

Review of Author-it 5

Amanda Caley and Jane Schofield test drive the latest version of Author-it and the new component Author-it Xtend™.

Introduction

Author-it is a single-source content management system. You create content for re-use 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.

The new version of Author-it provides a much improved, more user-friendly environment, in which tabs and ribbons have replaced the menus used in previous versions.

Top ten changes

1. The most noticeable change is the interface, which makes it easier for you to manage the design and format of the library and its contents. Workflow tabs are used — **Author**, **Design**, **Manage**, **Import** and **Publish** — to display the relevant ribbon (Figure 1). You can hover the mouse over an icon to view a callout explaining its function. When you open a book, additional tabs are displayed: **Edit**, **Review**, **View** and **Publish**.
2. Clicking the Author-it logo now displays some items that were on the **File** menu in previous versions, with a button to customise Author-it **User Options**. The **User Options** can be set for templates and include the file locations for publishing and the Author-it Xtend™ settings.
3. **Search** has been improved. You can now restrict results to those in specific folders or to those modified or created by particular groups or users. You can combine most of the

criteria to create more precise searches. The text search also now supports **Match Case** to find only text with the specified capitalisation and **Whole Word** to find complete words only.

4. The **Show Relationships** feature has been greatly enhanced to enable you to see how many times an object is used and in which books. **Next** and **Previous** buttons have been added so that you can continue showing relationships and easily return to the original list of relationships.
5. When you open a book or topic, additional tabs are displayed at the foot of the editor pane. The tabs show the name of the books that use the topic and a search facility. You can dock these tabs within the opened book pane to customise the layout.
6. There is a new scalable zoom feature in books and topics.
7. Templates and styles can now be grouped and organised by category (lists, headings and so on). To get the most out of this feature, you should consider who needs to use which templates and styles and also think about how to restructure your folders and what changes to make to group and user permissions.
8. Table management has been improved. When a table is inserted or the cursor is in an existing table, an additional tab is displayed named **Layout** (Figure 2). This contains icons for inserting and deleting rows and columns, formatting borders and shading, and managing header rows. Author-it tell us that an update will include even more improvements to tables by the time you read this article!

Useful websites

Author-it website
www.authorit.com

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

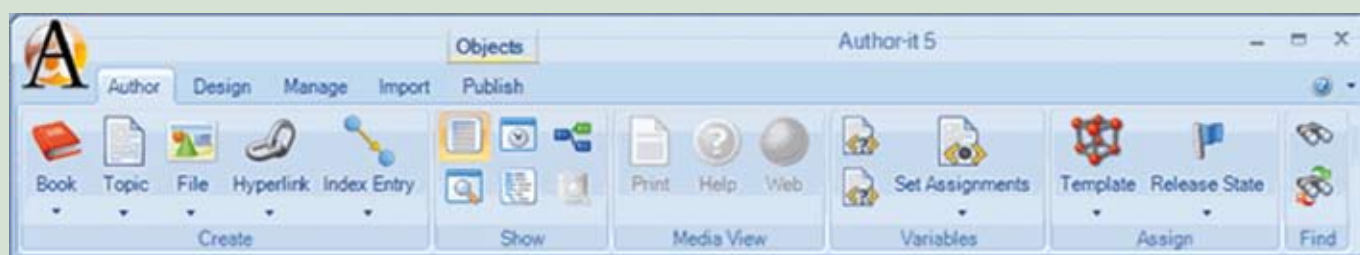


Figure 1. Workflow tabs — callouts displayed by hovering



Figure 2. Layout tab

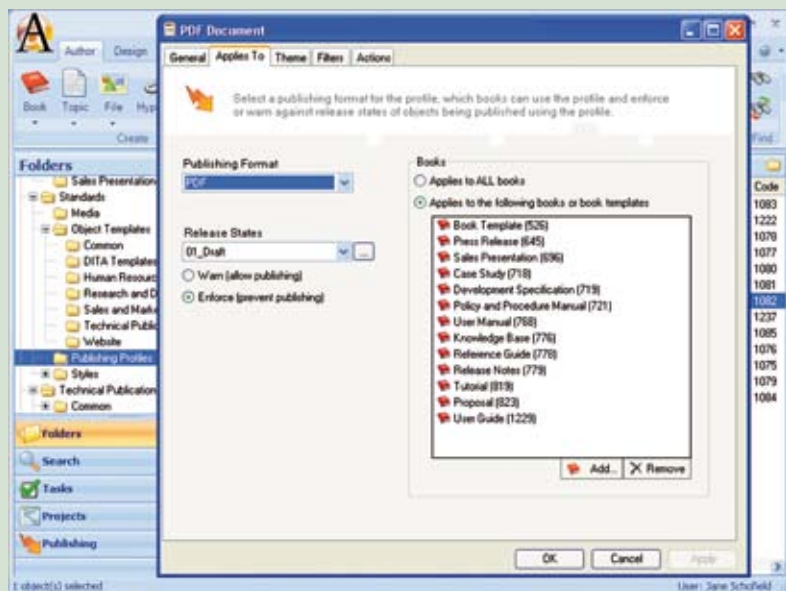


Figure 3. Example of a Publishing Profile, PDF Document

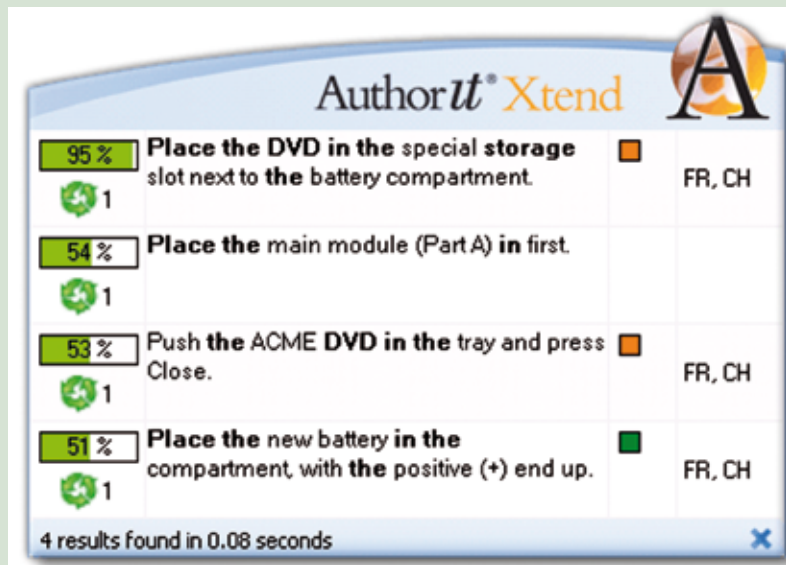



Figure 4. Popup showing potential content fragments

9. Help is now an icon, , with a drop-down list, and this is located below the standard Windows minimise and maximise buttons.
10. Publishing Profiles is a cool new feature that enables you to create different profiles for different users. Once profiles are set up, you can be sure that your team will always publish their deliverables using all the relevant settings and objects. Read on...

Publishing Profiles

This is the most exciting new feature. Profiles enable you to specify at a highly granular level what content and in what format you want a given department, group or individual to be able to publish. For example, you might have three very different print output requirements: user manuals, sales proposals and legal contracts. For each type of deliverable, you can set up a specific set of rules. You can exclude individual topics

and substitute styles and media objects to change the nature and appearance of your documents.

Profiles enable you to create new topics in a book and keep them as work in progress until they are approved and ready for release. For example, you can set up a profile to exclude released content or one to publish only review content.

If you have a standard document that you frequently need to create with only a few changes, you will find the 'Variable Prompt' extremely useful.

User and Group Permissions

As Publishing Profiles are another type of object, you can apply security to them at folder level and/or using their release state. In an upgraded library, profiles are in a top-level folder but, in a new installation, they are under the **Standards** folder (which you will usually set up with restricted access).

The best approach is to set permissions before adding books or creating a new Publishing Profile. For example, you may want to set the permissions so that a technical communicator can publish books in a draft state but only a senior technical communicator can publish in a released state.

Settings for Publishing Profiles

When you view a Publishing Profile (for example, PDF Document) in the **Publishing Profiles** pane, the window opens to show information on the **General** tab. Click the **Applies to** tab to view the preferences for a Publishing Profile (Figure 3). Preferences can be set for:

- Publishing format
- Release state
- Warning or enforcing release state
- Adding books to the profile (there is a search button to locate the books to be added).

Once preferences are set, the Publishing Profile is updated with any changes or added books.

You can add new profiles to the **Publishing Profiles** folder by clicking the **Publishing Profile** icon, located on the **Design** tab. Enter a new name for the publishing profile on the **General** tab, then select the **Applies to** tab to set the preferences and add the books to the Publishing Profile.

Publishing Console

In the **Navigation** pane, the Publishing Console displays a list of Publishing Profiles used in the library. Click a Publishing Profile to view the books that can be output to that format. It may be, depending on the profile, that a particular book can only be published to PDF and Word. At the foot of the window are tabs displaying the pending, queued and published jobs.

Author-it Xtend™

This new product helps you to find and reuse existing content in your library. You don't have to know where to find the content to reuse it: this authoring memory module automatically offers possible matches in a popup as you type in new content. If something the same or similar exists in your library, it will be offered for reuse.

Author-it Xtend™ settings

In the Author-it User Options, you can customise preferences to determine the:

- Minimum number of words before the popup is displayed
- Number of suggestions offered
- Colours used to highlight matches
- Minimum precision of the matches shown
- Display of the percentage match.

How it works

When you have typed the minimum amount of content, the popup shows relevant fragments of content for reuse (Figure 4). It includes:

- The ranking based on the percentage of the content that has been met
- The status of the offered content in the review cycle
- The number of times the offered content has been reused
- A preview facility that enables you to view topics in which the fragment has been used.

You can display the popup manually at any time by pressing **Ctrl-Enter**. If there is no matching content for the text you have typed, the message 'no matches found' is displayed.

You can use the popup to insert topics as well as text fragments:

- Use left and right arrow keys to preview the topic
- Right-click on the topic description and select **Insert Topic as Text** or press **Ctrl-Enter**.

Possible issues

This product is not packaged as part of Author-it 5: it is purchased as a separate product. Before you can use it, you need to install SQL server and the Author-it Service Manager. You can download the SQL Server 2005 Express Edition from the Microsoft website free, along with information on its use and system requirements.

Author-it Xtend™ only works with SQL databases, therefore, not with JET databases. If you currently use a JET database, you will need to export it to an SQL database and index the library using Author-it Service Manager. The Author-it Knowledge Center provides instructions on how to do this.

Conclusion

As shown by the top ten changes, version 5 includes improvements to many aspects of Author-it. It provides a new interface, with tabs and ribbons that provide a more intuitive working environment. The right-click menu used in previous versions is still available and makes the transition to Author-it 5 relatively easy, as you can continue to use this menu while getting used to the new interface. The ability to customise the User Options gives more control and individuality to users, and the ability to add and create Publishing Profiles is extremely useful.

However, be aware that using a JET database, depending on its size, is significantly slower in Author-it 5 than before. This suggests that the software is designed to run with SQL rather than JET databases. However, if you haven't upgraded yet, be sure to install the latest update: we are told by Author-it that this includes significant performance improvements for JET databases.

The disappointment with the standard Author-it 5 package is that it does not include Author-it Xtend™, an extremely useful tool for technical communicators that generated much interest and discussion when first publicised. However, while individuals and small teams may not be able to justify the expense, large organisations will no doubt find it easier to reap the benefits of this exciting new authoring memory functionality. **C**

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