Delivering enterprise software documentation on a wiki

Australasian Online Documentation and Content Conference (AODC)
20th - 22nd May 2009, Melbourne
Introduction

Agile development

Workflow and tracking

Structure and chaos

Release management

Steering wiki development
Introduction

Agile development

Workflow and tracking

Structure and chaos

Release management

Steering wiki development
Intro – The wiki and I

Sarah Maddox
- Technical writer at Atlassian
- 10 years technical writing
- 9 years software development

Wiki
- Software that allows you to edit a web page and publish the updated page immediately
- Many brands: Confluence, TWiki, MediaWiki, etc

Confluence wiki
- Enterprise wiki from Atlassian
Ooo-er and Aaah

A challenge presented when using a wiki for technical documentation
One of the ways to tackle the “ooo-er” moment

Plugin

- Extends the core functionality of the wiki
- Similar to an add-on for your browser

Space

- A logical collection of pages in Confluence
- Configurable and managed independently within a wiki site
- See example

Live demo
A hierarchical page structure in a space

A list of spaces on my Confluence dashboard

A page

Intro – A space
“We have come to value…

- Responding to change over following a plan
- Customer collaboration over contract negotiation
- Individuals and interactions over processes and tools
- Working software over comprehensive documentation

But that’s off topic

You may find some answers in a blog post or two:
http://tinyurl.com/8n7pvz
http://tinyurl.com/a5ntwl

Agile Manifesto and Principles:
http://agilemanifesto.org/
Introduction
Agile development
Workflow and tracking
Structure and chaos
Release management
Steering wiki development
Workflow and tracking

- Create, review and publish a page
- Track the page history
  - View all versions of the page
  - Revert to a previous version of a page
  - View a “diff”
- Set permissions
- Monitor via RSS and “watches”
- Look at some real-life comments
Create a page with restricted permissions

These procedures are based on core Confluence functionality. There are alternatives that make use of plugins.

Add your page content

Restrict viewing to group(s) or user(s)
- Review via comments and updates
- Unhide when ready to publish

Our new wiki page lists two third-party workflow plugins. More about plugins later.
 Workflow and tracking 3

- Track the page history, revert and view a “diff”

Introducing workflow

<table>
<thead>
<tr>
<th>Version</th>
<th>Date</th>
<th>Changed By</th>
<th>Operations</th>
</tr>
</thead>
<tbody>
<tr>
<td>CURRENT</td>
<td>Jan 14, 2009 14:46</td>
<td>Sarah, Minor rewording</td>
<td></td>
</tr>
<tr>
<td>v 2</td>
<td>Jan 12, 2009 13:38</td>
<td>Ed, Added note about plugin support</td>
<td>Restore this version</td>
</tr>
<tr>
<td>v 1</td>
<td>Jan 12, 2009 11:56</td>
<td>Sarah</td>
<td>Restore this version</td>
</tr>
</tbody>
</table>

There are 2 changes. View first change.

Confluence does not have any built-in workflow.

It does have the features and plugin points to let you design a workflow to suit your needs.

Interesting plugins already created:
- Approvals workflow Plugin: [http://confluence.atlassian.com/display/CONFEXT/ApprovalsWorkflowPlugin]
Set permissions

- **Groups**
  - These are the permissions currently assigned to groups for this space.
  - **conflic-users**
  - **my-team**

- **Individual Users**
  - These are the permissions currently assigned to individual users for this space.
  - **Administrator (admin)**

- **Anonymous Access**
  - When a user is using Confluence while not logged in, they are using it anonymously. For example: Enabling anonymous `commenting` permission, allows non-logged-in users to make comments in this space.

**Can I control the edit rights on my documents?**

**Space permissions**
- Apply to all content in a space and are quite granular.
- You might allow your team full edit and admin rights while others can only add comments.

**Global permissions**
- Apply across the entire site (not shown here).
- Page-level restrictions apply to a single page (not shown here).
Monitor via RSS and “watches”

- Watch a page or a space
- Build an RSS feed from one or more spaces

“Watches” go to your email address

RSS readers abound, like Thunderbird (email) and Sage (Firefox add-on)
RSS feed displayed in Thunderbird

An easy way to manage the wiki page updates and comments
Look at some real-life comments

Some customer comments are short, to the point and directly related to the documentation.

Anonymous says:
The documentation should be updated to tell the user that (apparently as of 2.7 but for sure in 2.9...) that file is in confluence/WEB-INF/lib/confluence-[version].jar#velocity.properties.

Sarah Maddox says:
Fixed. Thank you 🌟
Cheers — Sarah
Some customer comments are full of hard-won and relevant information, which can be copied into the documentation.

“Hi Stefan
Thank you for this information. We have included it in the page, under the heading ‘International Characters in Attachment File Names’.

Cheers - Sarah”
Workflow and tracking

Real stuff

Turning disappointment into LUV

“We’re starting to feel the LOVE guys! If you need any help on the integration side, don’t hesitate to contact me.”
Introduction

Agile development

Workflow and tracking

Structure and chaos

Release management

Steering wiki development
Structure and chaos

- Table of contents within a page
- Left-hand navigation bar showing pages in space
- Index of documentation versions
- Page ordering
- Content re-use

I can embrace the chaos, but... Help!
Table of contents within a page

Use the `{toc}` or `{toc-zone}` macro to build a linked list of headings within a page

Limit the heading levels in the TOC for a sophisticated effect, such as the “Highlights of this release:”

```
{toc:minLevel=2|maxLevel=2}
```
- Administrator edits the space layout
- Left-hand navigation bar shows pages in space
Documentation version index

Using spaces as version control mechanism

Expandable section at top of left-hand panel shows documentation versions

More later about using spaces for version control
Page ordering

Live demo

Drag and drop a page or a page tree to a different location
Content re-use is alive and well in wikis

Confluence provides the following macros:

- `{excerpt}` – Define a re-usable chunk
- `{excerpt-include}` – Copy the re-usable chunk into another page
- `{include}` – Copy the entire contents of one page into another page

Re-use content within one space or across spaces

Some blog posts (full URLs are in your handouts):

- Content re-use on a wiki – http://tinyurl.com/576su6
- Cross-application plugins – http://tinyurl.com/amypce
- About the Atlassian Integration Guide – http://tinyurl.com/69ea57
The `{excerpt}` macro

```
{excerpt}
```

There are people who don't like cheese. Someone even felt brave enough to ask, "[Is it weird to not like cheese?](http://answers.yahoo.com/question/index?qid=20090420185638AAihrmR)" While we may quarrel with the split infinitive, we have to applaud the transparency and bravery shown by this internaut.

```
{excerpt}
```
The {excerpt-include} macro

* {excerpt-include:Page with re-usable excerpt|nopanel=true}

---

Page re-using an excerpt

Added by Administrator, last edited by Administrator on Apr 23, 2009  (view change)

Let's take a look at some instances of internet bravery:

- There are people who don't like cheese. Someone even felt brave enough to ask, "Is it weird to not like cheese?" While we may quarrel with the split infinitive, we have to applaud the transparency and bravery shown by this internaut.
- "Internet bravery is probably the only type of boldness that can keep you from getting killed." This sentiment is hotly debated on Newsvine.
Release management

- **Leading up to release date**
  - Work in the “live” space
  - New --- Create new pages with restricted permissions
  - Updates --- Copy existing pages and restrict viewing
  - Follow the usual draft and review procedure

- **Close to release date**
  - Copy space to create snapshot of current release …

- **On release date**
  - Unhide new pages
  - Update content of existing pages
  - Export new release to PDF, HTML and XML …
Copy space to create snapshot of current release

The Copy space plugin is not officially supported
More about plugins later

“Copy Space” option appears in Space Admin once the plugin is installed
List of spaces on Dashboard

Confluence is the enterprise wiki designed to make it easy for you and your team to share information with each other, and with the world.

Spaces: All

- Application Links 1.1
- Crowd 1.3
  - Documentation for Crowd version 1.3.x
- Crowd 1.4
  - Documentation for Crowd version 1.4.x
- Crowd 1.5
  - Documentation for Crowd version 1.5.x
- Crowd 1.6
  - Documentation for the latest version of Crowd single signon and identity management

Example comes from Atlassian’s documentation wiki at http://confluence.atlassian.com

- Archive spaces, e.g. CROWD015
- CROWD space contains current release
Export major releases to PDF, HTML and XML

“Export Space” option is available based on space permissions
Supply the downloadable documentation on the wiki

Example comes from Atlassian’s documentation wiki at http://confluence.atlassian.com

Useful for customers who are behind a firewall or using an earlier version of the product
Introduction
Agile development
Workflow and tracking
Structure and chaos
Release management
Steering wiki development
Steering wiki development

- How to make your voice heard
- Plugins
- Core wiki functionality
- DITA and DocBook conversions
Steering wiki development 1

- Plugins extend the core functionality of the wiki
- Similar to add-ons for your browser
- Developed by Atlassian or third party
- Installed into Confluence by an administrator
- Many – see the Confluence Extension pages at the link below

How can you make your voice heard in plugin development?
Try out the plugins. Tell the developers what you want.
Visit the Confluence plugin page at:
http://confluence.atlassian.com/display/CONFEXT/Plugin+Index
- **Copy Space plugin** – already mentioned

- **Gliffy plugin** for diagrams:
  - A commercial plugin which we use in the documentation
  - Drawn on the web page
  - Editable by others, just like a wiki page
  - Displays as a JPEG image
Steering wiki development 3

- Already achieved in Confluence:
  - Copy Space plugin
  - Page ordering
  - Pagetree macro bundled with Confluence

- Still to be done in Confluence:
  - Bundling and support of Copy Space plugin
  - PDF exports
  - Version-specific links to help files

How can you make your voice heard about Confluence in particular?
Use and abuse the wiki.
Raise and vote for issues at:
http://jira.atlassian.com/browse/CONF/

Developers are human too ;) Give them praise and “aah”s. Then tell them what you want.
DITA to Confluence conversion
- Open source project and asking for contributors
- DITA2wiki converts from DITA to wiki markup
- Not yet from wiki to DITA

Confluence to DocBook conversion
- Proprietary solution developed as a Confluence plugin
- Scroll Wiki Exporter
- Wiki to DocBook and PDF

How can you make your voice heard?
DITA2wiki project on SourceForge: http://sourceforge.net/projects/dita2wiki/
Scroll Wiki Exporter: http://www.scrollyourwiki.com
Come up and ask me anything you like

I have a demo Confluence wiki on my notebook

Addresses:

- Email at sarah@atlassian.com
- Blog at http://ffeathers.wordpress.com
- Atlassian at http://www.atlassian.com
- Documentation wiki at http://confluence.atlassian.com

So, the take aways are?
1) Confluence works out of the box for technical documentation.
2) Help us to steer wiki development the way we want it to go.