SD Day Workshop Outputs

November 14th &15th 2023

Oslo

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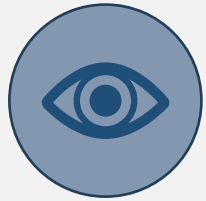
Authoring

Standards lookup

Tool to search for standards references and include them in AT document

01

Quality checks management

Improve content quality(language, identify provisions, correct your speech, grammar, etc.)

02

Comment import from Enquiry

Export comments directly from enquiry to AT
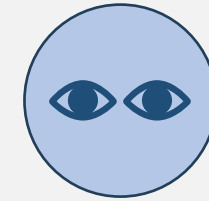
03

Integration with terms libraries

Improve speed and content quality with fast terms lookup

04

Granular content lookup

Referencing granular content from other standards

05

Initiate limited-access enquiry

Start an enquiry (full, partial, public or limited-access) directly from the AT

06

Requirements quality analysis tool

Content analysis for requirements validity, clarity

07

Integration with Asset/PM mgmt

Implement AT as part of your process

08

Integration with Import service

Push your projects directly to Import service

09

Integration with customer repositories

Sync any document with your repository

10

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Results analysis

Rank	Card	Result
1	**Standards lookup**	**7.9**
2	**Quality checks management**	**7.5**
3	**Comment import from Enquiry**	**7.3**
4	Integration with terms libraries	6.8
5	Granular content lookup	6.4
6	Requirements quality analysis tool	5.8
7	Integration with Asset/PM mgmt	5.6
8	Initiate limited-access enquiry	4.6
9	Integration with Import service	2.9
10	Integration with customer repositories	2.5

Rank 1-3: Very high results (most from 8 to 10 with some exceptions).
- Most questions
- High interest in language-specific quality controls
- Comments dependency on Viewer 2.0

Rank 4-5: High results, but first items that might be applicable for a smaller group
- Important mostly for SDOs with many documents
- Language specific

Rank 6: Lower interest due to most applications only in English

Rank 8: Low interest, requires AT + ENQ to be used

Ranks 7, 9, 10: Could be resolved with a single approach (API), but generally the lowest interest. Should support import/export in AT repository according to common rules.

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Detailed feedback

Card	
Standards lookup	- Enabling authors to pick standard from a database - Possibility to pick dated or undated versions - For online viewing there should be an option to alert of newer version. In Authoring Tool (AT) there should be a notifications that alerts on outdated reference - Unique identifier (URI) required which can be resolved in a custom way for each organization (Viewer, Store) - Workshop required with current and future users to clarify requirements
Quality checks management	- Workshop required with customers that require non-English content - General enquiry if any enhancements are required for existing functionality
Comment import from Enquiry	- Dependency on Viewer upgrade
Integration with terms libraries	- Integration must be built with user interface - Enabled via config

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Detailed feedback

Card	
Granular content lookup	- Referencing individual content inside a standard. Possible to do between documents present in AT - Prerequisite is to have the «Standards lookup» functionality - Must use URI for granular content - To discuss lookup in Viewer, Store (e.g., indexed table to lookup references and map to different URI)
Requirements quality analysis tool	- Mostly applies to English-only - Intended for use with industry-standard tools and/or AI - Framework can be built to run qeneral quality check with possibility to connect API from/to quality engine
Integration with Asset/PM mgmt	- Important for organizations that have integrated infrastructure and want to manage documents through their lifecycle or use SD Fonto integration only
Initiate limited-access enquiry	- Enhancment to existing enquiry initiation - Must have API to fetch user group data from Enquiry/Identity and display

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Enquiry

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Integration with Import service

Start new enquiries by fetching documents from Import service

01

Comment export to AT

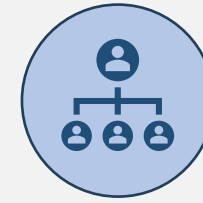One-click comment export to AT or a template

02

Manual enquiry

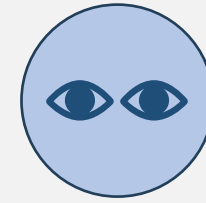Create new enquiry directly in ENQ tool

03

Organization support

Support team collaboration

04

Invitees-only enquiries

Enquiry for a limited audience

05

Comment flexibility

Public/private, like/dislike, private notes, questions on document, FAQ

06

Comment review in context

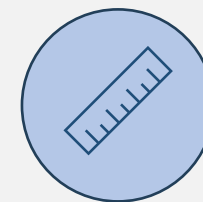Review comments in the Viewer

07

Support documents, multiple documents

Commenting on support documents, open 2 documents in 1 screen

08

Redlines

Show redlines to limit the comment scope

09

Offline commenting

Work with documents offline

10

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Results analysis

Rank	Card	Result
1	Comment export to AT	**6.3**
2	Organization support	**6.1**
3	Redlines	**5.6**
4	Integration with Import service	5.2
5	Invitees-only enquiries	5.1
6	Comment flexibility	5.1
7	Support documents, multiple documents	4.7
8	Offline commenting	4.2
9	Manual enquiry	4
10	Comment review in context	3.3

Rank 1: Most interest. Dependency on Viewer. Only if used AT + ENQ

Rank 2-3: High result with some very low answers

Rank 4: May be universal import control to request the document from any repository in a defined form. API exists already today and might need some awareness about enquiry import process

Rank 5-8: Very close results with big variance between organizations that are aware about Enquiry and others

Rank 9-10: Low results. Mostly interesting for organizations that do not plan to use AT

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Detailed feedback

Card	
Comment export to AT	- Dependency on viewer - Must have an option to select comment or proposal. If proposal then the proposed text needs to be highlighted and have a striketrough in viewer, must be sent to Fonto in correct way. - Should organize the comment review in order of priority.
Organization support	- Teams or organization support. Comments can be seen between team members.
Redlines	- Source file required to compare to. Must be an option to load previous version together with the new version in enquiry or offer user to buy previous version (integration with store?) - Viewing previous versions - Can it be used to compare PDFs? - Limited enquiry + redlines must work together
Integration with Import service	- Metadata handled in source (asset, product or other management tool) system, stored in Import as single source of truth

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Detailed feedback

Card	
Invitees-only enquiries	- Can be used for enquiries, national adoptations, etc. - Can be used for standards related work (e.g., special workstream where an opinion from shot list of users is required)
Comment flexibility	- Must be fully configurable and set up per user and use case
Support documents, multiple documents	- Documents might be in excel or other formats, may require to convert to PDF or XML
Offline commenting	- Viewer 2.0 must be completed first
Manual enquiry	
Comment review in context	- Can be used for enquiries or standards related work - Doing comment priotization should be investigated (comment vs proposal; paragraph changes vs 1 word changes)

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Day 2: Stream 1 – Marketing & Sales Workshop

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Topics discussed (voting)

1. Importing ISO/IEC/CEN/CENELEC standards into AT

2. Shared use cases and best practices/ tips and tricks to handle them
    a) Creating national adoptions of CEN/CENELEC standards
    b) translating european/international standards

3. Best Practices:
    a) Working with commenting

Not discussed

- Shared use cases and best practices/ tips and tricks to handle them: authoring purely na
  standards

- Best practices: Working with versions and milestones

1.Importing ISO/IEC/CEN/CENELEC documents into AT

- At has functionality that allows you to upload valid NISO STS files into AT.

  - *Note: AT is based on the same software ISO/IEC/CEN/CENELEC are using for their OSD project*

- But what IS valid NISO STS??

- in Theory, XML provided by ISO/IEC/CEN/CENELEC should follow the Guidelines for coding NISO STS Standards

  - The ISO OSD should produce XML as defined in the guidelines

- in Practice:

  - there are still differences between ISO and IEC in terms of encoding
  - the current ISO OSD is not in line with the guidelines (work in progress)
  - the coding guidelines have evolved over the years, but no organization have updated the XML in their back-catalogue
  - The QC done on the XML especially at CEN/CENELEC and IEC is quite poor and we often encounter XML that is invalid/ missing images/…

- but: AT requires one very specific way of XML encoding in order to work correctly

- RESULT: not all files received from ISO/IEC/CEN/CENELEC will import into AT!

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1. Importing ISO/IEC/CEN/CENELEC documents into AT

…. so what can we do about it?

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- Implement transformations for the most common use cases preventing upload, such as:
    - graphic files stored in different locations
    - \<reg-meta\> instead of \<std-meta\>
    - footnotes at the end of the standard,
    - …
- Influence ISO's development team to be more accurate in their XML encoding

You as Members

Make yourself heard!

→ provide feedback to ISO/IEC/CEN/CENELEC when you find errors and request correction

→ make them understand that the coding guidelines and their correct application are important and you want to be involved!

→ share import issues with SD so we can add potential transformations

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1. Summary of discussion in the group

- Generally, the group agrees the quality of the provided XML is poor, especially from CEN/CENELEC

- SFS has escalated this problem since 2015 without much success

- SN has also escalated this problem for multiple years and is now:
  - Correcting the poor quality XML using SD Authoring
  - Creating tickets at CCMC detailing which errors appear in which file and asking for corrections
  - New IT Director Groven Serge SGroven@cencenelec.eu is aware and a good contact point also for others to escalate the issue to

- It is foreseen that when CCMC, ISO and IEC publish their XML directly from OSD, the quality issues will disappear; however, it will be years until all standards are published from OSD, therefore it is still worth and relevant to escalate issues found to these organisations

- Members need to get more involved and have more visibility about the ISO/IEC coding guidelines for NISO STS

- CEN TF Digital content has an XML sub-group which should be reactivated

2a. Authoring National Adoptions: principles

National

European
(CEN/CENELEC)

International
(ISO/IEC)
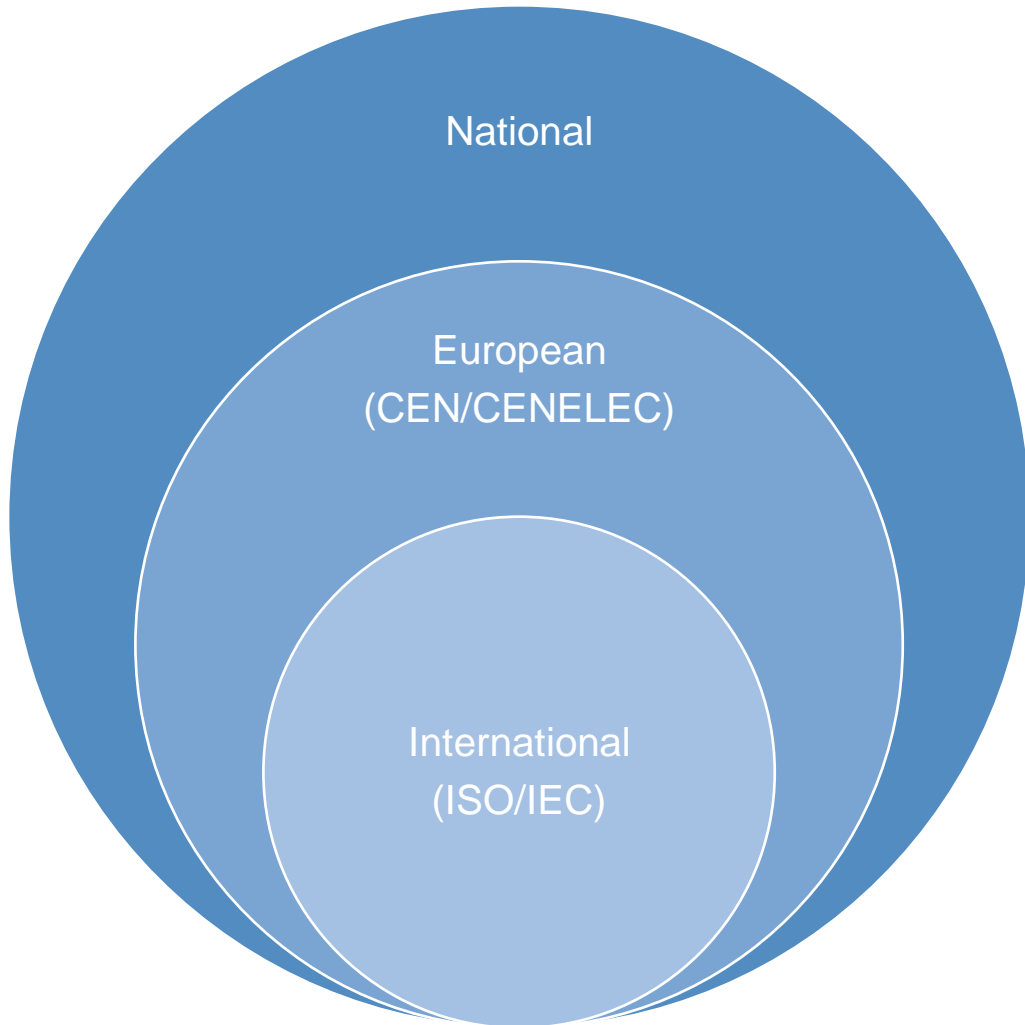
Adoptions are like an Onion: the national content is added around the European and/or International content

Basic assumptions:
- the European and International content is not modified
- National content can be added to the front of the document:
  - national foreword
  - national coverpages
- National content can be added to the back of the document:
  - national Annexes
  - national Bibliography
- National content can be added to the European and International content through
  - National notes
  - National footnotes

2a. Possible ways to create adoptions using AT

- **Option 1: All in one**
  - The international and European content is added into a single document in AT
  - National content is added, i.e.
    - National foreword
    - National notes/footnotes
    - National Annexes
  - Single XML file is produces from AT which can then be used for publishing

- **Option 2: Piece by Piece**
  - If we assume we don't want to touch the European/international content at all, we don't need it in AT
    - in case of national notes, these can be added into the national foreword
  - In AT, we create a national annex (specific template only containing the <back> matter of the standard)
  - in AT (or elsewhere), create the national foreword
  - Use your XML production chain to assemble the XML into a single file using the original ISO/CEN xml files and the nationally created files that can then be used for publishing

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2a. How do you create national adoptions?

- ✓ SN have fully automated their adoptions process using Option 2
  - ✓ National Annexes are created as separate documents
  - ✓ National Foreword created in their project management db
  - ✓ Réalta assembles the different pieces of XML according to predefined rules and returns a consolidated XML and PDF

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2b. Translating documents

- AT is not a translation software

- Each working document has a single language assigned to it

- Therefore you either:
  - upload a translated XML (from a translation software like Trados)
  - upload the XML in the original language and overwrite it with the translation bit by bit
  - create a new document from scratch and write your translation in there

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2b. How do you work when you need to translate documents into your national language?

- ✓ SN:
  - ✓ Use SDL Trados for translation based on XML from ISO/CEN
  - ✓ export XML of translated document
  - ✓ upload translated documents into SD Authoring to do editing
  - ✓ Currently there are more efforts done on translations of chapter 3 Terminology to build up terminology database

- ✓ NEN:
  - ✓ Translations done in MS Word, outsourced to translation agency, then committee review and proof reading
  - ✓ no XML used at this point

- ✓ AFNOR:
  - ✓ using SDL Trados based on MS Word
  - ✓ will start experimenting with XML file and then use AT for editing, review etc similarly to SN

- ✓ SFS:
  - ✓ using SDL Trados based on MS Word, then use eXtyles to create the correct XML export for original and translated standard
  - ✓ Main issue: how to match up sections between the translated and original XMLs. Currently based on semantic IDs, but with SD Authoring & OSD, GUIDS are not useable for matching
  - ✓ there may need to add some more attributes or other identifiers for sections to enable this matching

- ✓ UNE:
  - ✓ SDL trados based on MS Word and then produce PDF, XML is currently not required but will start to become more importing with the SMART initiatives
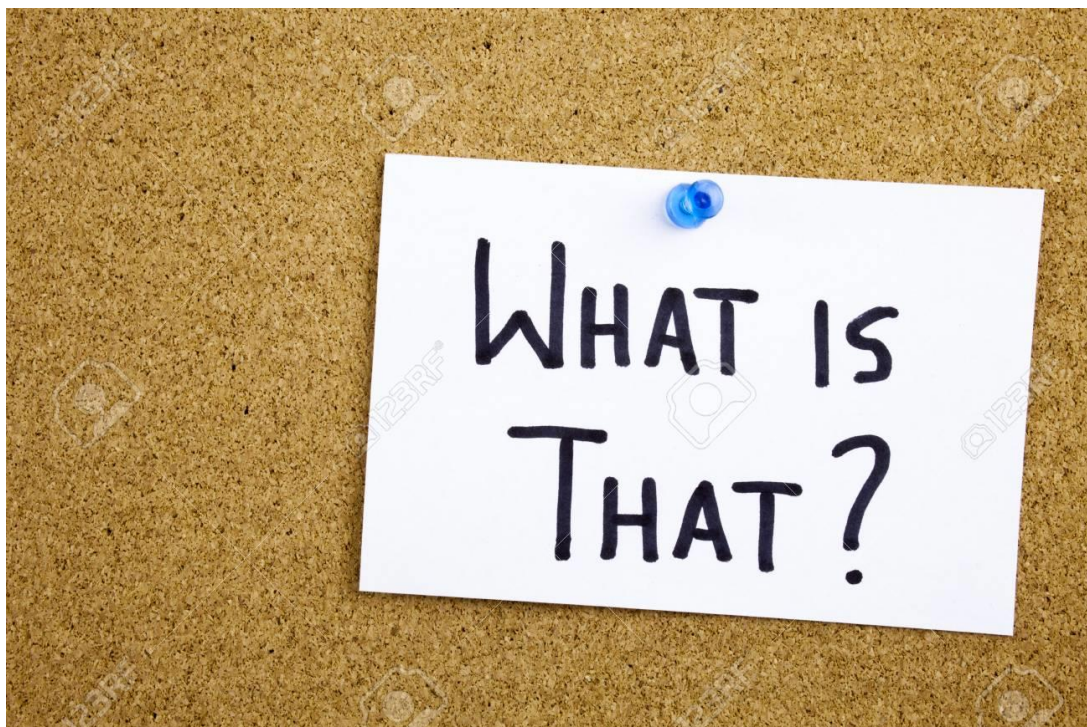
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3. Working with Commenting

Commenting is a feature of the system that enables comments and proposals.

Comments:

- Make a comment in the text without adding a concrete proposed change

Proposals:

- proposes an actual change to the existing text/ equation/ figure/ table

- Shown in a "track-changes" way

- proposed changes can be automatically applied

NOTE: in Fonto 8, comments/proposals are immediately shared when user enters them; in the current production system comments are first private and need to be actively shared

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Some tips and tricks

Use tags to categorize your comments

Tags are like keywords that can be associated to comments; they can be used to categorize comments and filter on this categorization, for example, tag a subset of comments:

1. for review in an upcoming meeting
2. for review by a specific person or to assign responsibility of an area to a specific person
3. for noting things that should be handled in the next edition of the document
4. etc

Download comments

For sharing comments with people that do not have access to the AT tool, you can export the comments in 2 formats:

1. Excel format: contains all relevant information on the comment in multiple columns
2. MS Word format: specifically designed to match the ISO commenting template

We recommend to use the exporting of comments as little as possible; comments cannot be imported back, so it's best to use the comment filtering features in AT to find what you are looking for

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Some tips and tricks

Reach consensus

Comments and proposals can be controversial; it may be difficult to reach a consensus within the WG on which comments should be accepted/ rejected.

Did you know that on each comment you can "vote" to support/ don't support the comment? This can be done "live" in a WG meeting or people could do this in preparation of a meeting.

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Day 1: Stream 2 – Marketing & Sales Workshop

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Import and Store Roadmap Discussion

Import

- Improve process for onboarding new SDO data providers:
  - Custom template in excel format that would need to be filled out by customer or end SDO that Import could import.
  - During process user importing would be prompted to upload files corresponding to the standards.

Store

- Search
  - SD to provide customers documentation on Store search, including details on how it works, and how it can be optimized based on customer requirements
- SD to create library for different release notes
  - Product team switching to "release based" development with information on what features will go out in the next release
- Custom SSO logins
  - Quite important for enterprise customers.
- SD should offer collections based on criteria other than ICS codes.

Day 2: Stream 2 – Marketing & Sales Workshop

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Store Workshop

Store Workshop: Ideas for Store 2024+ Roadmap| Date: 15/11/23 | Location: Oslo, Norway

GOAL	MAD	GOOD	QUESTIONABLE	Rules

GOAL
The goal is to brainstorm ideas for SD Store, vote for them and prioritize. Most voted and valuable ideas will go to Store Backlog for 2024 and the future.

GOOD - All the ideas that are clear, viable for business and could be developed

MAD - Ideas that sounds a little crazy to be implemented in the closest future, but have a potential to be taken in the account after a few years or could be reviewed

QUESTIONABLE - Ideas that can negatively affect business or functionality that already exists in Store.

Rules
- No limit on the number of ideas per person
- Discuss ideas in a group of 3 people
- Present ideas for the rest of group
- Each participant has 5 votes that can be distributed between ideas (you can put any amount of votes to any idea)
- List of the most voted ideas will be created as a result and taken into the account for the Store Roadmap and Backlog in 2024 and further

Sticky notes

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A whiteboard from a workshop or brainstorming session, divided into three columns labeled "MAD" (with an unhappy face), "GOOD" (with a smiley face), and "QUESTIONABLE" (with an uncertain face). The board contains numerous colored sticky notes organized into circled groupings labeled: Guidance, Self-Serv. Admin, AI, Order Mngmt, UI/UX, Notifications, Viewer, Stages & Suggestions, and Search.
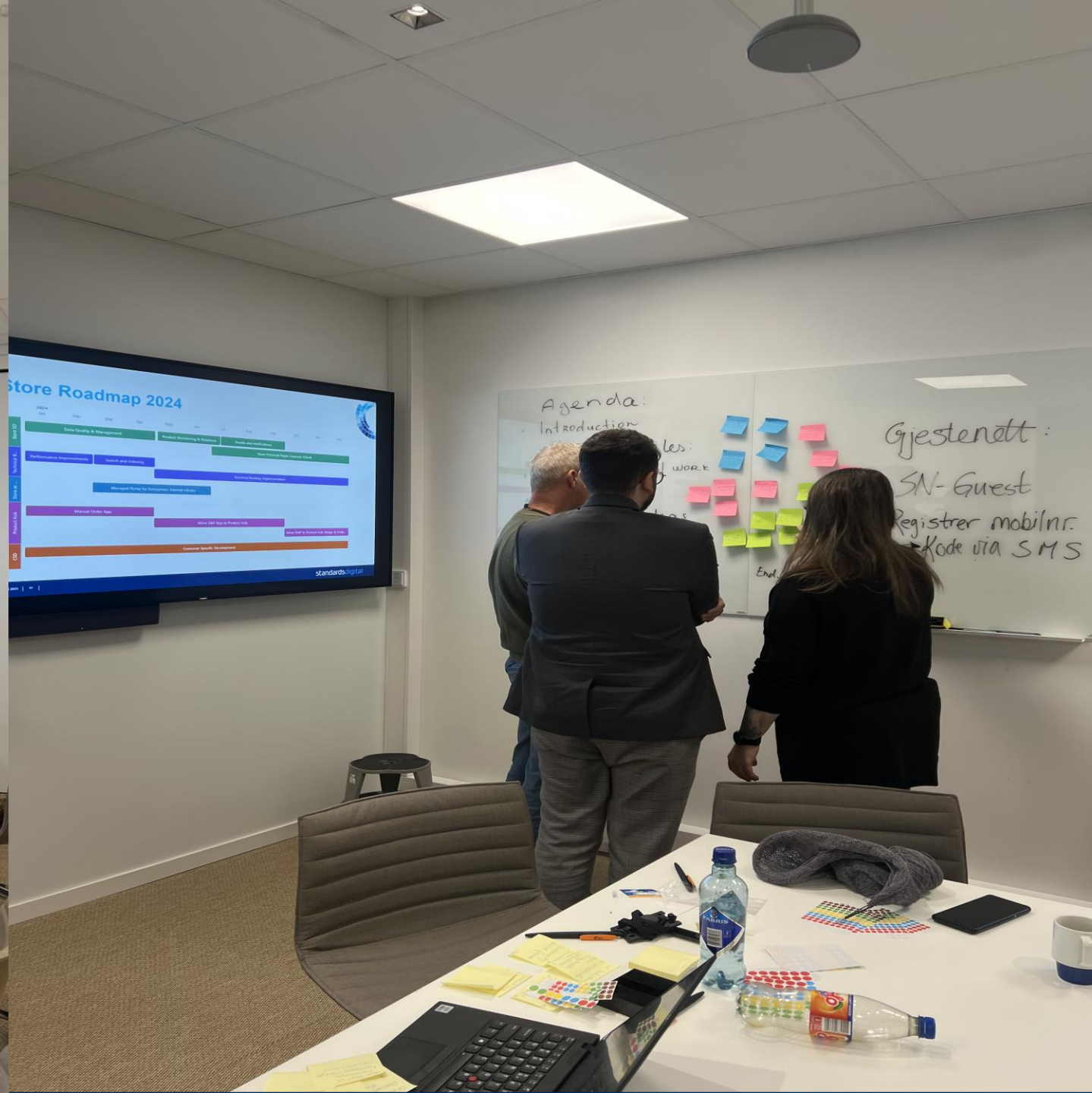
Group Ideas
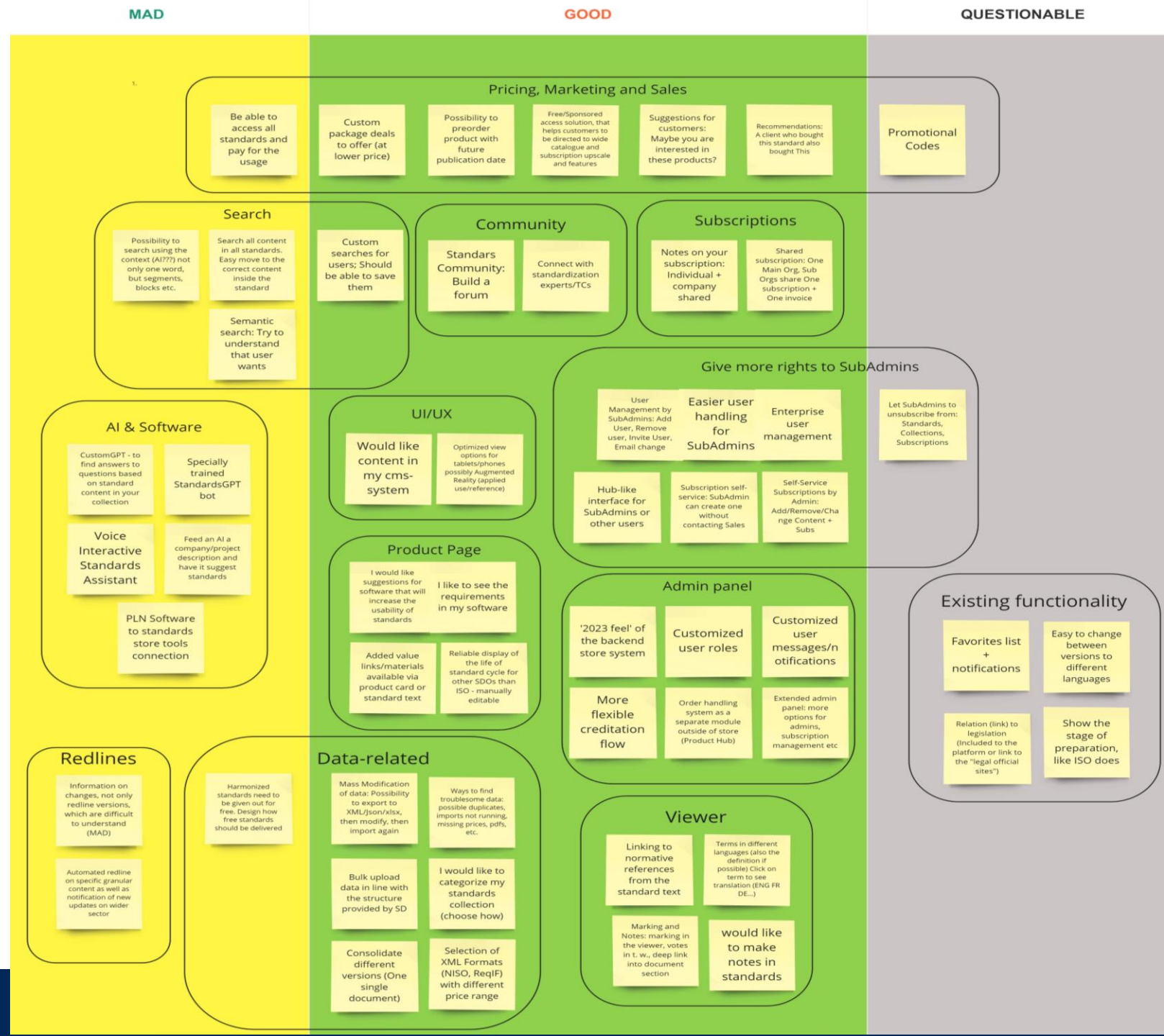
Group Ideas continued…

MAD   GOOD

Guides & Recommendations

- Catalogue of-and tools for disseminating interactive guide + implementation guides to popular standards
- Guided implementation (Where to Start?!) - MAD
- For relevant standards (that are non-ambiguous) I would like a wizard/guide here to implement
- 3D presentation how the different standards are related + hierarchy (MAD)
- Capacity to know the tools & IT environment use by client (Polution, Doors, etc)
- I would like a guide to finding connect standards

Store Front-end

- User Panel: Overview area on Front-end with details of all changes due to Standards
- Alert Panel for users: Information about updates, special offers, downtimes
- Lean login process: Login - end on user content, not on front page
- A/B testing of placing elements on Store Pages
- Would like a more intuitive web page (main page?!) with impressed design
- ore customization per one client, less one choice will apply for all
- Chat with customer service
- A quick glance online "Library" view

Day 2: Stream 2 – Voting Results

To Follow

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