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Author-it 5.2

Amanda Caley assesses the latest release of this authoring tool and finds the major enhancement to be structured authoring for topics.

Introduction

Author-it is a single-source content management system (CMS). You create content for reuse within and across projects to reduce maintenance, minimise errors, eliminate duplication and significantly reduce the time you spend reviewing and reworking your content. You can publish from a single source to print, online help and web formats.

In the Spring 2008 issue of *Communicator* Jane Schofield and I wrote an article reviewing Author-it 5. There was a big step change from Author-it 4 to Author-it 5, providing a new interface with tabs and ribbons for a more intuitive working environment. Initially, it did take me a while to get used to the new interface; however, I can say that I do now prefer it to the old one.

Although this is a review of Author-it 5.2, there was an exciting new addition to the functionality in Author-it 5.1, namely object variants. Author-it 5.1 also saw the introduction of a Quick Search feature and the ability to quickly create file objects using drag and drop.

The major new enhancement in Author-it 5.2 is structured authoring for topics, which enables you to use rules and a well-defined process to enforce consistency throughout your documentation. You can control the content in each type of topic. Other minor enhancements include:

- Pasting and formatting content using an import profile
- Improvements to the Quick Search feature
- Creating an e-mail with a link to an Author-it object.

In addition to these new features, stability and speed has greatly improved since the launch of Author-it 5. If you are still using Author-it 4 because your library didn't pass User Acceptance Testing in an earlier release, I would recommend having another look at it now that most of the issues have been resolved.

Object variants

This new feature opens up a host of new possibilities. In addition to setting up the standard variables within topics, Author-it now enables you to:

- Have several versions of a topic for different audience groups
- Maintain live versions of documentation for multiple releases of software.

It does require time and effort to work out and plan how you want to use object variants in conjunction with other features such as release states, variables and publishing profiles. However, the opportunities for saving time and money downstream are there if you can afford to invest in the analysis and set-up.

I will not cover variants in this article. If you are interested in learning more about this new feature, see the Resources list. You can find detailed information in the Author-it Knowledge Center and Hamish Blunck has written an excellent document that outlines the best practice for using Author-it variants when documenting multiple releases of software.

Important note: There is an issue when creating new release states and new variables in Author-it Administrator. It is sometimes necessary to log out of the Author-it Library and then log in again to see the new items in the Library.

What is structured authoring?

For the benefit of anyone who is new to structured authoring, I thought it would be useful to provide some background history. Structured authoring has been around for many years: it will be 49 years old this summer! According to Wikipedia, 'structured writing is a form of technical writing that leverages decades of research into documentation best practices'.

The term was coined by Robert E Horn in the US, and became a central part of his Information Mapping method of analysing, organising and displaying knowledge in print and in the new online presentation of text and graphics. Horn and colleagues identified dozens of common documentation types, then analysed them into structural components called information blocks. They identified over 200 common block types. These were assembled into information types using information maps.

The seven most common information types were:

- Concept
- Procedure
- Process
- Principle
- Fact
- Structure
- Classification.

These types are loosely related to the three basic information types in Darwin Information Typing Architecture (DITA): concept, task and reference. An Information Mapping procedure is a set of steps for a person. A process is a set of steps for a system.

If you would like to find out more about the Information Mapping method and its origins, see the Resources list. There are several interesting articles on Horn's website and he has also written a book, *Mapping Hypertext*, which is referenced there.

In 1967, Horn founded Information Mapping Inc (IMI). Today IMI and its global partner network have brought Information Mapping to hundreds of thousands of individuals in over 30 countries. Andrew Jackson of Pacific Blue Solutions, one

of three UK partners, says: 'The benefits of structured writing are clear for both writers and readers. Research has shown that writers find decreases in development time and document revisions, while readers report increases in learning, retrieval and recall of information.'

What about structured authoring software tools?

There are many software tools out there today offering functionality that can help you to create content using a structured writing methodology. However, like all tools, they need to be driven by you and not the other way around. Tools can provide the facility to create content in a structured way but you need to define and set up the rules that you want to use.

Many organisations and individuals shy away from using specific software tools to help them with their structured writing, for various reasons including:

- Cost of purchase
- Cost of implementation (and the time and technical expertise required)
- Inability to accommodate their range of content
- Inflexible rules that cannot be modified by users.

Is it possible to have the best of both worlds?

When it comes to choosing the best authoring tool to meet your particular needs, one of the big decisions that you usually have to make is whether to opt for a tool that supports structured authoring or creative freedom?

The problem with many structured authoring specialised tools (for example, Arbortext) is that they are expensive, require experienced developers to set up complex DTDs (Document Type Definition) or XSDs (XML Schema Definition), and all your content has to be created in a structured environment. You often have to make compromises with content that is not really suited to such an environment.

With Author-it 5.2, you can have the best of both worlds. It gives you the flexibility of working either with or without structured authoring. You can decide that some of your content will benefit from being developed in a structured environment but not all of your content needs to be forced down this route.

The structured authoring functionality in Author-it has been designed so that you don't have to apply it to all of your content before you can start to reap the benefits. It can be set up and implemented gradually on all or a selected set of your current content. Alternatively, you can leave all of your existing content as it is and apply it only to new content.

Easy-to-use interface

Good news for the less technically minded authors: you do not need to be familiar with XML to implement structured authoring in Author-it. It has a clear and easy to use interface.

To set up a structured authoring environment in Author-it, you need to:

- Create templates
- Create rules using the Structure Builder (Figure 1)

You also have the option of:

- Choosing the release states to which you want to apply the validation rules
- Using the publishing profiles feature to prevent publishing if any topics are not in the designated release states.

Standard structured authoring templates are not included in Author-it 5.2. It is up to you to set up your own rules. You can modify your existing templates or create new ones. You may find the standard Author-it DITA Topic templates useful as a starting point. I understand that Author-it Software Corporation is planning to include example structured authoring templates in future releases.

Validation is based on:

- Minimum and maximum occurrences of a rule
- Whether the rule is fixed or flexible
- Allowable objects for a rule (for example, styles)
- The running order of the rules.

For each of the structured authoring templates that you create, you set up specific rules (for example, **Opening paragraph**, **Numbered tasks**, **Data table**, **Notes**, **Closing paragraph**). The fixed or flexible element refers to the sequence of the rules in the Structure Builder. To make a rule optional you need to set the minimum occurrence to 0. Once you have set up your rules you can easily adjust and refine them until they meet your specific requirements.

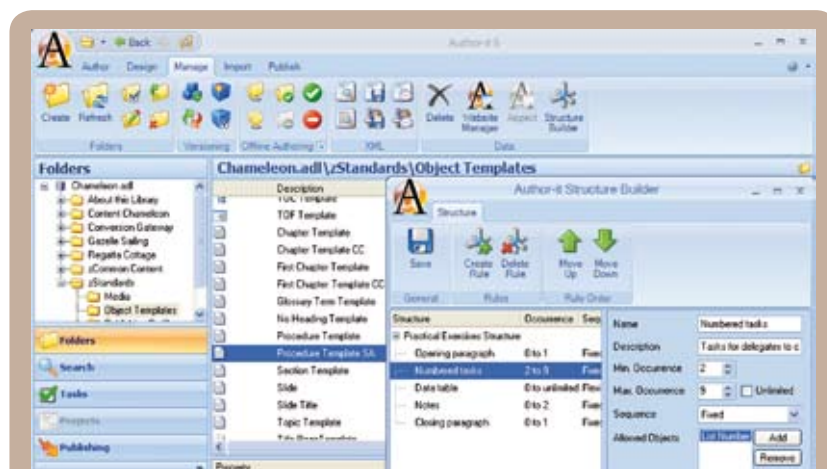


Figure 1. Author-it Structure Builder

The Rules window

Using the **Rules** tab (in the **Book Editor** view) you can view the rules that have been defined for each paragraph in a topic (Figure 2). You can have the **Rules** window open while you work on your topic. You can click on the **Validate** button at any stage to check your topic.

Unfortunately, the words 'ParagraphStyle requires:' take up valuable space in the **Detail** column. You have to expand the window to see the rules, losing much of your working window. There is no horizontal scroll bar, which is not good if you have lots of allowable objects in a rule.

Pin pointing rule failures is not an easy task in this first release as Author-it does not

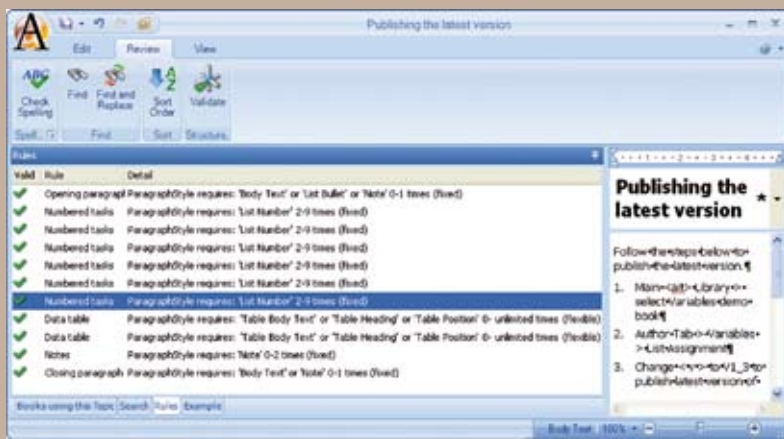


Figure 2. The Rules window

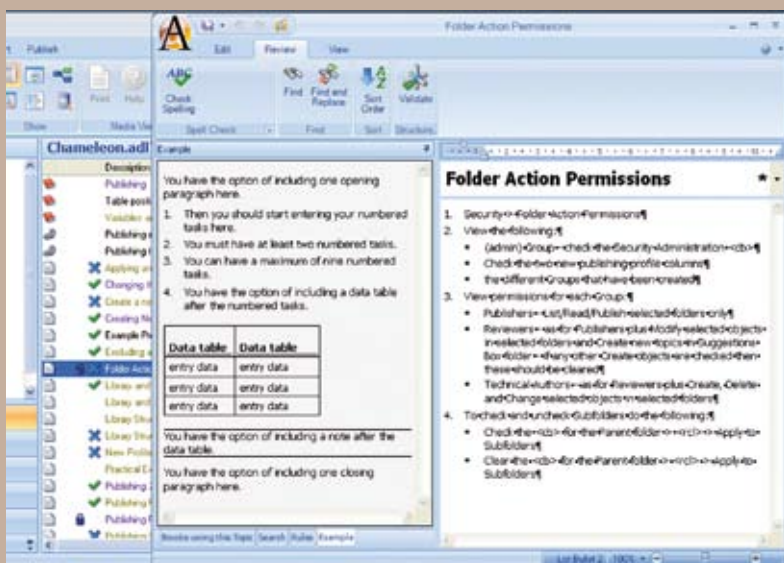


Figure 3. Example topic

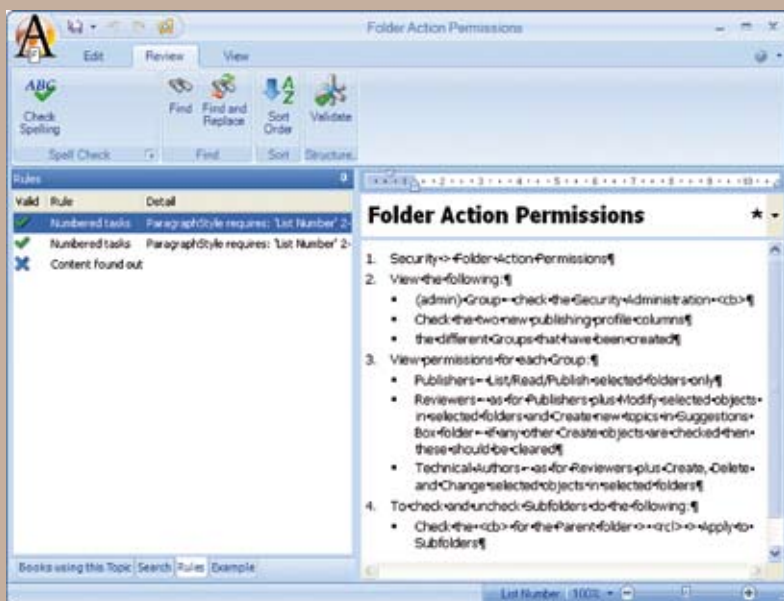


Figure 4. Rule failure

specifically highlight where in the topic it has failed validation. With Author-it 5.3 the exact point of failure in the topic editor view will be highlighted when you click the **Validate** button.

Example topics

I think the facility to include example topics with templates is an excellent addition. When I first started using Author-it, I was thrilled to be liberated from the need to be careful not to damage Word templates and end up with lots of styles with + + or the infamous mutant char char style! It was also great to be able to set permissions on folders and control the workflow of documents through release states. Then I thought: 'what a shame it doesn't also have a facility to include our styles and conventions, so that we are guided through what to use rather than always having to refer back to our blueprint document'. You now have this facility; you can include guidelines and instructions to authors in the example topics. Authors just need to click on the **Example** tab whenever they need to see an example topic (Figure 3).

Time to experiment and evaluate this new feature

Setting up a structured authoring environment in Author-it is relatively easy and does not require you to have XML knowledge. The difficult part of the task is designing the rules you want to use and planning the implementation. I found the best way to get to grips with it was to play with the functionality in a test library first.

If you are new to Author-it, your best starting point is the Author-it Knowledge Center (see the Resources list). If you are an experienced Author-it user upgrading to version 5.2, here's my 12-step guide for a first-pass evaluation of one type of content:

1. Create a copy of one of your existing template objects. For example, **Procedure Template** and call it **Procedure Template SA**.
2. On the **Properties > General Tab**, select the 'Make this object a structure template' checkbox.
3. Close the topic and, with the topic selected but not open, select **Manage > Data > Structure Builder**.
4. Give the structure a name and description, select an example object and a release state.

TIP If you are going to replace a standard template with a structured authoring template (for example, replace all **Normal** templates with **Normal SA**) then it is advisable not to apply a release state initially. This is because a message will pop up for each topic that does not validate in the release state selected.

5. Click the **Create Rule** button and create your first rule, for example, **Opening paragraph**.
6. Create a few more rules, using the up and down arrows to change the order if required.
7. Go to the book that you want to try it out on and apply the **Procedure Template SA** to all the **Procedure Template** topics in your book.

TIP Pick a smallish book to run your first test.

8. If your topics are already following the structure, as you apply the **Procedure**

- Template SA** a green tick will appear in front of the topic title when viewed in the Library Explorer. If not, they will have a blue cross.
9. Assuming you have some topics with blue crosses, open one and select **Review > Structure > Validate**. The last paragraph to validate will have a green tick. The first paragraph to fail will have a blue cross. For example, if you have two green ticks followed by a blue cross the first paragraph not to validate is paragraph 3 (see Figure 4).
 10. Before you validate all the topics, amend the relevant publishing profile on the **Applies To** tab. Select the release state that you selected in step 4 and select **Enforce** (to prevent publishing). You will now be able to publish using this profile only after all the content in the selected book has been validated. Try it!
 11. Amend the content of your topics until you have validated all the topics in your test book.
 12. And, finally, if you think this functionality could be useful within your organisation, the last and most important step to take is to do your analysis and planning before you touch anything at all in your live system.

Analysis and planning

As ever, the devil is in the detail. The analysis and planning that you do before implementation will make a big difference to whether or not the end result yields the benefits that you are seeking to achieve. You may find that you need to revise the structure of your topics to get the most out of this new feature.

You must work out carefully how you want to structure your content and set up the appropriate templates, rules and most importantly permissions. There is no point in setting up rules if everyone can override them—it's like installing an expensive safe and leaving the door open! It is not about trust: it is about keeping your important assets safe.

Consistency and control

Using the new structured authoring functionality can help you to increase consistency, especially useful if you have a large team of authors or have a quick turnover of authors, or both.

You can keep a tight control of your content by setting up your users' permissions so that they follow the correct structure and only have access to the relevant styles for the specific type of content they are creating. This is particularly useful if you have inexperienced authors and other departments contributing directly into Author-it. You can protect all content that is in a draft or review state from being accidentally published and issued.

You can use the example topic feature not only to provide authors with an example of how the topic should look but also to describe what should be included in each of the different topic types. Instead of having a blueprint document, you can include all your instructions to the authors at the point of need (Figure 4).

Conclusion

The stability and speed of Author-it has greatly improved in version 5.2. If you have not upgraded to Author-it 5 from Author-it 4, it is worth taking another look at this latest release. Many of the issues that previously prevented successful user acceptance testing have now been resolved.

If you are already using Author-it and have upgraded to Author-it 5.2, you have the opportunity of testing structured authoring without the need to buy any additional add-on software.

If you are currently evaluating which authoring tool is right for your organisation, Author-it provides a unique opportunity to implement structured authoring in both a staged and selective way.

I like the way that you can implement structured authoring in a staged way. In reality, very few organisations have the luxury of being able to stop production work to do a 'big-bang' type of migration. For most of the projects on which I have worked, migration from one system to another usually takes at least six months. How many organisations can stop production work for that length of time? The ability to move content to a formal structure gradually means that you do not necessarily have to touch all of your legacy content; you can incorporate the gradual validation of topics into your business as usual.

I particularly like the fact that structured authoring is not an 'all or nothing' feature. You have the freedom to choose which content needs to be structured and which content does not. For example, you may decide that the only type of content you want to validate against a set of rules is your processes and procedures.

The new structured authoring feature provides additional benefits, even if you do not want to use the structured authoring functionality. I particularly like the example topics that you can now build into templates. These are excellent for including not only an example of how a particular type of topic should look but also guidance and instructions. It is rather like a context-sensitive help facility for your authors.

I understand from Author-it Software Corporation that the new structured authoring functionality has been extended in Author-it 5.3. This version should include example structured authoring templates, and book objects and topic rules will be enhanced to include items such as character styles and embedded topics. Therefore, to avoid costly re-working, I would strongly recommend not entering into any major analysis and planning until you have fully evaluated the enhancements to structured authoring in Author-it 5.3. You may find that you can tailor the new example structured authoring templates to meet your requirements. **C**

Resources

Author-it website
www.Author-it.com

Author-it User Group
<http://tech.groups.yahoo.com/group/authorit-users>

Robert E Horn's website
www.stanford.edu/~rhorn/a/topic/stwrtnng_infomap/tocStructrdWriting.html

Structured authoring
www.Author-it.com/kc/42125.htm

Using object variants variants
www.Author-it.com/kc/33352.htm

Using object variants for multiple releases
http://hamishblunck.com/docs/Using_Author_it_Variants_for_Maintaining_Multi.pdf

Amanda Caley FISTC, Director of Content Chameleon, has many years of experience in technical communication, training and project management. Content Chameleon delivers complete solutions for complex content to business sectors including finance, government, retail, shipping and telecommunications. Amanda is a qualified PRINCE2 practitioner and an Author-it Certified Consultant.
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