

# Using AuthorIT Administrator



By AuthorIT Software Corporation Ltd.

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This document was created using *AuthorIT* (<http://www.author-it.com>).



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# Contents

<b>Chapter 1 Using This Guide</b>	<b>1</b>
Who This Guide Is For .....	1
What This Guide Covers .....	1
What You Should Already Know .....	2
Typographical Conventions.....	3
Your Feedback Please .....	3
Contacting Us .....	4
<b>Chapter 2 Getting Help</b>	<b>5</b>
Many Ways to Get Help .....	5
Help Yourself.....	5
Ask Other People Who Use AuthorIT .....	5
Ask Us For Help.....	6
Using AuthorIT's Help System.....	6
Getting Context Sensitive Help.....	6
Getting Help About Microsoft Windows .....	6
Using AuthorIT's Product Documentation.....	7
Logging a Support Call.....	7
Finding Which Build of the Software You Are Using.....	8
<b>Chapter 3 Understanding AuthorIT</b>	<b>9</b>
Understanding AuthorIT's Architecture .....	9
Understanding Your Document's Different Output Formats .....	10
Understanding the Components of Your Document .....	11
Assembling Your Document .....	11
Reusing Objects .....	11
Commonly Encountered Objects.....	12
Understanding the Document Creation Process With AuthorIT.....	12
<b>Chapter 4 Working With Libraries</b>	<b>13</b>
Opening a Library .....	13
Upgrading Existing V3 JET Libraries to V4 .....	13
Upgrading Your Library .....	14
Creating a New Library Database.....	14
When To Use More Than One Library.....	15
Exporting a JET Library Database to SQL Server.....	15
Maintaining Libraries .....	16
Object Locking.....	16
Repairing and Compacting a JET Library .....	17
Removing Empty Objects .....	18
Reindexing Topic Text Relationships.....	18
Reindex Book Table of Contents.....	19
Reindex Search .....	19

Create Dictionary From Wordlist .....	20
Refreshing Library Properties .....	22
Performing Administrative Tasks from the Command Line.....	23
The External Files Report .....	24
Working with Edit History .....	26
Setting Edit History Save Points .....	27
Archiving History Records.....	28

---

**Chapter 5 Working With Security 31**

---

Understanding Security Permissions.....	31
Understanding Users and Groups.....	31
Understanding the Different Types of Permission.....	31
Understanding Release States .....	32
Understanding Folder Action Permissions .....	33
Working with Users and Groups .....	36
Adding a Group.....	36
Adding a User .....	37
Specifying the Groups a User Belongs To .....	38
Clearing a User's Password .....	38
Changing a User's Password.....	39
Deleting a Group.....	40
Deleting a User .....	41
Working With Permissions .....	42
Adding or Removing a Permission .....	42
Refreshing Permissions .....	43
Adding a Release State.....	43
Deleting a Release State .....	43
Renaming a Release State .....	44
Changing a Release State's Color.....	44
Activating Floating Licences.....	45

---

**Chapter 6 Working With Variables 47**

---

Variable Types .....	48
Displaying Variables.....	48
Variable Usage in AuthorIT .....	49
Variable Assignments in AuthorIT .....	50
Creating Variables.....	50
Editing Variables .....	51
Deleting Variables .....	52
Creating AuthorIT Website Manager Variables.....	54
Website Manager Publish Format .....	55

---

**Glossary of Terms 57**

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---

**Index 61**

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## Chapter 1

# Using This Guide

This section helps you get the most out of this Guide.

## In This Chapter

Who This Guide Is For .....	1
What This Guide Covers.....	1
What You Should Already Know .....	2
Typographical Conventions .....	3
Your Feedback Please.....	3

## Who This Guide Is For

This Guide is for the person who administers the AuthorIT Enterprise Edition and Workgroup Edition for teams who share their authoring work. In this document we'll call this person the AuthorIT Administrator. That is also the name of the separate program that you use to carry out AuthorIT's administrative functions - we'll call that the "AuthorIT Administrator program".

This Guide is also for those using the Desktop Edition, who will use the AuthorIT Administrator program to perform regular *maintenance tasks* (see "Maintaining Libraries" on page 16).

The program that you use to actually do the authoring work is called the AuthorIT **Desktop Edition, Workgroup Edition, or Enterprise Edition** - we'll call it the "AuthorIT program". People who only use that program do not need to read this Guide, but will find the *Using AuthorIT* Guide useful.

## What This Guide Covers

This Guide tells you about:

- ▶▶ **Understanding the basics** of how the various components of AuthorIT work together.
- ▶▶ **Working with Libraries**, including Upgrading existing Libraries, Creating new Libraries, and Performing regular maintenance tasks.
- ▶▶ **Working with security permissions**, including Folder Actions and Release States.
- ▶▶ **How to get help** using AuthorIT.

## What You Should Already Know

Before you read this Guide you need to be comfortable working with:

- ▶▶ The Windows environment and its applications.
- ▶▶ SQL Server.
- ▶▶ The AuthorIT program.

None of these topics are covered in this Guide (although we have provided a brief conceptual overview of AuthorIT). For information about these topics, refer to their separate user documentation.

## Typographical Conventions

Before you start using this Guide, it is important to understand the terms and typographical conventions used in the documentation.

For more information on specialized terms used in the documentation, see the **Glossary** at the end of this document.

The following kinds of formatting in the text identify special information.

Formatting convention	Type of Information
Triangular Bullet(➤)	Step-by-step procedures. You can follow these instructions to complete a specific task.
<b>Special Bold</b>	Items you must select, such as menu options, command buttons, or items in a list.
<i>Emphasis</i>	Use to emphasize the importance of a point or for variable expressions such as parameters.
Monospace	Information that you must type, or information like folders and filenames.
CAPITALS	Names of keys on the keyboard. For example, SHIFT, CTRL, or ALT.
KEY+KEY	Key combinations where you must press and hold down one key and then press another, for example, CTRL+P, or ALT+F4.

### Information That Is Only Relevant To Certain Configurations

All Editions

Some information only applies if you are using:

- ▶▶ A particular Edition of AuthorIT (like the Enterprise Edition), or
- ▶▶ A certain component (like the optional AuthorIT Project Manager, or the SQL Server database that you can use with the Enterprise Edition).

That information is marked with the name of the Edition or Component.

## Your Feedback Please

To help us improve what we offer you, we would like your feedback about this Guide, and about any other aspect of AuthorIT. Go on, we can take it (and that includes compliments, too). Every comment counts, as far as we are concerned. You'll find we're very responsive, and we act on your suggestions as swiftly as we can.

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## Chapter 2

# Getting Help

This section describes how to get help when you have questions or problems using AuthorIT.

## In This Chapter

Many Ways to Get Help.....	5
Using AuthorIT's Help System .....	6
Using AuthorIT's Product Documentation .....	7
Logging a Support Call .....	7

## Many Ways to Get Help

There are many ways to get help when you have questions or problems while working with AuthorIT.

### Help Yourself

Most people like to be able to find their own answers. It's often quicker than other ways, and it's usually more satisfying. There are a few options when you want to find the answers yourself. If you can't find the answer quickly, don't hesitate to ask us for help directly.

- ▶▶ **Use the standard HTML Help system** (see "Using AuthorIT's Help System" on page 6) that ships with AuthorIT.
- ▶▶ **Use the printed product documentation** (see "Using AuthorIT's Product Documentation" on page 7) about *Getting Started With AuthorIT*, *Using AuthorIT*, *Using AuthorIT Administrator*, and *Using AuthorIT Project Manager*.
- ▶▶ Use our **online Knowledge Center** (<http://www.author-it.com/kc/index.mv>), which contains the entire suite of documentation for all AuthorIT products, as well as answers to frequently asked questions (FAQS), troubleshooting tips, and information on how you can customize AuthorIT to meet your needs. To go there, choose **Help > AuthorIT Website > Knowledge Center** from the main AuthorIT menu.

### Ask Other People Who Use AuthorIT

When you have a problem or question that does not require an urgent answer, you can ask the members of the free online **AuthorIT User Group** <http://www.author-it.com/?page=usergroup>. This is also a particularly good option when you have a question about different ways of implementing AuthorIT.

## Ask Us For Help

We pride ourselves on our responsive, friendly support. AuthorIT offers a variety of *support options* (see Support page - <http://www.author-it.com/index.mv?servicess>) which allow you to *log calls with our online Help desk* (see "Logging a Support Call" on page 7) when you have questions, problems or suggestions about AuthorIT.

## Using AuthorIT's Help System

AuthorIT's HTML Help system contains most of the information you'll need to successfully work with AuthorIT.

### *To Use AuthorIT Help*

- 1) From the main menu, choose **Help > AuthorIT Help**. The HTML Help file opens, and the most recently viewed tab is shown first.
- 2) Find the information you need by:
  - ▶ Using the **Contents** tab. Read about *finding the information you need* (see "What This Guide Covers" on page 1) in this Guide.
  - ▶ Using the **Index** tab to find topics containing those terms that have been indexed.
  - ▶ Using the **Search** tab to find all occurrences of a word in the Help file, no matter how trivial.

## Getting Context Sensitive Help

Use AuthorIT's context-sensitive help to find out about each field or screen you're working with.

### *To Get Context Sensitive Help*

- 1) Choose the screen and tab you want help on then,
- 2) Press the F1 button. The Help topic for that screen or tab pops up.
- 3) When you've finished reading, close the window.

## Getting Help About Microsoft Windows

We assume you already know how to use standard Microsoft Windows applications. For more information about using Windows applications, please refer to the Windows user documentation - including the online Help which you can open by:

- ▶ Choosing the Windows **Start** button, then choosing **Help**.
- OR-
- ▶ Clicking on a blank part of your Windows Desktop, then pressing the **F1** key at the top of your keyboard.

---

## Using AuthorIT's Product Documentation

AuthorIT's product documentation set helps you use the range of AuthorIT programs. The documents are:

- ▶▶ The *Getting Started With AuthorIT* Guide, which explains how to install AuthorIT, and includes a Tutorial to get you started. To read the online version of the Tutorial, choose **Help > AuthorIT Website > Beginner's Tutorial** from the main AuthorIT menu.
- ▶▶ The *Using AuthorIT* Guide, which explains how to use the AuthorIT program. To read the online version, choose **Help > AuthorIT Website > User Guide** from the main AuthorIT menu.
- ▶▶ The *Using AuthorIT Administrator* Guide, which explains how to use the separate AuthorIT Administrator program used to manage user security, Library administration, and other settings, and how to install the AuthorIT Workgroup or Enterprise Edition server and client components.
- ▶▶ The *Using AuthorIT Project Manager* Guide, which explains how to use the separate AuthorIT Project Manager program that manages projects and tasks.
- ▶▶ The *Using AuthorIT Localization Manager*, which explains how to use the separate AuthorIT Localization Manager to manage and produce documentation in multiple languages.

## Logging a Support Call

Sometimes you can't find the answer you need on your own. We're happy to lend a helping hand.

### *To Log a Support Call*

- 1) Find your license number (on that scrap of paper you filed somewhere a few months ago, or try **Help > About**).
  - 2) Go to the Help desk page on our website:
    - ▶ From the main menu in AuthorIT, choose **Help > Log Support Call**. This passes your details to the Help desk page, so it's faster.
- OR-
- ▶ In your Internet browser, go to the *Help desk page* (<http://www.author-it.com/helpdesk.mv>). You'll need to type in your email address, and your license number if you're a customer.

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**Note:** The Help desk displays all current calls that use your email address. You can then follow up on an existing issue you have reported, or log a new call.

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If you're logging a problem, you are prompted to check that you're using the latest build. *Find out which Build* (see "Finding Which Build of the Software You Are Using" on page 8) of the AuthorIT program you are using (**Help > About** again).

- 3) Tell us your problem, question or suggestion. Please log **only one issue in each call**, so we can pass them easily between the appropriate people on our team. The Help desk system has a **Log Another Call** button that makes logging multiple calls faster.

If you're logging a problem, please write exactly what you were doing and where, so we can quickly find an answer for you - without a flurry of emails seeking and supplying more details. Paste the text of any error messages that appear. To solve a problem we often need to reproduce it - so if you can describe exactly what steps we have to take, that helps too. Think of it as a procedure that you're writing (Step 1 - open AuthorIT, then open the Library called XYZ, Step 2 ...). The more you tell us, the easier it is for us to help you swiftly.

- 4) Write a brief **Title** which says what the call is about, in as few words as possible. If necessary, we may change it (especially if you type a job title in that field instead).
- 5) Click on the **Log Call** button. You'll get a confirmation that the call has been successfully logged (and an email will also follow). Note the call number. You can log another call if you need to by clicking the **Log Another Call** button.

## Finding Which Build of the Software You Are Using

When you *log a Support Call* (see "Logging a Support Call" on page 7), we need you to tell us exactly which Build of AuthorIT you are using. This is easy to find.

### *To Identify the Software Build*

- 1) From the AuthorIT menu choose **Help > About**. A window appears, containing details about the software including the Version you are using (for example, 4.00.0426).
- 2) The Build is the last 4 numbers of the Version number (for example, Build 0426).

## Chapter 3

# Understanding AuthorIT

This section is a "crash course" in AuthorIT's concepts, so that you understand them when you're reading the rest of this Guide. For further conceptual detail about AuthorIT, please read the *Using AuthorIT* Guide.

## In This Chapter

Understanding AuthorIT's Architecture.....	9
Understanding Your Document's Different Output Formats.....	10
Understanding the Components of Your Document.....	11
Understanding the Document Creation Process With AuthorIT .....	12

## Understanding AuthorIT's Architecture

In AuthorIT's single-user **Desktop Edition**, all program components are stored on your desktop computer. This includes the separate **AuthorIT Administrator** program that you use for maintenance tasks, such as repairing and compacting your Library.

AuthorIT's **Workgroup Edition** and **Enterprise Edition** allow sharing of work across a network to multiple client computers, but they do not have a server application component. We've found it's simpler to store only the shared library and template files on a server, avoiding the local Windows registration and shared component issues that crop up when you're running an application from the server. The AuthorIT application is installed separately on each client workstation. Record locking in the database is done on the basis of each user's login details and the time recorded on their client computer's system clock.

AuthorIT's **Workgroup Edition** and **Enterprise Edition** use a distributed client architecture:

- ▶▶ Only **Shared data files** including Library databases and various templates are stored on a server.
- ▶▶ Each **client computer** has its own copy of the program files.
- ▶▶ The separate **AuthorIT Administrator** program that you use for maintenance tasks and to manage AuthorIT's user security and other settings, is installed on the Administrator's computer.

## Collaborative Authoring Delivers Results Faster

Collaborative authoring is one of AuthorIT's real strengths - our customers tell us that sharing the work across the whole development team gets their product to market quicker and cheaper, with no hold ups while they wait for the documentation to be completed.

## Understanding Your Document's Different Output Formats

AuthorIT is a program that you use to author, manage, and publish documents in a variety of **output formats**, all from a single-source database.

This means you can change the document in one place, and your changes will be contained in each output format when you next publish them. Each output format has different constraints and considerations (discussion of which is gradually being added to the *Using AuthorIT* Guide).

These are the output formats AuthorIT can publish to:

- ▶▶ Printed Word document
- ▶▶ PDF document
- ▶▶ Windows Help system
- ▶▶ Pure cross-platform HTML pages with integrated navigation tree
- ▶▶ XHTML transitional pages with integrated navigation tree
- ▶▶ HTML Help system
- ▶▶ Java Help system
- ▶▶ Oracle Help for Java system
- ▶▶ DITA (Darwin Information Typing Architecture)
- ▶▶ AuthorIT XML

There are three main groupings of these output formats, which we will refer to throughout AuthorIT's Product Documentation:

### Printed (Document tab)

- ▶▶ Printable MS Word
- ▶▶ PDF

### Help (Windows Help tab)

- ▶▶ Windows Help
- ▶▶ HTML Help
- ▶▶ JavaHelp
- ▶▶ Oracle Help

### Web (HTML tab)

- ▶▶ HTML
- ▶▶ XHTML
- ▶▶ HTML Help
- ▶▶ JavaHelp
- ▶▶ Oracle Help for Java

- » DITA
- » AuthorIT XML

## Understanding the Components of Your Document

With AuthorIT, your document is built of components (also known as "objects"). This section helps you understand them better.

### Assembling Your Document

Creating a document in AuthorIT is like building with Lego bricks - you construct your document from many smaller pieces, which are called "objects". There are different types of object which have different functions (like a Lego roofing tile or a corner brick).

### Reusing Objects

You can reuse each object as many times as you like, in the same document or in many documents. When you change the object, your changes happen instantly in all the places where that object is used. This saves you lots of time, guarantees consistency, and makes it far easier to maintain your documents.

You can combine the same topics in different ways, by using different Books. You can arrange the same topics in a different order in each Book's Contents window. For example, the sequence of topics in a tutorial will probably be different than in a reference manual about the same product or service.

## Commonly Encountered Objects

These are the AuthorIT objects you will encounter most often:

- ▶ **Library.** The single-source database that stores all the components of your document set, which you can combine into documents, and publish those documents in many output formats. You'll usually have only one Library.
- ▶ **Book.** A particular document (or part of a document if you're using sub-books), which remembers how the other objects, like Topics and Styles, fit together.
- ▶ **Topic.** A small section of your document's contents, which usually contains a heading, several paragraphs of text, and perhaps tables and other objects like graphics. Each topic usually corresponds to one "page" in Windows Help, although there may be many topics in a single page in your printed or HTML output formats.
- ▶ **File.** A graphic or other external file which AuthorIT includes when you publish your document. AuthorIT's File object holds the settings like scale and captions, and either the name of the external file or the actual embedded graphic.
- ▶ **Style.** A formatting component that controls how text appears in your published document.
- ▶ **Media.** A formatting component that controls section-level, page-level, and window-level formatting in your published outputs.
- ▶ **Table of Contents.** An automatically created list of your document's contents, included when it is published.
- ▶ **Glossary.** A list of definitions for specialized terms that appear throughout your document.
- ▶ **Index.** A list of phrases that appear throughout your document, so that you can find where they occur.

## Understanding the Document Creation Process With AuthorIT

Creating a document in AuthorIT is a bit different from creating one in other authoring tools, because AuthorIT lets you reuse components of your document in many places, and even in different documents. After a while, you'll get used to thinking of ways that you can construct sections of your document so they're easier to reuse.

In general, when you create a document you'll work with its **structure**, **content** and **format**. You use different types of AuthorIT object for each of these.

For more detail about the document creation process, read the *Using AuthorIT* (<http://www.author-it.com/docs/html/userguide/html/index.mv>) Guide.



## Chapter 4

# Working With Libraries

An AuthorIT Library database contains all the document components you work with, as well as user account details and security settings. Unless you use different standards (for different clients, for example), you will normally only use one Library.

As you might imagine, this section tells you how to work with Libraries.

## In This Chapter

Opening a Library.....	13
Upgrading Existing V3 JET Libraries to V4.....	13
Creating a New Library Database .....	14
Exporting a JET Library Database to SQL Server .....	15
Maintaining Libraries.....	16
The External Files Report.....	24
Working with Edit History.....	26

## Opening a Library

To open a Library with the AuthorIT Administrator program, your User login must have the "*Security Administration*" permission.

## Upgrading Existing V3 JET Libraries to V4

If you open a JET Library database created with an earlier version of AuthorIT, it will be converted to the latest version, and a backup will be created in the same folder as the library with "Backup of " prepended to the original filename. The upgrade process may take a while if your library is large - this is normal. Make yourself a cup of coffee and AuthorIT should finish soon. Do not succumb to the temptation to stop or reset AuthorIT.

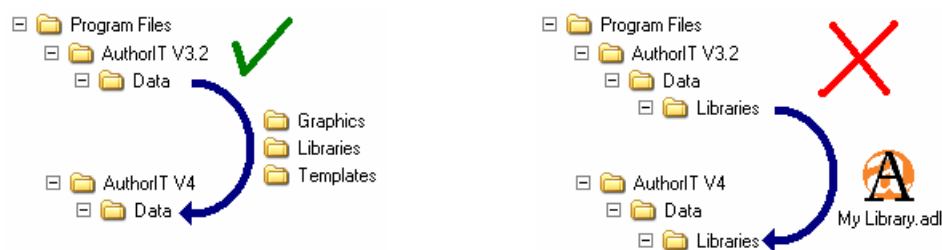
### Run Library Compact After Library Upgrade

We recommend that you *compact your Library* (see "Repairing and Compacting a JET Library" on page 17) after it is upgraded, which should free up significant space.

## Upgrading Your Library

When AuthorIT changes versions, you will often need to upgrade your library. This is so AuthorIT can add new fields to the underlying database that will contain the data required by the new features.

When upgrading a library to a new version, you will usually want to copy the library to a new directory, and upgrade the copy. When doing this, it is important that **all the external files** that AuthorIT needs (such as Word templates and linked file objects) are copied also. It is also important that the **same relative path** is maintained. Failure to do this causes AuthorIT to be unable to find these files when attempting to display the object or generate a book.



Correct

The library and all supporting files are copied

Incorrect

The library is copied but all the external files are left behind

---

**Note:** This example assumes that all external files are stored in folders within your **data** folder.

---

## Creating a New Library Database

You won't need to create new library databases very often - please read about *when to use more than one library* (on page 15).

### *To Create a New Library*

- 1) From the main menu of the AuthorIT program, choose **File > New Library**. The *File Open* dialog window appears.
- 2) Go to the **New Library** tab, and select the Library template you want to base your Library on.
- 3) Choose the **OK** button, then wait while AuthorIT creates and opens your Library.

SQL Server

- 4) To create a SQL Server Library database, do those same three steps, and then **export your JET database to SQL Server**.

## When To Use More Than One Library

You can share any objects that are contained in the same AuthorIT Library between multiple documents and users. You can **not** share objects from one Library to another. We strongly recommend that you only create more than one Library if you have different document sets, departments or customers who **do not need to share common information**. Otherwise, to maximize AuthorIT's benefits, use only one Library to store all your document components.

## Exporting a JET Library Database to SQL Server

Use the AuthorIT Administrator program to export a JET Library database to a SQL Server Library database. You must first create the SQL Server database and assign database permissions to users, then *create a JET Library database* (see "Creating a New Library Database" on page 14).

---

**Note:** On average, your library will double in file size when you export it to SQL Server. You may need to allocate more file system space before exporting.

---

### *To Export a JET Library to SQL Server*

- 1) From the main menu of the AuthorIT Administrator, choose **Export**. The **Export Database To SQL Server** screen appears.
- 2) Enter the name of the server and the database.
- 3) To use a Trusted NT Connection to the database, make sure the "Use Trusted Connection" checkbox is ticked, then go to Step 5.
- 4) If you're not using a Trusted NT Connection to the database, make sure the "Use Trusted Connection" checkbox is blank, then enter the correct Login ID and Password.
- 5) Choose the **Export Now!** button, and then make a cup of coffee while AuthorIT exports the database. If it's a big database, you may even need to make several cups.

---

**Note:** This functions requires that the you have at least db\_dbadmin privileges on the SQL Server database.

---

## Maintaining Libraries


### Object Locking

To prevent multiple authors from trying to modify the same object at the same time, objects are locked when they are opened or checked out.

- ▶ A local lock is placed on an object when it is opened, and removed when the object is closed. Other authors will be able to open the object during this period but will not be able to edit it. If the computer that has an object locked does not close the object correctly (crash, power off without correctly exiting, network problem etc) then the lock should clear after five minutes. Failing that, the administrator can *clear the object locks*.

A local lock is indicated by  in the object list.

- ▶ An offline lock is placed on an object when it is checked-out to an offline library and removed when the library is checked back in. In the offline library, all objects that were not checked-out have locks placed on them so that they may not be modified. The administrator may *clear the object locks* associated with an offline library, which will free up the objects but prevent the offline library being checked-in again.

An offline lock (checked-out object) is indicated by  in the object list.

- ▶ A lock is also placed on an object in a Target library when it is exported as part of a translation job and removed once the job is imported. The administrator may clear the object locks associated with a translation job but this will prevent the translation job from being imported.

To see who has an object locked, open the object and the locking information is displayed as part of the title bar.

### Clearing All Object Locks

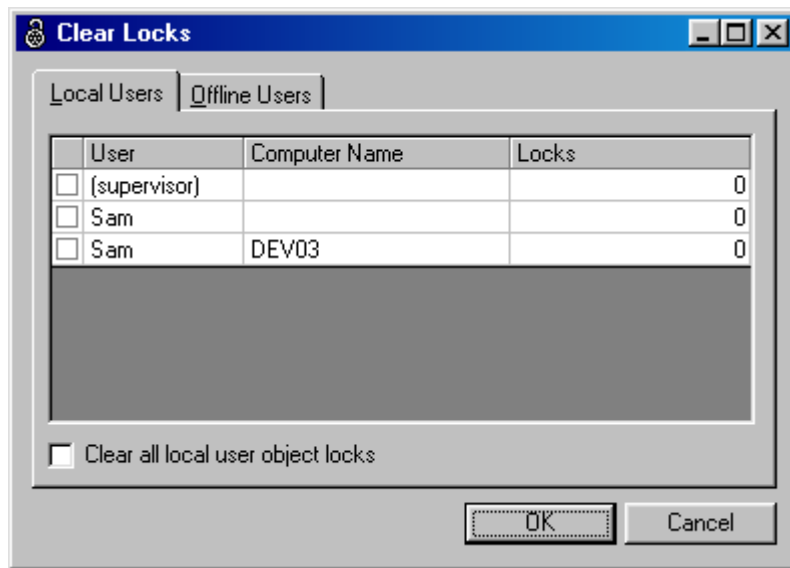
Object locks are automatically cleared after 5 minutes. If a user's session crashes, the objects they were working with may still be locked. Some operations, like updating object templates, require objects to be locked.

In these situations, the AuthorIT Administrator program lets you forcibly clear all object locks. We recommend that you inform all users if possible before you take this action, to help maintain harmonious working relationships with them.

#### *To Clear Object Locks*

- 1) From the main menu of the AuthorIT Administrator program, choose **Maintenance > Clear Object Locks and Sessions**.

- 2) The following screen will be displayed:



The **Local Users** tab represents authors who are connected directly to the Main Library. If AuthorIT was not exited correctly, it may leave locks on objects.

The **Offline Users** tab represents Offline Libraries and can be used to clear all the locks created when an author creates an Offline Library. This will however mean that the Offline Library can not be checked back in again. Ensure the author who owns the Offline Library is aware you are undoing their check-outs.

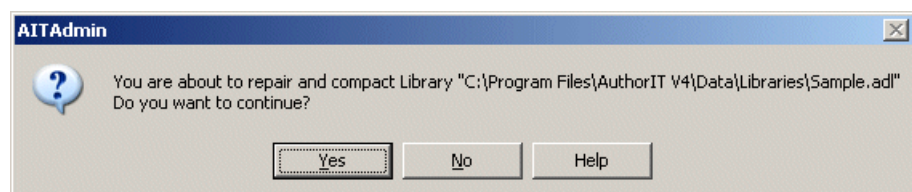
- 3) Either individually select the sessions to clear by checking the box in the leftmost column, or select the 'Clear all local user object locks' option at the bottom.
- 4) Select OK.

## Repairing and Compacting a JET Library

As you work with an AuthorIT Library it becomes fragmented, just like the hard drive on your computer. From time to time you'll need to repair and compact your Library to free up disk space and to increase performance. This function also scans your library for problems and tries to fix them. Much of the time, this works. However, you should always keep regular backups of your Library - restoring from such a backup is sometimes the only solution.

### *To Repair and Compact a Library*

- 1) Close all open objects and ensure all other users are logged out of the Library.
- 2) From the **Maintenance** menu, choose **Repair and Compact Library**. A prompt appears asking you to confirm the action.



- 3) Choose **Yes**. AuthorIT repairs and compacts the Library. This process may take a few minutes depending on the size of your Library and the speed of your computer.
- 4) Once the repair is complete, AuthorIT displays the message *"The Library repair and compact is complete"*. Choose **OK** to continue.

## Removing Empty Objects

The **Remove Empty Objects** functionality was added to correct earlier problems where as the result of a failed import or offline library check-in, "empty" objects could be incorrectly created in a library. This function cleans out those empty objects.

If you find objects displaying without any description or details it indicates there are empty objects in your library. In these circumstances, you should use AuthorIT's **Remove Empty Objects**.

There can also be rare cases when an object displays as normal but with an object code of zero (0). In this case, there is a field missing in the library data. Running the **Remove Empty Objects** function will correct the problem by reallocating the correct ID without removing the object from the library.

### *To Remove Empty Objects*

- 1) Start AuthorIT Administrator
- 2) From the **Maintenance** menu select **Remove Empty Objects**

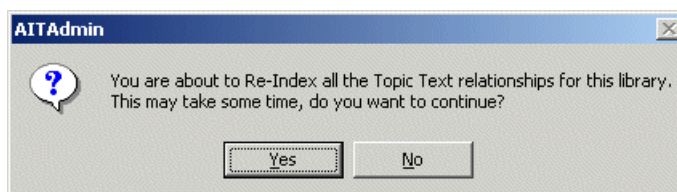
## Reindexing Topic Text Relationships

Each time a topic is saved AuthorIT looks at the content in each Topic and indexes all relationships that Topic has with other objects. This process is also carried out automatically when your library is upgraded. The index is then used when you list associated objects ('Show Relationships').

If at any time you find an associated object is not listed, you can re-index the topic text relationships. For example, a Topic may contain two file objects, but only one may be found when listing the objects used by that topic.

### *To Re-Index Topic Text Relationships*

- 1) Start AuthorIT Administrator
- 2) From the **Maintenance** menu select **Re-Index Topic Text Relationships**. A prompt appears asking you to confirm the action.



- 3) Choose **Yes**. AuthorIT re-indexes the relationships. This process may take a few minutes depending on the size of your Library and the speed of your computer.

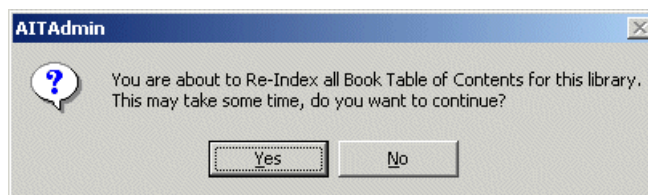
## Reindex Book Table of Contents

Each time a Book is closed, AuthorIT remembers and indexes the state of the Book Contents and which Topics are expanded and collapsed.

From time to time, this information cannot be saved, and you are prompted to reindex the Book Table of Contents.

### *To Reindex Book Table of Contents*

- 1) Start AuthorIT Administrator
- 2) From the **Maintenance** menu select **Reindex Book Table of Contents**. A prompt appears asking you to confirm the action.



- 3) Choose **Yes**. AuthorIT reindexes the books. This process may take a few minutes depending on the size of your Library and the speed of your computer.

## Reindex Search

AuthorIT maintains a single plain text index for all objects containing every publishable piece of text relating to those objects. For Topics, this includes the topic text with all paragraph and style tagging removed. It also includes variable assignments in the format `<variable>=assignment`.

This index is used when running **Find and Replace** or **Object Search**, and greatly speeds up the search functionality within AuthorIT.

In some very rare circumstances, the text in the plain text index may not match the actual text in the object, resulting in inaccurate search results. If you find you're not getting the correct or expected search results, you should use AuthorIT's **Reindex Search**.

### *To Reindex Search*

- 1) Start AuthorIT Administrator
- 2) From the **Maintenance** menu select **Reindex Search**.
- 3) Progress is displayed as AuthorIT reindexes the search. This process may take a few minutes depending on the size of your Library and the speed of your computer.

## Create Dictionary From Wordlist

While some Dictionaries are provided with AuthorIT, you may be working in a language that isn't provided or have a word list more relevant to what you are documenting.

In this case, you can create your own dictionary for any single byte language, provided you have a *word list* (see "Dictionary Word List" on page 20) and a *character map* (see "Dictionary Character Map" on page 21).

### Dictionary Word List

A word list file contains all the words you want in your dictionary. This word list must be formatted as follows:

- ▶ ASCII (not a MS Word document) with a .TXT suffix
- ▶ Lower case characters only
- ▶ Alphabetically sorted
- ▶ Each line must be delimited by a carriage return and be left aligned
- ▶ Each line must contain only one word

Example:

```
a
aardvark
able
aren't
...
```



## Dictionary Character Map

A character map file containing all the valid characters used in the dictionary. A character map file must be formatted as follows:

- ▶▶ It must be a plain text file called DICT25.MAP
- ▶▶ It must contain all characters which are valid in a word. It should not include characters that are punctuation characters or spaces.
- ▶▶ These characters must be alphabetically sorted
- ▶▶ Each line will contain the letter in upper case, a comma and then the equivalent letter in lower case
- ▶▶ Where a letter is the same in either case (for example an apostrophe) list it twice with a comma separator
- ▶▶ Example format:

A,a

B,b

C,c

...

Y,y

Z,z

'

---

**Note:** The default character map file (DICT25.MAP) for English contains 27 characters ('a' to 'z' and an apostrophe character)

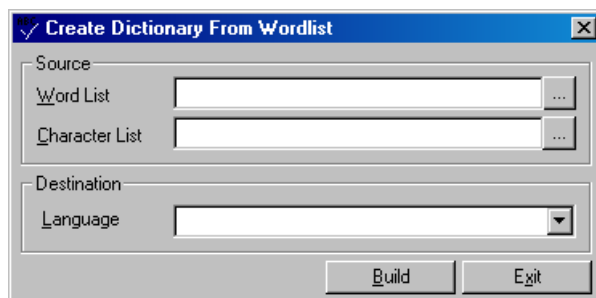
---

## Creating the Dictionary

### *To Create a Dictionary:*

- 1) Start AuthorIT Administrator
- 2) From the **Maintenance** menu select **Create Dictionary from WordList...**

The Create Dictionary From Wordlist window appears:



- 3) Enter the path to a valid *Word List* (see "Dictionary Word List" on page 20) file
- 4) Enter the path to a valid *Character Map* (see "Dictionary Character Map" on page 21) file

- 5) Enter the language (or name) of this dictionary
- 6) Choose **Build**

The required files are created in a sub-directory of your Dictionaries folder. You can then choose this Dictionary in your Spelling Options.

## Refreshing Library Properties

The main screen of the AuthorIT Administrator program shows several properties of the Library database you are administering. To see up-to-date details, especially numbers of active objects and users in the Library, you'll need to refresh those details.

### *To Refresh Library Properties*

- 1) From the main AuthorIT Administrator screen, choose the **Refresh** button. The details are updated immediately.

## Performing Administrative Tasks from the Command Line

You can perform the common maintenance tasks of exporting a SQL library to JET and/or compacting a JET library from the command line. This enables you to automate the process in a batch or as part of a scripted or scheduled process. You may choose to do this as part of your regular backup routine.

---

**Note:** To use the AuthorIT Administrator program from the command line, your User login must have the "*Security Administration*" permission.

---

### Syntax

```
aitadmin[.exe] libraryname [ /user /pwd ] [ /export ] [ /compact ] [ /exit ]
```

The parts of the command line switch syntax are:

Argument	Description
aitadmin	The path to the AuthorIT Administration program.
libraryname	The type, name and path of your AuthorIT Library (.adl) file. AuthorIT will open this library when found.  For example:  /jet"C:\Program Files\AuthorIT V4\Data\Libraries\Sample.adl"  -OR-  /sql"authorit2 server1"
user	User account to sign into the AuthorIT Library database.
pwd	Password used to sign into the AuthorIT Library database.
export	Where the <i>libraryname</i> has been specified with the <i>/sql</i> parameter, instructs AuthorIT Administration to Export the SQL Server Library Database to a Jet Library Database.  You must supply the name of the new Jet Library, you do not have to supply the path to this file. To ensure that your relative paths remain valid, the file will be created in the existing Library Path.  Please note that if the export file already exists, it will be deleted.  Example:  /export"Backup.adl"

Argument	Description
compact	Where the <i>libraryname</i> has been specified with the <i>/jet</i> parameter, instructs AuthorIT Administration to Compact the Jet Library database.  Where the <i>libraryname</i> has been specified with the <i>/sql</i> parameter <b>and</b> with the <i>/export</i> parameter, the Jet Library created by the Export process will be compacted.
/exit	Tells AuthorIT to close and exit after the process is complete.

### Examples:

To compact a Jet Library database:

```
c:\Program Files\AuthorIT V4\AITAdmin.exe /jet "c:\Program Files\AuthorIT V4\Data\Libraries\Sample.adl" /user "(supervisor)" /pwd "AuthorIT4" /compact
```

To Export a SQL Server Library database to Jet and compact the Jet database after exporting:

```
c:\Program Files\AuthorIT V4\AITAdmin.exe /sql "my database|my server" /user "(supervisor)" /pwd "password" /export "New Jet Library.adl" /compact
```

## The External Files Report

The **External Files Report** lists all files that are stored outside of the library but that are linked to by one or more AuthorIT objects, including linked graphics, and external files (such as Word templates or HTML templates).

Use the report to gain better management of external files and to quickly identify linked files that cannot be found.

### *To Display the External Files Report*

- 1) From the main menu of the AuthorIT Administrator program, choose **Reports > External Files Report**.

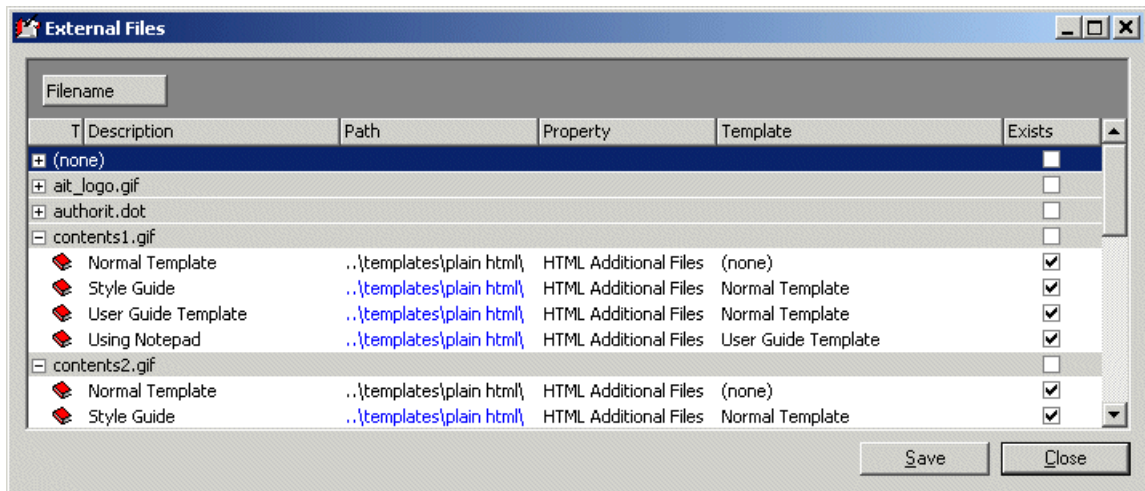
The External Files Report is displayed:

Description	Path	Filename	Property	Template	Exists
Linked Graphics Directory Template*	graphics\	<del>(none)</del>	Document Graphic	(none)	<input checked="" type="checkbox"/>
Linked Graphics Directory Template*	graphics\	<del>(none)</del>	Help Graphic	(none)	<input type="checkbox"/>
Linked Graphics Directory Template*	graphics\	<del>(none)</del>	HTML Graphic	(none)	<input type="checkbox"/>
Linked Icon File Template	graphics\	<del>(none)</del>	Document Graphic	Linked Graphics Directory Template*	<input type="checkbox"/>
Linked Icon File Template	graphics\	<del>(none)</del>	Help Graphic	Linked Graphics Directory Template*	<input type="checkbox"/>
Linked Icon File Template	graphics\	<del>(none)</del>	HTML Graphic	Linked Graphics Directory Template*	<input type="checkbox"/>
Linked GIF File Template	graphics\	<del>(none)</del>	Document Graphic	Linked Graphics Directory Template*	<input type="checkbox"/>
Linked GIF File Template	graphics\	<del>(none)</del>	Help Graphic	Linked Graphics Directory Template*	<input type="checkbox"/>
Linked GIF File Template	graphics\	<del>(none)</del>	HTML Graphic	Linked Graphics Directory Template*	<input type="checkbox"/>
Linked Terminal Screen File Template	graphics\	<del>(none)</del>	Document Graphic	Linked Graphics Directory Template*	<input type="checkbox"/>
Linked Terminal Screen File Template	graphics\	<del>(none)</del>	Help Graphic	Linked Graphics Directory Template*	<input type="checkbox"/>

The Report contains the following information:

- ▶ **Description:** The Description (name) of the AuthorIT Object.  
Multiple entries appear for the same object when that object links to more than one external file.
- ▶ **Path:** The path that has been defined to the file from within AuthorIT.  
Blue and black settings are used to indicate information that is inherited from a template (blue) or set directly in the object (black).
- ▶ **Filename:** The name of the external file as it has been defined in AuthorIT  
A strike through the filename indicates the file or path defined cannot be found. This can occur if the external file or folder it is stored in is moved, renamed, or deleted.
- ▶ **Property:** The field in AuthorIT where the file has been defined - such as the Word Template field on a Book object, or the HTML tab of a File object.
- ▶ **Template:** The AuthorIT template the object is based on.
- ▶ **Exists:** This check box is used to indicate whether or not the file can be found at the location defined. The box is checked when the file can be found, and clear if it cannot be.

2) Drag the column headers to group by column if desired:



3) Choose **Save** to save the report as HTML, or **Close** to close the report.

## Working with Edit History

### Enterprise Edition

AuthorIT's Edit History allows you to quickly see what changes different authors have made, and gives you the ability to roll back (or revert) to a previous revision.

Before you can use the Edit History to view and compare changes, you must first define which events should create history records. This is done by defining *Save Points* (see "Setting Edit History Save Points" on page 27). Only changes that have history records can be used to compare and revert.

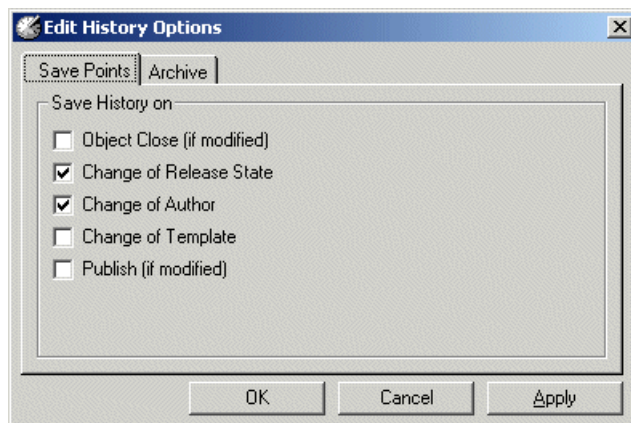
Because each history record must be stored somewhere, this can impact on the size of your library. There are a number of settings and features to *archive history* (see "Archiving History Records" on page 28) from the database.

## Setting Edit History Save Points

The Save Points you choose will depend largely on the level of control that you want, and on your environment. For example, in a single user situation you may choose to save only on object close, whereas in a multiuser environment, saving the history on change of author and change of release state is probably more appropriate.

### To Set Save Points

- 1) From the main menu, choose **History > Settings**. The Edit History Options window appears. Select the **Save Points** tab.

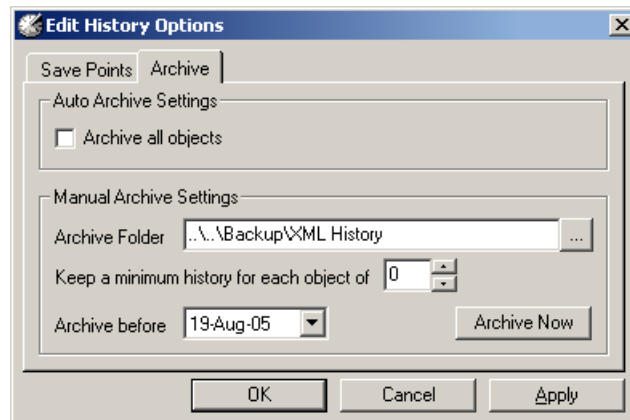


- 2) Check the events that you want to save a history record on. Choose from:
  - ▶ **Object Close** - saves a revision when an object is closed *and* has been modified.
  - ▶ **Change of Release State** - saves a revision when an object has its Release State modified
  - ▶ **Change of Author** - saves a revision when an object is modified and the author is not the last author who modified it
  - ▶ **Change of Template** - saves a revision when an object is modified and the template it is based on is changed
  - ▶ **Publish** - saves a revision when an object is published and the last modified record doesn't have an XML history attached
- 3) Choose **OK** to save your changes and close the window.

## Archiving History Records

History records can be stored internally inside the AuthorIT library, or **archived** in XML format to an external location. Archiving is optional, however it will help prevent the size of your library from quickly ballooning out of control.

You can choose from **auto** settings (when *all* records are archived as they are created) or **manual** settings where you define when records should be archived.



### Auto Archive Settings

- ▶ **Archive all objects** - when checked, this option will override any manual settings and archive *all* history records externally.

### Manual Archive Settings

- ▶ **Archive Folder** - defines the location where the XML history files are created. This path should always be relative to the location of the library so all users will be able to see it.

Edit History can still be accessed for comparison and revert even when archived, provided the users can access the archive folder. If you are using auto archive, then all users will need read and write permissions. If you are using manual archive, then the user performing the archive will need read and write, while all other users will only need read permissions to the archive folder.

---

**Note:** If working with multiple libraries, we recommend you define a separate archive folder for each library.

---



- ▶▶ **Keep a minimum history for each object of** - defines how many histories are retained in the library before being archived. For example, if the minimum is set to 3, the three most recent histories for each object are still stored internally, and only the fourth and earlier records are archived.
- ▶▶ **Archive before** - determines a date to archive prior to. Defaults to today, so only records from yesterday and earlier would be archived. To include histories created today, set this to a later date.
- ▶▶ **Archive Now** - when using manual settings, history is only archived when you tell AuthorIT to do so. This must be selected each time you want to archive manually.

---

**Important:** Once history records have been archived they are stored externally and cannot be brought back into the library. If you move your library, you will need to take care to ensure the path to the archived files remains valid. If the files cannot be found, you will be unable to compare or revert to a previous revision.

---



## Chapter 5

# Working With Security

### In This Chapter

Understanding Security Permissions .....	31
Working with Users and Groups.....	36
Working With Permissions.....	42
Activating Floating Licences .....	45

## Understanding Security Permissions

### Understanding Users and Groups

AuthorIT's security permissions are set for individual **users** and for **groups** of users. A user inherits the security permissions that apply to any groups they belong to, which makes it easy to change permissions for many people at once.

#### Resolving Conflicts Between Permissions From Different Groups

If a user *belongs to more than one group* (see "Specifying the Groups a User Belongs To" on page 38), sometimes the permissions inherited from those groups may conflict.

For example, one group's members may have permission to modify topics whose Release State is "Final" or "First Draft", and another group's members may have permission to modify only "First Draft" topics but not "Final" ones. When there is such a conflict of inherited permissions, the **least restrictive** permission is used (in this case, ability to modify both "Final" and "First Draft" topics).

### Understanding the Different Types of Permission

AuthorIT allows you to apply security permissions to users or (more commonly) to groups of users. These security permissions come in two flavors:

- ▶ **Folder Actions** that apply to all the objects or object templates in a folder, of the specified type (for example, creating Style objects or editing Topic Template objects).
- ▶ **Release States** that apply to particular objects (for example, First Draft, Final Draft, Released, Archived - your organization gets to define those terms).

## Resolving Conflicts Between Folder Actions and Release States

If there is a conflict of permissions between the Release State and Folder Action applying to a particular object in a particular folder, then the **most restrictive** permission wins.

For example, you may have permission to Edit topics in a particular folder, but one of the topics in that folder has a Release State of "Final", which you have permission to view, but not to edit. In this case, you can view the topic but not edit it.

## Understanding Release States

AuthorIT lets you define your own customized Release States to show where, in its release cycle, a particular document component is. You can use these Release States to determine which actions can be performed on objects. For example, a Topic with Release State of "In Review" may not be able to be edited by some users, and only a Senior Editor may be able to delete a "Published" Style.

The Release States you define should suit your organization's document control process, and will probably be slightly different from those used by other organizations (even if only in name). Your AuthorIT Reseller can offer advice about this.

The actions you can control are the same as those for Folder Actions:

- ▶▶ List objects.
- ▶▶ Read objects.
- ▶▶ Publish objects.
- ▶▶ Modify objects.
- ▶▶ Delete objects.
- ▶▶ Change Release State.
- ▶▶ Change Version.
- ▶▶ Change Permissions.

## Understanding Folder Action Permissions

Folder Action permissions determine which actions a User can perform with the objects in a particular folder. For example, all Users may only be able to create or edit Books in a particular folder, or certain Users may be able to edit a particular type of object, but not delete it.

### Usually Implemented for Groups Rather Than Individuals

Folder Actions are usually implemented for Groups of Users, rather than individual Users. Think particularly about which roles in your team involve setting and managing standards, and which roles you wouldn't want involved in that.

### Restricted Access

You are likely to *implement restricted access* (see "Restricting Access to Object Templates" on page 33) to certain types of objects (like styles or topic templates), to ensure consistency of standards across your team.

### Inheriting Folder Action Permissions

When you create a new folder, it will inherit the Folder Action permissions that apply to its parent folder. You can *change these* (see "Working With Permissions" on page 42) later.

### Restricting Access to Object Templates

You are likely to implement restricted access to certain types of objects (like styles or topic templates), to ensure consistency of standards across your team.

You will probably grant Folder Action permissions, to work with restricted objects, only to senior staff who are responsible for setting and managing standards. To do this, you'll need to keep the restricted access objects in a separate folder or folders apart from the open-access objects.

When you create a new Library the default folder structure includes folders for the most common Restricted objects.

## The Folder Action Permissions

### Create object

The User can create objects **of the specified type** in this folder. There can be more than one type allowed in each folder, and each is specified separately. This permission is primarily designed so you can control which types of object may be created in a particular folder.

You can combine objects and object templates in the same folder. However, this is **not** recommended, because you are most likely to want to *restrict what people can do with object templates* (see "Restricting Access to Object Templates" on page 33).

### Create object template

The User can create object templates **of the specified type** in this folder. There can be more than one type allowed in each folder, and each is specified separately. This permission is primarily designed so you can control which types of object template may be created in a particular folder.

You can combine objects and object templates in the same folder. However, this is **not** recommended, because you are most likely to want to *restrict what people can do with object templates* (see "Restricting Access to Object Templates" on page 33).

### List objects

The User can see a list of the objects **of any type** contained in this folder. Permission to *Read* (see "Read objects" on page 34) any of the objects is specified separately.

If the User does not have permission to list objects in a particular folder, then:

- ▶▶ Those objects **do not appear** in the Folder List, Search Results, Task Objects List, Object Relationships dialog or any other area where objects are listed.
- ▶▶ Objects **already used in relationships** which the User does have permissions to List are displayed for integrity reasons, but their name is shown as "(no List permission)".
- ▶▶ Any **Styles** from that folder are not shown in the **Styles** drop-down list in the Topic Editor window.
- ▶▶ Any **Templates** from that folder are not shown in the **Based on** drop-down list in a Topic's General tab.

If you **remove** this permission from a User, then these permissions are also removed: Read, Modify, Publish, Delete, Version, Release.

### Read objects

The User can open and read the contents of objects **of any type** in this folder.

If you **add** this permission to a User, then permission to *List* (see "List objects" on page 34) objects is also added automatically.

If you **remove** this permission from a User, then these permissions are also removed: Modify, Publish, Delete, Version, Release.

### Publish objects

The User can publish **Books** from this folder, in any output format.

If the User does not have permission to publish Books from a particular folder, then those Books do not appear in the list in the Publishing window.

If you **add** this permission to a User, then permission to *List objects* (on page 34) and *Read objects* (on page 34) is also added automatically.

### Modify objects

The User can modify objects **of any type** in this folder. If the User does not have permission to modify objects in a particular folder, then objects can be opened but are in a "Read-Only" state.

If you **add** this permission to a User, then permission to *List objects* (on page 34) and *Read objects* (on page 34) is also added automatically.

### Delete objects

The User can delete objects **of any type** from this folder.

If you **add** this permission to a User, then permission to *List objects* (on page 34) and *Read objects* (on page 34) is also added automatically.

---

**Note:** This permission is required before the User can **move** objects from this folder into another one. The User would also need permission to **create** objects of that type in the destination folder.

---

### Change Release State

The User can change the Release State of objects **of any type** in this folder.

If you **add** this permission to a User, then permission to *List objects* (on page 34) and *Read objects* (on page 34) is also added automatically.

### Change Version

The User can change the Version of objects **of any type** in this folder.

If you **add** this permission to a User, then permission to *List objects* (on page 34) and *Read objects* (on page 34) is also added automatically.

### Change Permissions

The User can change the Folder Action permissions which apply to objects **of any type** in this folder. This permission is defined separately from the "Security Administration" permission so that you can have Users who have permission to modify Folder Actions but not to modify details of Users and Groups.

### Modify Folder

The User can change the folder's name, and create sub-folders.

## Security Administration permission

The User can *maintain security permissions* (see "Working With Security" on page 31), including Users and Groups. By default, it is assigned to Users who belong to the "(admin)" group.

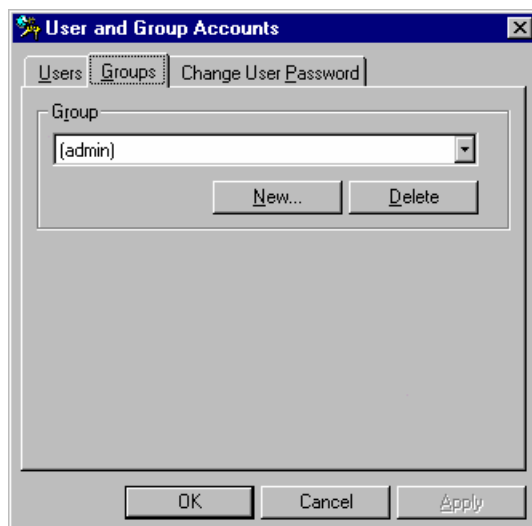
# Working with Users and Groups

## Adding a Group

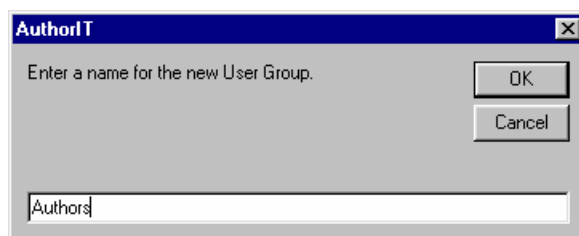
User Groups allow you to set permissions for a group of Users who share a similar function in AuthorIT - for example, writers, reviewers, or Administrators. After you have created the Group you can specify who its members are. Users who are members of a Group inherit its permissions, and can have their own individual permissions as well.

### To Add a Group

- 1) From the main menu, choose **Security > User and Group Accounts**. The User and Group Accounts window appears. Select the **Groups** tab.



- 2) Choose the **New** button on the **Groups** tab. A window appears, ready for you to enter the name of the new Group.



- 3) Enter the name of the new Group, then choose **OK**. The window closes and the new Group appears in the Group drop-down list.
- 4) Choose **Apply** to save the new Group.
- 5) Repeat Steps 2 to 4 for each new Group, then choose the **OK** button to close the window.



## Adding a User

Every User of a Library should have their own user account:

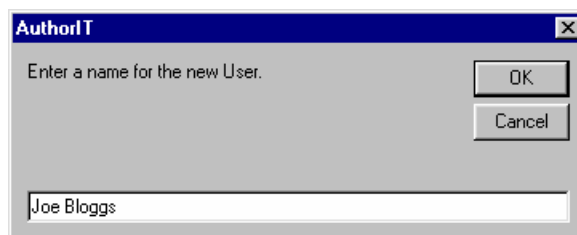
- ▶ For security and auditing reasons, and
- ▶ Because many of a User's settings and preferences are stored against a user account, so if Users share an account their preferences may change unexpectedly.

### To Add a User

- 1) From the main menu, choose **Security > User and Group Accounts**. The User and Group Accounts window appears.



- 2) Choose the **New** button on the **Users** tab. A window appears, ready for you to enter the name of the new User.



- 3) Enter the name of the new User, then choose **OK**. The window closes and your new User appears in the User drop-down list.
- 4) *Specify which Group/s* (see "Specifying the Groups a User Belongs To" on page 38) the new User belongs to.
- 5) Choose **Apply** to save the new User's account.
- 6) Repeat Steps 2 to 4 for each new User, then choose the **OK** button to close the window.

## Specifying the Groups a User Belongs To

A user's security permissions are often determined by the groups the user belongs to - it's quicker that way, and easier to make changes. Groups usually define the security settings for users who perform particular roles - for example, Authors, Editors, or Developers.

If there is a conflict between permissions inherited from two different Groups, *the least restrictive permission is used* (see "Resolving Conflicts Between Permissions From Different Groups" on page 31).

### To Set the Groups a User Belongs To

- 1) From the main menu, choose **Security > User and Group Accounts**. The User and Group Accounts window appears.



- 2) Go to the **Users** tab, then select the User whose Group details you want to set.
- 3) In the **Group membership** panel, specify which Group/s the User belongs to.
  - ▶ To **add** the User to a Group, select that Group from the "Available Groups" list, then choose the **Add** button.
  - ▶ To **remove** the user from a Group, select that Group from the "Member of" list, then choose the **Remove** button.
- 4) Choose **Apply** to save your changes.

## Clearing a User's Password

If a User has forgotten their password, you can reset that password to be empty.

### To Clear a User's Password

- 1) From the main menu, choose **Security > User and Group Accounts**. The User and Group Accounts window appears.



- 2) Go to the **Users** tab, then choose the User from the drop-down list.
- 3) Choose the **Clear Password** button.
- 4) Choose **Apply** to clear the password.
- 5) You can now *change the password* (see "Changing a User's Password" on page 39) if required, or you can leave it blank and let the User change it.

## Changing a User's Password

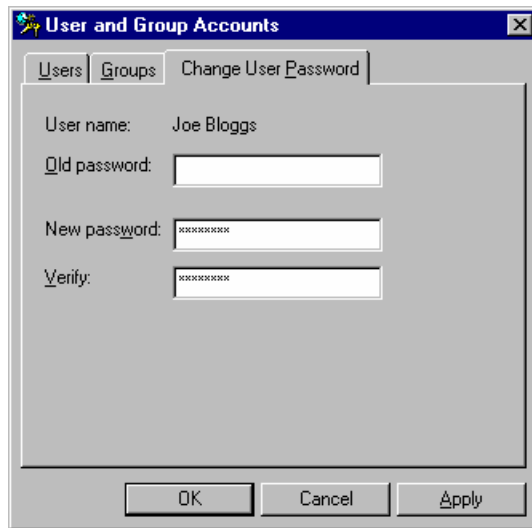
When a new user account is created, it is always created with no password. From time to time you may need to change a user's password, usually when they have forgotten it. In that case, you'll first need to *clear their password* (see "Clearing a User's Password" on page 38). You may also want to levy a bribe of some sort, but that's up to you.

### *To Change a User's Password*

- 1) From the main menu, choose **Security > User and Group Accounts**. The User and Group Accounts window appears.



- 2) Go to the **Users** tab, then select the User whose password you want to change.
- 3) Go to the **Change User Password** tab.



- 4) Enter the existing password, enter the new password, and then enter the new password again in the Verify field.
- 5) Choose **Apply** to change the password.

## Deleting a Group

You may have added a User Group incorrectly or by mistake, or you simply want to permanently delete a Group from an AuthorIT Library.

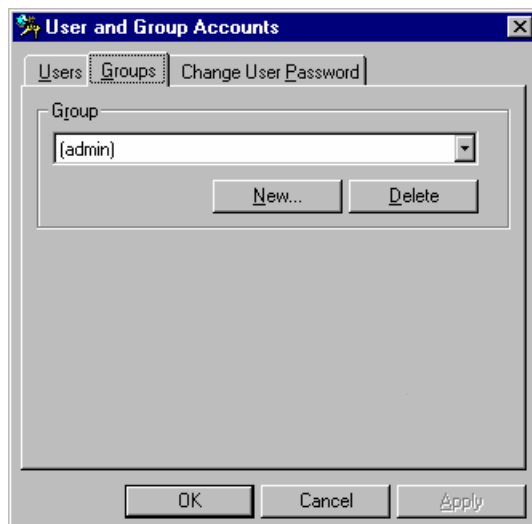
---

**Warning:** When you delete a Group from a Library, all that Group's permissions are permanently removed from the Library, and they can not be recovered. Please be careful.

---

### *To Delete a Group*

- 1) From the main menu, choose **Security > User and Group Accounts**. The User and Group Accounts window appears.



- 2) Go to the **Groups** tab.
- 3) Select the Group you want to delete.
- 4) Choose the **Delete** button. You are prompted to confirm the deletion of the group.

---

**Note:** You can only delete a Group if it does not have any members.

---

- 5) Choose **Yes** to confirm deletion of the Group. The Group and all associated permissions are permanently deleted from the Library.
- 6) Choose **OK** to close the window.

## Deleting a User

You may have added a User account incorrectly or by mistake, or you simply want to permanently remove a User from an AuthorIT Library.

---

**Warning:** When you delete a User account from a Library all that user's preferences, settings and even their customized Styles toolbar are permanently removed from the Library, and they can not be recovered. Please be careful.

---

### *To Delete a User*

- 1) From the main menu, choose **Security > User and Group Accounts**. The User and Group Accounts window appears.



- 2) Go to the **Users** tab.
- 3) Select the User you want to delete.
- 4) Choose the **Delete** button. You are prompted to confirm deletion of the User.
- 5) Choose **Yes** to confirm deletion of the User. The User account and all associated settings and preferences are permanently deleted from the Library.
- 6) Choose **OK** to close the window.

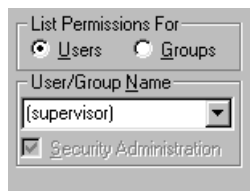
## Working With Permissions

### Adding or Removing a Permission

Adding and removing permissions for a user or group is similar for both Folder Actions and Release States. You may need to *add a Release State* (see "Adding a Release State" on page 43) before you can add permissions for objects which use that State.

#### *To Add or Remove Permissions*

- 1) Start the AuthorIT Administrator program and then:
  - ▶ To assign or revoke a Folder Action, choose **Security > Folder Actions** from the main menu. The Folder Action Permissions window appears.
  - ▶ To assign or revoke a Release State, choose **Security > Release States** from the main menu. The Release State Permissions window appears.
- 2) Select the user or group whose permissions you want to change.



Existing permissions for that user or group are shown as ticks. For users, any **blue** ticks are inherited from a group to which the user belongs - so you'll have to either change the group's permissions, or *remove the user from that group* (see "Specifying the Groups a User Belongs To" on page 38).



- 3) Add or remove permissions for each folder. You can always come back and add them later if you miss any (and you know the users will remind you if that happens).



When you point to any checkbox and pause for a moment, its folder and permission combination is shown as a tooltip.

- ▶ To **add** permissions, make sure the checkbox is **ticked**.
- ▶ To **remove** permissions, make sure the checkbox is **blank**.

---

**Note:** When you add or remove permissions, others may automatically be added or removed at the same time.

---

- 4) Choose **Apply** or **OK** to save your changes.

## Refreshing Permissions

When you change the permissions assigned to a user, the permissions are refreshed when the User:

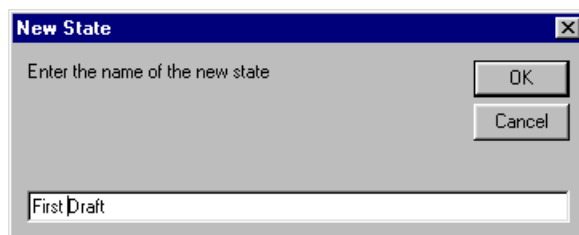
- ▶▶ Logs in.
- ▶▶ Creates or moves a folder
- ▶▶ Refreshes the Library Folder Explorer.

## Adding a Release State

AuthorIT allows you to add your own customized Release States for objects, to reflect the document release cycle you use. Once you have added a Release State, you can *add permissions* (see "Adding or Removing a Permission" on page 42) for that State to Users and/or Groups.

### *To Add a Release State*

- 1) Start the AuthorIT Administrator program, then choose **Security > Release States** from the main menu. The Release State Permissions window appears.
- 2) Point to the name of any existing Release State, then right-click and choose **Add State** from the pop-up menu. The New State window appears.



- 3) Type the name of your new Release State, then choose **OK**. The window closes and the new State appears in the list. The State's color defaults to black, which *you can change* (see "Changing a Release State's Color" on page 44) if you like.
- 4) Save your changes by choosing **Apply** or **OK**.

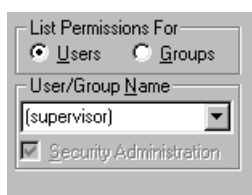
## Deleting a Release State

You can delete customized Release States for objects when you no longer need them.

### *To Delete a Release State*

- 1) Start the AuthorIT Administrator program, then choose **Security > Release States** from the main menu. The Release State Permissions window appears.

- 2) Select the user or group from whom you want to delete a Release State.



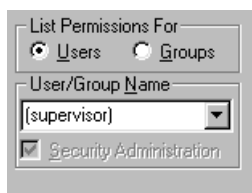
- 3) Point to the name of the Release State you want to delete, then right-click and choose **Delete State** from the pop-up menu. If the release state is not in use then the Release State is deleted, otherwise a message is displayed telling you how many objects are in that state.
- 4) Save your changes by choosing **Apply** or **OK**.

## Renaming a Release State

You can rename a customized Release State.

### *To Rename a Release State*

- 1) Start the AuthorIT Administrator program, then choose **Security > Release States** from the main menu. The Release State Permissions window appears.
- 2) Select the user or group for whom you want to rename a Release State.



- 3) Point to the name of the Release State you want to rename, then right-click and choose **Rename State** from the pop-up menu. The Rename State window appears.
- 4) Type the new name of the Release State, then choose **OK**. The window closes and the renamed State appears in the list.
- 5) Save your changes by choosing **Apply** or **OK**.

## Changing a Release State's Color

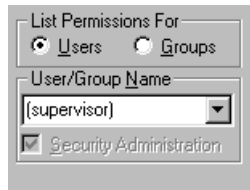
With AuthorIT, you can customize the text color used to represent the Release State of an object when it's displayed in the main Library window or Book editor.

### *To Change Release State Colors*

- 1) Start the AuthorIT Administrator program, then choose **Security > Release States** from the main menu. The Release State Permissions window appears.



- 2) Select the user or group whose Release State Colors you want to change.



- 3) Select the name of the Release State whose color you want to change, then:
  - ▶ Right-click and choose **Set Color** from the pop-up menu.

-OR-

- ▶ Double-click the color box on the right of the screen.

The standard Windows color-picker window appears.



Select colors which are easy to read against a white background.

- 4) Choose the new text color, then choose **OK**. The Color-Picker window closes and the color is applied to the Release State's name and color box.
- 5) Repeat Steps 3 and 4 for each Release State whose color you want to change.
- 6) Save your changes by choosing **Apply** or **OK**.

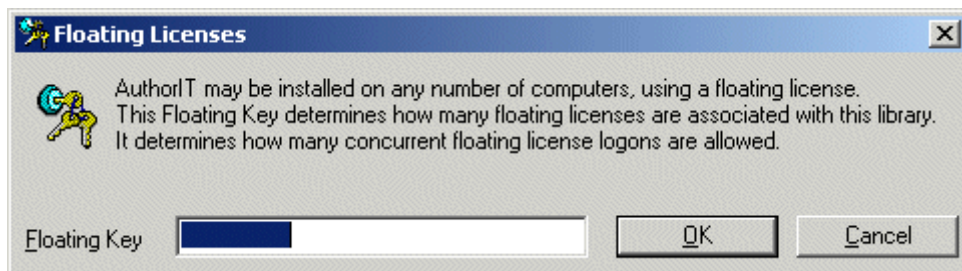
## Activating Floating Licences

If you're running AuthorIT's Floating License option, you'll need to activate your Floating Licences. Each Library needs its own Floating License key. When you create a Library, it inherits the key from your default Library (on which the new Library is based). Activate the key for your default Library, and if you are already using any other Libraries, for each of those too.

### *To Activate Floating Licenses*

- 1) Open the Library using AuthorIT Administrator

- 2) Choose **Security > Floating Licences** from the main menu.
- 3) A window appears for you to enter your Floating key



---

**Note:** This key will be provided by the AuthorIT Sales team in a separate email. If you have not received this email, please contact [sales@author-it.com](mailto:sales@author-it.com) or [mailto:sales@author-it.com](mailto:mailto:sales@author-it.com).

---

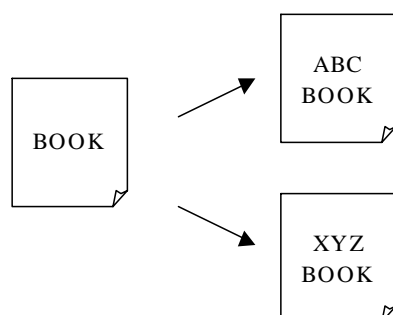
- 4) Enter your Floating key, and choose **OK**.

## Chapter 6

# Working With Variables

Workgroup Edition, Enterprise Edition

Variables act as placeholders in your Topics that can be filled with changeable data. Say for example, you need to produce a document for your many different clients you can save time by producing one document, and then changing the Variables (company name, logo, and so on...) to make personalized versions of the document.



Variables are used in Topics. Their names appear between <angle brackets>. The value of a Variable is only displayed when the final output is published.

---

**Note:** Variables are only available in the AuthorIT Workgroup or Enterprise Editions.

---

## In This Chapter

Variable Types.....	48
Displaying Variables .....	48
Variable Usage in AuthorIT.....	49
Variable Assignments in AuthorIT.....	50
Creating Variables.....	50
Editing Variables.....	51
Deleting Variables.....	52
Creating AuthorIT Website Manager Variables .....	54

## Variable Types

AuthorIT provides four types of Variables for you to use in your Topics:

### Text

Ideal for storing text that appears regularly in your documents. Text Variables may be a string of any characters up to 2000 characters long.

### List Of Values

Similar to Text Variables, except that you are able to choose from a list of preset character strings, each up to 255 characters long.

### File Objects

Used for AuthorIT File objects. Commonly used for logos and graphics.

### System

Produces standard system information such as: the time, the date, or the name of the user currently logged on.

---

**Note:** Variables are used in AuthorIT, but are created in the AuthorIT Administrator.

---

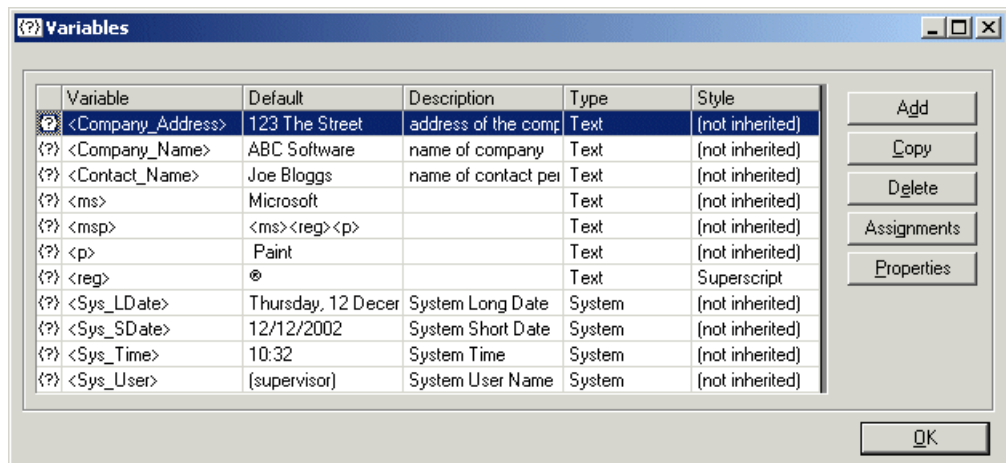
## Displaying Variables

You can display a list of available Variables and view their properties.

### To Display Variables

- 1) Start **AuthorIT Administrator** and open your library.
- 2) From the main menu choose **Variables**.

The Variables window appears.



- 3) Select a Variable and:

- ▶ Choose the **Properties** button.

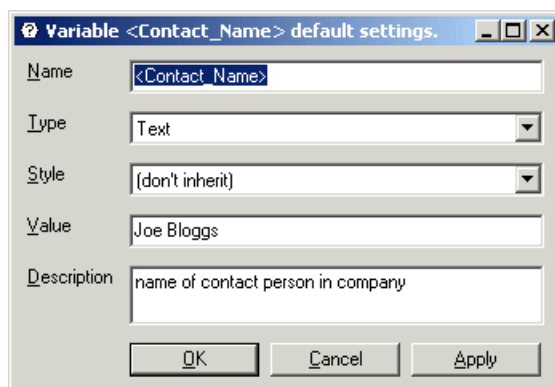
-OR-

- ▶ Right-click and choose **Properties** from the shortcut menu.

-OR-

- ▶ Double-click the Variable.

The Variable default settings window appears.



- 4) When you have finished, choose **OK** to close the window.

---

**Note:** The information that appears in the Variable default settings window can be *edited*.

---

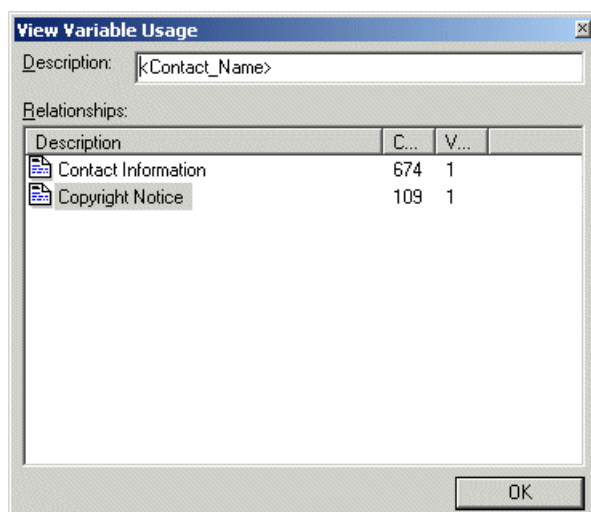
## Variable Usage in AuthorIT

You can display where Variables are used in your library.

### *Displaying Variable Usage*

- 1) Select a Variable, then right-click and choose **Usage** from the shortcut menu.

The Variable Usage window appears. You are able to view which objects in your Library use the Variable.



- 2) When you have finished, choose **OK** to close the window.

## Variable Assignments in AuthorIT

Variables can be assigned new values in objects. You can see in which objects.

### *Displaying Variable Assignments*

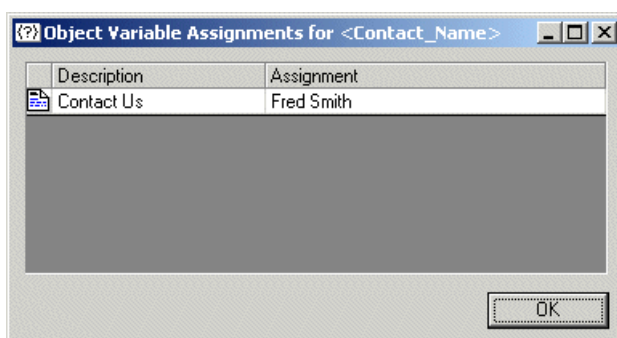
- 1) Select a Variable, then:

Choose the **Assignments** button.

-OR-

Right-click and choose **Assignments** from the shortcut menu.

- 2) The Variable Assignments window appears. You are able to view in which objects the Variable has been assigned a new value.



- 3) When you have finished, choose **OK** to close the window.

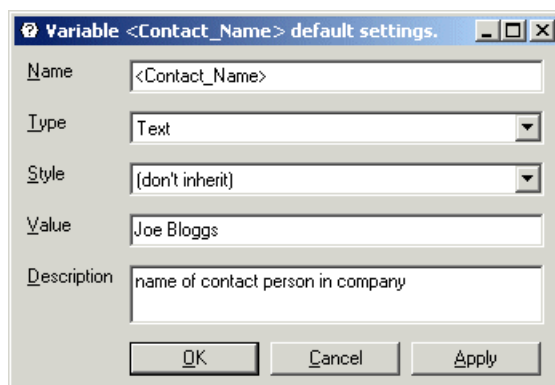
## Creating Variables

You can create a new Variable that can then be used within the Topic and Book objects in your Library.

### *To Create a New Variable*

- 1) Start **AuthorIT Administrator** and open your library.
- 2) From the main menu choose **Variables**.  
The Variables window appears.
- 3) Choose the **Add** button.

The Variable default settings window appears.



- 4) Enter a **Name** for the Variable. Choose a name that is unique and will not be used to describe any other Variables.

---

**Note:** The Variable name may only contain the characters 0-9,a-z,A-Z and \_ (underscore).

---

- 5) Choose the **Type** of Variable that you wish to use in your topic.
- 6) Enter a **Description** to identify the intended use of the Variable.
- 7) Enter a **Value** for the Variable. This is the default value that will be placed into the Variable placeholder.
- 8) Choose **OK** to save the new Variable.
- 9) Repeat these steps for each new Variable.

## Editing Variables

You can edit the information that appears in a Variable at any time.

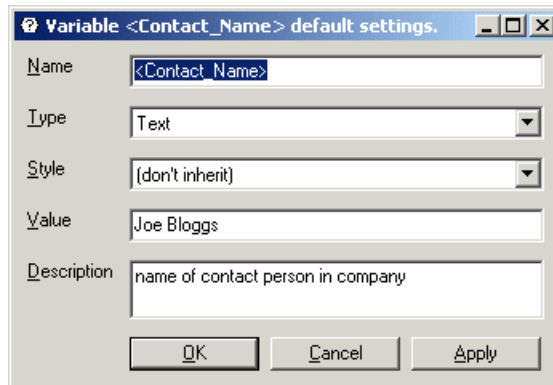
### *To Edit a Variable*

- 1) Start **AuthorIT Administrator** and open your library.
- 2) From the main menu choose **Variables**.

The Variables window appears.

- 3) Select a Variable and:
  - ▶ Choose the **Properties** button to display its properties.
  - OR-
  - ▶ Right-click and choose **Properties** from the shortcut menu.
  - OR-
  - ▶ Double-click the Variable.

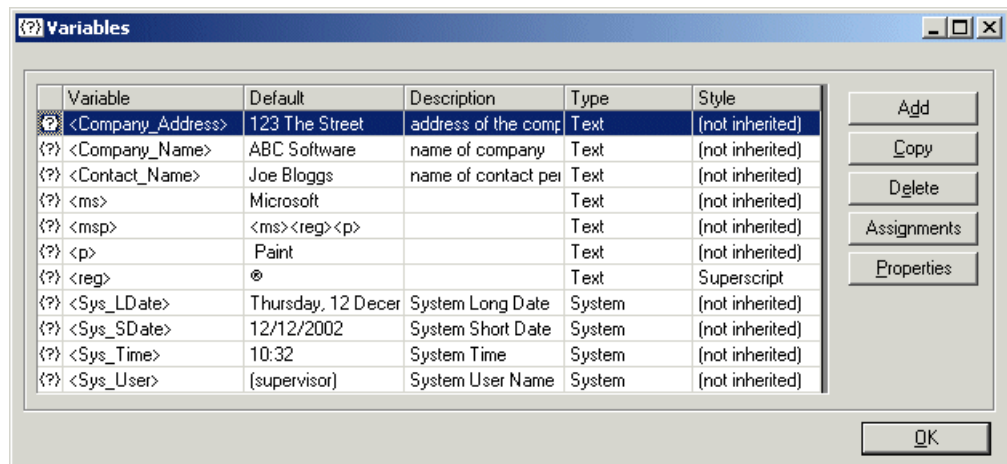
The Variable default settings window appears.



- 4) Make your changes.
- 5) Choose **OK** to save the changes to the Variable.

## Deleting Variables

You can delete a Variable in the Variables window.



### *To Delete a Variable*

- 1) Start **AuthorIT Administrator** and open your library.
- 2) From the main menu choose **Variables**.

The Variables window appears.

- 3) Select a Variable and:

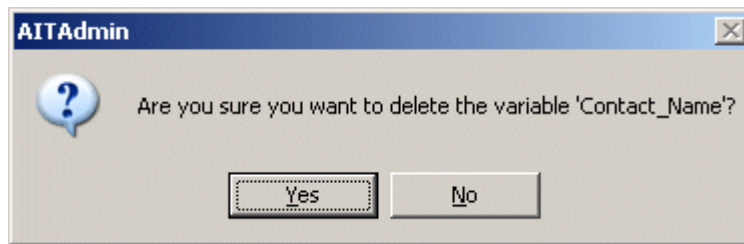
- ▶ Choose the **Delete** button.

-OR-

- ▶ Right-click and choose **Delete** from the shortcut menu.



A confirmation window appears.



- 4) If you are *absolutely* sure you wish to delete the Variable, choose Yes.

---

**Warning:** Deleting a Variable will affect all occurrences of the Variable in the Topic and Book objects in your library. Before you delete a Variable you should be aware of the effect this may have on your objects.

---

## Creating AuthorIT Website Manager Variables

The following variables must be created in the AuthorIT Administrator before you can publish to AuthorIT Website Manager.

---

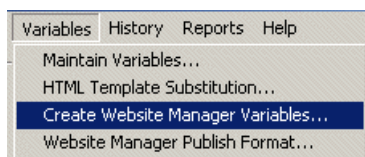
**Note:** Variables using the *List Of Values* type should default to your *main* template, and the *body* placeholder (by default main and body are added as entries in the list of values, these should be updated to match the names used in your templates). Variables using the Text type are not given a value, the author adds the value when the content is created.

---

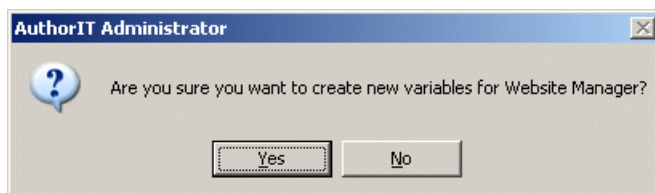
Name	Type	Value	Description
WebsiteManager_Page	Text		Indicates when a new webpage is created
WebsiteManager_PageRef	Text		Assigns a page reference to the HTML file
WebsiteManager_MenuName	Text		Indicates a menu item and assigns this menu name to the topic
WebsiteManager_Template	List Of Values	List the template names (do not add the .tpl extension). <hr/> Note: Assign the main template as the default	Indicates the HTML template used for the page
WebsiteManager_Placeholder	List Of Values	List the placeholder names. <hr/> Note: Assign the body placeholder as default	Assigns a placeholder to the topic, the placeholder identifies the location in the template where the topic content will be displayed
WebsiteManager_ParentPageRef	Text		Assigns a parent menu entry in the sitemap

### To Create the Variables:

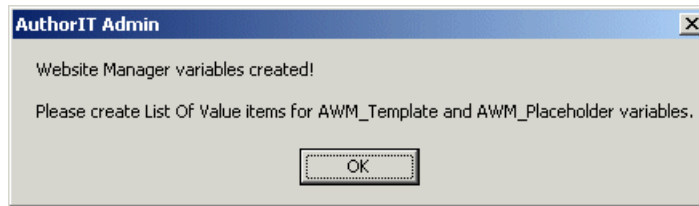
- 1) Start **AuthorIT Administrator** and open your library
- 2) From the main menu choose **Variables > Create Website Manager Variables...**



- 3) Choose **Yes** to create the AuthorIT Website Manager variables automatically



- 4) When the variables have been created choose **OK** to close the window



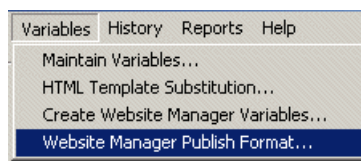
- 5) Update the values for the Template and Placeholder variables to include the list of templates used, and the list of placeholders used.

## Website Manager Publish Format

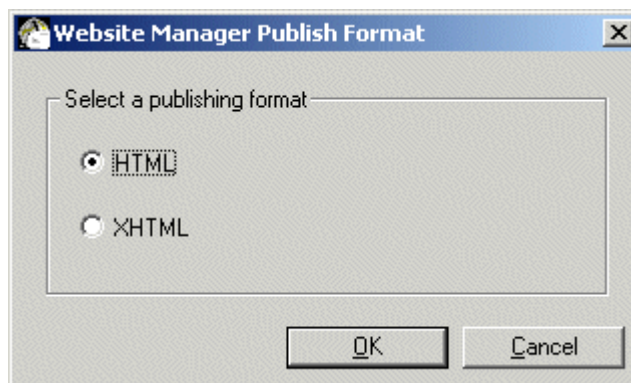
After the Website Manager Variables have been created you should set the publishing format that will be used, choosing either HTML or XHTML.

### *To Set the Publishing Format for AuthorIT Website Manager:*

- 1) Start **AuthorIT Administrator** and open your library
- 2) From the main menu choose **Variables > Website Manager Publish Format...**



- 3) Choose either HTML or XHTML and choose **OK** to save the changes



**HTML** (or HyperText Markup Language) is the language used for documents on the World Wide Web

**XHTML** (or Extensible HyperText Markup Language) is a hybrid between HTML and XML using stricter syntax than HTML



# Glossary of Terms

## A

### Alias

A term used in Windows Help to define an alternative name for a topic. An alias can be used in place of a Context string.

### API

Application Programming Interface. Use for programs to access the features of another program.

### ASC

AuthorIT Software Corporation Ltd.

### AuthorIT Administrator

The person who uses the **AuthorIT Administrator program** to manage AuthorIT's user security and other Library settings.

### AuthorIT Administrator program

The separate program that the Administrator uses to manage AuthorIT's user security and other settings.

### AuthorIT client

The AuthorIT program that is installed on each computer - either the **Workgroup Edition** or **Enterprise Edition**. You use these programs to author, manage, and publish documents, and use the **AuthorIT Administrator** program to manage user security and other Library settings in a multi-user environment.

### AuthorIT program

The AuthorIT program that is installed on each computer - either the **Workgroup Edition** or **Enterprise Edition**. You use these programs to author, manage, and publish documents, and use the **AuthorIT Administrator** program to manage user security and other Library settings in a multi-user environment.

## Autotext

This is a collection of rich text pieces of information stored in a Microsoft Word template or document. These can be accessed from the **Edit** menu in Word. AuthorIT uses these for storing page headers and footers.

## AVI

A format of audio and video file used in Windows Help and HTML.

## B

### Book Object

The Book object represents the content and structure of a document. Objects can be dragged and dropped into a hierarchical outline list to form the content of the document and rearranged to form the desired structure.

### Browser

Software that allows you, the client, to view World Wide Web or Intranet resources.

## C

### CSS

Cascading Style Sheets. A way of implementing styles in HTML.

## D

### Default Library

The Library that you base any new Libraries upon. **Default.adl** is stored in your `..\authorit\templates` file directory.

### DHTML

Dynamic HTML (DHTML) is a mixture of HTML, Javascript, and Style Sheets which is used to provide greater user interactivity, dynamic forms and information management. Processing is done client-side to provide fast interaction, and reduce server resources.

## E

### Exact Measurement

An exact or absolute measure of length. The absolute units supported are:

- ▶ **in** - inches (1 in = 2.54 cm)
- ▶ **cm** - centimeters
- ▶ **mm** - millimeters
- ▶ **pt** - points (1 pt = 1/72 in)
- ▶ **pc** - picas (1 pc = 12 pt)

## F

### File Directory

A directory (or folder) in your computer's file system. Not to be confused with AuthorIT's internal *Library Folders* (see "Library Folder" on page 58).

### File Object

The File object is used to link or embed any pictures, OLE objects, or files created and maintained by a separate application. It also defines how they are formatted in the printed and on-line documents.

## H

### Help Workshop

Microsoft's Help Workshop is a tool that is used to compile and test the Windows 95/98 Help system. This tool is distributed with AuthorIT, and is automatically invoked to compile the RTF file and associated pictures files created by AuthorIT into a Windows Help file (.hlp).

### Hotspot

A clickable area on the screen. The mouse pointer will usually change to a "hand" or other similar symbol over these areas. These areas may also be highlighted using coloring and underlining.

## HTML

Hyper Text Markup Language is the language of the World Wide Web. HTML is used to write documents on the World Wide Web, and to "glue" other resources together.

## HTML Help

HTML Help is the next-generation online help authoring system from Microsoft Corporation. It uses the underlying components of Microsoft Internet Explorer to display help content.

### HTML Help Workshop

Microsoft HTML Help Workshop is a tool that is used to compile and test the HTML Help system. This tool is distributed with AuthorIT, and is automatically invoked to compile the HTML pages, graphics, and associated files created by AuthorIT into an HTML Help file (.chm).

## I

### Image Map

This is a file that stores information about the "hotspots" (clickable areas) in the image. This file uses a server program to execute the links.

## J

### JavaHelp

A platform independent help and online documentation system, written entirely in the Java programming language.

## JET

A database format used by AuthorIT to store a documentation Library. AuthorIT can also use SQL Server databases.

## L

### Library

A Library is a repository that holds all the AuthorIT objects including the standards. Generally you will only use one library as you will have one set of documentation standards.

## Library Folder

A customizable folder in AuthorIT's Library window, which contains AuthorIT objects. You can control which activities are possible within each folder by assigning *Folder Action permissions* (see "Understanding Folder Action Permissions" on page 33) to different Users or Groups.

## M

### Microsoft Word

Microsoft's Windows word processor. AuthorIT requires the word processor to publish the printed documentation, not for editing or any other output. However, you must have your own licensed copy.

## O

### Offline Library

A Library containing all or some of the information from a Main Library which allows an author to take work offline and work on it in a situation where they cannot connect directly to the Main Library. Works in a similar way to a library card and allows an author to 'check-out' objects, work on them somewhere else and then 'check-in' the objects again.

### OLE

Object Linking and Embedding. A technology that enables Windows based applications to share information.

### Oracle Help for Java

A Help format created by Oracle Corporation.

## P

### Pixel

Computer screens are made up of thousands of tiny dots which are individually colored to show an image. These dots are called pixels.

## R

### Relative Measurement

A measure of length relative to another length. The supported units are:

- ▶▶ **em** - ems
- ▶▶ **ex** - x-height
- ▶▶ **px** - pixels

### RTF

Rich Text Format.

The rich-text format (RTF) standard is a method of encoding formatted text and graphics for easy transfer between different programs and different operations. Generally, it is used by all Microsoft Word programs for moving word-processing documents between different platforms without having to rely on special translation software or conversion utilities. The RTF standard provides a format for text and graphics interchange that can be used with different output devices and operating systems.

## S

### Server

A computer system which can be accessed from remote systems for the purpose of exchanging data.

## T

### Tag

This is the popular name for an HTML element, although there is a slight theoretical difference. Basically, a tag is an element in action. It starts with "<" and ends with ">". It can have attributes, but this is not necessary. The end of the element is signaled with the tag without its attributes, and with "/" as the first character. For example, the ending tag for <B> is </B>.

### TOC

Table of Contents

### TOF

Table of Figures

## **Topic Object**

A Topic object represents a concise chunk of text, usually no more than a few paragraphs. In a traditional document this would be the text under a specific heading or sub-heading in the document hierarchy.

Topic objects will make up the vast majority of all objects in a Book, and as such contain many properties defining how the Topic will be represented in both the printed and on-line documentation.

## **U**

### **URL**

A Uniform Resource Locator is the standard way to express the location of a resource on the Internet. It is used most extensively on the Web.

## **W**

### **W3C**

World Wide Web Consortium.

### **WAV**

A format of audio file used in Windows Help and HTML.

### **Windows 95/98**

Microsoft's 32 bit desktop operating system.

### **Windows NT/2000/XP**

Microsoft's 32 bit server / professional operating system.

### **WinHelp**

Microsoft Windows Help engine.

### **WYSIWYG**

What You See Is What You Get.

## **X**

### **XML**

Extensible Markup Language. All XHTML produced by AuthorIT is fully XML compliant.



# Index

## A

Activating Floating Licences • 45  
 Adding a Group • 36  
 Adding a Release State • 42, 43  
 Adding a User • 37  
 Adding or Removing a Permission • 42, 43  
 Admin • 17, 37  
 Alias • 57  
 API • 57  
 Archiving History Records • 26, 28  
 ASC • 57  
 Ask Other People Who Use AuthorIT • 5  
 Ask Us For Help • 6  
 Assembling Your Document • 11  
 AuthorIT Administrator • 57  
 AuthorIT Administrator program • 57  
 AuthorIT client • 57  
 AuthorIT program • 57  
 Autotext • 57  
 AVI • 57

## B

Book Object • 57  
 Browser • 57

## C

Change Permissions • 35  
 Change Release State • 35  
 Change Version • 35  
 Changing a Release State's Color • 43, 44  
 Changing a User's Password • 39  
 Clearing a User's Password • 38, 39  
 Clearing All Object Locks • 16  
 Commonly Encountered Objects • 12  
 Contacting Us • 4  
 Create Dictionary From Wordlist • 20  
 Create object • 34  
 Create object template • 34  
 Creating Variables • 50  
 Creating a New Library Database • 14, 15  
 Creating AuthorIT Website Manager Variables  
   • 54  
 Creating the Dictionary • 21  
 CSS • 57

## D

Default Library • 57  
 Delete objects • 35

Deleting a Group • 40  
 Deleting a Release State • 43  
 Deleting a User • 41  
 Deleting Variables • 52  
 DHTML • 57  
 Dictionary Character Map • 20, 21  
 Dictionary Word List • 20, 21  
 Displaying Variables • 48

## E

Editing Variables • 49, 51  
 Exact Measurement • 58  
 Exporting a JET Library Database to SQL  
   Server • 15

## F

File Directory • 58  
 File Object • 58  
 Finding Which Build of the Software You Are  
   Using • 7, 8

## G

Getting Context Sensitive Help • 6  
 Getting Help • 5  
 Getting Help About Microsoft Windows • 6  
 Graphics • 58

## H

Help Workshop • 58  
 Help Yourself • 5  
 Hotspot • 58  
 HTML • 58  
 HTML Help • 58  
 HTML Help Workshop • 58

## I

Image Map • 58

## J

JavaHelp • 58  
 JET • 58

## L

Libraries  
   compacting • 17  
 Library • 58  
 Library Folder • 58, 59  
 List objects • 34, 35  
 Logging a Support Call • 6, 7, 8

**M**

Maintaining Libraries • 1, 16  
Many Ways to Get Help • 5  
Microsoft Word • 59  
Modify Folder • 35  
Modify objects • 35

**N**

Notice, copyright • 1

**O**

Object Locking • 16  
Offline Library • 59  
OLE • 59  
Opening a Library • 13  
Oracle Help for Java • 59

**P**

Password • 38, 39  
Performing Administrative Tasks from the  
Command Line • 23  
Pictures • See Graphics  
Pixel • 59  
Publish objects • 35

**R**

Read objects • 34, 35  
Refreshing Library Properties • 22  
Refreshing Permissions • 43  
Reindex Book Table of Contents • 19  
Reindex Search • 19  
Reindexing Topic Text Relationships • 18  
Relative Measurement • 59  
Removing Empty Objects • 18  
Renaming a Release State • 44  
Repairing and Compacting a JET Library • 13,  
17  
Resolving Conflicts Between Folder Actions  
and Release States • 32  
Resolving Conflicts Between Permissions  
From Different Groups • 31, 38  
Restricting Access to Object Templates • 33,  
34  
Reusing Objects • 11  
RTF • 59

**S**

Security Administration permission • 13, 23,  
36  
Server • 59  
Setting Edit History Save Points • 26, 27  
Specifying the Groups a User Belongs To • 31,  
37, 38, 42

**T**

Table of Contents • 59  
Table of Figures • 59  
Tag • 59  
The External Files Report • 24  
The Folder Action Permissions • 34  
TOC • 59  
TOF • 59  
Topic Object • 60  
Typographical Conventions • 3

**U**

Understanding AuthorIT • 9  
Understanding AuthorIT's Architecture • 9  
Understanding Folder Action Permissions • 33,  
59  
Understanding Release States • 32  
Understanding Security Permissions • 31  
Understanding the Components of Your  
Document • 11  
Understanding the Different Types of  
Permission • 31  
Understanding the Document Creation Process  
With AuthorIT • 12  
Understanding Users and Groups • 31  
Understanding Your Document's Different  
Output Formats • 10  
Upgrading Existing V3 JET Libraries to V4 •  
13  
Upgrading Your Library • 14  
URL • 60  
Using AuthorIT's Help System • 5, 6  
Using AuthorIT's Product Documentation • 5,  
7  
Using This Guide • 1

**V**

Variable Assignments in AuthorIT • 50  
Variable Types • 48  
Variable Usage in AuthorIT • 49  
Variables • 47

**W**

W3C • 60  
WAV • 60  
Website Manager Publish Format • 55  
What This Guide Covers • 1, 6  
What You Should Already Know • 2  
When To Use More Than One Library • 14, 15  
Who This Guide Is For • 1  
Windows 95/98 • 60  
Windows NT/2000/XP • 60  
WinHelp • 60

Working with Edit History • 26  
Working With Libraries • 13  
Working With Permissions • 33, 42  
Working With Security • 31, 36  
Working with Users and Groups • 36  
Working With Variables • 47  
WYSIWYG • 60

**X**

XML • 60

**Y**

Your Feedback Please • 3