW\_Instant\_Voice\_Conference\_Icon.gif]]), selecting the consultation target from the Team Communicator, and clicking '''Instant Voice Conference'''. Refer to [[Voice\_Consult#Completing\_the\_Conference|Completing the Conference]].

### 1/8/13

ISSUE

Failure to use the pipe character ( | ) inside a link code can sometimes cause this link and surrounding links to fail. For example: [[Link]].

### RECOMMENDATION

Always use the | character, even if the link name and display name will be the same. For example:

[[Link|Link]].

### 11/19/12

ISSUE

Switching between the Wiki editor and the Rich Text Editor can sometimes cause unwanted HTML characters to be inserted into the page. These characters may prevent Ponydocs from recognizing the category information on the page, which then removes the page from your TOC.

### RECOMMENDATION

Avoid using the Rich Text Editor. If you must use the Rich Text Editor, do not switch back and forth between the Rich Text Editor and the Wiki editor. See Recovering a Lost Page for instructions on how to recover a page.

# Docs Platform Release Note

### Important

This only applies to docs.genesys.com.

# Current Releases

### Release 3.1.2

Link to JIRA Release: Version 3.1.2 Release date: 08/03/2017

- PUBSWIKI-1453 HelpLink error for some Closed content
- PUBSWIKI-1449 [AI] Forcing favicon update
- PUBSWIKI-1450 Bing indexing for wiki content

### Release 3.1.1

Link to JIRA Release: Version 3.1.1 Release date: 07/21/2017

- PUBSWIKI-1231 [AI] Typing in the input field when a search came up empty should not update the text
- PUBSWIKI-1288 [AI] Quick Links Menu format
- PUBSWIKI-1346 [CNTX HLP] Fix drag'n'drop row order
- PUBSWIKI-1366 [AI][CNTX HLP] Add logger feature
- PUBSWIKI-1368 [CNTX HLP] Add ContextualHelpPreview user right
- PUBSWIKI-1394 [CNTX HLP] Scroll to no working
- PUBSWIKI-1400 [CNTX HLP] Update ark-contextual-help library
- PUBSWIKI-1431 Search App: Match latest changes to wiki front page
- PUBSWIKI-1436 Implement site map for external search application search as Google
- PUBSWIKI-1437 Spacing issue with magnific popup (x shows under header in smaller aspect ratios)
- PUBSWIKI-1445 search application bugs

### Release 3.1.0

Link to JIRA Release: [1] Release date: 07/10/2017

- PUBSWIKI-1340 Help widget. Prevent widget position to negative position
- PUBSWIKI-1347 Help widget. Add widget height/width parameters
- PUBSWIKI-1347 Help widget. Widget size: Angular version
- PUBSWIKI-1347 Help widget. Widget size: launcher version
- PUBSWIKI-1351 Help widget. Add url backend API parameter
- PUBSWIKI-1353 Help widget. Prevent widget to be hidden
- PUBSWIKI-1396 Fixes for restricted Release Notes, RN TOI, Sort Known Issues
- PUBSWIKI-1417 Rebranded skin.
- PUBSWIKI-1419 Support for restricted and closed type versions
- PUBSWIKI-1422 Closed extensions: add Special:Closed and update Special:HelpLink
- PUBSWIKI-1424 Fix for broken update panel.
- PUBSWIKI-1427 Implement Structured data for Google indexing
- PUBSWIKI-1432 Indented H1s with long breadcrumbs.
- PUBSWIKI-1432 Add toolbar button for Vimeo widget.

### Release 3.0.18

Link to JIRA Release: Version 3.0.18 Release date: 05/18/2017

- PDF Improvements (titles on single page PDFs display correctly, missing images in localized PDFs are fixed, PDF of SMI guide now shows all columns).
- Site Commenting (Disqus is enabled. Thanks for all your support getting this important communication tool working! Comments so far have been handled very nicely.)
- CSS corrections (spacing in and after ordered and unordered lists is fixed, lists in light boxes (particularly the What's New light boxes) are now fixed).

### Release 3.0.17

Link to JIRA Release: Version 3.0.17 Release date: 03/24/2017

- **Site speed improvements**. We are starting to make changes to speed up the site. Initial changes should result in a 2 second reduction in page loading time across the site. Average page loading time under normal conditions reduced from 6 second average to 4 seconds.
- **PDF caching**. PDFs are now cached on generation. For faster downloads, customers will be served the cached PDF only until writers re-save any page in their books. To support this new feature, writers are asked to click the "Refresh PDF" link (available under the Helpful Links widget) as part of the process for releasing new content. This Refresh PDF action clears the old cached PDF from the server, and

creates a fresh PDF for customers to download.

- More PDF Improvements:
  - Ability to suppress online elements from showing up in the PDF. (PUBSWIKI-1313) Note: If you have artificats in PDFs that need to be removed, email the support alias with your request.
  - Long vertical images automatically reduce to fit the page (PUBSWIKI-1329
  - Automatic Table of Contents added for single-page PDF creation.
  - Bug that caused missing words in links is now fixed. (PUBSWIKI-1282)
- Updates to Validation tool. Many updates to the tool, including the ability to toggle results based on different criteria (if you only want to see certain categories of error, you can). Of special note: there is now support for lexicon checks of content. We can use a wiki page to store preferred terminology versus outdated terminology, and the tool will return those preferences during the validation, letting you automatically make appropriate fixes. (PUBSWIKI-1272)
- Updates to Review Manager tool. Many updates to the tool, including a new button to open review comments for the page (button appears above the H1 for the page).(PUBSWIKI-1263)
- Updates to RN automation to support 9.0. (PUBSWIKI-786)
- **Garbled text fix**. Garbled text that appeared in localized toggledisplay headings, in some languages, on certain browsers, is now fixed. (PUBSWIKI-1338)
- Spacing issue. A long-standing spacing issue that sometimes occured after lists is now fixed. You can remove your <br/> workarounds. (PUBSWIKI-1306)
   Note: This kind of global style change may introduce unintended consequences. If you notice spacing issues, please send a report to the support alias.
- Lightbox limitation lifted. A limitation where lightbox links (Option, Glossary, and Stat Server Metrics) in ordered or unordered lists had to be formatted in html is now lifted. You can now use regular wiki markup for these lightbox link templates.

### Release 3.0.16

Link to JIRA Release: Version 3.0.16 Release date: 01/13/2017

- **PDF Improvements** Scaling enabled for tables and code snippets. (PUBSWIKI-1314)
- LinkTarget extension External links now use the LinkTarget extension to open links in external tabs, and the extension has been updated to work with Special Pages. (PUBSWIKI-1303, PUBSWIKI-1312)
- **Rating Widget** A link to the rating widget is now included in the right-hand TOC for every page. (PUBSWIKI-1310)
- Skin Improvements Spacing around images has been improved. (PUBSWIKI-1306)

### Release 3.0.14

Link to JIRA Release: Version 3.0.14 Release date: 09/22/2016

### • PDF Improvements

• Improved Speed - A new PDF file is only generated if wiki content has been updated since the last

file was created. (PUBSWIKI-1226)

- Character Encoding Server updates have fixed character encoding issues for PDF generation, increasing support for localized PDFs. Exception: Korean PDF generation is still not supported. (PUBSWIKI-1213)
- Wide Table Support Wide tables can now be displayed in landscape mode by adding a .pdf-tablelandscape class to the wikitext. (PUBSWIKI-521)
- Headings for Long Table Tables that break across multiple pages now have the heading repeat on each page. (PUBSWIKI-522)
- Support for RTL Languages PDF generation now includes RTL support for localized content. (PUBSWIKI-1217)
- Language Code Settings Localized wikis now have improved awareness about the language they are using. (PUBSWIKI-1216)
- Localized Images Images in localized PDF files now appear correctly. (PUBSWIKI-1245)
- Review Manager Tool The comments panel now appears correctly. (PUBSWIKI-1176)
- HowIsThisUsed Template This template has been updated to be aware of version status (only appearing on unreleased content) and to use a simplified style. (PUBSWIKI-1136)
- Semantic Forms Update We are now using the latest version of the Symantic Forms extension. (PUBSWIKI-1122)
- Customer Care Links Fixed Links at the bottom of wiki pages have been corrected. (PUBSWIKI-1233)
- (Beta Feature) Single Page PDF You can now manually generate a PDF from an individual page inside your manual, instead of for the entire manual. (PUBSWIKI-1174) Note: This feature does not yet include the other PDF fixes from this release, and should be used sparingly. Contact Tech Pubs Support if you need details on how to generate single page PDFs.
- Search Application
  - Icon Updated The icon used by the search application web page now matches that of docs.genesys.com. (PUBSWIKI-1212)
  - Improved Build Process Improvements have been made to the build process for our Search Application. (PUBSWIKI-1219)
- Marketo Tracking Added Marketo tracking JavaScript. (PUBSWIKI-1246)

### Release 3.0.13

Link to JIRA Release: Version 3.0.13 Release date: 08/19/2016

#### RN Improvements

- Update Release Number and/or Date You can now easily update the release number and/or date of a specific Release Note version. (PUBSWIKI-547)
- Support has been added for multi-component RNs. (PUBSWIKI-1192)
- Search Improvements
  - Quick links to product pages now work correctly. (PUBSWIKI-1200)

- Search facets can now be sorted. (PUBSWIKI-1052, PUBSWIKI-1115)
- URL now includes search criteria as parameters. (PUBSWIKI-1152, PUBSWIKI-1049)
- The default page for Search now displays correctly. Previously, the Contact page was showed instead. (PUBSWIKI-1208)
- Validation Tool Supports Re-Validation A new "Validate Again" button has been added to the validation tool, allowing you to easily refresh the results. (PUBSWIKI-1191)

Release 3.0.12

Link to JIRA Release: Version 3.0.12 Release date: 07/22/2016

- Validation Tool Fixes Multiple fixes and improvements have been made to the validation tool. (PUBSWIKI-1179)
  - Improved testing for broken external URLs
  - ExtWidget links checked to see if they should be replaced by internal links, or if they create broken URLs
  - Div tags used to create anchors no longer reported as a problem
  - CSS has been upgraded
  - HTML formatting issues were disabled
- **CSS Improvements** Images are no longer cut off or extend past the width of the page, and images with frames or captions display properly. (PUBSWIKI-1100)
- **Support for Large Images** Images up to 10 MB in size can now be uploaded to the Genesys Documentation website.

### Release 3.0.11

Link to JIRA Release: Version 3.0.11 Release date: 07/08/2016

- (Beta Feature) User-Driven Page Rating System Users can now rate pages using a 5-star system to indicate if they find the content useful. (PUBSWIKI-1178)
- Search Indexing Corrections Pagination parameters no longer cause errors when exporting content to be indexed for the search application. (PUBSWIKI-1180)
- TOC Formatting The Special:TOCList page now displays content correctly. (PUBSWIKI-1177)
- **Support for SOE Redesign** Changes were made to support an ongoing redesign for SOE content. (PUBSWIKI-1164)
- CSS Improvements
  - Minor issues with the right-side TOC and appearance of scrollbars have been fixed. (PUBSWIKI-1163)
  - CSS related to BEC contextual headers were cleaned up. (PUBSWIKI-1134)
- Validation Tool Access Access to the validation tool has been made more convenient, with a link now available from the Manage Content section of the Helpful Links section.

- Search Appearance The search application now looks and feels like the main site redesign, both for the home page and search result pages. (PUBSWIKI-1113)
- **RN Generation: Updated Translation Support Templates** Translation Support templates in Release Notes have been updated and improved. (PUBSWIKI-1141)

### Release 3.0.10

Link to JIRA Release: Version 3.0.10 Release date: 06/24/2016

- (Beta Feature) Commenting Enabled Users can now leave comments directly on a page without using the edit button, and use comment management tools to help locate and deal with outstanding comments in their content. (PUBSWIKI-697)
- Lightbox CSS Fixed in Help Skin CSS for lightbox content is now being pulled from the correct source when the *useskin=help* URL parameter is used. (PUBSWIKI-1144)

### Important

This release include beta features, which are only available to uses who are part of the beta testing group. Contact the *TechPubs Support* email alias for requests to add usernames (for you or your team) to the list of beta testers.

# Archived Release Notes

### Release 3.0.9

Link to JIRA Release: Version 3.0.9 Release date: 06/13/2016

## [+] Show Details

- Lightbox fix Glossary links (glossaryterm) and configuration option links (optionslink) now open in a lightbox again. The underlying extension (PrettyPhoto) is changed to use the new Magnific Popup instead of an outdated lightbox extension. If you have other kinds of content that you would like to use in a lightbox popup, please content Tech Pubs Support alias, and we'll work to provide a new template for your use case. (PUBSWIKI-1045)
- Back to Top Linking The anchored table of contents (right-side TOC) for each page now includes a
  persistent "back to top" link. If you have manually inserted back to top links on your pages, you can
  now remove those from your content. (PUBSWIKI-1093)
- Scrollbars for Full Screen Tables Large tables that cannot be displayed completely in fullscreen lightbox view now include scrollbars at both the top and bottom. (PUBSWIKI-1095)
- Icon-Style Links New icon-style links were requested for BEC training, leading to creation of the Icon\_Buttons template. Example available here. If you are working on training pages, or want to use
these icons in some way in your own content, contact Joe McMonagle or the Tech Pubs Support alias. We will work with you to clarify the use case and standardize a template for you. (PUBSWIKI-1119)

• **Optional Page Navigation for Manuals** - When defining a manual, you can now add the optional "pagination" parameter to force links to the next and previous topics to appear at the bottom of each page.

Sample syntax: \*{{#manual:Dep|My Deployment Guide|pagination}}

#### (PUBSWIKI-1123)

- **TOC Automatically Opens Sub-Topics** When viewing a chapter page, the left-hand TOC now expands automatically to display related sub-topics. (PUBSWIKI-1131)
- **ToggleDisplay Fix for Localization** Use of apostrophes in the display text for ToggleDisplay content (a common occurrence for translated content) is now supported. (PUBSWIKI-1138)
- **PDF Icons** Wiki links that end with a ".pdf" extension now display a PDF icon following the link. (PUBSWIKI-924)
- **Default PonyDocs Product Definitions** Defining default PonyDocs products can now be done independently for each sub-wiki. Previously, if the pre-defined default product did not exist in a subwiki then the main landing page would not load. (PUBSWIKI-1127)
- **Cargo Extension** The latest version of the Cargo extension is now available on the main (docs.genesys.com) wiki. (PUBSWIKI-1074)

Release 3.0.8

Link to JIRA Release: Version 3.0.8 Release date: 05/31/2016

# [+] Show Details

- **Quick Links Behavior** The quick links dropdown now requires a click (instead of a hover) to show the list of available products. (PUBSWIKI-1110)
- **Removing Table Classes** The edit toolbar no longer includes a class when adding tables to wikitext. (PUBSWIKI-1108)
- External Links for Contextual Help Widget added to allow external links for help content. (PUBSWIKI-1103)
- Skin Updates Landing pages for sub-wikis no longer apply Cloud/Premise formatting that was only intended for main wiki. (PUBSWIKI-1106)
- **Knowledge Center Integration Updated** CSS has been updated to better match the site design. (PUBSWIKI-x)
- Development Improvements Improved regression testing process to be automated based on "QA" tagging. (PUBSWIKI-952)

Release 3.0.7

Link to JIRA Release: Version 3.0.7 Release date: 05/02/2016

<toggledisplay linkstyle font-size:larger showtext="[+] Show Details" hidetext="[-] Hide Details">

- **XML Upload** The Special:Upload page now correctly handles XML files with pages from the Template namespace. Previously, the upload would fail for users who were not part of the ContentManagement group. (PUBSWIKI-1079)
- Skin Design The look and feel of docs.genesys.com has been redesigned. (PUBSWIKI-764)
- Genesys Knowledge Center Integration A new widget and special page have been added to allow access to an internal Genesys Knowledge Center server populated with FAQ content for select products. (PUBSWIKI-1082)

Release 3.0.6

Link to JIRA Release: Version 3.0.6 Release date: 04/06/2016

# [+] Show Details

- Genesys Knowledge Center (GKC) Integration A new widget has been added to support Genesys Knowledge Center integration. (PUBSWIKI-1071)
- **Help Skin Localization** Static English content removed from Help skin for contextual help access. (PUBSWIKI-1070)
- Automated Testing Updated the version of Chrome being used for testing. (PUBSWIKI-1057)
- DPL Limitations DPL configuration has been updated to remove a limitation on the number of results returned. (PUBSWIKI-1077)
- Antidot Search
  - Fixed a bug related to incorrect case for version parameters. (PUBSWIKI-1055)
  - Spell-check is now enabled even when results are returned. (PUBSWIKI-1033)
  - Search facets are no longer shown when a search query does not return any results. (PUBSWIKI-1032)
  - When passing parameters via URL, duplicate results (for different versions) are no longer shown and unreleased content cannot be viewed by users who are not logged in. (PUBSWIKI-1066)

# Release 3.0.5

Link to JIRA Release: Version 3.0.5 Release date: 03/11/2016

- **MediaWiki TOC Generation** The automated table of contents that MediaWiki generates at the top of pages, listing headers within the page, now displays the first heading correctly when viewing pages that are not inside PonyDocs content. Previously the first heading was skipped on non-PonyDocs pages. (PUBSWIKI-1050)
- **Improved Indexing for Search** Content indexing for search has been improved to provide better coverage for stand-alone wiki pages. (PUBSWIKI-1047)
- Automated RN Generation A correction was made to Apache configuration to support RNs being generated from JIRA.

Release 3.0.4

Link to JIRA Release: Version 3.0.4 Release date: 03/04/2016

# [+] Show Details

- **Protected Namespaces** Editing rights to the Template, Form, and Widget namespaces has been restricted to the Content Management user group. (PUBSWIKI-965)
- Bug Fixes
  - Wiki Page Creation Creating a new wiki page from the table of contents now includes a sample heading and the PonyDocs version category on the page. (PUBSWIKI-958)
  - Validation Tool Link checking in the validation tool has been improved. (PUBSWIKI-961)
  - **RN Generation** Creating RNs for new version families (such as 8.5.x) now updates both the overview page and table of contents correctly. (PUBSWIKI-1021)
  - (Admin) Wiki Maintenance Scripts Restored Wiki maintenance scripts now work correctly. Default behavior is to apply results to the main wiki database; see JIRA ticket for instruction on how to apply to sub-wikis. (PUBSWIKI-1037)
- Localization Fixes The German draft wiki now points to the correct database, and the (unused) second draft wiki is no longer accessible. (PUBSWIKI-1038)
- Server Updates Changes made to Apache configuration to support ongoing updates and development. (PUBSWIKI-974)

**Note:** Going to https://docs.genesys.com/Home will no longer bypass our security checks. Access to the wiki will require users to be on the Genesys network (in office or via VPN) or to link into the site from supported external locations, such as Customer Care.

# Release 3.0.3

Link to JIRA Release: Version 3.0.3 Release date: 02/26/2016

- Image Re-sizing for Cloud Content Images are now resized correctly when included in Cloudrelated templates. (PUBSWIKI-597)
- Search Improvements
  - You can now navigate suggested search terms using arrow keys. (PUBSWIKI-729)
  - If an error occurs during search a pop-up message appears allowing you to report the problem via email. (PUBSWIKI-853)
- Semantic Forms Extension Semantic forms can now be used to help simplify writer process. (PUBSWIKI-932)
- Update and Purge Special Page Improvements Improvements have been made to increase stability and ensure the dropdown to select default page behavior (update/ignore) is working correctly. (PUBSWIKI-847, PUBSWIKI-938)

- **Disabled MediaWiki Auto-complete for Search Field** The auto-complete feature for the search field from wiki pages has been turned off. Previously, the search box would display results for actual MediaWiki page names, regardless of whether those pages were released. (PUBSWIKI-972)
- Writer Resource Wiki Graphics Restored Graphics for the Writer's Guide have been restored after being lost during the system upgrade. (PUBSWIKI-1023)
- Development Improvements Improvements have been made to the development and testing platforms. (PUBSWIKI-973, PUBSWIKI-852)

Release 3.0.2

Link to JIRA Release: Version 3.0.2 Release date: 02/12/2016

# [+] Show Details

- New Design for Wiki Entry Points Entry points for Cloud content, Premise content, and our main wiki have been redesigned based on the upcoming wiki skin revamp. (PUBSWIKI-767, PUBSWIKI-769, PUBSWIKI-964, PUBSWIKI-966, PUBSWIKI-967, PUBSWIKI-968, PUBSWIKI-969, PUBSWIKI-970, PUBSWIKI-971)
- Search Application Encoding has been updated so that our Antidot search application works in all regions. (PUBSWIKI-828)
- Linking Issues Fixed Links with special characters in the display text (primarily localizated content) and links to product landing pages now work correctly. (PUBSWIKI-977, PUBSWIKI-1011)
- Localization Improvements
  - AutoAnchor Extension The missing Autoanchor extension has been added, ensureing that links to headers in localized content now work correctly. (PUBSWIKI-976)
  - Cloud Content Display Display for Cloud content in localized wikis now works the same as in the main wiki. (PUBSWIKI-949)
  - PonyDocsExport Tool Access to the PonyDocsExport special page (used primarily by localization team) has fixed. (PUBSWIKI-978)
- **Save and Continue** The Save and Continue feature now works correctly; previously, unwanted headers could be appended to the end of a page. (PUBSWIKI-955)
- Update Tab The Update tab now displays a hand icon on mouse-over. (PUBSWIKI-934)
- **PDF Export for SOE** Content errors on SOE wiki pages have been fixed to restore PDF export capability. (PUBSWIKI-986)
- Sub-wiki Architecture Overhaul All sub-wiki now share a common code base. (PUBSWIKI-907, PUBSWIKI-911)

Exceptions: MoreDocs and Closed wikis are still outside of this architecture. We expect Closed to be shut down, and MoreDocs to be brought in line with new architecture or shut down after content is migrated to main wiki.

- Server Updates A number of fixes and improvements have been made behind the scenes to improve our server. (PUBSWIKI-914, PUBSWIKI-881)
- Development Improvements Development VMs have been updated with improved tools to support our latest updates. (PUBSWIKI-960, PUBSWIKI-1012)
- **Regression Testing** Improvements have been made to our regression testing process and platform.

(PUBSWIKI-908, PUBSWIKI-963, PUBSWIKI-987, PUBSWIKI-1005)

Release 3.0.1

Link to JIRA Release: Version 3.0.1 Release date: 01/15/2016

# [+] Show Details

- PonyDocs Validation Report Tool (Beta) The new PonyDocs validation report tool has been published in beta form. (PUBSWIKI-204)
- Developer Tool Updates Improvements made to developer tools and environment. (PUBSWIKI-936, PUBSWIKI-950)
- Wiki Entry Point for Internal Users Please direct any internal users who are having issues accessing wiki content to the new Confluence Access Point. (PUBSWIKI-948)

# Release 3.0.0

Link to JIRA Release: Version 3.0.0 Release date: 12/19/2015

# [+] Show Details

• Upgrade to MediaWiki 1.25

**Important Note:** Please report any issues you find with this upgrade in the related **JIRA task**.

# Release 2.1.2

Release date: 12/14/2015

- Search updates
  - **Spellcheck** Added spellcheck functionality to search. Misspellings now result in a 'did you mean?' search suggestion. (PUBSWIKI-848)
  - **URI support** You can now search for URI strings. Previously, the search application misinterpreted the URI and the search failed. (PUBSWIKI-861)
  - **Re-enabled default product/manual search** Re-enabled the default search behavior from product or topic pages. If you start a search from a Product landing page, results are narrowed to that product facet only. If you start a search from a topic page, results are narrowed to that manual facet only. (PUBSWIKI-836)
  - **Support for special characters** You can now include special characters (like ampersand '&') in the search query. Previously, some special characters broke the search. (PUBSWIKI-797)
- New Update Button A new, cleaner "update" feature is available from the edit bar. You can use this button to update individual pages from current version to target version, without having to launch the full update & branch console. (PUBSWIKI-860)

- **RN Generation from JIRA** The ability to generate automated RNs from JIRA has been restored. (PUBSWIKI-929)
- Alfresco File Downloads Fixed The Repository extension has been updated to restore proper download functionality for Alfresco-based content. (PUBSWIKI-916)

# Release 2.1.1

Release date: Dec/2/2015

# [+] Show Details

- Wiki-based RNs Support Localized Releases (PUBSWIKI-514)
- Closed and Localized Wiki Fixes Improvements to shared image configuration, database access, and external accessibility for Closed and various Localized wikis. (PUBSWIKI-917)
- Search Application Updated

# Release 2.1.0

Release date: Nov/25/2015

# [+] Show Details

- Transition to New Server Completed transfer to a new server.
- SSL Support and Improved Security Numerous updates to support SSL on our wiki. (PUBSWIKI-414)
- Improved Development Process Search application development process streamlined. (PUBSWIKI-878)

Release 2.0.4

Release date: Nov/09/2015

# [+] Show Details

- Cloud Template Improvements Cloud templates have been cleaned up, and PDF compatibility improved so that text doesn't overwrite images. (PUBSWIKI-774)
- Editing Buttons Fixed The External Link and Localized Wiki Table buttons now work correctly when editing wiki content. (PUBSWIKI-879)
- Minor Skin Update The "create account" link no longer appears at the top of wiki pages when not logged in. (PUBSWIKI-778)

Release 2.0.3

Release date: Nov/06/2015

- Button Access During Preview Preview mode no longer blocks access to buttons at the bottom of the page. (PUBSWIKI-530)
- Save and Continue A new button has been added to the editor, allow writers to save their current progress and continue editing without interruption. (PUBSWIKI-570)
- Improved Server Caching MediaWiki caching for links has been updated. Previously, after saving new pages or creating RNs some links would not work due to cached values not being updated. (PUBSWIKI-850)
- GlossaryTerm Button Correction Square brackets are now added correctly with the GlossaryTerm button. (PUBSWIKI-862)
- Special Characters in Topic Name/Title Underscores or special characters (< or >) now work as expected. Note: Writers should still use only alphanumeric characters when creating topics unless a special requirement necessitates otherwise. (PUBSWIKI-872)
- Business Edition Cloud Templates Updated (PUBSWIKI-595)
- Google Analytics Restored (PUBSWIKI-832)
- Improved Image Support in Help Skin Slimbox Thumbs extension now works inside the Help skin. (PUBSWIKI-610)
- Development Process Updates Server architecture and development processes have been improved. (PUBSWIKI-866, PUBSWIKI-851, PUBSWIKI-863, PUBSWIKI-867, PUBSWIKI-844, PUBSWIKI-279)

Release 2.0.2

Release date: Oct/14/2015

# [+] Show Details

• Change password functionality has been restored.

This means that if your reader forgets their password, requiring admin reset, the reader can then change their newly assigned password as per the regular process. Recently, this was not possible; readers had to live with the assigned password. To change a password, go to http://docs.genesys.com/Special:Preferences > Change Password. (PUBSWIKI-838)

• Improvements to the script that processes Config Options XML files.

This is a small improvement to the automated script. The custom editor is still disable for the time being. (PUBSWIKI-842)

Release 2.0.1

Release date: Sept/15/2015

# [+] Show Details

 MediaWiki 1.20 Bug Fixes (PUBSWIKI-835, PUBSWIKI-827, PUBSWIKI-831, PUBSWIKI-829, PUBSWIKI-92, PUBSWIKI-748, PUBSWIKI-745, PUBSWIKI-551, PUBSWIKI-328, PUBSWIKI-857)

Release 2.0.0

Release date: Aug/29/2015

# [+] Show Details

#### • Mediawiki Upgrade

#### New Features

- New editor. You can now "tab" between wiki markup, preview, and show changes. We recommend you ONLY use the Preview option in this tabbed editor, not the "show preview" button you are used to.
- Enhanced Ponydocs TOC.
  - The Ponydocs TOC now includes the display title (H1) from your content pages. This lets you write shorter, more abstract topics (in keeping with the recommendation to "keep it short") while still being able to understand your TOC.
  - When you add a new Topic, the TOC asks you to create the page. Automatic page creation, for the most part, is turned off in the wiki. This small increase in required steps will offer a big boost to the sanitization of content. Trust us, it's a good idea.
- When viewing a topic, the Version dropdown now only lists versions that actually contain the current topic. Previously, this dropdown would include all versions defined for the current product, regardless of whether the topic existed in all versions.

#### Limitations

- You need to save your pages a SECOND time before it will show up properly in your left-hand TOC. This is a temporary limitation.
- You may need to save your TOC a SECOND time before new topics appear as "created". This is a temporary limitation.
- Disqus commenting is temporarily disabled.
- MultipleUpload is temporarily disabled.
- Google Translate drop-down is temporarily disabled.
- Update button on individual pages is temporarily removed. Writers should use the global "Update and Inherit" special page.
- The custom form editor for configuration options pages in the warehouse is temporarily disabled.
- The custom SMI editor is temporarily disabled.

# Release 1.1.7

Release date: 03/23/20145

- RN Automation Improvements
  - Release number shown in Welcome page is now correct. (PUBSWIKI-676)
  - Trailing spaces in Component Name are now deleted. (PUBSWIKI-572)
  - Confirmation form now includes "Cancel" option (instead of just yes/no) where appropriate. (PUBSWIKI-463)

- Support has been added for Deployment Procedures. (PUBSWIKI-574)
- Improved styling. (PUBSWIKI-407)

#### Help Skin Improvements

- When using the Help skin, search now returns results for the actual version name when "latest" is used in the URL. (PUBSWIKI-657)
- File (image) pages are now displayed in the Help skin, with a link to get back to the previous page. (PUBSWIKI-602)
- Various improvements have been made to Help skin styling. (PUBSWIKI-613)
- The Help skin now correctly displays all pages that are opened from search results within the skin. (PUBSWIKI-619)
- Help skin has been updated to work with common templates. (PUBSWIKI-620)
- The Genesys logo is now included in the Help skin. (PUBSWIKI-618)
- **SMI Framework** Special tools created to support the wiki version of the System Media Interfaces Guide have been published. (PUBSWIKI-583)
- **Search Interface** Appearance of the limiting criteria for search results has been updated. (PUBSWIKI-440)
- **Isolated Product Search** Version are now not selectable in the search engine. Results returned depends on the current version selected. (PUBSWIKI-569)
- Images for Closed Wiki PDF Generation PDF files generated from the Closed wiki should now include images. (PUBSWIKI-660)

# Release 1.1.6

Release date: 12/19/2014

- RN Automation Improvements
  - Preserve version numbers for existing Known Issues when generating RNs. (PUBSWIKI-512)
  - When generating RNs, the component dropdown selector is now alphabetized. (PUBSWIKI-510)
  - Release tables now include "Under Shipping Control" restrictions. (PUBSWIKI-493)
- **Google Translate** A Google Translate dropdown selector is now available on all wiki pages. (PUBSWIKI-519)
- Unreleased Content Indicator Unreleased content in PonyDocs now includes a small visual indicator at the top of the page to make it easier to quickly identify the status of content being edited/viewed/ reviewed. (PUBSWIKI-219)
- Secure Link Icon Removed To prepare for SSL implementation on the docs.genesys.com website, links to secure websites no longer display a lock icon after the link text. (PUBSWIKI-533)
- **PDF Support on Closed Wiki** Guides on the Closed wiki can now have PDF files generated, but only by special request. Contact Devon for details. (PUBSWIKI-478)
- Improved Database Backups (PUBSWIKI-391, PUBSWIKI-371)

• PrettyPhoto Update - The #ppin command now supports size parameters. (PUBSWIKI-181)

Release 1.1.5

Release date: 12/01/2014

# [+] Show Details

- **Retire GWE to Improve Performance** Until GWE can be upgraded to prevent performance impact, it has been retired from docs.genesys.com. (PUBSWIKI-536)
- **Search Improvements** Search features on Closed and WriterResourceWiki have been improved. (PUBSWIKI-492)
- **PDF Fixes** PDF files generated from wiki content have been fixed to remove Disqus content and display Glossary terms correctly. Previously, some Disqus-related content was visible in PDF files and books using many Glossary terms would not display correctly. (PUBSWIKI-544, PUBSWIKI-545)
- **jQuery update** Wiki extensions now share a common instance of jQuery to improve performance and prevent conflicts. (PUBSWIKI-366)
- Help Skin Improvements Searching for content does no longer returns results from restricted releases. (PUBSWIKI-541)
- Images in LightBoxes Clicking an image now causes it to appear in a light box. (PUBSWIKI-132)
- **Configuration Options** Extensions and updates have been made to support moving Configuration Options documentation into our wiki. (PUBSWIKI-497)

# Release 1.1.4

Release date: 09/30/2014

# [+] Show Details

- **Updated** <**tt**> **Formatting** Text marked with <**tt**> tags is now bolded by default to allow easier identification.
- PDF Improvements Numerous display issues with user-generated PDF files have been fixed or improved. (PUBSWIKI-498)
- AJAX for Advanced Search Dropdown On the search screen, the page no longer refreshes when the selected product is changed. (PUBSWIKI-494)
- Server Stability
- Wordcloud Magic Word Fixes
- Help Skin Improvements

Release 1.1.3

Release date: 08/22/2014

- **RN Automation** RN Automation process has been improved. (See the Release Notes with JIRA Process article for details about how to create release notes.) (PUBSWIKI-435)
- User Permissions Update The process for granting access to the wiki has been updated with improved distinction between user roles. (PUBSWIKI-419)
- Search improvements
  - By default, search is now limited to the currently viewed product or manual when you are viewing a product landing page or a page in a manual. A checkbox allows search against the entire site, so you aren't forced to restrict your search to the product or manual you are browsing. (PUBSWIKI-202)
  - From the search results screen, you can now restrict results to any combination of product/manual/ version instead of searching across the entire http://docs.genesys.com website. (PUBSWIKI-157)
- PonyDocs Export Extension You can now export XML for specific sets of documentation, limiting content to specific PonyDocs-based product, manual, version, or version status. (PUBSWIKI-432)
   Limitation: This extension is intended for wiki admin use. Writers who want to export content based on PonyDocs-based categories should request assistance from the technicalpublicationswikiadmin@genesys.com email alias.
- Wiki Account Reminders A message is now displayed on the login, create account, and change
  password screens to remind users that wiki accounts are not tied to internal Genesys accounts and
  should use a different password for security purposes. (PUBSWIKI-413)
- Skin Changes:
  - The link text for "Legal Disclaimers" in the header now reads "Legal Notices".
  - Genesys forums have changed, so the header link now points to the correct location.
- Automated Database Backups Improved Server backup process has been improved to account for additional wiki databases and images. (PUBSWIKI-391, PUBSWIKI-371)

Release 1.1.2c

Release date: 06/20/2014

# [+] Show Details

- RN Automation
- GAX Help Updates

# Release 1.1.2b

Release date: 06/08/2014

- **Glossary Link-back Feature** The template for adding glossary terms now allows you to specify whether the glossary page should link back to the location where the term is used.
- Glossary Limitations Increased The number of glossary terms allowed per page has increased.
  - up to 15 if addlink= parameter is always true and the text= parameter is never used
  - up to 60 if addlink= parameter is always false and the text= parameter is always used

• Improvements to Contextual Help - It is now possible to add contextual help for a product outside of the Documentation Platform release cycle.

# Release 1.1.2

Release date: 05/23/2014

# [+] Show Details

- Disqus Commenting Updates
  - The most recent Disgus comments are now displayed on the <a href="http://docs.genesys.com/Documentation/Enterprise">http://docs.genesys.com/Documentation/Enterprise</a> page.
  - You can now specify whether to show or hide comment dates in the Disqus extension on the Enterprise landing page.
- Enterprise Landing Page Updates This landing page now displays all dynamic content in the right rail. The page also features configurable "Trending" and "Recent Videos" widgets to highlight new content. (PUBSWIKI-306)
- **Display Live Statistics Using Magic Words** You can now display live statistics on your page using the #livestats magic word. See Live Statistics Using Magic Words for details.
- GWE Analytics GWE analytics for our website are now viewable from the http://docs.genesys.com/ Special:GWEAnalytics special page. You can use this page to get trending information about popular guides, top pages, searched keywords, and so on.
- **Branch/Update Clarified** The Branch option is no longer available to copy one version of a Ponydocs manual to another version. You must now use the Update option instead.
- **Support for "Closed Content" documentation** Added automatic login capability when documentation is accessed directly from Genesys software. For regular users, the standard login process is used to access that content. (PUBSWIKI-234)
- New Skin for Help Content You can now use a special "help" skin to modify the look and feel of your wiki-based help content. This skin is intended for use in conjunction with the contextual help system in a browser window or with the upcoming Ark component. For details on how to enable this skin, see https://jira.genesys.com/browse/PUBSWIKI-359 (PUBSWIKI-209)

#### Live Statistics Using Magic Words

While editing a wiki page, you can now use this syntax to generate live statistics:

{{#livestats:<id\_stat>|<date>|<product>|<top\_product\_type>}}

Note: the 4th fields are used only if you need products top pages or guides, otherwise only the 1st and 2nd fields are reguired.

- <id\_stat> values: -toppage -topguide -topstandalonepage -mostviewedproduct -topproduct -topproductslist -topguideslist
- <date> values: -today -week -month
   Note: if you use the <id\_stat> "topproductslist" or "topguideslist", you have to type an integer
   that is between 1 and 10 into the <date> field.
- <product> values: any product short name such as "IW", "Cloud", etc.
- <top\_product\_type> values: -toppage -topguide

If you make a mistake an error will be returned with a link to docs.genesys.com.

# Release 1.1.1

Release date: 03/27/2014

# [+] Show Details

• Corrections to GWE Configuration - Updated GWE connection details. (PUBSWIKI-283)

# Release 1.1.0

Release date: 03/24/2014

# [+] Show Details

- **New Splash Pages** The http://docs.genesys.com default page has been changed to a splash page allowing users to select different views for documentation depending on the edition (Premier, Business, or Enterprise) that they are using. (PUBSWIKI-256)
- Recent Comments Extension A new extension has been created that displays a list of the most recent Disqus comments. Used on http://docs.genesys.com/Documentation/Enterprise. (PUBSWIKI-251)
- **Update Tool Clarified** The option to branch content has been removed. Writers should instead use the update option when moving wiki content from one version to another. (PUBSWIKI-211)
- Notes Now Appear Correctly in PDF Inline CSS changes have been made that allow notes in wiki content to appear correctly in generated PDF files. (PUBSWIKI-255)
- Genesys Web Engagement (GWE) Implementation GWE is now being used to record statistics and information about site usage.

# Tip

Reported issues that are related to use of footnotes will not be fixed. Please check the guidelines relating to (footnotes) introduced in the Writer's Guide for additional details.

# Release 1.0.0

Release date: 03/07/2014

- Standard Development Process for Documentation Platform Starting with this baseline release, development of the documentation platform now uses proper processes. This includes:
  - PUBSWIKI project created in Jira for planning corrections/improvements and tracking release status.

- Source control with central repository. (PUBSWIKI-196)
- VM environments for development and testing. (PUBSWIKI-195)

Processes are being documented in the Administrator's Guide.

- **Refined CD Readme Process** The process for Managing Readmes has been updated. All products should use this new process starting with release 8.5. (PUBSWIKI-235, PUBSWIKI-236)
- Mulitstep Fixes:
  - link resolution (PUBSWIKI-242)
  - page refresh fixes (PUBSWIKI-241)
  - spaces in links (PUBSWIKI-225)
- **Updated PDF Generation** The new PDF style developed by Astadia, which includes many bug fixes, has been applied. Timestamps have also been added to generated PDF content. Writers should generate PDFs from their content and open Jira items to report any issues. (PUBSWIKI-147, PUBSWIKI-148)
- **E-mail Server Updates** E-mails sent from the production server (for example, to request password changes) are now delivered correctly. (PUBSWIKI-139)
- Modified View for Preview Accounts Users accessing content with a preview account (for example, restricted content requiring a login) no longer see the "Helpful Links" list in the left rail. (PUBSWIKI-143)
- Whitespace Issues Fixes Some leftover whitespace issues from last year's site redesign have been fixed. (PUBSWIKI-126, PUBSWIKI-112)
- **Custom Edit Bar Button Updates** Output from custom edit buttons was simplified to reduce comments and clutter while editing pages. Tooltip instructions for buttons are improved, and Overview of Wiki Edit Buttons added to the Writer's Guide. (PUBSWIKI-224)

# General Tips and Tricks for Writers

The page covers general tips and tricks for content on **docs.genesys.com** that writers chose to share with the group.

# Troubleshooting

Feel free to add content here about embarrassing things you have done while creating Ponydocs content that have caused the Pony Express to go off the proverbial rails.

# Schrodinger's links

If links on a landing page work fine at one resolution, but not at another, is your cat OK? (I assume it will be. They have Gnine lives.)

Issue: In certain cases, Links on landing pages can fail to work at some screen resolutions. (Encountered this in 8.5: the Genesys Info Mart 8.5.x Release Notes link on https://docs.genesys.com/ Documentation/GIM was not clickable at some resolutions -- see revisions older than Thursday, June 13, 2019 5:38 PM). Workaround: The issue is actually due to the use or AnchorDiv within the item class. This template adds the following code to your page: <div id="NAME\_OF\_DIV" style="height: 65px;margin-top:-65px;"></div>

(This creates a new (invisible) div on the page that covers up a space of 65 pixels above it, so having this just underneath of text links you want to be clickable is a problem. Why do we have that odd spacing? It's because of the banner at the top of the page is normally that tall – when we jump to an anchor on the page, we don't want it to be hidden underneath the banner.)

The solution is to move the AnchorDiv template outside of the <div class="item">...</div> listing. (Or anchor to the Release Notes heading rather than than to a specific item within that list.)

Regardless, you can see the specific fix here: https://docs.genesys.com/ index.php?title=Documentation%2FGIM&type=revision&diff=792227&oldid=763263

Mystery solved, and the cat's Gfine!

# Schrodinger's content

What happens when you comment out a manual on the Manuals page in your project?

Libraries, ReadMes, and some other content becomes unfindable by Ponydocs. You can see the content if you edit the source code of the Library page, but as far as Ponydocs is concerned, the content does not exist in published form. THe content both exists and does not exist.

NEVER use on the **Manuals** page. Probably a good idea not to use them on the **Versions** page either!

I have used them in TOCs with no ill effects that I have detected.

The case of the stubborn release table that refuses to update

Ever have a great publishing day where everything just goes your way? Then, when you check your product landing page to ensure everything looks good, you notice the release table didn't update with a link to the latest RN! What the heck?! What gives?

Well, here's some tips and tricks to try, if that ever happens to you:

- Did you add in the GNINE template? If it's missing, this is *usually* caught during your RN format check with Pubs Editors but they're human so sometimes it gets accidentally overlooked and that's usually the first thing you should check. If you find it is missing, be sure to add it into both your published and draft versions of your RN and save the updates. Then head on over to your product landing page, give it a refresh, and see if that worked.
- Navigate to your published RN (not the draft) and click edit > Save page. Again, go back to your
  product landing page, give it a refresh, and see if that worked. Sometimes re-saving the published RN
  will cause the release table to update.
- After a page refresh on your product landing page and still no change to the release table, try clicking **Edit source > Save page** on the product landing page.
- If none of these tricks work, then you should contact the **Tech Pubs Support** email alias for additional help and advice.

Good luck!

# AudioCodes Admin Guide - special instructions

Provided by Jose Druker, 12-2020. While these are specific to the 400 Series IP Phones 2.2.16 Administrators Guide, they may be a useful reference if other AudioCodes manuals need to be updated. These instructions supplement existing writer instructions.

The Word document makes extensive use of styles. The style gallery has probably become cluttered over the years by sloppy copy-and-paste from other documents. When adding future updates, ensure that you apply the correct styles.

Note the following styles, in particular, which you must use for correct auto-numbering:

- For figure and table titles (hereafter referred to as "captions"), use Caption AC.
- For a new "chapter" heading, use Heading 1. For a two-digit subhead in a chapter, use Heading 2, etc.
- For a new appendix heading, use H1 Alpha AC. For a two-digit subhead in an appendix, use H2 Alpha AC, etc.

# Tip

- With so many styles in the document, it's hard to find a particular style in the small Style gallery box in the ribbon, so it's helpful to use the small arrow at bottom right of the Style gallery to open the Styles task pane. Then to see what style you need to use, put your cursor in an existing paragraph that exhibits the desired formatting, and in the Styles pane you'll see a box around the style that was used. Then put your cursor back in your new paragraph and click the style in the Styles pane to apply it.
- In general, it's preferable to paste in new content using Paste Special > Unformatted text, and then apply the desired styles.

Each "chapter" and appendix starts on a new page, but two-digit and three-digit subsections do not. Use Next Page section breaks between "chapters" or appendixes to force the page breaks. As long as you use a section break to force the new page, headers will adjust automatically.

Otherwise, use manual page breaks very sparingly, if at all. It's better practice to use Paragraph > Line and Page Breaks > Keep with next, rather than Page break before, to improve page display.

As pagination changes with future updates, remove any residual instances of manual page breaks or Page break before paragraph formatting that cause now-unwanted page breaks.

Figure and table captions use two field codes to handle auto-numbering. There are separate numbering sequences for figures, tables, appendix figures, and appendix tables, respectively. You can see the different numbering sequences if you toggle field codes. The field codes are:

• For figure captions:

{ STYLEREF 1 \s}-{SEQ Figure \\* ARABIC \s 1}

• For table captions:

{ STYLEREF 1 \s}-{SEQ Table \\* ARABIC \s 1}

• For appendix figure captions:

{ STYLEREF "H1 Alpha AC" \\* MERGEFORMAT \s }-{SEQ Figure \\* ARABIC \s 1 }

• For appendix table captions:

{ STYLEREF "H1 Alpha AC" \\* MERGEFORMAT \s }-{SEQ Table \\* ARABIC \s 1 }

If you find that caption numbering has gone out of sequence in the body of the document, first try updating the fields in the Caption AC paragraph(s) as described in #4, below. If this doesn't fix the numbering, follow the tip below to remake the caption. NEVER hard-code the numbers.

# Tip

To add a new figure/table caption, copy and paste the entire Caption AC paragraph from an existing figure/table, and then overwrite just the descriptive part of the caption (i.e., the part after "Figure x.x: " or "Table x.x: "). This is the best way to ensure that you include the correct field codes that handle auto-numbering. Then update the fields. Remember:

- Copy the Caption AC paragraph from a matching caption (figure or table, and main body or appendix), and don't use Paste Special to paste it in.
- If you are pasting in the descriptive part from another document, use Paste Special > Unformatted text, so you don't inadvertently change the style.

If you insert a new figure or table, the numbers in later figure/table captions and in the List of Figures (LOF) or List of Tables (LOT) won't adjust until you update all fields.

To update numbering in an individual figure or table caption:

- Select at least the "Figure x.x" or "Table x.x" part of the caption. (It doesn't matter if you select the whole paragraph.)
- Right-click and select Update Field.

To update all figure and table numbering in the document:

- Put your cursor in any figure or table caption. This should mean that you're in a Caption AC paragraph.
- Pull down the small arrow under the Select menu at top right of the ribbon, and click Select All Text With Similar Formatting (No Data). This makes all Caption AC paragraphs active.

• Right-click any selected text and select Update Field.

To update the TOC, LOT, and/or LOF:

- Right-click anywhere in the applicable list.
- Select Update Field, then select the option to update the entire table.

Ensure that all fields, including in-line cross-references, have been updated before you make the PDF. To do so:

- Select the entire document and click F9.
- In the dialog boxes for the TOC, LOT, and LOF updates, select the option to update the entire table.
- If you did not previously update all figure and table numbering in the document, you will need to repeat this step to re-update numbering in the TOC, LOT, and LOF (otherwise, the first F9 would have caused these tables to be generated before Word got to renumbering the actual figures and tables).

# Technical Publication Production Processes

This articles under section will include tasks/processes specific to Pubs Editors:

- Format checking by Pubs Editors
- Updating the Genesys Engage on-premises Release Notes page
- Customer Care Documents on our Docs site
- Legal Documents on our Docs site
- Pubs Localization Admin's Process
- Restricted Repository Files (SpeechMiner)
- FileZilla: Uploading files to the production server and SharePoint
- Renaming and uploading old Help zip files

# Format checking by Pubs Editors

This primarily covers RN Format checking. However, on occasion, a PDF may need to be checked. A tab was added to cover that scenario.

# Important

#### If the product/component is associated with v9.0 (formerly G-NINE):

- If the RN is online, has the writer incorporated the G-NINE templates, per instructions in the "Convert Your Release Notes" section of Converting Docs to That Thing Called 9.0 (formerly called G-NINE)?
- Has the writer incorporated the G-NINE templates on the product landing page, per instructions in the "Set Up Your Landing Page" section of Converting Docs to That Thing Called 9.0 (formerly called G-NINE)?
- Is the product/component listed on the overall v9.0 page?

#### Tempo code to use for format checking: XPROJ-85.

Things to look for when checking the format of various documents.

# HTML General (PA), Update, and Hot Fix RNs

# HTML General (PA), Update, and Hot Fix RNs

#### BROWSER TAB

Open the RN in the browser. Hover over the browser tab – Is the correct RN name displayed?

#### FILE NAME

Does the file name match existing RNs?

#### COPYRIGHT DATE

Should start with the year of the first release and end with the year of the most current release. Example: 2013-2021; And does it include the new Genesys name, Genesys Cloud Services, Inc.?

# CONTENTS SECTION

- Is the date in the release table correct? Does it match the date in the new release section?
- Is the release type in the release table correct? Does it match the release type in the new release section header?
- Links:
  - Check/follow the link to the Introduction section.
  - Check/follow the link in the release table to the new release section. Does it work? Does it lead to the correct release?
  - Check/follow the link to the previous RN. Does it pull up the correct file?
  - Check/follow the link to the Known Issues and Recommendations section.
  - Check/follow the link to the Discontinued Support section.
  - Check/follow the link to the Additional Information section.

# INTRODUCTION SECTION

- The Alcatel-Lucent paragraph: If the initial release of the product (listed in the release table in the Contents section) is earlier than February 1, 2012, the paragraph must remain in place. If the initial release of the product (listed in the release table) is later than February 1, 2012, the paragraph should be removed.
- Is the introductory sentence the standard boilerplate for a General (PA) release? Occasionally, a writer will accidentally use the restricted boilerplate ("This release note applies only to the X.X releases of <Name of Component> that are specified in the Contents, above."). Should be: "This release note applies to all X.X releases of <Name of Component>."
- Is the link to the SOE up-to-date? Should be: https://docs.genesys.com/Documentation/System/Current/ SOE/Welcome
- Use of Third-Party Software:
  - Does the link to the Readme pull up the correct file? Occasionally, though not very often, a writer accidentally inserts the wrong path. For example, I checked an RN recently where this link pulled up another HTML release note.
  - If the Readme for the product has transitioned to online format, the text and link should be updated appropriately. Example: "...see the <a href="http://docs.genesys.com/Documentation/ GVP#More\_Release\_Information">Legal Notices</a> for Genesys Voice Platform."

## NEW RELEASE SECTION

- Do the date, version number, and release type in the header match the date, version number, and release type in the Contents section?
- Do the links in the new release section header work?
- Supported Operating Systems
  - Does the link to the Contents section work?
- New in This Release
  - Does the boilerplate language match the release type?

- General: "There are no restrictions for this release."
- Hot Fix: "This is a hot fix for this product."
- Update: "This is an update for this product." or "There are no restrictions for this release."
- Are the new features formatted as a bulleted list? Are the bullets our standard square format?
- If a new OS, database or browser is listed, the writer should follow the directions under SOE Information in RNs.
- Corrections and Modifications
  - Are the item separators (gray divider lines) correctly paired? Is spacing between the item separators and the text consistent?
  - Is the JIRA number listed? Is it correctly located at the end of the closing text, or on a separate line if the item ends with a list or Workaround?
- Does the Top of page link work?
- Is alignment correct on the left side? If it looks indented, the writer might have forgotten to include the closing html code that pairs with the opening code. For example, paired with .

# KNOWN ISSUES AND RECOMMENDATIONS SECTION

- Are the item separators (gray divider lines) correctly paired? Is spacing between the item separators and the text consistent?
- If bullets are utilized, are they our standard square format?
- Are the items listed by the version number in the Found In field (most recent version at the top)?
- Does the Top of page link work?

#### DISCONTINUED SUPPORT SECTION

- Has the opening paragraph been updated with the current SOE reference? The writer should follow the directions under SOE Information in RNs.
- If an OS, database, browser, Java, and so on is discontinued, the writer should follow the directions under SOE Information in RNs according to the scenario that applies to her or his situation. As a cheat sheet, here's the convention based on the scenario examples here.
- Are the item separators (gray divider lines) correctly paired? Is spacing between the item separators and the text consistent?
- Does the Top of page link work?

#### Scenario 1 (Component no longer supports an SOE item but Genesys and vendor do)

• (Online)

**Discontinued as of** 

Date: July 27, 2017

Release: 8.5.008.19

• (HTML) July 27, 2017; 8.5.008.19

## Scenario 2 (SOE item reaches Genesys EOS and the PM doesn't extend support)

• (Online)

Discontinued as of	Date: June 30, 2018	Release: All releases
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• (HTML) June 30, 2018; All releases

# Scenario 3 (SOE item reaches Genesys EOS, PM extends support, then later ends support)

• (Online)

Discontinued as of Date: September 25, 2019 Release: All releases	
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• (HTML) September 25, 2019; All releases

#### ADDITIONAL INFORMATION SECTION

- If there is a link/reference to the SOE, has it been updated? The writer should follow the directions under SOE Information in RNs.
- Does the Top of page link work?

RN FORMAT CHECK REQUEST EMAIL

• If there are new features in this release, does the email include a feature table indicating the number of new features, the platform, and the initiative under which the features fall? If there are no new features, the table isn't needed. Marudhu needs this information for feature metrics collection.

APPROVAL/REMINDER EMAIL

After checking and approving the HTML release note, send the writer an email along these lines:

Format approved.

#### **REMINDERS:**

- **DO NOT** Publish RN freeze forms for components that are part of 9.x (formerly known as G-NINE), which could include 9.1, 9.0, 8.5, and/or 8.1 components.
- **DO** continue to publish RN freeze forms for components that are not part of 9.x.
- **HTML release notes**: Once approved by Pubs Editors, upload the file to SharePoint and the Production repository, and place a copy of the file in \\Galaxy\tdoc\_final\Current\_RNs.
  - Link to instructions in the Writer's Guide on how to upload files to the Production repository: https://docs.genesys.com/Documentation/Ponydocs/1.0/Help/ProductionServerSharePoint
  - Link to Production repository: https://docs.genesys.com/Special:RepositoryUtils
- Confirm that the file displays correctly on your document page.

ARCHIVING THE HTML FILES IN THE REPOSITORY (PRODUCTION SERVER) AND SHAREPOINT

# Important

In early 2021, all IX writers now upload new or updated files to the Repository in addition to Sharepoint.

When the file has been approved and the IP test has passed, upload the file to the appropriate public folder in the Repository (production server) via Repository Utils and, if it's a new file, Refresh the map, and to the appropriate Genesys Public folder in Global IX SharePoint.

# PROBLEMS WITH THE RN FREEZE FORM

# Important

For the most part, RNs for versions 8.5 are onward no longer require RN Freeze forms. The need for publishing RN freeze forms is indicated in the Doc tab of the Packaging Spec (Excel format). In June 2021, the the Packaging Spec was converted online and no longer includes a Doc tab section.

Can't locate the release number in the drop down menu. It is possible that the IP has been frozen with a differing release type. Advise the writer to try entering another release type – does the current release number now appear in the drop down menu? If yes, there is a discrepancy between the IP and the RN. The writer should contact the Project Manager/PCT and notify them of the situation. Either the IP freeze form needs to be updated – or the RN needs to be revised to match the IP.

# HTML Restricted RNs

# HTML Restricted Release Notes

Information regarding Restricted RNs can be found here: https://docs.genesys.com/Documentation/ Ponydocs/1.0/Help/restrictedreleasenote

In general, restricted RNs should be standalone (just one release documented). There are exceptions to this, primarily for internal development purposes, resulting in cumulative restricted RNs. Some examples of cumulative restricted RNs:

• Genesys Designer. Heads up! While there is one "main" cumulative RN, Designer has the occasional "branch" restricted RN for a specific customer. For these, make sure that the name of the customer is

included in the file name, as well as the release number (rntitle85rn\_customer\_85xxxxx)

• Workspace Web Edition & Web Services

#### FILE NAME

The file name uses the standard convention for HTML RNs, but incorporates the release number (preferably with no decimal points) and, if needed for clarity, the name of the customer. Examples:

- rntitle85rn\_85xxxxx.html
- rntitle85rn\_85xxxxx\_customername.html

#### COPYRIGHT DATE

If standalone, just the current year. If cumulative, should start with the year of the first release and end with the year of the most current release. Example: 2016-2021

#### CONTENTS

- Release type "Restricted" in the main release table (and in the new release section header).
- Includes link to current General (PA) release note. (This makes it unnecessary to list Known Issues that aren't specific to the restricted release itself.)
- Do the links to the various sections work?

#### INTRODUCTION

- Introduction section uses the "Restricted" boilerplate: "This release note applies only to the 8.5 releases of <Name of Component> that are specified in the Contents (above)."
- Link to SOE is correct? Should be: https://docs.genesys.com/Documentation/System/Current/SOE/ Welcome

#### NEW RELEASE SECTION

- Header: Release type "Restricted"
- New in This Release: Uses the "Restricted" boilerplate: "This is a restricted release for this product. For availability of this release, contact your Genesys representative. This section describes new features that were introduced in this release of <Name of Component>."

#### KNOWN ISSUES AND RECOMMENDATIONS SECTION

- Only Known Issues associated specifically with the restricted version should be listed here. If the list seems long, check with the writer.
- Are the item separators (gray divider lines) correctly paired? Is spacing between the item separators and the text consistent?
- If bullets are utilized, are they our standard square format?
- Are the items listed by the version number in the Found In field (most recent version at the top)?

• Does the Top of page link work?

#### DISCONTINUED SUPPORT SECTION

- Has the opening paragraph been updated with the current SOE reference? the writer should follow the directions under SOE Information in RNs.
- If an OS, database or browser is discontinued, the writer should follow the directions under SOE Information in RNs.
- Are the item separators (gray divider lines) correctly paired? Is spacing between the item separators and the text consistent?
- Does the Top of page link work?

# ADDITIONAL INFORMATION SECTION

- If there is online restricted documentation associated with the release, instructions for accessing them should be provided here including login credentials.
- Does the Top of page link work?

#### RN FORMAT CHECK REQUEST EMAIL

• If there are new features in this release, does the email include a feature table indicating the number of new features, the platform, and the initiative under which the features fall? If there are no new features, the table isn't needed. Marudhu needs this information for feature metrics collection.

# DELIVERING THE RESTRICTED OR PRE-RELEASE RN

# Important

Starting summer 2021, writers now can submit Restricted RNs to the Production Builds Request email alias. Pubs Editors still has to format check the RN before the writer does so. Instructions to writers about this are within the Restricted Release Notes article in this Writers Guide. If you as a Pubs Editor are doing this, follow the steps here.

- First, ask the writer to confirm with the Project Manager/PCT that the IP exists and the release type is correct (RESTRICTED or PRE-RELEASE). Doing this ahead of time will save effort later (see the NOTE at the end of this section).
- Compose an email to the Production Builds Request email alias, copy the writer, copy Pubs Editors, and the Project Manager (and any other individuals the writer deems necessary – however, the PjM should suffice). The body of the email should be something along these lines:
  - "Hello,The attached restricted RN is approved for inclusion in the IP for Genesys Designer 8.5.100.00. Let me know if you have any questions regarding this file."
  - If there is non-online documentation (PDF, HTML, etc.) being delivered with the release: "Hello,The attached restricted RN is approved for inclusion in the IP for Genesys Designer 8.5.100.00. The attached PDF is also approved to accompany this restricted release within the Documentation folder associated with the build. Let me know if you have any questions regarding these files."

- Attach the approved file(s) to the email.
- In the subject line, include the release type, the component name, and the release number. For example: Restricted RN: Genesys Designer 8.5.100.00. **Note:** After you receive a reply from Production Builds (usually Diana) that the RN has been included into the IP, you must remove the Production Builds alias from your thank you email as it will re-open the JIRA.

# Important

If the IP is not yet in place, or the release type doesn't match your request, Production Builds will notify you of the discrepancy. If the writer and Project Manager are not copied on this notification, you'll need to contact them. The Project Manager/PCT is responsible for updating the release type of the IP and notifying Production Builds of the change. Suggested verbiage:

Would the appropriate member of the PCT please:

- Republish the Component freeze form with the correct release type.
- Send an email to "Production Builds Request" asking that the release type of the corresponding IP be updated.

# ARCHIVING THE RESTRICTED OR PRE-RELEASE RN

# Important

The writer should also archive the Restricted RN in SharePoint, per the instructions here.

Restricted and Pre-release RNs are stored in SharePoint in the Restricted Docs folder in the Global IX site. **NOTE:** These files are **not** uploaded to the production server.

If this is a standalone Restricted RN or Pre-release Note, simply upload the file into the appropriate product folder. If it is a cumulative Restricted RN, locate the existing file and upload a new version.

You can upload the RN anytime after you send the email to Production Builds.

# **ONLINE** Release Notes

# ONLINE Release Notes

## MAIN PAGE

Look for "pink" links. Otherwise, check to see if the references/links to the SOE have been updated as noted on the SOE Information in RNs page.

- Available Releases section:
  - Has the link/reference to the SOE been updated as noted on the SOE Information in RNs page? Should be: "The operating systems available for use with each component release are listed in the table at a high level only. For more detailed information about the supported operating environments, including requirements, supported versions, and any conditions or limitations, see the <PRODUCT NAME> (real link to the SOE page for the Product; for example, eServices) page in the Genesys Supported Operating Environment Reference Guide."
  - Is the information in the release table correct? Release version, date, release type, restrictions, supported operating systems? Does this information match the table on the specific release page?
- Discontinued Support section:
  - Has the link/reference to the SOE been updated as noted on the SOE Information in RNs page? Should be: "This section documents features that are no longer supported in this software. This cumulative list is in release-number order with the most recently discontinued features at the top of the list. For more information on discontinued support for operating environments and databases, see Discontinued Support in the Genesys Supported Operating Environment Reference Guide."
  - If an OS, database or browser is discontinued, follow the directions provided on the SOE Information in RNs page.
- Related Resources section:
  - Is the section called Related Resources instead of Additional Information? Related Resources is the heading name for online RNs.
  - Has the link/reference to the SOE been updated as noted on the SOE Information in RNs page? Should be: The <PRODUCT NAME> (real link to the SOE page for the Product; for example, eServices) page in the Genesys Supported Operating Environment Reference Guide provides detailed information about the supported operating environments, including requirements, supported versions, and any conditions or limitations for <PRODUCT NAME> components.

#### SPECIFIC NEW RELEASE PAGE

- Top of page:
  - Is the release version at the top of the page formatted correctly? Occasionally, writers misplace decimal points. Does it match the version number in the release table on the main page?
  - Is the information in the release table correct? Date, release type, restrictions, supported operating systems? Does this information match the table on the main page?
- What's New section:
  - Are new feature/enhancements formatted as a bulleted list?
  - No excess white space between items?
  - If a new OS, database or browser is listed, the writer should follow the directions provided on the SOE Information in RNs page.

- Resolved Issues section:
  - Are the item separators (gray divider lines) correctly paired? Is spacing between the item separators and the text consistent?
  - No excess white space between items?
  - Is the JIRA number listed? Is it correctly located at the end of the closing text, or on a separate line if the item ends with a list or Workaround?

#### KNOWN ISSUES PAGE

- Are the item separators (gray divider lines) correctly paired?
- Is spacing between the item separators and the text consistent? No excess white space either within the items or between the items? (There's a persistent template issue that tends to insert excess white space between the text and the item separator.)

#### TRANSLATION SUPPORT PAGE

This page only exist for components that have been localized. This page is automatically generated via the RN Generation tool the first time the component is translated. No need to format check, in this case. You only need to format check this page for later additions. For those, do the following:

- If new languages were added (should be rare now), do they follow the convention listed in the Languages, Abbreviations, and Codes section of Localizing online (wiki) Help.
- If a new release is added for the an existing major version, are the columns sorted by latest to oldest, based on the English version (the latest being the first column. Is the versioning for the translated release in the same code stream as the English release? Note: You will not necessarily know if the translated release numbers are correct, but there should be some logical association between it and the English version. If you see something that looks odd, it's a good idea to bring it to the writer's attention.
- On the English release page (you find this at the top of the first column), has that page been updated to expose the section "Supported Languages". **Note:** The RN release pages have this section commented out automatically. It should only be exposed, when a particular release is translated. Once exposed, the writer should republish the page.

#### RN FORMAT CHECK REQUEST EMAIL

• If there are new features in this release, does the email include a feature table indicating the number of new features, the platform, and the initiative under which the features fall? If there are no new features, the table isn't needed. Marudhu needs this information for feature metrics collection.

#### APPROVAL/REMINDER EMAIL

After checking and approving the HTML release note, send the writer an email along these lines:

Format approved.

#### **REMINDERS:**

• **DO NOT** Publish RN freeze forms for components that are part of 9.x (formerly known as G-NINE, 9.0, v9.0, etc.), which could include 9.1, 9.0, 8.5, and/or 8.1 components.

- **DO** continue to publish RN freeze forms for components that are not part of 9.x.
- HTML release notes:
  - Once approved by Pubs Editors, place a copy of the file in \\Galaxy\tdoc\_final\Current\_RNs, and notify Pubs Editors. Pubs Editors will upload the file to the Production Server (cache2/public), and let you know when it's done so you can confirm that the file displays correctly on your document page.

# PDF

# <h2PDF

On occasion, you may be asked to format check a PDF. At this point, there are 4 scenarios that might fall under, EAP, third-party document, or a special circumstance.

# "Older" PDF=

On very rare occasion, you man need to test a PDF for an product documentation that was not converted to an online version. This is the case with the SIP Server 8.1 Deployment Guide. For that, only minimal testing is required.

- Does the PDF open correctly? With TOC on the left and cover page.
- Does the Genesys name now appear as Genesys Cloud Services, Inc? There are four places on the copyright page. There may be others in the manual.
- Does it include a TOC and Index that works? (check a few links)
- A selective scan through a couple pages to make sure everything is OK.
- If it's an update to an existing PDF, is the file name the name as the existing name?

#### EAP

Usually, a PDF for EAP is a temporary solution. In fact, it might be added to the public repository up to the released EAP docs are available online, and then the PDF is removed from the repository. Writers create the PDF based on the instructions in the Early Adopter Program article in this guide.

If you have a request to test a PDF for an EAP, you check the following:

- Does it include the Disclaimer on the cover?
- Does it include a DRAFT watermark (20% opacity)?
- Is the PDF file name something meaningful, as opposed to the auto-generated file name used for a PDF generated from the wiki?
- Confirm there are no change bars.

# Third-party

If you get a PDF from a Genesys product developed by a third-party, for example Avtex developers and documents Gplus Adapter for WFM, only minimal testing is required.

- Does the PDF open correctly?
- Does it include a TOC?
- A selective scan through a couple pages to make sure everything is OK.
- If it's an update to an existing PDF, is the file name the name as the existing name?

#### Special Circumstance

There may be a case that a Product Manager agreed to send some content to a specific customer. Perhaps, a new feature is being added specifically for them and that no one else should see or be aware of. A writer might be asked to create content for that, say in Confluence. Monique Gionet had this scenario in September 2021. For that circumstance, do the following:

- Does it include the Disclaimer on the cover? It's the same disclaimer used for EAP PDFs mentioned above.
- Does it include a DRAFT or RESTRICTED watermark (20% opacity)?
- Is the PDF file name something meaningful, as opposed to the auto-generated file name used for a PDF generated from the wiki?
- Confirm there are no change bars.
- Is the date stamp on the cover? You might have to alert the writer to add it when the PDF comes your way.

# HTML Pre-release Notes

# HTML Pre-release Notes

Pre-release Notes have a specific template, with specific legal boilerplate in the Introduction section.

# Important

Since 2020, Pre-release Notes are rare.

### FILE NAME

The file name uses the standard convention for HTML RNs, but substitutes "pr" for "rn". Additionally, the release number and/or the customer name is included. Examples:

- rntitle85pr\_85xxxxx.html
- rntitle85pr\_85xxxxx\_customername.html

# INTRODUCTION SECTION

- Check the second bullet item for the intended date of delivery.
- Check the fifth bullet item for the estimated General (PA) release date.

#### KNOWN ISSUES SECTION

Should only list issues associated with this specific pre-release.

#### ADDITIONAL INFORMATION SECTION

Additional Information includes anything the Product Manager or the Project Manager feels is needed for this code drop. Generally, this should be testing information, platforms, and so on. (Not the usual list of other documents – unless the PCT insists.)

#### DELIVERING THE RESTRICTED OR PRE-RELEASE RN

- First, ask the writer to confirm with the Project Manager/PCT that the IP exists and the release type is correct (RESTRICTED or PRE-RELEASE). Doing this ahead of time will save effort later (see the NOTE at the end of this section).
- Compose an email to the Production Builds Request email alias. Copy the writer, Pubs Editors, and the Project Manager (and any other individuals the writer deems necessary – however, the PjM should suffice). The body of the email should be something along these lines: "Hello, The attached Pre-release Note is approved for inclusion in the IP for Genesys Designer 8.5.100.00. Let me know if you have any questions regarding this file."
  - Attach the approved file to the email.
  - In the subject line, include the release type, the component name, and the release number. For example: Pre-release Note: Genesys Designer 8.5.100.00

# Important

If the IP is not yet in place, or the release type doesn't match your request, Production Builds will notify you of the discrepancy. If the writer and Project Manager are not copied on this notification, you'll need to contact them. The Project Manager/PCT is responsible for updating the release type of the IP and notifying Production Builds of the change. Suggested verbiage:

Would the appropriate member of the PCT please:

- Republish the Component freeze form with the correct release type.
- Send an email to "Production Builds Request" asking that the release type of the corresponding IP be updated.

### ARCHIVING THE RESTRICTED OR PRE-RELEASE RN

Restricted and Pre-release RNs are stored in SharePoint in the Restricted Docs folder in the Global IX site. **NOTE:** These files are **not** uploaded to the production server.

If this is a standalone Restricted RN or Pre-release Note, simply upload the file into the appropriate product folder. If it is a cumulative Restricted RN, locate the existing file and upload a new version.

# HTML Deployment Procedure

# HTML Deployment Procedure

# Important

Since 2019 or earlier, HTML Deployment Procedures are rare or non-existent. If there is a Deployment Procedures, it's online and part of the online Release Note.

#### FILE NAME

Does the file name match the existing RP?

#### BROWSER TAB

Hover over the browser tab - Is the correct DP name displayed?

#### COPYRIGHT DATE

Should start with the year of the first release and end with the year of the most current release. Example: 2013-2015

#### INTRODUCTION

• Release table: (In most cases this is the only area of the file that has been updated.) Does the new release information (Release Number; Date; Release Type) \*Links: Do they lead to the anticipated location?

#### DEPLOYMENT PROCEDURE

In most cases, there are no changes in this section.

- Format: Take a quick scan to see if the numbered list is in order, etc.
- Links: Do they pull up the correct document, or lead to the anticipated location?

# ARCHIVING THE HTML FILES IN THE PRODUCTION SERVER

When the file has been approved and the IP test has passed, upload the file to the appropriate folder in the production server (cache2\public) and to the appropriate Genesys Public folder in SharePoint. Then refresh the map (the tool parses all of the folders to see if there is new content): https://docs.genesys.com/Special:Repository?action=refresh-map

# HTML Release Advisory

# HTML Release Advisory

# Important

HTML Release Advisories are no longer created. There were replaced by online Product Alerts, when needed by a product.

#### FILE NAME

Does the file name match the existing RA?

#### **BROWSER TAB**

Hover over the browser tab - Is the correct RA name displayed?

#### COPYRIGHT DATE

Should start with the year of the first release and end with the year of the most current release. Example: 2013-2015

#### ALCATEL-LUCENT PARAGRAPH

If the initial release of the product (listed in the release table in the Contents section of the associated RN) is earlier than February 1, 2012, the paragraph must remain in place. If the initial release of the product (listed in the release table) is later than February 1, 2012, the paragraph should be removed.

#### ITEM SEPARATORS

Are the item separators (gray divider lines) correctly paired? Is spacing between the item separators and the text consistent?

## LINKS

Do they pull up the correct document, or lead to the anticipated location?

## ARCHIVING THE HTML FILES IN THE PRODUCTION SERVER

When the file has been approved and the IP test has passed, upload the file to the appropriate folder in the production server (cache2\public) and to the appropriate Genesys Public folder in SharePoint. Then refresh the map (the tool parses all of the folders to see if there is new content): https://docs.genesys.com/Special:Repository?action=refresh-map

# HTML Language Pack RNs

# HTML Language Pack RNs

HTML Language Pack RNs are no longer created. Language Pack RNs are part of the online RN, if the component has language packs.

ARCHIVING THE HTML FILES IN THE PRODUCTION SERVER AND SHAREPOINT

When the file has been approved and the IP test has passed, upload the file to the appropriate folder in the production server (cache2\public) and to the appropriate Genesys Public folder in SharePoint. Then refresh the map (the tool parses all of the folders to see if there is new content): https://docs.genesys.com/Special:Repository?action=refresh-map

# HTML Localized RNs

# Second box title goes here

No longer created.

**ONLINE Product Alerts**
### Third box title goes here

This is part of online readme template. There is nothing for you to format check.

### ONLINE Readmes (What's New In X.X.X)

### Third box title goes here

This is a very high level information, mostly in bulleted lists. There is nothing for Pubs Editors for format check.

# Updating the Genesys Engage on-premises Release Notes page

The Genesys Engage on-premises Release Notes page contains links to all Genesys Engage onpremises Release Notes for product/component/versions that are still supported and/or reached end of support but have not yet been approved for removal from our site.

#### Important

Igor Klyashchitskiy's Production team adds a link to this Genesys Engage on-premises Release Notes page in the IP Readme for customers seeking the associated RN. Before that was implemented, Igor had to include the URL for each RN, which we provided. That was a time-consuming process, and it was easier to just include a link to the whole page to let customers find the RN for themselves.

### Review the RN page

- The page is laid out with tabs for each two-digit version from 9.1 down to 5.x with an Other tab that includes versions that didn't merit a tab of its own.
- At the far right, for all tabs but 9.1, 7.1, 7.0, and 5.x, there is an Other Resources section.
  - For 8.0 and below, the section contains links to distinct pages for Release Advisories, Wizard Advisories, Deployment Procedures, and International Release Notes.
  - For 9.0, 8.5, and 8.1, there may be links to those separate Other Resources pages but that section also may have links to associated files on the RN page.
  - Looking at the Other Resource type pages, you will see that they are also set up with tabs. Some have more tabs than others.
  - Note: Starting with 8.5, updating these Other Resources pages became a lower priority. That meant that this section and the pages were only updated if a customer complained. That never happened.
- The RNs are presented in columns, automatically created via templates.
- The RNs are grouped under the product heading. To be consistent, even products that only have one RN have a heading.
- At the top, you see that there's a link to a video I created some years ago about how to navigate through these pages.

### Review the RN page source

- At the top, you see the coding for the video.
- For the wiki coding, you see the tabber coding to create the tabs.
- Each tab section includes <div class="three-columns-rn">; this wraps all items within the tab into the columns. You will note that there are more than 3 columns even those the template name indicates three. Julie must have changed the template definition after she created it. Some years back, I had to manually create the columns.
- Each product group has the following:
  - <div class="group-rn">; the product group template for the RNs
  - the product name using the Level 4 section heading
  - a bullet list of links to all of the RNs for that product. In particular, notice the different coding between the online RNs and the HTML RNs.
  - the closing </div> tag
- For an online RN example, for Billing Data Server, the coding is as follows:
  - ====Billing Data Server====
  - [https://docs.genesys.com/Documentation/RN/9.0.x/bds90rn/bds90rn Billing Data Server];
     Note: What's odd is that on the display pages, it looks like the coding is absolute rather than relative. However, if you click Edit Source, you will see the coding is relative, using the Documentation:RN:bds... coding.

</div>

 For an HTML example, for SIP Server, the coding is as follows: <div class="group-rn">

====SIP Server====

- \*{{Repository|sip\_proxy81rn.html|278990496044|SIP Proxy}}
- \*{{Repository|sip81rn.html|278983573409|SIP Server}}
- \*{{Repository|sipspan81rn.html|278990868608|sipspan2}}

</div>

• This same structure is used for all RNs.

### What you update

You'll have two types of updates.

- Adding a link to a new RN, with the possibility of having to add a new group section. Adding a new RN should be rare. Adding a new section should be even rarer.
- Removing a link to an RN or related HTML files, like RA, WA, and so on.

#### Add a new Release Note

This should be rare but a month or two ago, I added an Outbound Contact Server Lite RN to the Outbound Contact section under the 8.1 tab.

- 1. Click Edit source.
- 2. If you are adding a new RN under an existing section, add a bullet to that section and the link to the RN. Place it where it should go alphabetically.
  - If the RN is online, use the standard link formatting for RNs on the docs site, like the BDS example.
  - If the RN is in the HTML format, get the link from the Repository Utility, like the SIP Server example.
- 3. Save the page.

#### Important

If you need to add a new section, for example for a new 9.1 product released with one or more RNs, you add a new section, following the BDS example. You add the section where it should be alphabetically.

#### Remove RNs from this page

Per the EOL process, when a product/version reaches end of support and it's more than a year past the EOS date, and Monique has confirmed with Customer Care that it is okay to remove the associated doc content from the product landing page, the writer follows the documented process to remove the content.

For this RN page, you remove the links from these pages either at the same time or after the writer does so on the associated product landing page.

When it's okay to remove the documentation, do the following:

- 1. Click Edit source.
- 2. Scroll or search for the files you need to remove.
- 3. If it's OK to remove all components for that product version, delete that section, including the RNs.
- 4. Save the page.
- 5. Check the Other Resources pages/links to see if the product version has files in that section and/or on the Other Resources pages.
- 6. If so, remove them from the respective Other Resources page.
- 7. When you're done, after saving the page, alert the writer that you have removed their files from this page.

### Notes

- If after removing everything, there are no sections/links on the associated tab, add a notice to the tab about those versions reaching EOS support. And sometime later, you can just delete that empty tab.
- Be aware of product name changes. In some cases, a product might be called something else in previous versions. For example, Pulse Advisors was previously called Performance Management Advisors starting in 9.0. So, earlier tabs use the old name.

# Customer Care Documents on our Docs site

Customer Care is responsible for some documentation on our site. Some of them are online and some of them are not. Here are some instructions on handling them.

### Online document

There is one online document that Customer Care maintains: Support Processes for On-Premises Licenses. Colette Jones updates it. So update requests should be directed to her.

### Non-online documents

#### Important

In February 2021, Joe reached out to Chris Doyle in Customer Care to ask about moving their Customer Care docs (currently available through Customer Care (Support) and Genesys System-Level Guides) to all.docs.genesys.com. The end result was that Chris Doyle is going to create one new Customer Care guide that includes information that is still relevant from the existing Care guides and new information to handle new delivery scenarios. Once Chris Doyle determined what the new guide would need, he would work with Colette Jones to create it. Jeff Erickson trained Colette Jones on the all.docs platform. As of December 1, 2021, Joe has not heard from Chris about the progress of that document.

On a few pages on our docs.genesys.com site, are links to Customer Care documents stored in the Production Server (previously Box). Somewhat regularly, Customer Care requests that we upload new versions of existing documents or new documents to those pages.

Unfortunately, those providing those documents don't always retain the same file name or even title of a document that they want to replace the currently available document. At the most basis, they just add a version number to the file name, which we can delete. At other times, the file name or title is different enough to raise questions about what file it's meant to replace. In early 2019, Joe requested they not change the file name and be clear what file is the be replaced and the URL of the page that includes the link.

### Important

Be aware that the Genesys Engage cloud Customer Care Support Guide was previously called Genesys Care Support Guide for Cloud Subscriptions and the file name was Support\_Guide\_Genesys\_Care\_Cloud\_Subscriptions. As of 11/05/19, the file in Production Server (and SharePoint) Genesys Public > Customer Care > Support Guides is called Genesys Engage\_Cloud\_Customer\_Care\_Support\_Guide.pdf. Joe is leaving the guide with the older name in the Production Server and SharePoint just in case there are links to the older name that we are unaware of

**Chris Doyle** in Customer Care handles PureEngage Cloud Customer Care Guide (file name Support\_Guide\_Genesys\_Care\_Cloud\_Subcriptions.pdf and Support Guide for Cloud Resellers: End User Cloud Subscriptions, PureEngage Cloud Premier Edition (including Self-Service, Outbound Engagement (including Mobile Marketing), Social Analytics; the file name is "Genesys Care for the Cloud.pdf." The following pages have links to them:

- https://docs.genesys.com/Documentation/ST/latest/Cloud/Welcome
- https://docs.genesys.com/Documentation/ST/latest/CloudReseller/Welcome

Note: Chris Doyle's name was provided to Joe by Robert Davis on 9/21/20 when Joe asked Robert and Sheldon Bacon (referred to by Colette Jones).

These documents can appear on any of the following pages:

- https://docs.genesys.com/Documentation/Cloud
- https://docs.genesys.com/Documentation/ST/Closed/SupportGuides/Welcome
- Customer Care confluence page, to which we don't have access. It had a link to the Genesys Care Support Guide for Cloud Subscriptions
- https://docs.genesys.com/Documentation/System/
- https://docs.genesys.com/Documentation/ST/current/CloudReseller/Welcome

The SharePoint location of these guides is: Genesys Public > Customer Care. The Support Guides are in the subfolder.

A few thoughts/lessons learned:

- On 2/8/19, Joe had to upload another version of the Genesys Engage cloud Customer Care Support Guide. The link on the second page above included underscores. Box wouldn't let me use the Upload a New Version option to upload the version with the underscores. The title for this document is Genesys Engage cloud Customer Care Support Guide. The file name is Support\_Guide\_Genesys\_Care\_Cloud\_Subscriptions.pdf. I changed the name to reflect the title but retained the old file name. The version in Box didn't have the underscores in the display name and both Kate and I received an error when we tried to upload it.
- It turns out that the other version with the underscores was also in the same folder and that's the one Joe used to link to the pages. The problem Joe had in January 2019 had to do with Chrome not always clearing its cache when the new upload happens, even after the cache is cleared. Joe added the Description for both files in Box to explain the situation.

### Important

There's a document called the CAS Operational Guidelines that is sometimes referred to as Customer Application Support Guide. Do not confuse this CAS guide with the Customer Application Support Guide posted on the Customer Care page of our docs site. The CAS document is an internal document created by Proferssional Services. Tony McGinty is the PS contact for that guide.

# Legal Documents on our Docs site

Since the beginning of 2021, Legal (or someone working with Legal) has requested that we host documents for them on our sites. As of November 2021, that has been limited to a Genesys Choice Agreement.

- In February 2021, the following all.docs.genesys.com page, Choice Terms and Conditions, was created and a Genesys Choice Agreement PDF added to our IX Repository that customers can download from this page. This request came to us from Jaime Borja in Legal.
- In November 2021, the agreement was reworked and some of it was moved online. The page was
  updated to include a link to the Genesys Choice Terms and Conditions online book, Genesys Choice
  Terms and Conditions, with the link remaining that enables customers download the revised agreement.
  George Mather (who worked with Joe on moving some of the content online), and a few others from his
  team, were trained (Note: should occur at the end of November/early December 2021) to update/
  maintain that online book on all.docs should changes be required down the road.

### What Pubs Editors might need to do

- Should the Genesys Choice Agreement need to be revised, George Mather or Jaime Borja will provide you with an updated PDF that you need to add to the public > Legal folder in the IX Repository. You also need to upload it to the Genesys Public > Legal folder in Global IX Sharepoint. The file name should be Genesys-Choice-Agreement.pdf.
- Should George or his team need to revise the stand-alone page, Choice Terms and Conditions, theoretically, they can make the changes since it's on all.docs. However, should they need help, I'm asking them to contact you.

## Pubs Localization Admin's Process

#### Important

These instructions were developed by Inga Frolova and Kate Breckenridge in conjunction with Tech Pubs Wiki Admins. This process does not apply to what Jaba is overseeing and Michael Katten is leading in 2021.

### Overview

#### Important

- There are **two** localization wikis for each language the Vendor wiki and the Customerfacing wiki.
- This process assumes that the basic wikis have already been set up. The Tech Pubs Wiki Admins are responsible for setting up a new wiki for each language/vendor or language/ customer combination. If you need wikis created for new languages or vendors, contact Tech Pubs Support.
- If new wiki accounts are needed for a new vendor, contact Tech Pubs Support.
- English Help Localization Kit: See the Help eLK tab/topic in this Admin's process Writer's Process for details.
- Localization Wikis (Vendor and Customer)
  - Set up (or update) the Vendor and Customer wikis:
    - Product (if needed)
    - Version (if needed)
    - TOC (always updated unless the writer specifically states that there have been no changes to the TOC)
    - Import the English XML
    - Update the JIRA sub-task with a comment stating that this has been done. Include URLs to the associated TOCs.
  - Import translated XML into the Customer wikis

### Help eLK (English localization kit)

After you have received notification (via JIRA) that the writer has completed Steps I through V of the Writer's Process and the Help eLK has been delivered to the Localization Coordinator:

- Verify that the Help eLK is complete:
  - Is the Help eLK zip file (and the files within it) named appropriately? See the Writer's Process for details. KATE: insert a link to the Writer's Process.
  - Does it contain the English XML file, the INFO.txt file, and the TOC .txt file?
  - Does the INFO.txt file contain the needed information?
- Update the DRAFT TOC and import the English XML on the associated **customer**-facing wikis (and make any other needed wiki adjustments as noted on the Customer wiki tab). Update the JIRA sub-task with a comment stating that this has been done. Include URLs to the associated TOCs. KATE: insert an example here.

### Vendor Wiki

You are responsible for maintaining the basic elements on the vendor/language wikis (product, version, manual, initial DRAFT TOC). The vendor (Milengo) has assumed the task of updating the TOCs and importing the XML on the vendor/language wikis.

- 1. Locate the appropriate URL on the Localization Wiki URLs tab in this process.
- 2. Click the URL for the language and wiki you are setting up (the Vendor wiki for that language or the Customer-facing wiki for that language).
- 3. Log in using the Wikisysop username and password. Contact **Tech Pubs Support** if you don't have that information.
- 4. Check whether the product is already created.
  - Click the Create or edit a product link in the Helpful Links box in the left column.
  - If the product is not listed, click edit to create it, using this format:
     { {#product:productShortName|displayName|description|parent} }. Note: Only the product and
     productShortName parameters are required. The format is also given in the bulleted list of tips on
     the Create or edit a product page. IMPORTANT: When setting up a new product, you need to add
     this to the Documentation:ListAllProducts page, otherwise the left TOC will not render correctly.
  - Click Save page.
- 5. Navigate to the Versions page (Helpful links for writers/Manage Ponydocs/Versions).
  - Click create to create the version using the following format: {{#version:name|status}}, where
    name is the three-digit version number and status indicates whether the version is released or not.
    For example, you might enter {{#version:8.5.2:unreleased}}. IN THE VENDOR WIKI the status
    should always be "unreleased". IN THE CUSTOMER FACING WIKI the status gets changed when the
    Help is made public (or a Draft version is utilized).
  - Click Save page.
- 6. Click the manual name to open the page where you will create the TOC. (If this is a new version of a

previously translated manual – change the version number in the URL in the browser bar and hit enter and then choose create. Manually modify the category tag with the new version number, then import the English TOC and save.) FROM IM WITH VIV: Click the manual name and then change the version number in the address bar and the category footer.

- Click create to open the page for editing, and then paste in the TOC from the approved English version of the Help or the customized TOC provided by the writer. Be careful not to delete the category tag! **Note:** The writer should have supplied the link to this TOC.
- Click Save page.
- To make the TOC links live (red), click edit and then click Save page.
- Import the edited English XML (see XML tab in this process) into ONE Vendor wiki. Step through the Help
   - look for missing pages, broken links, or any other issues that should be addressed BEFORE submitting
   the Help eLK to the Vendor.
- 8. Update the other vendor/language wikis associated with the release and import the English XML.

### Customer Wiki

Almost the same as the Vendor wiki, with a few differences.

You are responsible for maintaining the basic elements on the customer-facing/language wikis (product, version, manual, initial DRAFT TOC), updating the TOC if necessary for the current iteration, and importing the English XML into the DRAFT version prior to translation.

- You (or the writer, depending on their level of competency and/or their bandwidth) are responsible for importing the approved translated XML into the DRAFT version.
- It is the writer's responsibility to "push" the DRAFT version into the appropriate released version.

Editing and Importing the XML

- 1. Download the localized Help (the tLK) from the associated JIRA ticket.
- 2. Open the localized XML file in an editor (Notepad++ is preferred, though Wordpad and UltraEdit both work).
- 3. Find a timestamp. Using this timestamp as the "before," do a Find and Replace operation to edit all of the timestamps in the XML file. Change them all to the current time, and then save the XML file. Note: Do not perform this step before setting up the wiki as described above. The timestamp must be later than the TOC creation time.
- 4. Return to the wiki. Click Special pages from the Toolbox box in the left column.
- 5. From the Page tools section, click Import pages.
- 6. Click Choose file, select the XML file, and then click Upload file.
- 7. Once the import is complete, navigate to the Welcome page and verify that the XML has uploaded correctly. Spot check a page or two don't spend a lot of time.
- Copy the URL for the Welcome topic and then navigate to the Documentation page (https://docs.genesys.com/i18n/<language\_code>/Documentation) or (http://docs.genesys.com/ Draft/<language\_code>-<vendor>/Documentation).
- 9. Click edit and then create an entry for the Help file, if needed.

- If this is the first document for a product, add the product name as a Heading 3.
- Under the heading, paste the link to the Help file Welcome page. [KEB] Create a released version on the Special Versions page?
- 10. Click Save page.
- 11. Assign the JIRA issue for this Help file to the writer, who will perform a spot check of the Help file.

### Editing the XML

- Timestamps: Use regex (regular expressions) to find and replace. Search for "<timestamp>.\*</timestamp> Change them all to the a future date and time (no more than one day in the future), and then save the XML file. **Note:** Do not perform this step before setting up the wiki. The timestamp must be later than the TOC creation time.
- Versions: Make sure the type and format of the version number in the XML and on the wiki match. For example, if one is "DRAFT" and the other is "draft" or "Draft", the XML will not import.
- Useful information: To confirm that the XML is encoded as UTF-8 BOM, in Dreamweaver, press Ctrl + J and choose encoding. Or, open the file in Notepad++ and choose encoding.

### Accounts and User Rights

Setting up accounts and assigning user rights is technically the responsibility of the Wiki Admins. Contact Technical Publications Wiki Admin.

If they are otherwise occupied, follow the instructions provided under Wiki Access in the Writer's Guide.

- XML import issues usually result from one of two things:
  - The timestamp of the TOC or pages in the wiki are later than the timestamp of the XML file.
  - There is a misalignment of topic names and the TOC.
- Make sure the format of the version number in the XML and on the wiki match. For example, if one is 8.5.1 and the other is v851, the XML will not import.
- To upload/import translated XML into the customer-facing wikis without overwriting the existing translated Iteration:
  - In the XML, using regular expressions, search and replace the the release number (for example, ":8.5.1") with ":draft". When you import the XML into the wiki, it will go to the draft version (make sure that the version exists and that the TOC is in place first).
  - The writer (or possibly you) will then use the Ponydocs Update feature to migrate content from draft to the current version (for example, 8.5.1).
- When editing/importing the :draft TOC, remember to "edit and save twice" to make sure the left-hand navigation TOC works. NOTE: You may have to "edit and save" the first page of the **content** after the translated XML has been imported.

 PDF generation is NOT enabled on the localization wikis. There is another solution (PERL script) for creating a set of static HTML files from the content, that the customer can then open offline in their browser: https://github.com/ejamer/WikiToHTML KATE: After the wiki upgrade, I did a test and generated PDFs on a couple of localization wikis. While a PDF was generated, the translated content renders as guestion marks.

### Help eLK Naming Conventions

#### NOTE: Recently revised! (April 21, 2016)

Use the following naming conventions for the Help eLK (English localization kit).

#### Structure

The file name for a Help eLK has the following structure:

HELP\_LK\_ID\_specifics\_version-iteration\_date\_alphabetic\_ENU.zip

#### Variables

- *ID* is the abbreviated product name. This is often the same as the Wiki Product Short Name found in the URL for your product's landing page.
- *Specifics* is an optional variable. The "specifics" variable is for a product that might have more than one Help. Or, as shown in the example below, a Help (Genesys Rules Authoring Tool Help) that doesn't intuitively associate with the product name (Genesys Rules System).
- *Version* is the seven digit software release number associated with the Help that the XML files were derived from. Do **not** include decimal points.
- *Iteration* (for continuous delivery projects) is the iteration number of the software release associated with the Help . Confer with the PCT Project Manager and use the same iteration number used in the UI localization kit.
- Date is the creation date of the XML/eLK.

#### Constants

- *HELP* is a constant.
- *LK* (abbreviation for localization kit) is a constant.
- *Alphabetic*. A, B, C, etc. Used to identify version if the eLK needs to be revised and resubmitted to the vendor. The first version should be "A", the second "B", and so on.
- ENU (abbreviation for English-United States) is a constant.
- The *.zip* extension is a constant.

**Order of Fields** The fields in the LK file name should occur in the order shown above with underscores as indicated; the specifics field can also include a hyphen.

#### **Examples**

- HELP\_LK\_gax\_8520100-iteration2\_6-17-2015\_A\_ENU.zip
- HELP\_LK\_grs\_auth-tool\_8500100-iteration3\_6-17-2015\_A\_ENU.zip

### Localization Wiki URLs and Login Credentials

### Various login credentials for the vendor/language wikis

These were originally included in the localization process within the Writer's Guide. It was suggested that they should be removed, so I saved them here for reference.

#### Vendors

Username: Milengo

Username: Welocalize

Username: Simultrans

Username: XGS

Password: translate

#### Writers

Username: Writers

Password: genesys

#### **Genesys Functional QA**

Can use either a vendor username and password, or the Writers username and password.

LANGUAGE	LANGUAGE CODE	VENDOR	CUSTOMER
Arabic (Saudi)	ARA	https://ara- draft.docs.genesys.com/	https://ara.docs.genesys.com/
Chinese (Simplified)	CHS	https://chs- draft.docs.genesys.com/	https://chs.docs.genesys.com/
Chinese (Traditional)	СНТ	https://cht- draft.docs.genesys.com/	https://cht.docs.genesys.com/
Czech	CSY	https://csy- draft.docs.genesys.com/	https://csy.docs.genesys.com/
Dutch	NLD	https://nld-	https://nld.docs.genesys.com/

LANGUAGE	LANGUAGE CODE	VENDOR	CUSTOMER
		draft.docs.genesys.com/	
French (Canada)	FRC	https://frc- draft.docs.genesys.com/	https://frc.docs.genesys.com/
French (France)	FRA	https://fra- draft.docs.genesys.com/	https://fra.docs.genesys.com/
German	DEU	https://deu- draft.docs.genesys.com/	https://deu.docs.genesys.com/
Italian	ITA	https://ita- draft.docs.genesys.com/	https://ita.docs.genesys.com/
Japanese	JPN	https://jpn- draft.docs.genesys.com/	https://jpn.docs.genesys.com/
Korean	KOR	https://kor- draft.docs.genesys.com/	https://kor.docs.genesys.com/
Polish (Poland)	PLK	https://plk- draft.docs.genesys.com/	https://plk.docs.genesys.com/
Portuguese (Brazilian)	РТВ	https://ptb- draft.docs.genesys.com/	https://ptb.docs.genesys.com/
Russian	RUS	https://rus- draft.docs.genesys.com/	https://rus.docs.genesys.com/
Spanish (Latin American)	ESM	https://esm- draft.docs.genesys.com/	https://esm.docs.genesys.com/
Turkish	TRK	https://trk- draft.docs.genesys.com/	https://trk.docs.genesys.com/

# Restricted Repository Files (SpeechMiner)

### Important

- In general, restricted files are NOT housed in the production server. As of this writing, there are only two sub-directories in the Restricted directory: "Genesys Speech and Text-Legacy" and "SpeechMiner".
- As of April 2021, Genesys Interaction Analytics content (SpeechMiner and Speech and Text) is no longer closed. All files that were in the restricted folder were moved to the public folder in the repository.
- Pubs Editors are responsible for uploading any restricted files to the production server via RepositoryUtils.

# FileZilla: Uploading files to the production server and SharePoint

### Important

With Sophie's development of the Repository Utility, Pubs Editors no longer need to install FileZilla and use it to upload files to the production server. These instructions are kept here as a backup. However, if you need to use FileZilla, check with Ed Jamer as some of the information may have changed.

Important: You must be connected to the Genesys network (or VPN) to access the production server.

- Upload content to the appropriate product folder in the production server using Filezilla (/u01/app/ apache/html/extensions/Repository/cache/public).
- Upload content to the appropriate product folder in Genesys Public in SharePoint.
- Confirm that the writer (or you) has placed copies of updated RNs in \\galaxy\tdoc\_final\Current-RNs.
- · Provide writer with wiki coding if necessary:

{{Repository|FILENAME||DISPLAY-DESCRIPTION}}

• If you are uploading new content to the Production Server (as opposed uploading a new version of existing content), refresh the map by going to Repository and clicking "Refresh now!"

### Installing FileZilla

You can download and install FileZilla Client from https://filezilla-project.org/ download.php?show\_all=1 (from IT). Select 64-bit or 32 bit, depending on your machine.

**Important:** When installing FileZilla, read the prompts carefully to ensure you don't accidentally agree to install any other software.

### Configuring FileZilla

Once FileZilla is installed, you need to set up a Site that provides detailed information about connecting to our production server.

- 1. Under the File menu, select Site Manager.
- 2. Click New Site and type in a name you want to use (for example: "Production Server Cache")
- 3. Use these values on the Site Manager > General tab:

- Protocol SFTP SSH File Transfer Protocol
- Logon Type Normal
- Host 192.168.10.49
- User isweb
- Password T3chPubs3
- 4. Use these values on the Site Manager > Advanced tab:
  - Server Type Default (Autodetect)
  - Default remote directory (default remote directory value is case sensitive and must be spelled correctly without any extra spaces) /u01/app/apache/html/extensions/Repository/cache
- 5. Click OK to save the changes.
- 6. To open a connection to the production server, click on the small downward arrow toolbar button that is located just below the File menu and select the connection you just created. It should automatically connect and go directly to the cache folder. You can also click Server > Reconnect to connect to the Production Server after you first connect to it.

Note: When you connect for the first time, a dialog box will appear asking if the location is secure. Click the check box that says "Always trust this host, add this key to the cache." Then, click OK.

For historical reasons, here's a reference to Barry's instructions prior to 11/2/19.

# Renaming and uploading old Help zip files in our IX Repository

With the implementation of the Production Server (aka our IX Repository) to house our non-online files, came the requirement the same file name cannot be used more than once. In the past, file names for non-online helps did not include the release version. The Help files were embedded in the UI and our old repository tools did not have an issue with using the same file name multiple times, because an individual ID was assigned to each file. However, our current repository (on the production server) does not assign IDs. When there is more than one file with the same name within the entire repository it will stop searching at the first one it finds.

When notified of such a situation ("Hey, I clicked on a link for the 8.1 help zip file but when I opened the downloaded zip it was for 7.6!"), here's what to do:

- 1. Download the associated file from SharePoint.
- 2. Rename the file by adding the two-digit release number to the beginning of the file name. Example: r\_designer-help.zip becomes 81r\_designer-help.zip
- 3. Upload the renamed file to the Production Server.
- 4. Upload the renamed file to SharePoint. In SharePoint, add a file description that identifies the nature of the new file so we have a record of what was done. Example: "This file is identical to the r\_designer-help.zip in this folder. It had to be created because the repository does not support identical file names for different releases."
- 5. Update any corresponding links on the wiki with the new file name.
- 6. Repeat these steps for any other releases of the help.

# Legacy

The pages grouped under this section of the Writer's Guide are legacy content and retained for reference purposes only.

# Box to SharePoint

#### Important

The migration from Box to SharePoint was completed in early 2020. Retaining this article only as a reference.

On 11/21/19, Genesys IT announced that Box will no longer be accessible starting on January 1, 2020. As communicated previously, we'll be using SharePoint.

For non-online content to which we need to link from our doc sites, writers provide Pubs Editors with new or updates files and Pubs Editors uploads them to the Production Server. As of mid-October 2019, Pubs Editors are also placing copies of those files in the Genesys Public folder in the Global IX SharePoint site. (Note: Although SharePoint does support version history, the versions available in SharePoint will only go back to the October 2019 versions.)

For all other content stored in Box (for example, internal docs, drafts, processes), Kate will be moving content and department-wide files to SharePoint before the end of the year. However, she won't be moving content from personal folders or any other folders people have created to store or share files.

### Important

If you want to retain those files, prior to January 1, 2020, copy those files to SharePoint.

#### How to copy/content to SharePoint

If you want to retain the entire contents of a folder and add them to SharePoint, the easiest way is as follows:

- In Box, select the folder whose contents you want to retain and click Download. Box will create a zip file of the folder, including sub-folders and files. (Note: You can also select multiple folders at the same time to download into one zip.)
- 2. Extract the file on your computer.
- 3. Open IX Shares.
- 4. Create a folder for yourself in that location.
- 5. In that folder, drag the folder that you previously unzipped into your SharePoint folder.

#### A few points:

• If you have multiple versions of the same file in Box , when you download from Box it only downloads the latest version. It doesn't download the earlier "Version History" versions. So, if you need them, you

have to manually download them and move them to SharePoint.

If you need to share files with people outside of IX, since Global IX SharePoint is a private site, you'll
have to create a Public site in SharePoint.

# Alfresco to Box Instructions

### Important

This article is only retained only as reference about a tool IX previously used.

As of Monday, January 22, 2018, you are no longer be able to add content to Alfresco on-premises sites. You will be able to download content from those sites.

Since you won't be able to add documents to on-premises Alfresco sites, Pubs Editors will have to manually add any updated or new customer-facing documents to Alfresco Cloud. To that end:

- For all documents that require a format check (for example, HTML RNs of release type General, Update, and Hot Fix): Once approved by Pubs Editors, place a copy of the file in the \_Alfresco-Cloud folder on tdoc (specifically, \galaxy\tdoc\\_Alfresco-Cloud) and then notify Pubs Editors about it. Pubs Editors will then upload the document to Alfresco Cloud and let you know when it's done so you can confirm it displays correctly on your document page. (Our typical Pubs Editors reminders will include mention of that new step.) I added an underscore to this folder name and the \_Online-RN-PDFs folder so that they appear at the top of the tdoc folder.
- For other customer-facing documents that are stored in Alfresco (that is, not online) but that need to be accessed by customers from your documentation page:
  - For existing documents, place a copy of the file in the \_Alfresco-Cloud folder on \\galaxy\tdoc and send an email to Pubs Editors asking them to upload the document to Alfresco Cloud.
  - For new documents of this type, you do the same as above. In this case, you obtain the URL that you use on your documentation page from the Repository Tool the same way you always have.
- With the migration to Box, you won't have to update links on your documentation page for documents stored in Alfresco. Reva is providing us with a mapping mechanism.
- Pubs Editors will update processes once we've been trained on Box and the migration is complete.
- If your team uses the Alfresco wiki, Box doesn't support that. So, if you have content on an Alfresco wiki that you want to hold on to, you'll need to move it, perhaps to Confluence.

**Note:** This does not impact customer-facing documents that are exclusively online. It only impacts those that leverage the Alfresco Genesys Public site and, for SpeechMiner, the SpeechMiner folder in the Customer Documentation-Limited Availability Alfresco site.

# Conversion Tools

#### Important

This page no longer applies as it was associated with covering PDFs to online documents. Also, the CafeG link under PDF conversion no longer works as CafeG was retired.

**Important:** When planning a conversion to the Wiki, be aware that in general we don't want to just convert a document into a wiki format using the same structure that was in the PDF. We want to break it down into self-contained topics enable based on what the customer wants to do. This approach is based on Mark Baker's "Every Page is Page One" model which is designed for web-based content.

The Content Management group, led by Jose and Barry, are working to identify templates and guidelines to support writers in doing this. If you're preparing a conversion, contact the Wiki IA group.

There are conversion tools to help you move existing PDF and MediaWiki documents to the Genesys Documentation website. You can email the Wiki IA group for help.

### PDF Conversion

You can find the Frame-to-wiki converter tool on Cafe G: https://cafeg.genesys.com/docs/DOC-21570.

The current tool has the issues that are outlined below, but it still gets the conversion about 90 per cent correct. It is better than copy/paste and hand-tagging the whole content.

Correcting the issues is best handled by search and replace in a good XML editor that highlights code and tags, such as DreamWeaver.

If a book has a lot of procedures, there is a lot of hand work required to format them correctly. It is recommended to carefully edit of the XML file prior to importing it into the wiki, rather than trying to fix everything in the wiki text-editing interface.

#### **Converter** Issues

- Em dashes (—)and En dashes (-) are almost always converted to a double quote: "
- Links to graphics are always broken. All text, up to the end of a paragraph marker, that follows a link to a graphic is often corrupted or missing.
- Links to tables are always broken.
- Nested lists, either bulleted or numbered, or a combination of nested bulleted and numbered, are corrupted, and have to be recreated by hand.

• Graphics or tables that are included in a list or nested list often appear in the wrong place, and result in an or

#### tag being incorrectly inserted.

- Tables are not always converted correctly an usually have to be manually recreated.
- Links to subheads are commonly broken and have to be recreated by hand.
- The code and codewide tags are not always converted correctly.
- Procedures are not converted correctly if there are level 5 heads, indented paragraphs, prerequisites, and next steps included.
- Links to steps in procedures are always broken.
- It would be nice to have the current style applied to graphics.
- It would be nice to be able to make topic breaks automatically at level 1 and level 2 heads. Right now, if topics are created at level 1 heads, links to topics are broken.

### MediaWiki-to-Ponydocs converter

We also have a tool to convert MediaWiki content to Ponydocs format. Please email the Wiki IA group for more information.

# Converting FrameMaker files to the Genesys Docs Wiki Format

### Important

This page no longer applies.

If you have a FrameMaker file that you need to covert to a wiki document, see the following resources:

- Conversion Tool
- Video about using the tool

# Verttabber

### DO NOT USE (as of January 2015)

### Description

The verttabber is a no-longer-powerful tool for displaying many pieces of information on one page. It allows users to click through each piece of information on one page, reducing the number of clicks required to drill down to the desired information.

# DR0 to DR1 (Waterfall)

### Tip

This page only applies to projects following the Waterfall release model. It does not apply to projects following Continuous Delivery release model.

At a DR0, a decision is made by the approvers whether a project is approved for planning. While Technical Publications is not an approver at DR0, Tech Pubs Management is an approver at the Plan of Record (POR) meeting where requests of submitted by projects to hold the DR0. An approver from Tech Pubs Management for a project at the POR indicates that we have approved the project to go forward, and if DR0 passes, for Tech Pubs that will involve an assessment of the scope of the customer documentation work and an assignment of a writer.

Typically, there is already a writer assigned to the project at DR0. If a writer is not assigned, Tech Pubs Management looks for a writer. If one is not found for the timeframe needed, the project release date or scope may need to be revisited. DR1 is the official indicator that Tech Pubs has committed a writer to the project. <tabler> |-| Writers=

During this phase, the writer has a few tasks:

- Review the product requirements for the project, usually in the form of a PRD (product requirements document). The Product Manager leads the review of the requirements to ensure that the project core team are clear about the proposed product requirements.
- Review the Functional Specification. The writer reviews the specification prior to the review meeting, in
  which a developer leads the PCT through a review. The specification describes how the developers will
  implement the new features, feature improvements, and other fixes to the software for this release.
  Reviewers must review the specification to make sure he or she understands each feature's intent and
  the context in which a customer might use it. The description needs to be clear and complete enough
  so the writer can assess how much effort/writing will be needed to document each item. This writer will
  use this to create a documentation plan/schedule.
- Review the Packaging Specification.
- Create the Documentation Plan.

**Deliverable:** Prior to DR1 the writer must have an approved (by the Project Core Team) Customer Documentation Plan, which includes the schedule for reviews, approval, testing, and the like.

**Important:** Approval of the Documentation Plan with the schedule is critical as it's the reviewers' commitment to you as the writer to review the customer documents during the agreed upon review periods. For those review period where reviewers don't meet the deadlines, the approved Customer Documentation Plan is a vehicle of leverage to remind them of their commitment. Be aware, you can adjust review dates within certain limits as long as you can still meet the release date and reviewers review the documents in a timeline fashion. If you will be a few days later than the originally scheduled review team, alert your team and check with them about their ability to accommodate the change. If they will be later in getting comments back to you, evaluate how much time you can give

them without putting a strain on your work.

|-| Production Editors=

In this stage, Production Editors handle two tasks:

- Reviewing and approving the Packaging Specification for the project: When the Project Manager submits it for review and approval to the Packaging Spec Review Request email alias, the assigned Pubs Editor reviews it from a customer documentation perspective.
- Ensuring that XING definitions are created for release notes with the URL path.