



# Time-saving techniques using AuthorIT

Presented by  
Rhonda Bracey

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## Who am I?

Rhonda Bracey

- ▶ Owner and Managing Director of CyberText Consulting Pty Ltd providing consulting and contract technical documentation services since 1999; based in Perth, Western Australia.
- ▶ AuthorIT experience:
  - AuthorIT Certified Consultant since 2003.
  - Currently use AuthorIT with numerous clients.
  - Won Excellence Awards in the 2003-2004 and 2004-2005 Australia Chapter STC Competitions for online Help created with AuthorIT.
  - Co-presented a session on AuthorIT with Char James-Tanny at the STC Annual Conference, Baltimore, 2004.
  - The "Variable Queen"! (attributed by Char James-Tanny, 2003).

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## Coverage and focus

In this session, I'll discuss and demonstrate these AuthorIT elements:

- ▶ Variables.
- ▶ Topic reuse.
- ▶ Release states.

My focus is on how these elements can:

- ▶ Save time during the authoring and reviewing process.
- ▶ Preserve and maintain consistency of terminology and formatting.
- ▶ Add value to your documentation.

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## Time-saving technique: 1

VARIABLES

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## Variables

In this section, I will cover:

- ▶ Types of variables.
- ▶ How using variables saves you time.
- ▶ Creating, using, inserting, and assigning variables.
- ▶ Using variables in 'feedback loops'.

**Note:** All variables shown in this presentation have spaces surrounding the text within the < >. In real life, type variables without spaces.

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## Types of variables

### Text

- ▶ Ideal for repetitive text, long text, etc.
- ▶ Can be up to 2000 characters (including nested variables).
- ▶ Can be created from numbered or bulleted items.

### List of values

- ▶ Ideal for multiple product or company names, training course titles, etc.; are resolved to their assigned value when you publish.
- ▶ Can be up to 255 characters for each value.
- ▶ Can be created from numbered or bulleted items.

### File object

- ▶ Ideal for graphics, HTML code, etc.

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## How using variables saves time

Time savings occur because:

- ▶ You type fewer characters.
- ▶ The value that replaces the variable in the published output is ALWAYS accurate and consistent.
- ▶ If the value changes (e.g. product name or spelling), you change it in ONE place and the change ripples through all outputs when next published.
- ▶ You can 'nest' variables to apply values and consistent formatting at the same time, or to string together multiple variables.
- ▶ You can use keystrokes to add graphics to the content.
- ▶ You can use a single string to represent multiple steps in a list.

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## Example: Type fewer characters

Using variables for common text saves keystrokes — and therefore time and money. For example:

Phrase/variable	Keystrokes	If used 50 times
Configuration Specification document	38	1900 keystrokes
< cs >	6	300 keystrokes

Using a variable for this 3-word phrase cuts the keystrokes to 6; in 50 occurrences 1600 keystrokes are 'saved' — and it is never mistyped.

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## Example: Accurate and consistent

Because a variable's value is typed only once, its published value is always the same no matter where or how often that variable is used.

So, if the value for < cs > is Configuration Specification document (with upper case "C" and "S"), then that's EXACTLY how it displays when published — every time.

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## Example: Change value in one place

Ever had a name change for a product or a company and had to do a Find/Replace across multiple documents to make the change? There's a good chance you didn't get them all...

By using a variable for the name, you make ONE change in AuthorIT Administrator — the name changes everywhere it is used when you next publish the documents.

### Client example

- ▶ Over time, they've used WebForms, Web Forms, Webforms, NetForms, Netforms, and Net Forms for the same product.
- ▶ I made it < nf > with a value of Net Forms.
- ▶ When they change the name again, I only have to change the value ONCE.

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## Example: Nested variables

You can create a variable by 'nesting' one or more other variables.

For example, I bold button names such as **OK**. But creating a variable for this doesn't save me time as I'd end up with *more* keystrokes. However, **OK** is often part of a phrase such as Click the OK button or Click OK so I use a nested variable for it:

1. Create a Text variable (e.g. < ok >) for **OK** and apply the Special Bold style to it. The value is: **OK**.
2. Create another Text variable for Click the OK button (e.g. < cku >). The value is: Click the < ok > button
3. When published, the < cku > variable resolves to Click the **OK** button with **OK** in bold.

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## Example: Variables for graphics

Create variables for regularly used graphical elements such as toolbar icons. When you need to insert that graphic, just keep on typing. You don't interrupt your thought process to find and insert the file object. (**Note:** The file object for the graphic must already exist.)

1. Create a File Object variable. (In this example, < ddb > for "drop-down button".)
2. In the Value field, select the graphic file object from its folder list.
3. When published, the graphic displays where you typed the variable name in the text.

1. Blah blah blah.  
2. Click the < ddb > and select **XXX** from the list.  
3. Blah blah blah.

test topic  
1. Blah blah blah.  
2. Click the < ddb > and select **xxx** from the list.  
3. Blah blah blah.

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## Example: Variables for lists (1)

Create variables for common lists (e.g. first or last steps of a procedure). Use nested variables within the list if you need to include character formatting or graphics.

Copy the list to the clipboard. Don't copy the last paragraph mark.

1. Click <code>next to <code> in the left.
2. Click <code> next to <code> to view the Components list.
3. Click on a component.

In AuthorIT Administrator create a new Text variable and paste the copied list into the Value field. (cont...)

?? csp	Icon - Components	Components icon	File Object
?? cslb	click cals	lower case	Text
?? cckup	Click cals	upper case	Text
?? ccomp	Click cesp next to ccs in select Component steps		Text
?? ccs	Configuration specification		Text

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## Example: Variables for lists (2)

Insert the variable as usual.

```
test topic
1. <code>
2. blah blah blah
```

Check the result.

```
test topic
1. Click in next to Components in the Navigator List.
2. Click in next to List of Components to view the Components list.
3. Click on a component.
4. blah blah blah
```

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## Create variables

- ▶ Variables only work in the **Workgroup** or **Enterprise** editions of AuthorIT. (**Desktop**: You can emulate *some* variable behavior using embedded topics.)
- ▶ Created in AuthorIT Administrator; applied in AuthorIT.
- ▶ Variable names cannot contain spaces.
- ▶ If you're documenting code, be careful of variable names that could be the same as code tags (e.g. <code> tr >, <code> hr >).
- ▶ **Hint**: Use **l**, **u**, or **m** in the variable name to distinguish between lower, upper, and mixed case variables where all are used.

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## Use variables

Variables can be used in many places in your AuthorIT library, such as:

- ▶ Topic text.
- ▶ Object titles.
- ▶ Object descriptions.
- ▶ Custom HTML templates.

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## Insert variables into content

You can insert variables into your content and AuthorIT objects by:

- ▶ Typing them (quickest method, but you need to know your variables; watch for typos).
- ▶ Drag-and-dropping them from the list of variables under **Tools > Variables > List** (handy when you can't remember the exact syntax).

For imported or existing content:

- ▶ Use the Find/Replace function (check "match case", the areas being searched, and the starting point).

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## Assign variables

Use variable assignments when you have information that changes for different publication runs or different books. For example, a product or training course name.

Variables can be assigned:

- ▶ To a topic.
- ▶ To a book.
- ▶ On-the-fly — the value **ONLY** applies to that book/topic and is never stored in AuthorIT Administrator.

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## HTML variables

- ▶ HTML variables only work in the **Enterprise** edition of AuthorIT.
- ▶ HTML variables can be added to various types of code: HTML, JavaScript, ASP, etc.
- ▶ In AuthorIT Administrator, set up the file extensions of the code types where you want to use HTML variables (.htm;.html;.xhtml;.mv;.asp;.aspx;.js; are the defaults)
- ▶ HTML variables must use the syntax:  
**< authorit:name\_of\_variable >**
- ▶ Like other variables, they get resolved when the Book is published to one of the outputs that uses a custom HTML template.

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## Example: One template, many products

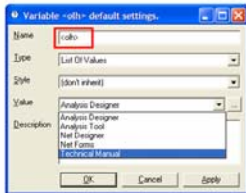
If you have a common 'look and feel' across a document set (such as CHMs for various products or applications), but you want to tailor each output to reflect the name of the product, then you only need to use ONE customized HTML template that contains a variable for the product name.

*Let's look at the code and the variable, and what it looks like when published...*

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## Example: HTML code and variable



Set up the variable as you would for any other List Of Values variable. Assign the variable at the Book level.

```
<table border="1" width="100%" cellpadding="0" cellspacing="0">
<tr>
<td colspan="2" style="text-align: center; background-color: #f2f2f2; font-weight: bold; font-size: 1.2em; padding: 5px;">
<strong>oltb</strong>
</td>
</tr>
<tr>
<td style="width: 50%; padding: 5px; vertical-align: top;">
<ol style="list-style-type: none; padding-left: 0; margin: 0;">
<li style="padding: 2px 5px 2px 20px;">Analysis Designer
<li style="padding: 2px 5px 2px 20px;">Analysis Tool
<li style="padding: 2px 5px 2px 20px;">Net Designer
<li style="padding: 2px 5px 2px 20px;">Net Forms
<li style="padding: 2px 5px 2px 20px;">Technical Manual
</ol>
</td>
<td style="width: 50%; padding: 5px; vertical-align: top;">
<ol style="list-style-type: none; padding-left: 0; margin: 0;">
<li style="padding: 2px 5px 2px 20px;">Analysis Designer
<li style="padding: 2px 5px 2px 20px;">Analysis Tool
<li style="padding: 2px 5px 2px 20px;">Net Designer
<li style="padding: 2px 5px 2px 20px;">Net Forms
<li style="padding: 2px 5px 2px 20px;">Technical Manual
</ol>
</td>
</tr>
</table>
```

In your custom HTML template, you must use the syntax **< authorit:name\_of\_variable >** or it won't work.

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## Example: How it publishes



The **< olh >** variable assignment of "Technical Manual" is now in the header area of the HTML output.

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## Example: 'Feedback loops'

- ▶ 'Feedback loops' are used to gather email responses from users about a topic.
- ▶ They are a nightmare to set up manually — you really couldn't do it using a customized HTML template in AuthorIT except perhaps with some very complex JavaScripting.
- ▶ But by using system variables in your custom HTML template you can set up feedback loop email links for EVERY topic in your published documentation in less than 5 minutes!

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## Example: Feedback loop code

```
<table border="1" style="width: 100%; border-collapse: collapse; font-family: sans-serif; font-size: 0.9em;">
<tr>
<td style="padding: 5px; vertical-align: top;">
<ol style="list-style-type: none; padding-left: 0; margin: 0;">
<li style="padding: 2px 5px 2px 20px;">Analysis Designer
<li style="padding: 2px 5px 2px 20px;">Analysis Tool
<li style="padding: 2px 5px 2px 20px;">Net Designer
<li style="padding: 2px 5px 2px 20px;">Net Forms
<li style="padding: 2px 5px 2px 20px;">Technical Manual
</ol>
</td>
<td style="padding: 5px; vertical-align: top;">
<ol style="list-style-type: none; padding-left: 0; margin: 0;">
<li style="padding: 2px 5px 2px 20px;">Analysis Designer
<li style="padding: 2px 5px 2px 20px;">Analysis Tool
<li style="padding: 2px 5px 2px 20px;">Net Designer
<li style="padding: 2px 5px 2px 20px;">Net Forms
<li style="padding: 2px 5px 2px 20px;">Technical Manual
</ol>
</td>
</tr>
</table>
```

Note that three variables are used in this example. I wanted to capture:

- ▶ the name of the manual (**oltb**),
- ▶ the AuthorIT ID of the topic (**sys\_objectid**), and
- ▶ the version of the topic the user is commenting on (**sys\_version**).

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## Example: Feedback loop variables

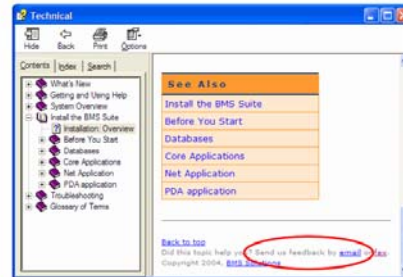
<SYS_MODIFIED>	The date the Object was	System
<SYS_MODIFIEDBY>	The user who last modified	System
<SYS_OBJECTID>	The Object Key	System
<SYS_SHORTID>	System Short Date	System
<SYS_STATEID>	The ID of the Release St.	System
<SYS_STATUS>	The ID of the Status the I	System
<SYS_TIME>	System Time	System
<SYS_USER>	System User Name	System
<SYS_VERSION>	The Object Version	System

- Two of the variables used in the code are **system variables** that extract the topic ID and the version number straight from the database.
- The other is the **< oh >** variable I use for the product/manual name.

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## Example: How feedback links publish



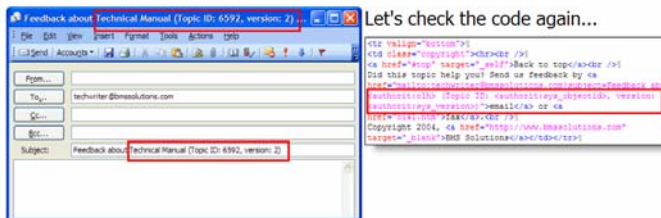
In the footer area of the HTML output is a "Send us feedback by email" link.

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## Example: User clicks the feedback link

- When the user clicks the "email" hyperlink in the online help, their email application opens ready for them to type their comments.
- Note that some of the data is already populated from the variables in the code.



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## Sample list of variables

A sample list of variables I have used with various clients is available from:

- WritersUA Conference website: [http://www.writersua.com/ohc05/suppmat/AuthorIT\\_variables.pdf](http://www.writersua.com/ohc05/suppmat/AuthorIT_variables.pdf)
- CyberText website: [http://www.cybertext.com.au/tips\\_ait.htm](http://www.cybertext.com.au/tips_ait.htm)

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## Time-saving technique: 2

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## Topic reuse

In this section, I will cover:

- How reusing content saves time.
- Types of reusable content (including 'embedded' topics).
- Creating, using, and managing reusable content.

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## How reusing content saves time

- ▶ Reusable, embedded content ALWAYS publishes the same (resulting in accuracy and consistency).
- ▶ Change embedded content in ONE place; the change ripples through all outputs when next published.
- ▶ 'Nest' reusable content to take advantage of minor variations from topic to topic.
- ▶ Use nested books to reuse a common set of topics across various publications (for example, an "About this Manual" section).
- ▶ Combine reusable content in various ways for different outputs.

**Hint:** If a piece of information is used more than a few times in a documentation set, consider making it a reusable topic or a variable.

**Hint:** Set up standard table outlines with the formatting already applied.

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## Types of reusable content

Any object in AuthorIT can be reused. However, I'll focus on reusable *topic content*.

Reusability can occur at numerous levels of *granularity*, such as:

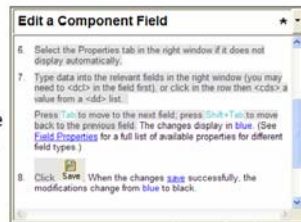
- ▶ Common phrases, sentences, and paragraphs (**Workgroup/Enterprise:** Consider using variables instead).
- ▶ One or more procedural steps (e.g. common beginnings and endings).
- ▶ Notes, warnings, tips, and/or their outlines.
- ▶ Tables and table outlines.
- ▶ Entire topics.
- ▶ Entire books.

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## Create reusable topics

- ▶ A topic that you want to reuse is created the same way as any other topic; the base template is not important.
- ▶ Reusable content displays with a gray background in the container topic. For example:
- ▶ Topic titles of reusable content are NOT displayed in the topic that contains them.
- ▶ Formatting is preserved in the container topic except for the last paragraph mark.



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## Use reusable topics

Drag the topic into the container topic and drop it where you want it to go. You are asked if you want to:

- ▶ **Paste As Text**
  - Connection to the source topic is lost.
  - Content reverts to plain text.
  - Use for table outlines.
- ▶ **Embed Topic**
  - Connection to the source topic is preserved.
  - Use for common, repeatable text to maintain consistency.

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## Manage reusable topics

- ▶ Consider creating a special folder for your reusable topics, or prefixing their titles with '**emb -**' or similar to find them quickly.
- ▶ An **embedded** topic maintains its connection to the source topic; if it is **pasted as text**, it loses this connection forever.
- ▶ You can only change the SOURCE of an embedded topic; to change it from within the container topic, double-click anywhere in its gray area.
- ▶ To find the folder where the source topic 'lives', right-click on the gray area within the container topic and select **Locate**.
- ▶ To find which topics contain the embedded topic, right-click on the source *topic* in its folder and select **Show relationships**.
- ▶ To remove an embedded topic from the container, press Del in the gray area and confirm the deletion.

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## Example: Repeatable text



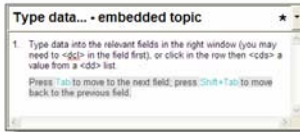
Here, two topics were embedded in the container topic; subheadings were added manually.

Topics like this can be combined and rearranged to suit the needs of the audience or the importance of the information.

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## Example: Procedural steps: Source



**Hint:** You can embed other topics into a source topic, thus creating many combinations of reusable content.

This source topic contains a procedural step and another embedded topic as a substep.

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## Example: Procedural steps: Container



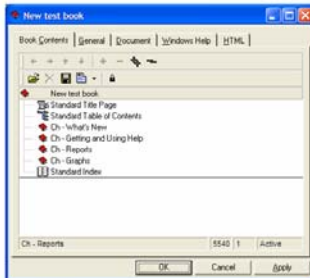
The reusable topic has been dragged and dropped into this container topic as an embedded topic, and displays with a gray background.

Note that other pieces of reusable content (and variables) are also used in this procedure — I wrote very little unique text for this and many other topics in this manual.

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## Example: Entire book



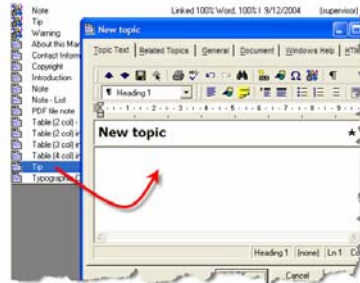
A new book was created and four existing books were added to it.

The content of each nested book remains constant, no matter what order or combination of nested books is used in the container book.

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## Example: Table outline 1: Drag'n'drop

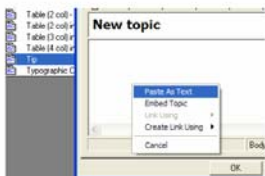


Select the topic to be reused, then drag it where you want it to go in the container topic.

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## Example: Table outline 2: Paste as text



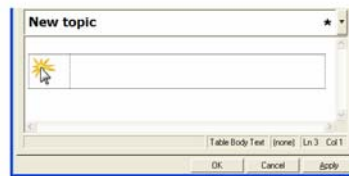
As soon as you drop the source topic, you are asked how you want to deal with it — paste it as plain text, or embed it.

For table outlines such as this one, ALWAYS choose **Paste As Text** or you can't type in the table cells.

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## Example: Table outline 3: Ready...



Once the table outline is pasted as plain text (no gray background), it is ready for you to enter content into the cells, or apply formatting to the table.

'Paste As Text' = disconnected from its source topic; future changes to the source topic will not affect this table.

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## Release States

In this section, I will cover:

- ▶ How release states save time.
- ▶ Identifying changed content for reviewers.
- ▶ Creating "What's New"-style topics.

## How release states save time

Time savings occur because you can:

- ▶ Readily identify the progress of topics through their life cycle, through a software version life cycle, or other user-defined documentation or business process.
- ▶ Use highlight colors to identify changed content to reviewers; reviewers only have to check the highlighted sections.

Other features:

- ▶ Set permissions to prevent others from modifying content with a particular release state.
- ▶ Set the same release state for all topics in a book at once.

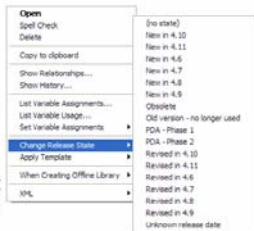
## Set up release states

- ▶ Done in AuthorIT Administrator under **Security > Release States**.
- ▶ Set any or all of these:
  - ▣ Permissions for users or groups.
  - ▣ Display color in AuthorIT.
  - ▣ Highlight color in Word output.
- ▶ Use the default release states or add your own to suit your documentation process. **Hint:** Right-click in the window to see the options.



## Use release states

- ▶ Done in AuthorIT.
- ▶ Click the **State** column header to sort/group those with the same release state, or use the Search tab and search by **In state**.
- ▶ Can only be applied from shortcut menu when you right-click an object or selection of objects; you only see release states you have permission to use.



## Create "What's New"-style topics

Example	Validation	Format	Normal Text	Normal Text	Normal Text	Normal Text	Normal Text	Normal Text
Example Validation: Formatted Contents	Normal Text	20/07/20	01	0501	1	None in 4.11		
Generic Validation: Field Types	Normal Text	20/05/01	01	2420	1	None in 4.10		
Generic Validation: Notes and Limitations	Normal Text	14/05/20	01	0168	1	None in 4.10		
Generic Validation: Pattern Matching	Normal Text	14/05/01	01	0212	1	None in 4.10		
Get up and: Email Addresses	Normal Text	12/05/01	01	0040	1	None in 4.10		
Use an Existing Validation Rule	Normal Text	21/05/01	01	0173	1	None in 4.10		
Action Operators	Normal Text	20/05/01	01	0422	1	None in 4.11		
Add a User Profile for Languages other than English	Normal Text	22/05/01	01	1029	1	None in 4.11		
Mail	Normal Text	23/05/01	01	0409	1	None in 4.11		
Available Fields for each Field Type	Normal Text	12/05/01	01	0420	1	None in 4.11		
Cell Properties Fields	Normal Text	15/05/01	01	0403	1	None in 4.11		
Change the Search Capable for a Field	Normal Text	20/05/01	01	0410	1	None in 4.11		

1. Sort the **State** column or use the Search tab to get a list of all new topics added for a product release.
2. Create your "What's New" topic based on this list.

**Hint:** For quick and easy statistics, search or sort by **State**, then check the total number of objects in the Status Bar.

## Identify changed content for reviewers

### Select Multiple Objects

1. To select two or more objects on a report
2. Click on an object. Smart tags shows changes display in the objects frame on the right
3. Press and hold down the Shift key
4. Click on another object whose holding down Shift Smart tags shows changes display in the objects frame and the first object's frame show that more than one object is selected

- ▶ Tell reviewers to check highlighted sections **ONLY (Note: Unchanged embedded content is not highlighted).**

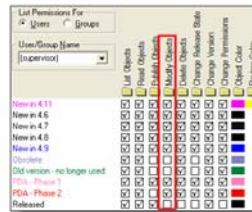
**Hint:** Use different highlight colors for new and revised content (based on release states), so reviewers know where they have to focus the most attention.

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## Same release state for all book topics

Your manual has been reviewed, signed-off, and published. You don't want *anyone* making changes to *any* topic in the released document.



1. In AuthorIT Administrator, use Release State permissions to prevent changes to objects with this release state.
2. In AuthorIT, use the Search tab and do a search for all Topic objects in a Book object.
3. Select the results, right-click and select **Change Release State > [release state]**.

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## cyberText consulting Conclusion



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## How do these techniques add value?

### Value to users/readers

- ▶ Consistent wording for common procedures means there are no surprises for readers. For some writers, this may equate to boredom, but a consistent approach helps readers perform tasks with the minimum of fuss and with no confusion.

### Value to writers/documentation teams

- ▶ Considerable time is 'saved' by using variables and reusable content, allowing writers to focus on other ways to provide quality information to their readers.

### Value to reviewers

- ▶ Reviewers only have to review new and changed content, not the entire document, saving time and reducing the risk that they may not thoroughly check a document they've seen many times before.

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## Questions

Any questions?

Thank you for attending. Please fill out your evaluation forms.

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## Contact me

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▶ <http://www.cybertext.com.au>



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