# INGENIUX

# Creating a Unified Portal with Multiple Authoring Systems

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You create content in a variety of systems across the company; content that you could use to provide great customer experiences. But pulling it all together in a single view is complicated for many reasons, including that the content is often in a variety of formats.

Here's the good news. Content – even if it is authored and stored in a variety of different formats – can be brought together under a single umbrella, transforming the way your organizations stores, manages, and accesses content.

This revolutionary content management model can be achieved with a unified portal that supports multiple authoring systems.

# What is a Unified Portal

A unified portal is a secure website designed to provide your customers (members, clients, partners, etc.) with all the information they need to be successful. It unifies the customer experience by aggregating information from across disparate systems and information silos, modeling business processes and workflows, and providing a central hub for customers to access and manage their information.

A unified portal is customized to meet the needs of an organization, from what functionality to provide, to the security required, to what content to integrate from other authoring systems.

In this paper, we'll look at the different types of content you want to support in your unified portal and how Ingeniux's Unified Portal Solution supports them.

# Content Authoring Systems for Learning and Support Content

Learning and support content are primary content types to expose through a unified portal. Depending on the organization, this content is created in different types of systems and different formats:

- XML – extensible markup language – XML is a commonly used format to share content and how it's formatted on the Internet, in Intranets and other web-based applications.

- DITA – Darwin Information Typing Architecture – is an open-standard XML data model used primarily by knowledge management teams with a lot of highly structured training and support content.

- HTML – hypertext markup language – the structure of web pages containing a mix of content and format information.

- Word, PDF, etc. – unstructured documents.

In addition to these content types for learning and support, you may also want to pull application data into your unified portal. Application data includes structured data from CRMs and ERPs as well as unstructured content containing support and knowledge information.

Your organization could manage one or more authoring systems that produce these types of content. What you need is a way to access this content and pull it into a unified portal, possibly reformat or add structure to it and display it for your customers.

# Integrating Content from Multiple Authoring System in a Unified Portal

Integrating content so that it shows up in the unified portal is only part of the challenge. You may also want to modify the content in some way, and you'll want a way to search across all the content with a single search function.

## Unify the Content

Pulling content into the portal in individual areas is fine and does happen, but sometimes you want to unify content from one or more content types to create a single specialized view of the content. You can do this with Ingeniux by leveraging the structure of the content to identify different components to combine.

For example, you may want to show a web page in the portal that lists all the courses available to a user alongside the courses they are currently taking. In another example, you may want to show a list of knowledge base articles related to a product the customer owns within their product listing page.

## Add Structure to Imported Content

Sometimes you'll want to add structure to the content you import to enable it for re-use. For example, you might only want the titles of your documents for one page in the portal, but on another page, you want to show title, author and summary, and classification.

Ingeniux enables you to apply metadata to all content managed within the portal directly and to any externally referenced content (content you connect with but don't import directly into the

portal). Using metadata, you can apply attributes such as regionality, access restrictions, organizational classification (service offering, product line), user role, and other facets.

## Search Across All Content

Everyone uses search to find the information they need quickly. It's important that any search experience provides the ability to search across all content in the portal and not force you to search each type of content separately.

For example, a customer wants to find all information related to an issue they are having with your software. When they enter keywords or phrases for the problem in the search box, they may see links to knowledge base articles that address the problem, an associated training course, a link to any related support tickets they have open, as well as links to community discussions where others have had the same problem.

Using Ingeniux InSite Search, Ingeniux's native search solution, you can search across all content integrated with the portal, including content that is connected but doesn't live directly within the portal.

You can use taxonomy to drive the InSite search experience in the portal as well. InSite search supports faceted and guided search based on taxonomy, making it quicker to narrow down the search results you are looking for.

# The Core Capabilities Necessary for Success

We've looked at the different types of learning and support content organizations create, and how you might want to integrate that content into a unified portal. To provide this capability, not just any portal solution will work.

Here are the core capabilities your unified portal solution must provide:

- The ability to import content into the portal in its raw state.
- Functionality that enables you to manage and unify content metadata for all content, whether it's created within the portal or imported from another repository.
- An intelligent content model which supports structured content and the ability to mix and match content to create unique views.
- A decoupled architecture that allows you to merge content from other systems and publish content to multiple channels, both online and offline.

Existing specialized DITA "box" publishing solutions require pre-rendered DITA as HTML, an approach that causes challenges for multi-channel publishing. Other traditional publishing solutions are page based and don't provide the ability to structure content or deliver it to different channels in different formats. You may be considering a specialized portal solution, but again, most do not offer a decoupled architecture to support multi-channel publishing or the ability to modify content or add structure to it once you import it into the portal.

These capabilities are not nice to have; they are critical to the success of your multiple authoring systems' portal solution.

# How Ingeniux Supports Multiple Authoring Systems

To help you understand how Ingeniux supports multiple authoring systems, let's look at the content types and aggregation sources for a unified portal.

## Legacy Documentation – PDF (made with InDesign, Frame), CHM, Word,

Ingeniux manages documents such as Word, PDF, and CHM (Compiled HTML file format) as digital assets. Assets are treated as "first class citizens" in the portal, which means you can manage metadata and properties, edit them, schedule and publish them. You can also classify them using taxonomy and filter them based on visitor user/ permission.

Even if you don't pull the documents directly into the unified portal, opting instead to manage them "in-place" (their original location), you can still apply metadata and classification and use this information to filter them.

## DITA Resources

Ingeniux imports native DITA XML into the unified portal. You can fill out either topics from the maps or filter out content inline within a topic based on user/visitor information (e.g., the location the user is in, the products they own, etc.).

## Other Web-based Documentation Types

Ingeniux also supports other web-based documentation types such as:

- Static HTML from a variety of other sources
- Other XML formats – DocBook, etc.
- Confluence – a popular Wiki system
- MadCap Flare – a popular documentation system

# Other Data Types/ Integrations

In addition to unstructured content like those types listed above, you can also integrate other business systems and pull their data in the Ingeniux Unified Portal.

- CRM/Marketing Automation account data (contacts, accounts, groups) from Salesforce, Dynamics, Eloqua, Marketo: Ingeniux syncs user data from these systems into the portal to improve performance. You can extend and enrich the basic user data with portal specific fields and metadata that may not exist in the source system.

- LMS (learning management system) integration – Absorb, Cornerstone OnDemand, Knowledge Anywhere, Sakai, Moodle: Ingeniux syncs and creates copies of the catalog to display in the portal. You can also live query transcript and other per-user data and display it in the portal.

- Ticket data from Salesforce, MS Dynamics, ServiceNow, ZenDesk, Freshdesk, etc.: Ingeniux connects to these applications via each system's API to conduct real-time queries that pull in requested data.

- Sales data from Salesforce (leads & opportunities): Again, this information is pulled into the portal by connecting to the Salesforce API and requesting data via real-time queries.

- Knowledge Base – import content and set up bi-directional sync to Salesforce knowledge: Ingeniux syncs the physical article content from the Salesforce knowledge base to the CMS. When you author a new item in the CMS, it is pushed to the knowledge base in Salesforce.

- Order/Product data from ERPs (Oracle EBS SAP, JD Edwards, and Dynamics): Like Sales data and ticket data, these are real-time queries to each systems' APIs. Ingeniux displays the data in the portal.

- Application Performance Monitoring (APM) integrations: you can pull data from applications such as New Relic and StatusScope using live queries.

# Decoupled Architecture for Multi-channel Content Delivery

A primary purpose of a unified portal solution is to bring together content from different systems and repositories and unify the content so that it can be published to different channels, both online and offline.

Ingeniux provides a hybrid technical architecture that includes both loosely coupled and decoupled options. Using the loosely coupled approach you can publish content to an Ingeniux website or portal. If you want to publish content to another website, Salesforce Knowledge or Communities, or some other location, including print, you leverage Ingeniux's decoupled architecture, defining custom publishing targets.

# Conclusion

The benefits of a unified portal are clear. This solution enables organizations to pull together content from multiple authoring systems into a single view that not only shows all the content, but enables you to unify it, add additional structure to it, and search across all of it at once. Having this capability profoundly improves the customer's experience.

Ingeniux provides a unified portal solution that enables you to integrate, unify and search across a wide range of content sources, both structured and unstructured. With its built-in support for structured content, you can apply structure to any content source integrated with the portal and combine different content types to create unique experiences.

# About Ingeniux

Ingeniux is the leading provider of web content management and digital experience software. We enable organizations to orchestrate the entire customer experience from acquisition through to sales to support and service, across any device, application, or website.

We build content management software with an unparalleled focus on the content itself. The Ingeniux CMS is designed to manage and deliver modern websites, customer support portals, online communities, and other customer touchpoints.

We believe in intelligent "structured" content. We design our software to enable content reuse, enable true mobile and multi-channel content delivery, and insightful content discovery. Our unique content-as-a-service capabilities deliver content into web and mobile applications, and other key channels.

Ingeniux software is available as a fully managed software service or an on premise application. Ingeniux delivers unparalleled service and support to customers worldwide.

To learn more, visit us at http://www.ingeniux.com.

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