

# Release Management in IXIASOFT CCMS

Exploring the Dynamic Release  
Management Module

<a href="#"><u>What is the IXIASOFT DRM?</u></a> . . . . .	2
<a href="#"><u>Who benefits from DRM, and how?</u></a> . . . . .	3
<a href="#"><u>Mastercard Achieves Company-Wide Reuse and Content Consistency with IXIASOFT's DRM</u></a> . . . . .	4
<a href="#"><u>SolidWorks Uses DRM to Adapt a Streamlined Localization Process and Improve Team Collaboration.</u></a> . . . . .	5
<a href="#"><u>DRM Makes Managing Hundreds of Products in Parallel Simple for Infor</u></a> . . . . .	6
<a href="#"><u>Johnson Controls Inc. Can Produce More Documentation in Parallel than Ever Before with IXIASOFT CCMS</u></a> . . . . .	7

## What is the IXIASOFT DRM?

IXIASOFT's Dynamic Release Management (DRM) module provides flexible and powerful release management features to support organizations that manage multiple products across many release cycles. DRM is a feature installed with the CCMS that supports segregating, branching, and merging of content. This enables users to pick and mix content for dynamic assembly and delivery. Users can build bridges between content sets to selectively reuse content.

Unlike many source version or revisioning systems, which typically work well for code but not documentation, DRM is designed to manage branching of content objects. Code repositories branch everything and merge all changes. DRM is different because it supports the reuse of content across branches, so individual content objects are forked only at the point of change. This helps users maximize reuse and ensures content does not exponentially increase because it is only branched when necessary, rather than branched globally for all objects.

**“This system was built to manage monsters – and it does.”**

[extract from Work Simple. SAP: The MainLite Project IXIASOFT User Conference]

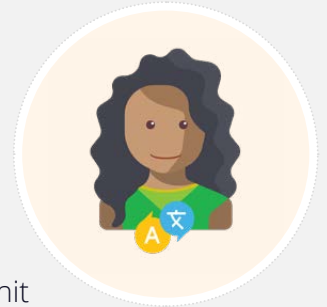
### What are some use cases of DRM?

- Management of multiple versions of the same product: this is a classic software versioning use case where organizations need to maintain multiple versions of a product. For example, parallel development.
- Product variants: a core version contains the base information for a specific product. The core is then branched to support different models or customer-specific variants. This is common in the manufacturing world.
- Organizations need tools to facilitate content sharing across the enterprise, which helps deliver content that is consistent, and ultimately drive up customer satisfaction. Warning notices are a perfect example because you can reuse the notices across all areas, ensuring the same warning is delivered to all customers.
- Continuous delivery: content is worked on in the development branch and pushed in the delivery branch only when it is ready for deployment.

## Who benefits from DRM, and how?

### 1. Information Architects

- Organize content by product
- Provide authors with templates
- Set up various levels of access rights
- Peace of mind, as content can only be accessed by authors with the correct content level security permissions



### 2. Authors

- Access content from permitted branches only; for example, for a specific business unit
- Sustained authoring autonomy in their area of expertise; for example, the author decides whether to reuse or fork a topic
- Easily apply fixes to various versions

### 3. Localization Managers

- Localized content is exported from the target branch only, reducing turnover and re-localization
- Faster delivery of localized content to the audience
- Easier to identify and kick off localization projects based on the required branch

## Main DRM Features

With DRM, organizations can:

- ✓ Support various versioning scenarios
- ✓ Segregate content logically
- ✓ Provide powerful merging capabilities
- ✓ Easily roll back a change (merge)
- ✓ Organize content sets for different teams
- ✓ Automatically apply branching model to content in localization
- ✓ Apply security at the branch level (ex. so only authors with permission can access a confidential project, and no other author can see the content in the system)
- ✓ Option of read-only content sharing, read/write, or no permissions

**Your company might need DRM if you answer yes to one or more of the following questions...**

- Do you work on multiple versions of a product in parallel?
- Do you ever need to push last-minute updates to multiple versions?
- Do you ever version content that is shared and controlled? For example, half of your products use Version A of the safety notes, but the other half use Version B?
- Do you want to create automated publishing from dedicated branches?
- Do you need to manage permissions on a branch level, so as to allow some authors to edit content, some to read and reuse only, and some not to see the branch content at all?
- Do you need to deliver content on a continuous integration timeline?
- Do you want to tag and restrict highly confidential content to specific users?
- Do you want to cut localization costs?



## DRM In the Workplace: Customer Use Cases

### Mastercard Achieves Company-Wide Reuse and Content Consistency with IXIASOFT's DRM

Founded in 1966, Mastercard International is a multinational American financial services company. Headquartered in Purchase, New York, the company has pushed financial technology to the limit, enabling global commerce, and making strides in mobile technology. Mastercard works in 150 currencies in 210 countries, and processes an average of \$16.2 billion in daily transactions.

Mastercard migrated to IXIASOFT CCMS in 2019. The Dynamic Release Management (DRM) feature, and the opportunities for reuse that it provided, were key reasons why Mastercard selected IXIASOFT CCMS to manage documentation. Currently, almost all of Mastercard's technical documentation teams use DRM – many of which configure the DRM structure to meet their team's specific needs.

#### QUICK FACTS

- Industry: Software/ Financial Services
- Annual Revenue 2019: \$16.883B
- Used in 210+ countries
- 13,400 employees

#### Benefits of DRM for Mastercard

- **Reuse.** Mastercard's teams using DRM "are achieving a reuse architecture that does not require using DITaval files and processing," says the chief information architect at Mastercard. DRM made reusing at the topic level easy, especially in comparison with using ditavals and conditional processing. Now, the teams can create a whole new version by branching reused topics.
- **Consistency Across Documentation.** With so many different projects on the go, DRM ensures the delivery of concise and consistent content to users. Prior to using IXIASOFT CCMS, Mastercard used spreadsheets to manage ditavals. It was a "maintenance headache." The CCMS simplifies this process, and allows for strong enforcement of legal notice trademarks.
- **Flexibility and Governance.** With DRM in place, teams can test and configure DRM frameworks to suit individual needs. "You can think of it as rapid development," says Mastercard's chief information architect. "With new use cases, the feature helps us to come along and rapidly find a solution, whereas in some systems it's back to the drawing board."

#### Future Projects

Mastercard sees many opportunities for future projects with the help of the IXIASOFT DRM. The business aims to evolve the user experience in the Technical Resource Center (TRC)—a customer portal for technical and operational content—by introducing entitlement and personalization. DRM can help with that by helping doc teams organize their content along the same lines as they want to deliver it. As Mastercard rolls these projects out, it may have an "upstream effect on DRM architecture or policies."

Other projects include content engagement, and semi-or full automation of customer announcements. Mastercard intends to integrate the CCMS with other internal documentation and software development tools.

DRM is part of a greater "ecosystem" at Mastercard. Looking into the future, Mastercard teams are looking at how best to leverage DRM to support that ecosystem. It is "just the beginning of their journey."

## DRM In the Workplace: Customer Use Cases

### *SolidWorks Uses DRM to Adapt a Streamlined Localization Process and Improve Team Collaboration*

SolidWorks, owned by French giant Dassault Systèmes, markets and develops 3D CAD analysis software, design software, and product data management software. The company delivers software that helps designers craft authentic design experiences. With more than 2.7 million users worldwide in over 80 countries, precise, streamlined documentation is a critical part of SolidWorks' internal strategy.

SolidWorks has been an IXIASOFT CCMS customer since 2011, and in 2014, decided to add the DRM module to their implementation. Typically, the company has two annual release cycles that overlap for a large part of the year. This normally includes a general availability release, and a series of service packs. Much of the version is worked on in parallel to the next annual release. DRM was adopted with the goal of streamlining this documentation development process.

#### QUICK FACTS

- Industry: Software
- €3.1 Million Revenue (net) in 2019
- 2.7 Million Users Worldwide
- Used in over 80 countries
- 13,400 employees

### Benefits of DRM for SolidWorks

- **Improved Localization Workflow.** DRM allowed for the development of a streamlined localization process across all teams by reorganizing the product information in a functional and rational way. Before SolidWorks moved to DRM, they were finding it "impossible" to make the localization process work.
- **Better Version Control.** DRM allows SolidWorks to keep documentation distinct and make sure they "don't end up releasing content that is inappropriate for a given version of the software when it's delivered," says the user assistance technology architecture director at SolidWorks. It ensures documentation for a new feature is being delivered in the next major release but not in the current one.
- **Possibility to Make Last-Minute Additions.** Recently, SolidWorks has been trying to perform localization work in a larger number of small deliveries. Sometimes, the company creates extra versions just to handle small amounts of last-minute work. DRM allows for a side-branch to work on last minute material.
- **Easy Implementation and Onboarding.** Team leaders at SolidWorks describe the DRM adoption process as "relatively easy" for new hires; "Onboarding someone new doesn't take long or cause too much trouble, everyone else on the team understands DRM well."
- **Enhanced Cross-Team Collaboration.** Another benefit of DRM for SolidWorks is that it helps align content processes with product development processes, streamlining collaboration and workflow across all teams.

### Future Projects

The basic DRM model is so flexible that many companies can use it out-of-the-box without a lot of time-consuming and expensive customization. For now, SolidWorks relies on IXIASOFT to keep using a classic DRM model to support annual releases.

## DRM In the Workplace: Customer Use Cases

*DRM Makes Managing Hundreds of Products in Parallel Simple for Infor*

Headquartered in New York City, Infor is an international software company that provides business applications for organizations delivered via cloud computing as a service. Infor helps businesses achieve company-wide digital transformation, deploying technology that puts the user experience first. The software is used by more than 67,000 organizations in 170 countries, 14,000 of which are cloud customers. In 2002, Infor was founded as an ERP software company.

Infor had been using IXIASOFT CCMS for several years before adopting DRM in 2014. With about 250 products being documented in the CCMS, it became imperative to split out separate content sets, and to tackle documentation with a systematic approach. Categorizing documents explicitly by product releasing version became a necessity. DRM made this possible.

### QUICK FACTS

- Industry: Software
- \$3.2 Billion USD in annual revenue (2019)
- More than 67,000 customers worldwide
- 17,000 employees
- 2,198 partners
- Offices in 44 countries

### Benefits of DRM for Infor

- **Simplification for writers.** A key reason why Infor adopted DRM is because it allows for the creation of products and versions that are meaningful to writers. In their previous experience with other CCMSs, the system would give a version number that had nothing to do with the software version of the product it came from. DRM provides a “much more natural way for writers to work,” with product and version attributes that “mean something to them in the real world.” This means that writers can work concurrently on 2 or 3 product versions, all while keeping content segregated and categorized.
- **Maximized reuse.** One of the greatest benefits of DRM at Infor is how it enables safe reuse for technical writers. In some cases, Infor repurposes 10, 20, or even 30 different product versions that go to the customer. This means big savings on time and resources.
- **Relieves stress around editing and publishing.** Working towards a product release on a tight deadline can be stressful, especially in a system with hundreds of users and multiple product lines. DRM allows the teams at Infor to focus on nothing but their own content, and leverage the use of libraries to share and control shared content between 2 product lines, taking away the stress and pressure that often comes with product releases.

### Future Projects

In the near future, Infor plans to launch a pilot project wherein the education department can leverage content that writers are generating so they can get up to speed on training workbooks. The project will involve repurposing content created by the documentation team.

The education department, for example, might open a user guide, find a chapter they need, and copy it directly out of the documentation and into the education material. This “siloes” approach will allow for additional teams in the system and better alignment on consistency and overall content strategy.

Johnson Controls is a multinational company that produces HVAC, fire, and security equipment for buildings for customers in more than 150 countries. Headquartered in Cork, Ireland, the company employs more than 105,000 people in 2,000 locations across six continents. JCI is on the Fortune Global 500 list, with worldwide sales topping \$23 billion (USD) and more than 8,700 active patents.

JCI uses IXIASOFT CCMS to help manage documentation for its numerous products. The DRM functionality enables the company to produce clean, consistent, and efficient documentation in multiple languages across a large scale. Here is their DRM story:

#### QUICK FACTS

- Industry: Manufacturing
- \$23 billion in revenue (USD)
- 105,000+ employees
- Year founded: 1885

### Benefits of DRM for JCI

DRM is used by all technical documentation teams at JCI. The functionality has boosted productivity, eliminated human error in several instances, and streamlined the translation process. Here are some of the other benefits DRM offers JCI:

- **Ability to Work on Multiple Releases in Parallel.** Now, JCI's teams can work on multiple product releases at once by branching different DRM versions. Prior to adopting DRM, the company did not have the tools necessary to work on more than one product release at a time. "We can do a lot more with our content than we did with a traditional Windows structure," says the principal information developer at JCI.
- **Better Organization with a Clear Structure.** DRM allows JCI's teams to put all of their content in one single source repository. This enables users to search for group and brand-specific content and have a better understanding of how the content is structured, eliminating errors and setbacks.
- **Maximizing Controlled Reuse.** Content reuse is a key feature of DRM for JCI, as it allows them to be "very determined" in their content reuse strategy, particularly with the view dependencies features. DRM allows for a library structure within the CCMS that puts reusable content "in a very logical place" through brands.
- **Flexibility.** Recently, JCI faced having to remove content from a release because a part of the product could not be completed in time. The DRM structure gave JCI's teams the possibility to apply labels and prepare for the eventuality of splitting out that content easily. In addition, DRM's library structure allows for significant flexibility when it comes to building a product architecture. Users can build a simple structure or a very complex one; "We are constantly coming up with new scenarios to test the capabilities of DRM."
- **Automated Localization.** With so many brands, automating JCI's localization process would have been impossible without DRM. Preparing files for localization, getting them back in six or seven languages, and putting them in the right place was made manageable with the DRM structure.

### Future Projects

JCI's next big project involves onboarding new teams to the CCMS, migrating pre-existing content into the system, and continuing to expand existing brands as they evolve.

Want to know more about DRM or IXIASOFT CCMS? [Get in touch with the team.](#)