

Implementing Author-it in One Hour



Goals for this Presentation

- ▶ This is a demonstration, not a training class.
- ▶ Author-it can be implemented more quickly and easily than any other single sourcing solution.
- ▶ Today's session is a "no frills" implementation; but it includes a lot!



A Very Quick Start

- ▶ Start with a pilot project:
 - Representative of typical content elements
 - Not too big, not too small
- ▶ Take it from start to finish.
- ▶ Involve your entire team.



Planning

- ▶ What will your first deliverable be?
- ▶ What existing content needs to be imported?
- ▶ What content will you create?
- ▶ What is the plan for content reuse?
- ▶ What are your publishing requirements?
- ▶ What Author-it users will be involved, and what are their roles?
- ▶ Will all users be in the same local area network? If not, how will remote users access Author-it?
- ▶ What is your implementation timeline?

Before Installing

- ▶ .NET 2.0 has been installed (pre-installed on VISTA).
- ▶ Use Windows Update to get latest .NET updates.
- ▶ Uninstall any previous release of Author-it 5. (can keep V4)
- ▶ Not necessary to uninstall evaluation version if release is unchanged - just apply new license file to library.





Installing

- ▶ Install Author-it client on Administrator's PC.
- ▶ Enter licensing information for library.
- ▶ Copy Author-it 5\Data folder to server.
- ▶ Install Author-it client on users' PCs.
- ▶ If necessary:
 - Export library to SQL Server.
 - Install Author-it Xtend.
 - Install Author-it Live.
- ▶ Test publishing for each client.
- ▶ Adjust file location settings.

Administering

- ▶ Define groups and users.
- ▶ Set folder permissions, including administrator access as appropriate.
- ▶ Define and set permissions for release states.
- ▶ Define variables.
- ▶ Configure history settings.



Customizing

- ▶ You can create one or more different customized publishing formats for each type of output (print, HTML, etc.).
- ▶ Customization involves creating or modifying Author-it objects and external publishing template files.
- ▶ During customization, you will create test books, publish, make changes, and republish, repeating those steps until you are happy with the results.





Customizing Books

- ▶ Identify types of publishing formats to be supported:
 - Different media (print, HTML, etc.)
 - Different formats for a particular media (for example, print formats for user guides, training guides, and job aids)
- ▶ For each type of document, create an Author-it book object template and:
 - Copy of an Author-it Word template for each print output
 - Folder containing frameset and additional related files for each type of HTML output (can be copied from default folders)
- ▶ Modify Author-it book object templates to point to appropriate Word templates or HTML frameset and additional files.

Customizing Topics and Formats



- ▶ As needed, create new Author-it topic object templates and media objects.
- ▶ Related Topics tab of topic objects controls autogenerated cross-reference elements (Next, Previous, In This Section, etc.).
- ▶ For print, customize Word style definitions and create autotext entries for headers and footers.
- ▶ For HTML, customize style definitions in Author-it or create a custom stylesheet.
- ▶ As necessary for HTML output, modify the frameset file and add additional HTML template files, scripting, graphics, and other window definitions.

The Style Guide

- ▶ Add examples of all styles to the *Style Guide* book.
- ▶ To review formatting for different types of books, include the *Style Guide* as a subbook in books based on different book templates you use.
- ▶ Publish to all outputs you support for each book type.
- ▶ Output for the same style can be formatted differently for different output types or book types.



Creating Books, Topics, and Content



- ▶ Create a book object for each deliverable. Base it on a book object template.
- ▶ Add topics based on topic templates:
 - For documents to be published to print output, create top-level topics using a topic template that sets a page layout (Section Break and Media object reference on Print tab of topic properties).
 - Include a TOC object in documents to be published to HTML.
 - For any topic that creates a new HTML page, Web tab must refer to a media object.
 - Set the hierarchy of topic objects in a book's contents to reflect hierarchy of topics (translates to heading levels when you publish).

Editing and Managing Objects

- ▶ Within topics, apply styles, add pictures (file objects), hyperlinks, tables, and other content.
- ▶ As necessary, add a glossary or perform indexing.
- ▶ Apply release states to identify development stage of content as relates to your workflow stages.



Publishing



- ▶ In the main window, select a book object, then right click and choose Publish To>*output format*.
- ▶ To publish from within the Book Editor, use the Publish tab.
- ▶ To publish multiple books and output types, use the Publish tab at the bottom left of the main window. Select one or more publishing profiles, then one or more books.
- ▶ Books or book templates may need to be identified on the Applies To tab of a publishing profile.
- ▶ When finished, you can leave the Publishing dialog open, then return to it after making changes and click on Republish.
- ▶ Any changes you make to published output are independent of the Author-it content. It's only output!

Importing

- ▶ Check style or tagging usage in source documents.
- ▶ If necessary, create additional styles in Author-it.
- ▶ Import a small sample document or project.
- ▶ Set topic structure rules for the desired level of chunking.
- ▶ Set style mapping rules to map source styles or tagging to Author-it styles.
- ▶ Check preview and make any needed additional changes to style mapping rules.
- ▶ At the end of the import, save import rule changes to an existing or new import profile.

Cleaning Up Imported Files



- ▶ Evaluate the results:
 - Identify any needed cleanup in Author-it.
 - Identify any cleanup that could be done more efficiently in source document.
 - Identify additional changes needed in import profile.
 - Discard the results of the import and repeat (after addressing cleanup and import profile changes).
- ▶ When satisfied, test additional samples or complete documents.

Managing

- ▶ Use the Search tab or Quick Search to return a list of objects (available from the main window or the Book Editor).
- ▶ You can search for variables and variable assignments.
- ▶ Search can be used to generate custom reports.
- ▶ Use Find or Find/Replace to find and replace text within content objects.





Right-Click Options

- ▶ Right-click on a selected object and choose:
 - Locate to see where an object is in the folder structure.
 - Show History (can compare and roll back if history is enabled through Author-it Administrator)
 - Show Relationships (where an object is used, and what dependencies it has) - you can repeat this operation on related objects, open an object, or perform other operations on listed objects by right-clicking.
- ▶ Author-it stores extensive metadata automatically. For a sample, select any object, right-click, and choose XML>View with Stylesheet.

Next Steps

- ▶ If you need translations, also pilot the Localization Manager from start to finish.
- ▶ Repeat the process with a larger document.
- ▶ Repeat the process with documents of other types.
- ▶ Explore other output types.



Additional Resources

- ▶ Other free webinars and training opportunities are described on **SDI's Website** (<http://www.sdicorp.com>, <http://www.sdicorp.com/authorit/>).

