

# Author-it Search Strategies and Methods



# Session Plan

- ▶ Informal - quick survey of search methods
- ▶ Not training or even a full demo - just identifying search options you might not have considered
- ▶ Strategies depend on what we are trying to accomplish
- ▶ Folders and naming conventions can support our search requirements
- ▶ Discussion after presentation - but speak up if you have anything to add
- ▶ More info in Knowledge Center
- ▶ Some notes on things that aren't strictly search, but concern reuse



# Why Search?

- ▶ Find content to reuse or adapt
- ▶ Reporting
- ▶ Discover relationships
- ▶ Identify redundancy
- ▶ Moving objects
- ▶ Other reasons?



# Object Search

- ▶ Use Advanced criteria
- ▶ Multi-select where helpful
- ▶ Search results can be copied to Excel or similar
- ▶ Pin results for moves from search results to folder
- ▶ Available from Book Editor as well as main window - can dock tab
- ▶ ***Searching for Objects*** (<http://kc.author-it.com/#b17173>)
- ▶ ***Using Advanced Search*** (<http://kc.author-it.com/#b17181>)



# Boolean Search

- ▶ And (+), Or (|), Not (-)
- ▶ And used by default
- ▶ Wildcards (\*)
- ▶ Quotes (")
- ▶ ***Using Boolean Logic to Enhance Search Results***  
(<http://kc.author-it.com/#b17174>)



## Quick Search

- ▶ Navigate through recently visited folders
- ▶ Save searches
- ▶ Export to CSV
- ▶ **Author-it Quick Search** (<http://kc.author-it.com/#b17182>)



# Locate

- ▶ From search results or book
- ▶ Show the folder where an object is located
- ▶ **Locating Objects** (<http://kc.author-it.com/#b17210>)



# Find and Replace

- ▶ Book, library, or selected objects
- ▶ Limited to text changes
- ▶ Cannot replace styles
- ▶ ***Finding and Replacing Text*** (<http://kc.author-it.com/#b17253>)



# Show Relationships

- ▶ Show where an object is used, and what it uses
- ▶ Includes localizations
- ▶ Can chain relationship windows
- ▶ Useful for identifying needed updates - for example:
  - Style usage
  - Comments
- ▶ ***View an Object's Relationships***  
(<http://kc.author-it.com/#b17043>)



# Replace Command

- ▶ Not exactly a search option
- ▶ Replace all relationships with an object with a different object
- ▶ Applies to the entire library!
- ▶ ***Replacing One Object With Another***  
(<http://kc.author-it.com/#b17207>)



## Advanced: XML Search and Replace

- ▶ Can view XML in browser or using stylesheet
- ▶ To do find and replace, need to have a thorough understanding of Author-it XML structures (<p> and <cs> elements)
- ▶ Test thoroughly in a sandbox library
- ▶ Beware of editors that do bad things! (treatment of white space, inserting junk)
- ▶ **Author-it XML Format** (<http://kc.author-it.com/#b6159>)



# Variables

- ▶ Manage Variables command from main window Author-it icon
  - Assignments
  - Usage
- ▶ Use variables and values on Search tab
- ▶ Can combine with Boolean searches
- ▶ **Working with Variables** (<http://kc.author-it.com/#b17339>)



# Folders

- ▶ Should support finding content for reuse
- ▶ By domain, product line, object type, permissions
- ▶ Store heavily reused content in folder and restrict permissions
- ▶ ***Working with Library Folders***  
(<http://kc.author-it.com/#b17161>)



# Naming Conventions

- ▶ Naming conventions aid:
  - Searches
  - Sorting in folders
  - Qualifiers for objects with similar names
- ▶ May be redundant for:
  - Object type
  - Object templates
  - Other searchable criteria
- ▶ **Object Description** (<http://kc.author-it.com/#b17761>)



# Identifying Reuse and Embedded Objects

- ▶ **Alt+Enter** to create reusable chunks
- ▶ Use naming convention to indicate reuse
- ▶ Consider using folders for reused objects
- ▶ **Books using this Topic** tab in Book Editor
- ▶ ***Embedded Topics - Best Practice Guide***  
(<http://kc.author-it.com/#b17268>)
- ▶ ***Creating an Embedded Topic from Selected Text***  
(<http://kc.author-it.com/#b17281>)



# Xtend

- ▶ Features and applications:
  - Suggestive reuse - Reuse content instead of creating new
  - Advanced search - Searching for content to reuse
  - Fragment highlighting - Identifying opportunities to increase reuse
- ▶ **Author-it Xtend** (<http://kc.author-it.com/#b17544>)



# HTML Search Options

- ▶ Javascript (client side)
  - **Using a Client Side (DHTML) Full Text Search**  
(<http://kc.author-it.com/#b17665>)
- ▶ Third-party search (server side)
  - **Using a Server Side (CGI Script) Full Text Search**  
(<http://kc.author-it.com/#b17660>)
- ▶ Web Help includes Lucene search engine
  - **Publishing to Web Help>Using the Search**  
(<http://kc.author-it.com/#b17615>)
  - **Web Help Performance and Scalability** (<http://kc.author-it.com/#b17637>)
- ▶ Aspect includes server side search
  - **Aspect Overview** (<http://kc.author-it.com/#b11510>)
  - **Viewing Content in Aspect>Search Options**  
(<http://kc.author-it.com/#b11617>)
  - **Author-it Aspect Web Application** (<http://kc.author-it.com/#b16842>)



# Supporting Search in HTML Outputs

- ▶ Keywords variable on media objects and HTML variables in template files can be used to embed keywords in HTML output
- ▶ ***Where You Might Use Variables>External Files and Templates*** (<http://kc.author-it.com/#b17351>)
- ▶ You can publish a site map for HTML, XHTML, and Web Help outputs
- ▶ ***Creating a Sitemap File*** (<http://kc.author-it.com/#b17616>) (Web Help)
- ▶ ***Creating a Sitemap File for Search Engines*** (<http://kc.author-it.com/#b17655>) (HTML & XHTML)



# Discussion

- ▶ Other search methods?
- ▶ Successes?
- ▶ Challenges?
- ▶ Wish lists for search?
- ▶ NY Metro Author-it User's Group on LinkedIn

