Getting Started With AuthorIT

By AuthorIT Software Corporation Ltd.

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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

This Guide is for anyone who uses the AuthorIT **Evaluation Edition**, **Desktop Edition**, **Workgroup Edition, Enterprise Edition**, or the **Offline Authoring** module.

What This Guide Covers

This Guide tells you about:

» Installing AuthorIT

» Understanding AuthorIT's Concepts.

» The AuthorIT Interface.

» The AuthorIT Tutorial

What You Should Already Know

Before you read this Guide you need to be comfortable working with the Windows environment and its applications. For information about this, refer to the separate Windows user documentation, including the *Windows online Help system* (see "Getting Help About Microsoft Windows" on page 6).

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.
Special Bold	Items you must select, such as menu options, command buttons, or items in a list.
Emphasis	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

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 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.

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.

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

Installing AuthorIT

This Chapter tells you how to install AuthorIT, so you can get up and running quickly. You'll also need to read about how to use AuthorIT. If you are upgrading, please refer to *Upgrading from a Previous Version of AuthorIT* (on page 9) before you continue.

The installation process varies slightly according to the type of edition you are using – single user (Desktop) or multi-user (Workgroup or Enterprise).

In This Chapter

Upgrading from a Previous Version of AuthorIT

Upgrading to AuthorIT V4 involves a number of steps. While you can install and run V4 alongside previous versions, we recommend that you fully un-install any previous versions first. We also recommend that you maintain accurate backups of your data before installing the software.

Important: Please read this procedure carefully before attempting to upgrade your existing version of AuthorIT. With any update we recommend you always test it in a separate environment before changing your production environment.

Upgrading to AuthorIT V4

1) Ensure all users are logged out of your library, then backup all your libraries, graphics, templates, and any other support files before you begin. If using SQL Server you can backup your library by exporting it to JET provided the library is under 2GB, otherwise have your SQL Server administrator back it up for you.

2) Install AuthorIT using the correct installation procedure for your Edition of AuthorIT. We recommend you fully uninstall your current version of AuthorIT first.

3) Using AuthorIT Administrator open your existing library. AuthorIT will prompt to upgrade your library. Choose **Yes** to continue. If using a JET database library (Workgroup or Desktop) AuthorIT will automatically backup your library then upgrade it.

4) Once the upgrade is complete you will be prompted to login (unless auto login has been selected). Once logged in, AuthorIT must complete the upgrade to your library. Progress is displayed while your library is upgraded. This may take a few minutes. Do not interrupt this upgrade. Any problems are listed in the Log file in the right hand pane while the library is being upgraded. The log file can also be opened later from the **\AuthorIT\Logs** folder.

5) If you are using a JET database library (Workgroup or Desktop) then we recommend you compact your library to improve efficiency. Graphics are now compressed in the database so if you use a large number of embedded file objects, you will see a significant reduction in the size of your library.

Please refer to the release notes for more information on the new features in V4.

Installing a Single User (Desktop) Edition

Installing AuthorIT Desktop Edition is easy. We recommend that you accept the default values suggested by the Setup program.

To Install AuthorIT Desktop Edition

1) Close all other Windows programs. This lets AuthorIT update essential components which are shared by other programs.

2) Run the AuthorIT setup program. After a few seconds the Setup Wizard appears, to guide you through the rest of the installation. Choose **Next** when you are ready to continue with the installation.
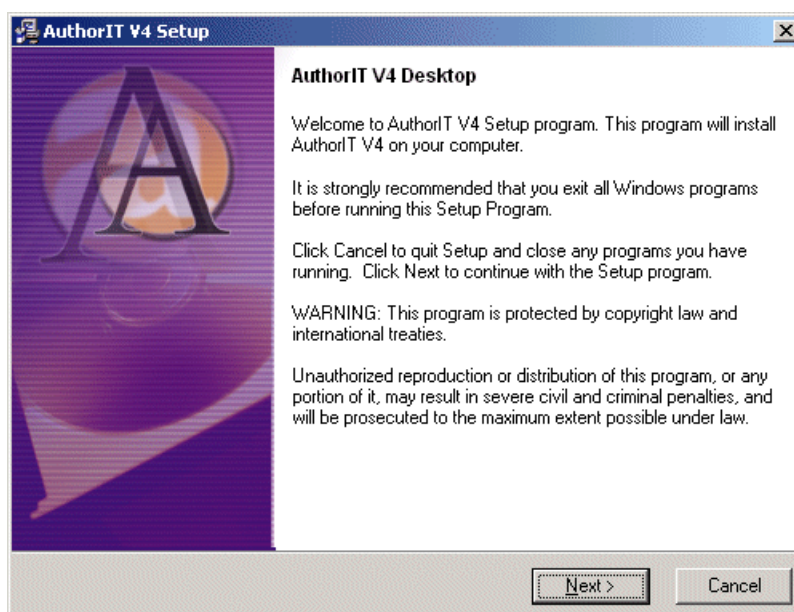
3) Enter the AuthorIT serial number that you have been supplied with, then choose
Next to continue.
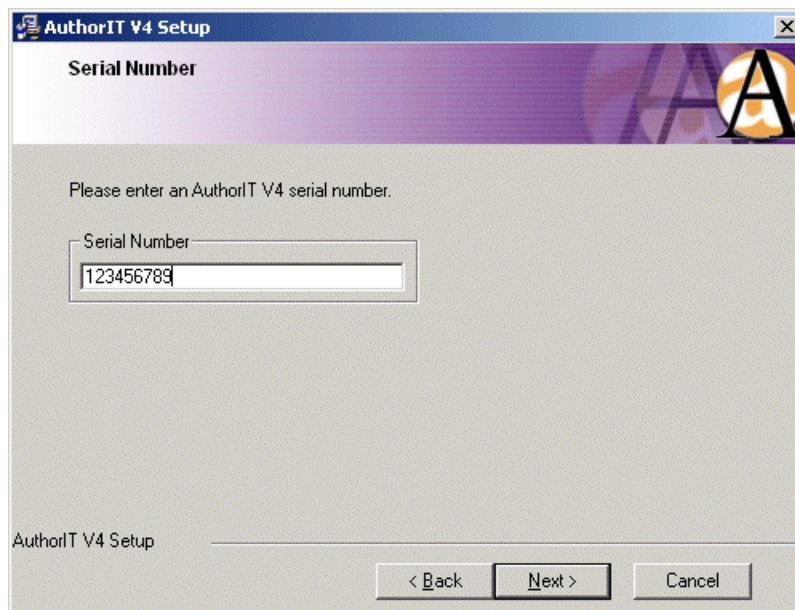
4) If you are happy with the agreement, then choose **Yes, I Accept This Agreement**
to continue the setup.
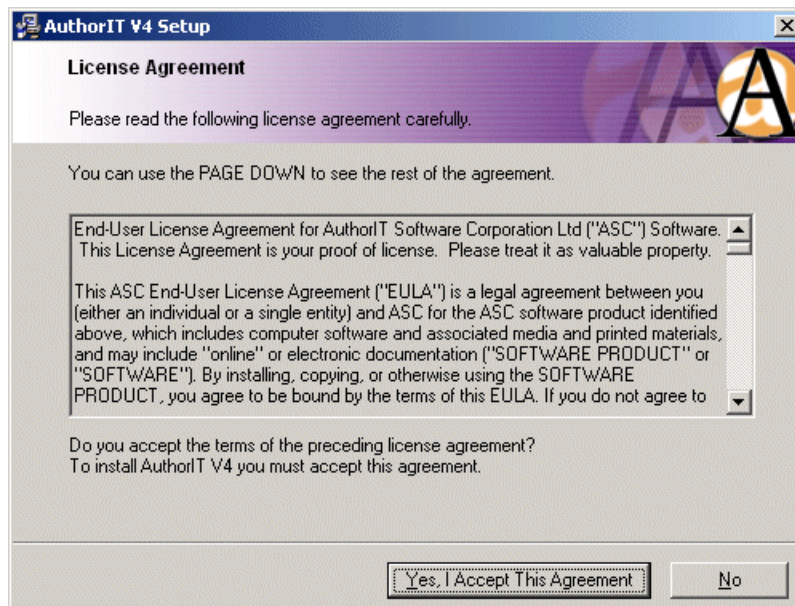
5) Enter your Name, Organization and Email details. Choose **Next** to continue.
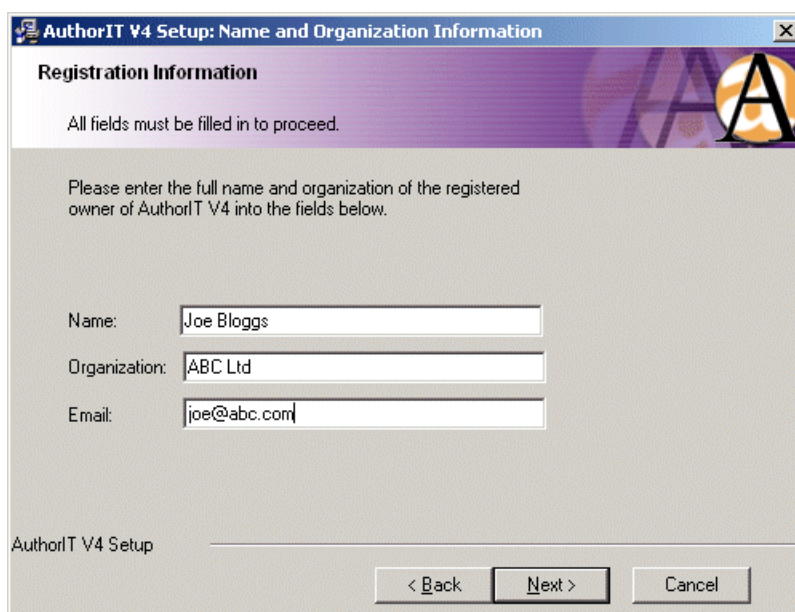
6) Confirm the Application File Location. This is where the AuthorIT program and supporting files will be installed. Choose **Next** to continue.
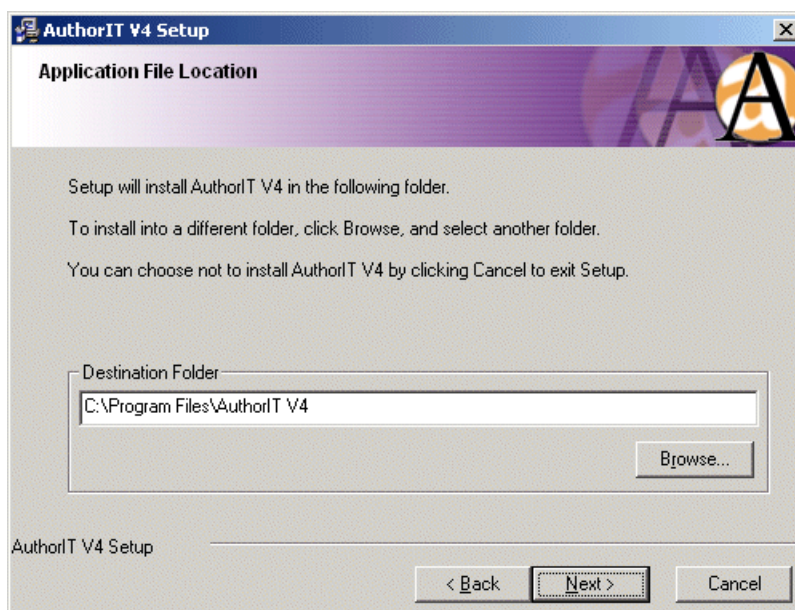
7)   Confirm the Data File Location. This is where your library and template files will be located. Choose **Next** to continue.
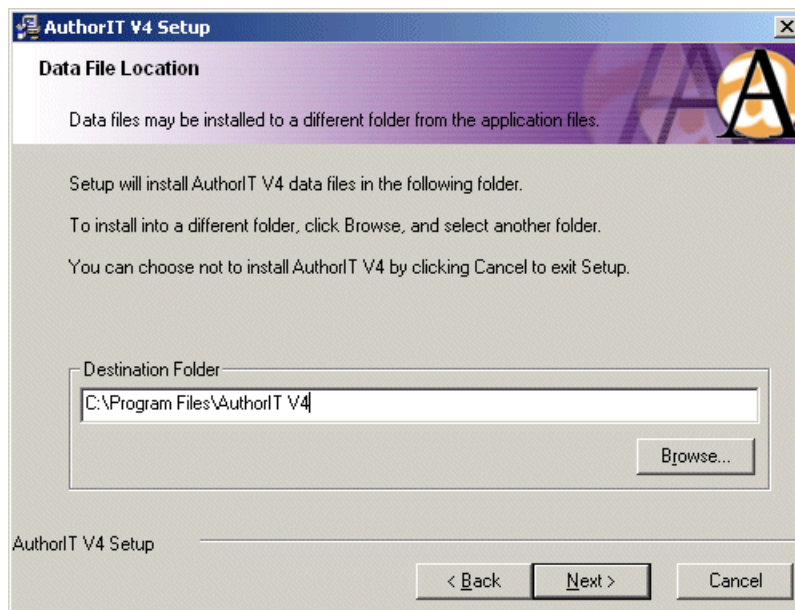
8)   When you have completed all of the required steps, choose **Next** to begin the installation process.
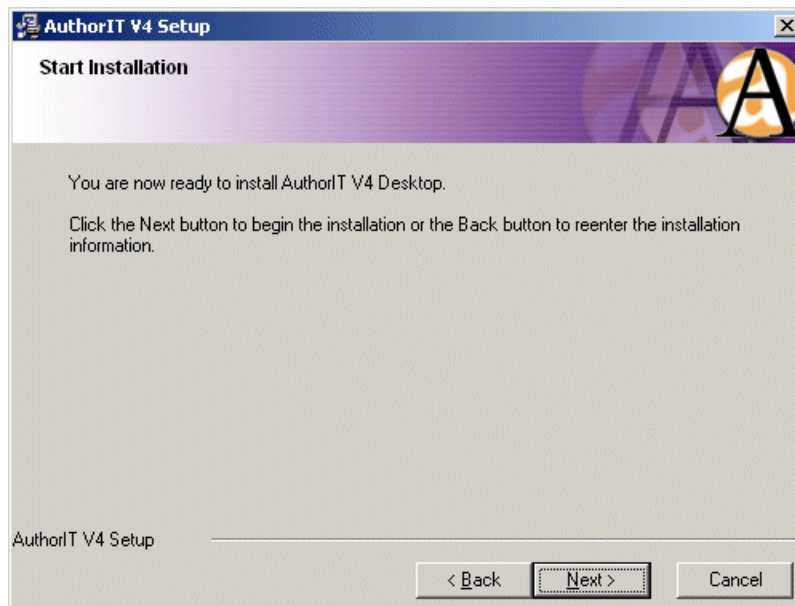
The AuthorIT application and supporting files are then copied across to your computer.
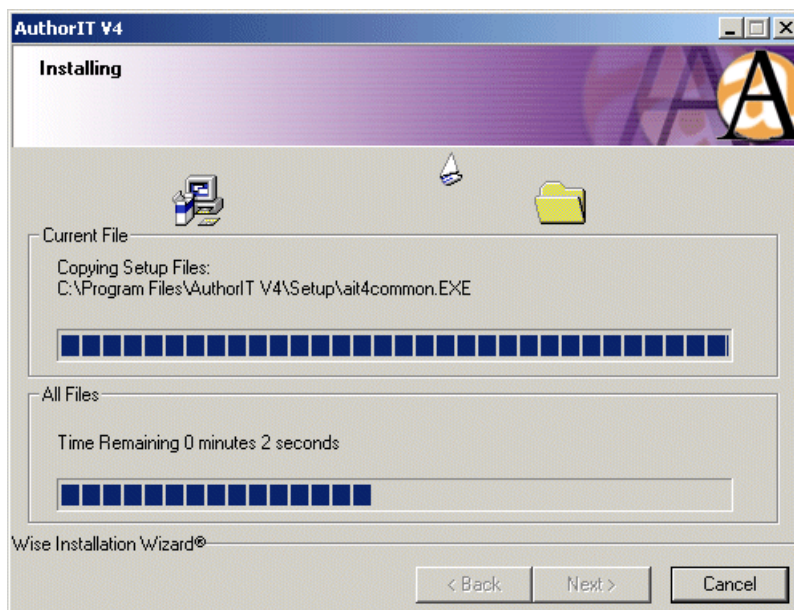
9) The Setup Wizard tells you when it has finished installing the files and configuring your computer. Choose **Finish** to exit the Setup program.
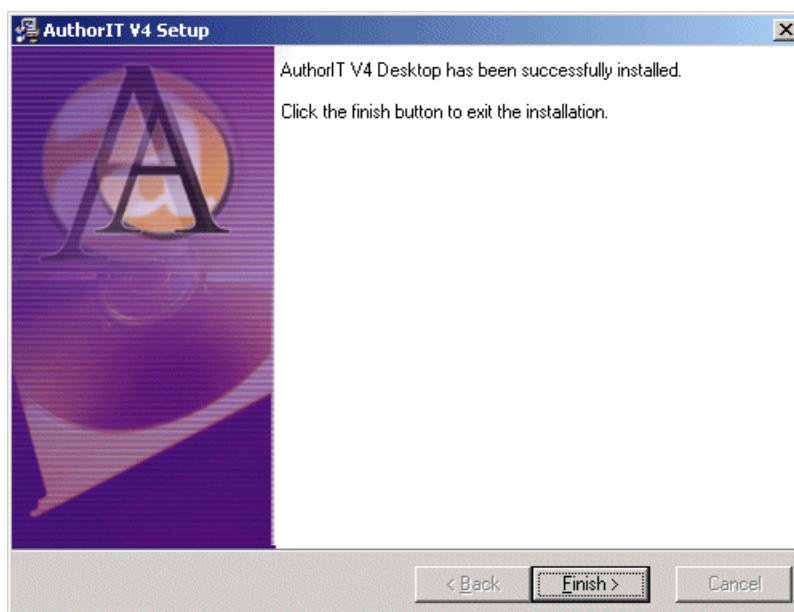
10) You may be prompted at this time to restart your PC. It is recommended that you let the PC restart.

Congratulations, AuthorIT is now installed on your PC!

Default File Directory Structure

When you install the AuthorIT Desktop Edition, this default file directory structure is created on your computer:

..Authorit

Backup			
Data			
	Icons		
	Libraries	Base directory for all relative file paths	
	Templates	Contains several sub-folders for different types of templates	
	Tutorial		
Dictionaries		Contains several sub-folders for different Language dictionaries	
Hcw		WinHelp Compiler files	
Hhw		HTML Help Compiler files	
JavaHelp			
OracleHelp			
Publishing		Published document outputs	

Note: If you change the relative positions of the Library and the **Templates folder** from AuthorIT's default directory structure, you will also need to *change relative file paths* (see "Changing Relative File Paths" on page 37) in several AuthorIT objects.

Installing a Multi-user Edition

Installing a multi-user edition is essentially a two stage process:

1) *Installing the server-based and administration components* (see "Step 1 - Installing the AuthorIT Server and Administration Components" on page 16):

   ‣ **Shared data files** including JET Library databases and various templates are installed on the server.

   ‣ The **AuthorIT Administrator** program that you use to manage AuthorIT's user security and other settings is installed on the Administrator's computer.

2) *Installing the AuthorIT program on each computer* (see "Step 7 - Install the Client Components on Each Computer" on page 25), and pointing it to the shared Data files on the server.

The following topics provide in-depth instructions on installing and configuring AuthorIT, ready to use, including the additional (and sometimes optional) steps required to create user accounts and work with a SQL Server database.

If you are upgrading, please refer to *Upgrading from a Previous Version of AuthorIT* (on page 9) before you continue.

Step 1 - Installing the AuthorIT Server and Administration Components

Before you install AuthorIT on each client computer, you'll need to install AuthorIT's server-based and administration components:

⯈ **Shared data files** including Library databases and various templates are installed on the server.

⯈ The **AuthorIT Administrator** program that you use to manage AuthorIT's user security and other settings is installed on the Administrator's computer.

AuthorIT's installation process makes installing across a network easier and more streamlined. We recommend that you complete this procedure from a client workstation that can view the server and has the appropriate rights to install programs onto it.

To Install AuthorIT V4 Server Components

1) Close all other Windows programs. This lets AuthorIT update essential components which are shared by other programs.

2) Run the AuthorIT setup program. After a few seconds the Setup Wizard appears, to guide you through the rest of the installation.
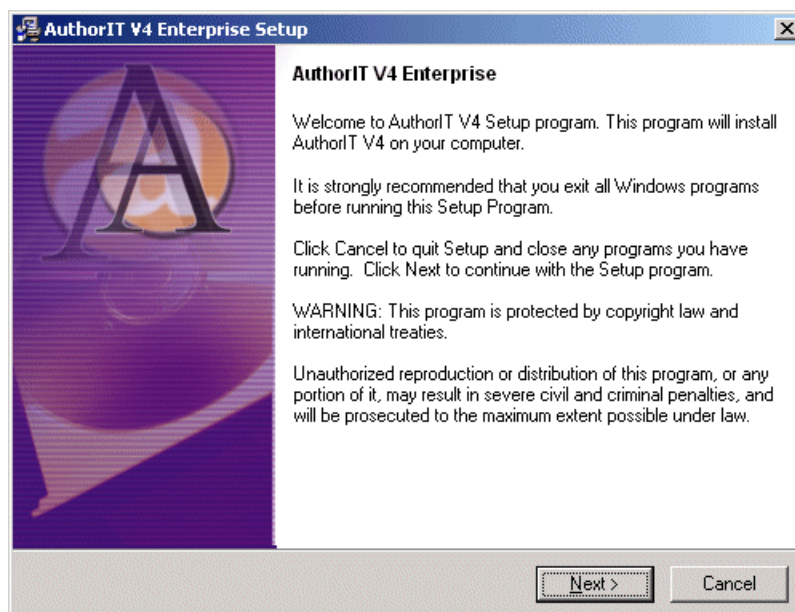
3) Choose **Next** when you are ready to proceed with the installation.

4) Enter the AuthorIT serial number that you have been supplied with, then choose **Next** to continue.
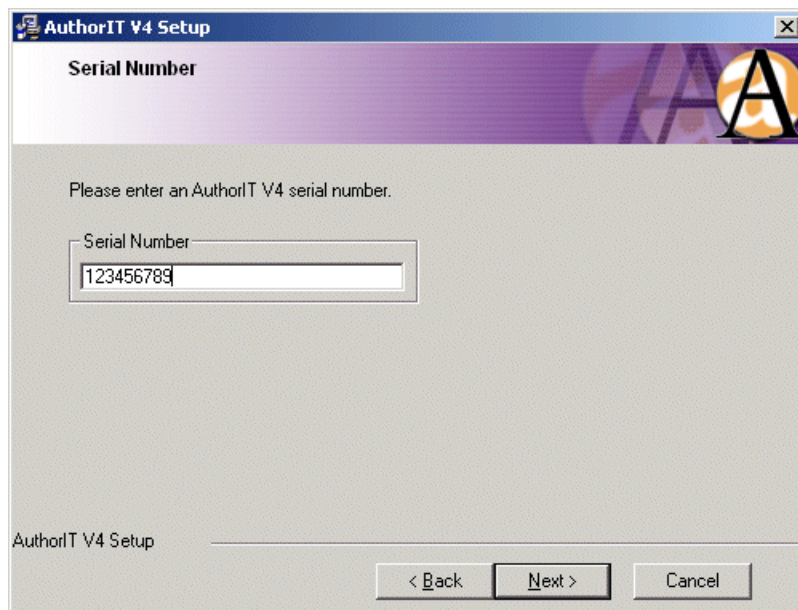
**5)** If you are happy with the agreement, then choose **Yes, I Accept This Agreement** to continue the setup.
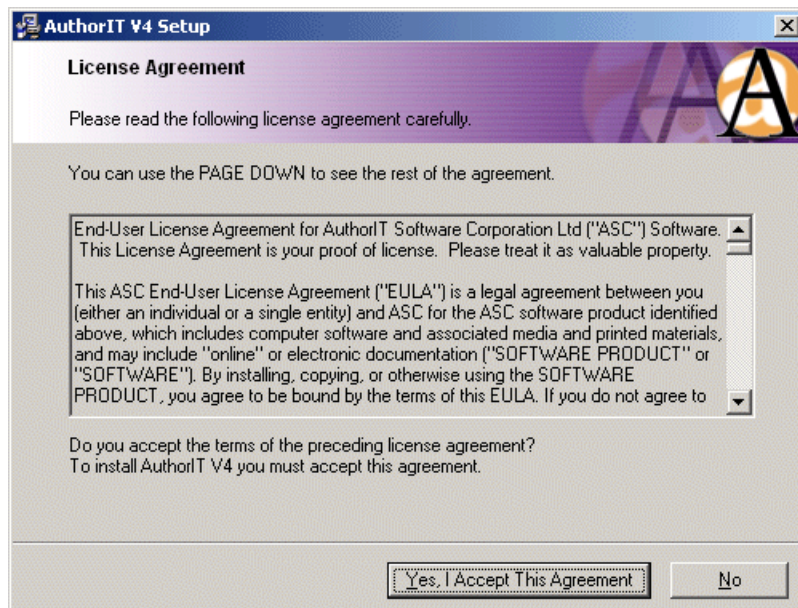
6) Enter your registration details and choose **Next** to proceed.
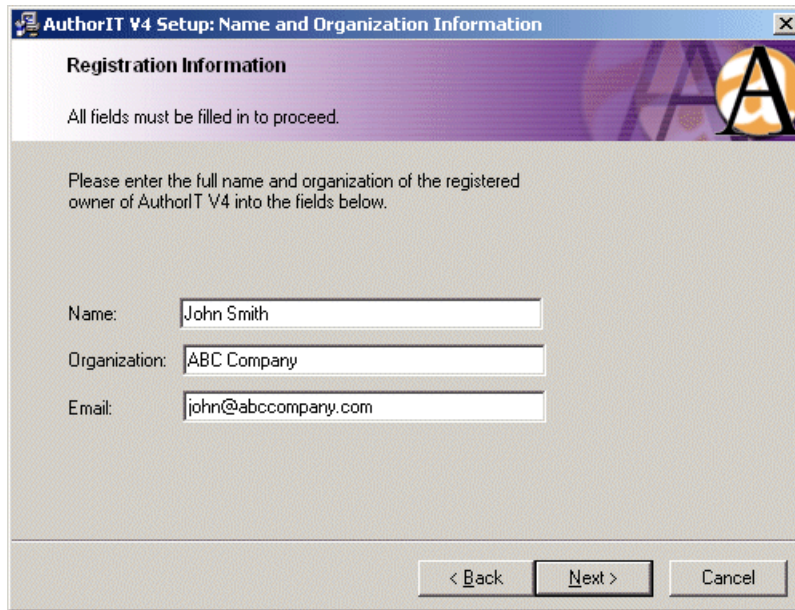
7) Choose the location area on the server where you intend the Shared AuthorIT files to be installed. We recommend that you use the Universal Naming Convention (UNC) to identify this location. It is also possible to use the traditional Windows mapped drive identifier method, for example: (F:).

8) If you are going to be using AuthorIT on this computer, check the box to install the AuthorIT Client components.
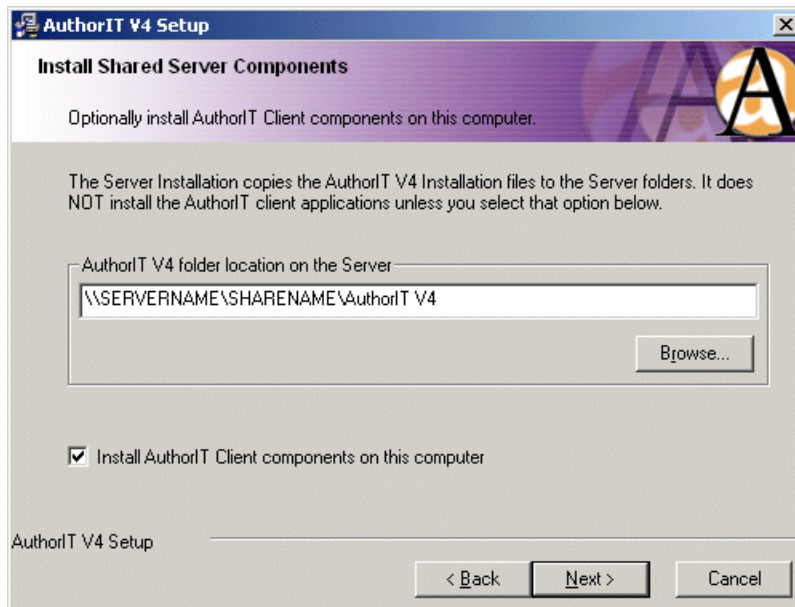
9) Choose **Next** to continue.

10) If you checked the box to install the AuthorIT Client Components you need to confirm the location where these will be installed on your PC.
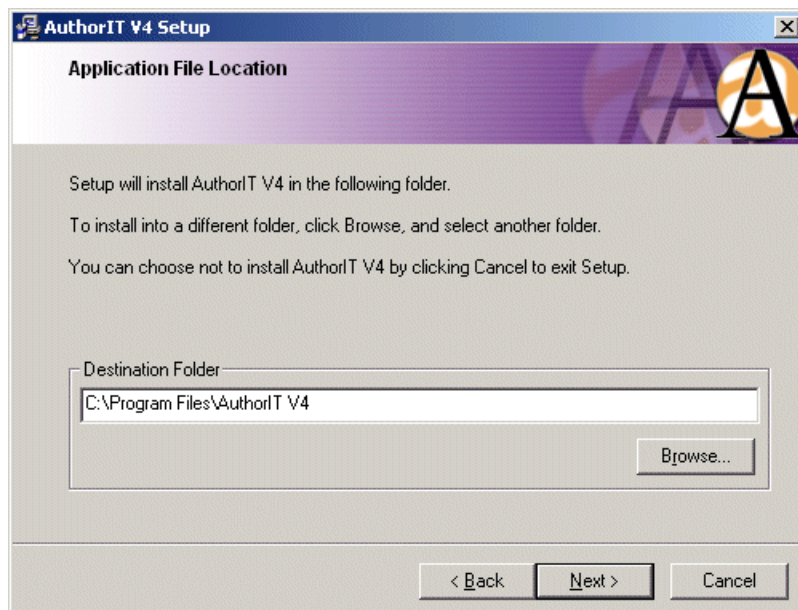
11) Choose **Next** to continue.
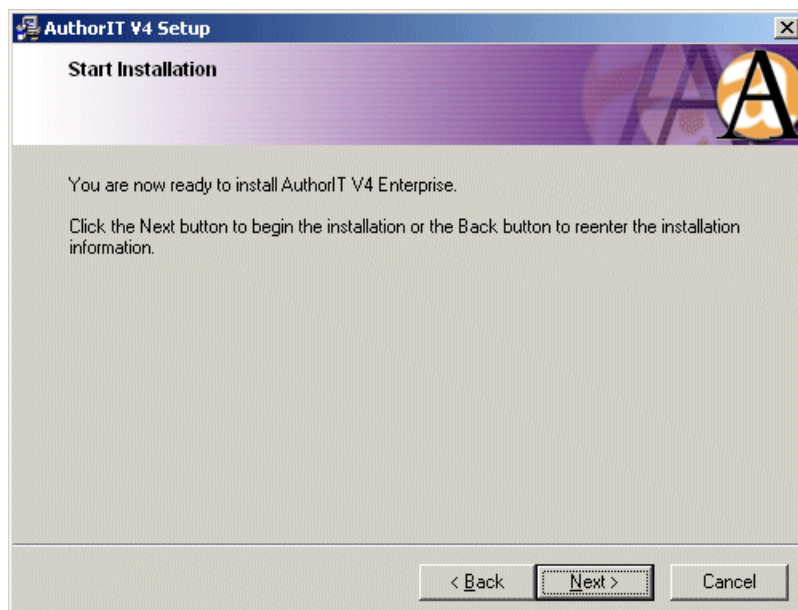
12) When you have completed all of the required steps, choose **Next** to begin the installation process. The files are then copied across to your server and/or machine.

Note for Windows 2000 Users: If your system has an older version of a particular DLL used for data access the setup program will be interrupted and you must reboot you computer. While the setup will resume installing the current component after you reboot, you will have to run `netsetup.exe`, which is found in the folder specified in step 5 above, again to fully complete the installation.
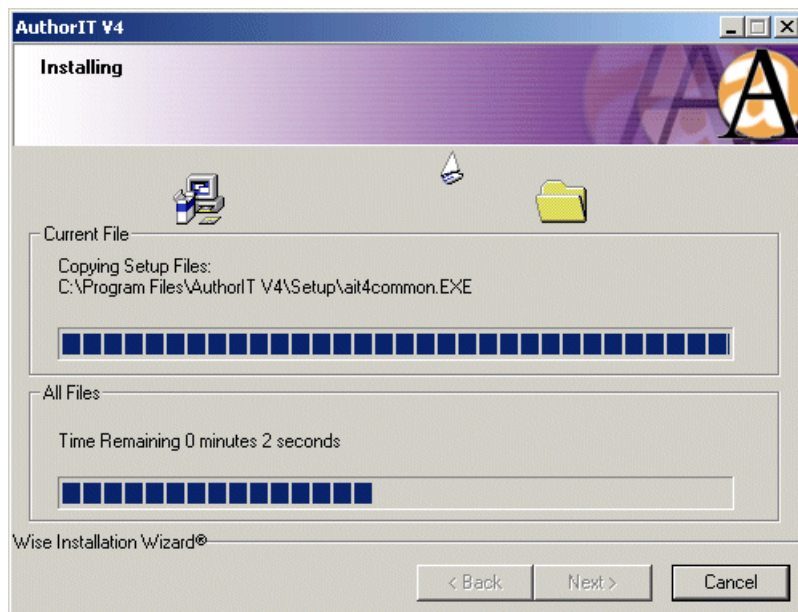
13) The Setup Wizard tells you when it has finished installing the files and configuring your computer.
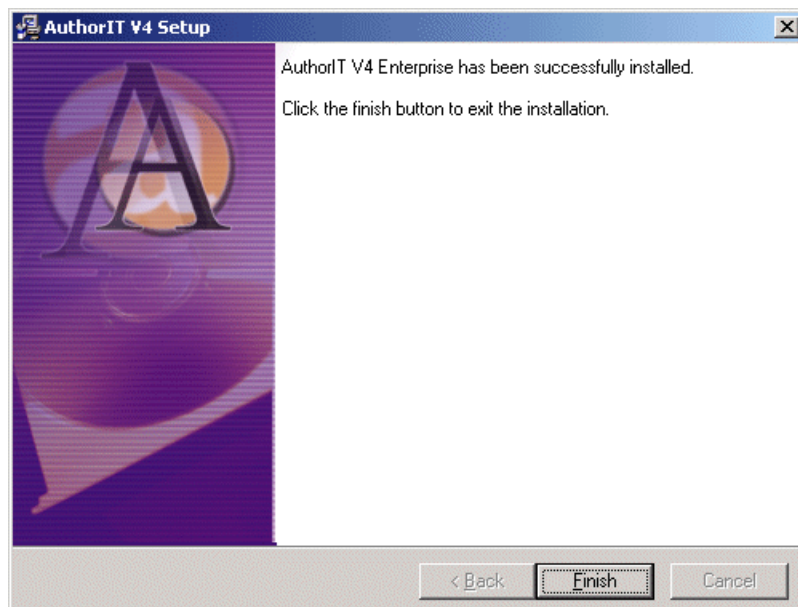
14) Choose **Finish** to exit the Setup program.

Congratulations, the AuthorIT V4 Server Components are now installed. To complete the installation, you must still install the AuthorIT program on each computer.

Minimum Server Requirements

System Requirements

As there is no server-based software, there are no relevant minimum system requirements. The server-based shared data files and JET databases have a low overhead and will run on any low-spec server. SQL Server databases will require more resources, and an installed copy of SQL Server 7.0, SQL Server 2000, or SQL Server 2003.

File System Space

Allow sufficient drive space when you are setting up the file system directories:

▸ The size of each **Library database** depends entirely on how much information it contains. It is hard to predict how much space to allow. If you have any existing AuthorIT Library databases, use these as a guide.

▸ For the shared files in the **Templates** directory, allow 3 Mb. Word templates, Default Library, and HTML Help components usually take up less than 1 Mb.

▸ **Graphics** are a bottomless pit, as you will be well aware. Allow as much space for them as you can get away with. Fortunately, because AuthorIT produces document output formats that encourage smaller graphic file sizes, things won't be quite as bloated as they could be.

Administrator's Computer

On the Administrator's computer, the AuthorIT Administrator program requires 2 Mb of drive space, and the AuthorIT program requires 19 Mb of drive space. There are *minimum system requirements* (see "Minimum Computer Requirements" on page 35) for these programs.

Default File Directory Structure Created on Server

When you install AuthorIT's server-based components, this default directory structure is created on the server:

AuthorIT V4

	Data		
		Icons	Icon library
		Libraries	Base directory
		Templates	Contains several sub-directories for templates and components for Word and web-based outputs
		Tutorial	
	Setup		Contains the **Netsetup.exe** and **Netsetup.ini** files necessary to install the client components on each PC.

If you change the position of your Templates folder, **relative to your Library**, then you will also need to *change relative file paths* (see "Changing Relative File Paths" on page 37) in several AuthorIT objects.

Step 2 - Grant file system read/write permissions to the shared data files

All AuthorIT users require **file system read/write permissions** to the shared data files, and the ability to create and delete files in the directory containing the library or libraries. When opening a Jet library an .ldb file is created in that same location. If a user does not have permission to create this file, a library cannot be opened.

Step 3 - Create a Blank SQL Server Database

SQL Server

Create a blank SQL Server database for the Library you want to work with - most of the time, you'll only need one. Read about when to use more than one library.

You'll also need to set up SQL user permissions:

Make sure each person who will use the library database/s has the necessary security permissions to read and write to the database.

» Each user who will use AuthorIT will need at least db_datareader, and db_datawriter privileges on the SQL Server database.

» Each user who will administer the database will also need db_dbadmin privileges on the SQL Server database.

These privileges can be allocated using user groups, and if using trusted connections, you can use the NT/Active Directories user groups.

We recommend you use NT permissions and trusted connections, to minimize your security administration workload. Also, only SQL Server library databases which were opened with trusted connections are listed in the Most Recently Used files list in the AuthorIT client program.

For detailed instructions about using SQL Server, please refer to your SQL Server user documentation.

Step 4 - Create or Open a Library

1)   Start the AuthorIT Administrator program, then create a new JET database or open an existing one. Read about when to use more than one library.

> **Note:**   If you open a JET Library database created with an earlier version of AuthorIT, it will be automatically upgraded to the latest version, and a backup named "Backup of *Library name*" will first be put in the same folder.

Step 5 - Export the JET Database to the SQL Server

SQL Server

Use the AuthorIT Administrator program to export the JET Library database to a SQL Server Library database.

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.

Step 6 - Create User Accounts and Assign Permissions

In each Library database, you'll need to create Users and then assign security permissions to them. We recommend setting up User Groups so you can restrict some functions (such as maintaining styles and templates) to senior members of your team.

In particular, make sure you set up Users correctly in your **default library**, as all new libraries based on that one will inherit its security settings. Note that user account information is only for the library you added it to. Because users are connecting to shared libraries, those security settings are available to each user.

Auto-Login and the (supervisor) Password

Each computer can be set up so that AuthorIT will automatically log in to each Library you open from that computer. If the **Automatically login to library** setting is turned on (**Tools > Options > General**) then the login screen is skipped and the user is logged in to the Library with the User Name and Password most recently used from that computer. These details are stored in the System Registry of the computer, so a measure of physical security is present.

If more than one user commonly works with each computer, you may want to turn this option OFF when you install the AuthorIT program on each computer.

Because existing users have probably been automatically logging in to libraries as "(supervisor)" during an evaluation, make sure you set a password for the "(supervisor)" User, which will prevent people from logging in to most libraries unprompted. After they have logged in under their own user name, Users can turn that Auto Login option ON to make access more convenient.

Auto-Login and Passwords

If the **Automatically login to library** setting is turned on for the client (**Tools > Options > General**), then when the user logs in to the Library, the User Name and Password most recently used from that PC is used, and the login screen is skipped. These details are stored in the System Registry of the client PC, so a measure of physical security is present.

If your Users tend to access the Library from more than one computer, turn this option OFF.

Customizing Each User's Styles Toolbar

For each Library, each user can customize the Styles toolbar in the Topic Editor, and assign keystrokes to styles. You can also copy an existing user's customized styles, but only from within the same Library.

Read the *Using AuthorIT* Guide for details.

Step 7 - Install the Client Components on Each Computer

Each person who needs to work with AuthorIT must have the AuthorIT program files installed on their computer. You must do this separately at each computer, after you have installed the shared server components.

AuthorIT's locally-stored client files are:

➼ AuthorIT executable (Workgroup Edition or Enterprise Edition).

➼ Help files.

➼ Language dictionaries.

➼ HTML TOC Images

➼ Windows Help Compiler files.

➼ HTML Help Compiler files.

After you have prepared the installation on your server, you are ready to install AuthorIT onto your client machines.

Note: This process can be *automated* (see "Automating the Client Network Installation" on page 29) by customizing the installation settings file. If the process has been automated you will not see the following prompts as the process already has all the information it needs to run the install.

To Install AuthorIT V4 Client Components

1) Close all other Windows programs. This lets AuthorIT update essential components which are shared by other programs.

2) Browse the server and locate the setup file called **netsetup.exe** located in the AuthorIT V4 folder.

3)   Run netsetup.exe to begin the installation process. The client setup confirmation screen appears. Choose **Next** to continue.
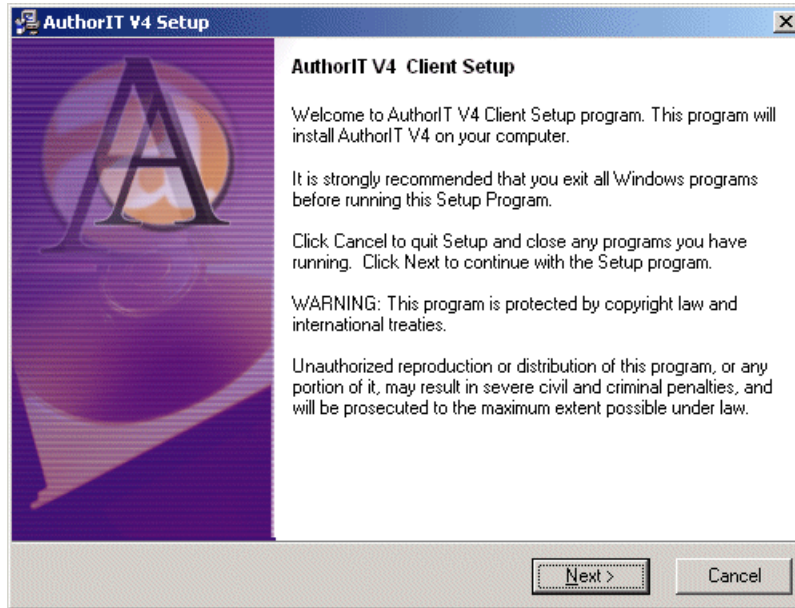
4)   The Setup Wizard shows you the location of the setup files on the server, and the location of where AuthorIT will be installed on your PC. After you have confirmed these suggested settings, choose **Next** to continue.
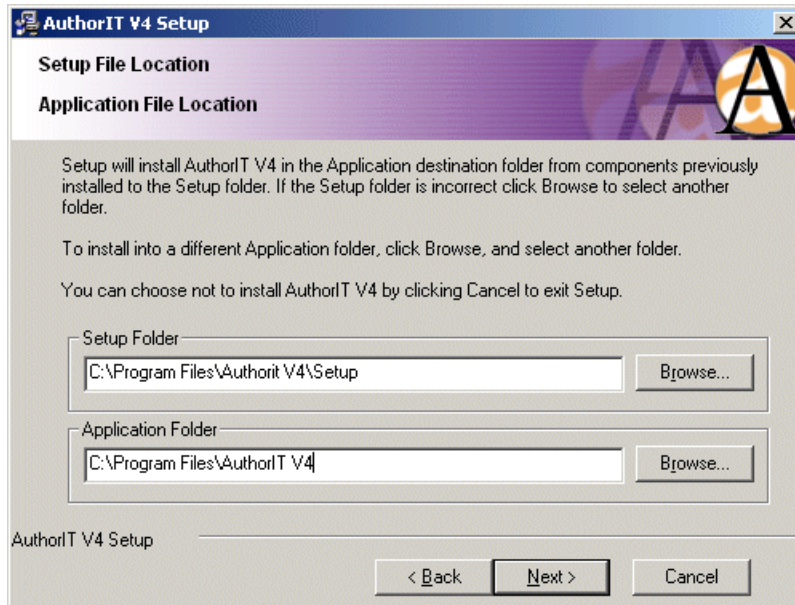
The Select AuthorIT Components window appears.
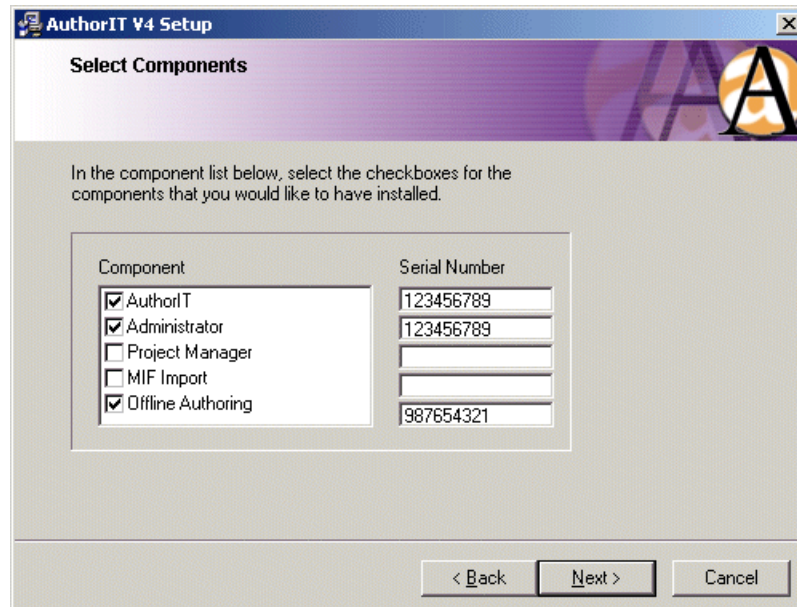
5) Choose the components that you are entitled to use and enter their appropriate serial numbers. Choose **Next** to continue.

Note: Evaluation versions of the *optional modules* (see "Installing Optional Components" on page 44) (Project Manager, Offline Authoring, and the MIF Import Filter) are included by default, and can be installed by entering `eval` as the serial number.
To install a licensed version of the Project Manager or MIF Import filter, you'll first need to download the corresponding setup files from the *Customer Area* http://www.author-it.com/customer.mv and copy these to the Setup folder on your server.
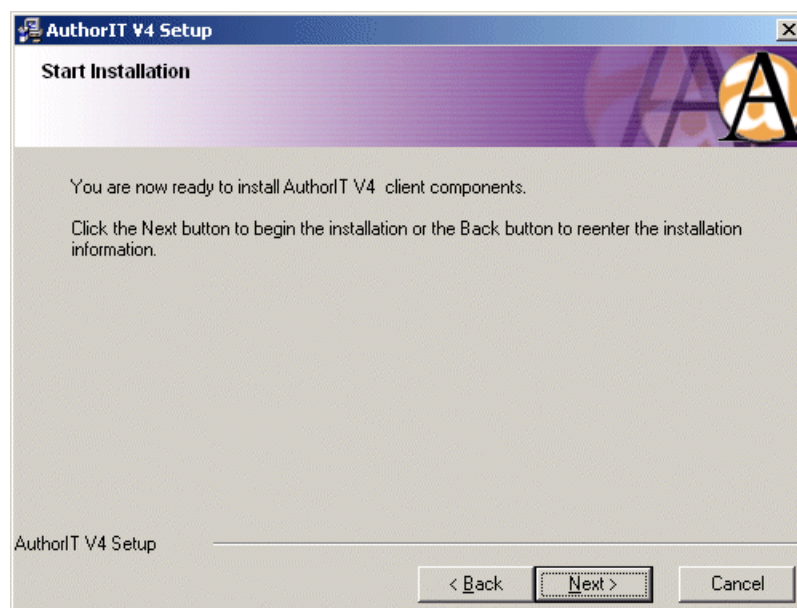
6)   When you have completed all of the required steps choose **Next** to begin the installation process.
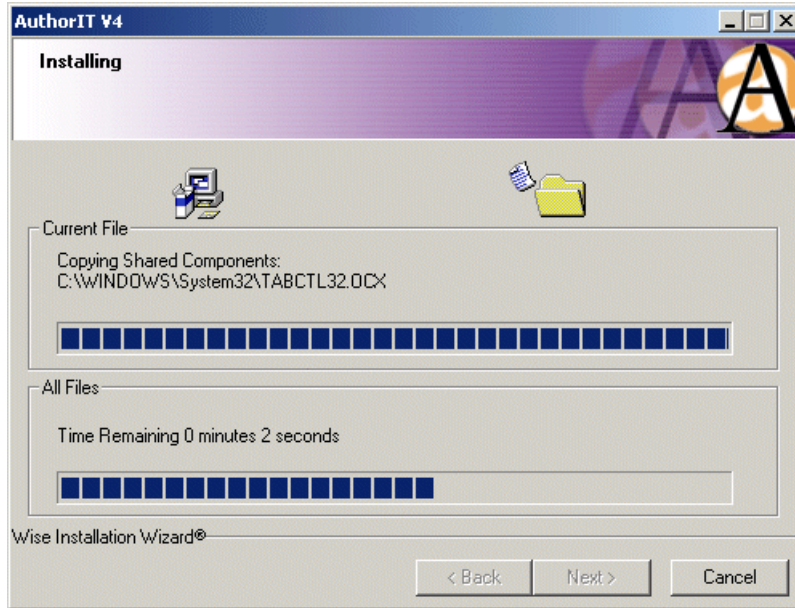
7)   Progress is shown as the components are installed
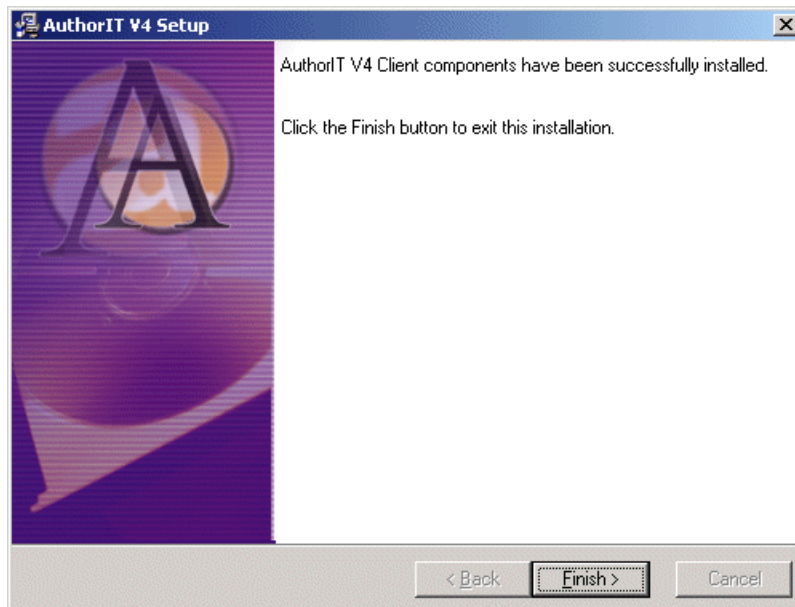
8)   Choose **Finish** to exit the Setup program.

9)   You may be prompted at this time as to whether you wish to have the PC rebooted. It is recommended that you let the PC reboot.

Congratulations, AuthorIT is now installed on your client PC.

Automating the Client Network Installation

After you have installed AuthorIT components on the server, you need to install the AuthorIT program on each client machine. With a little customization this process can be automated, saving you valuable time and resources.

When the Server Components are installed, a netsetup.ini file is created. By editing this file, you define which components are installed on each client PC, and which serial numbers are used. The setup can then be run unprompted from each client PC streamlining the overall installation. You can email all users you have setup a shortcut to the netsetup.exe, so all the users have to do is double-click the shortcut to install AuthorIT. You could even make netsetup.exe run as part of the user's login script so AuthorIT installs automatically the next time the user logs in.

Note: To complete this task you need to install the AuthorIT Administrator module to a client PC. The option to install the AuthorIT client components during the server setup, installs the Administrator on the PC doing the install.

To Automate the Client Network Installation

1) From the main menu, select **Security > Client PC Setup**. The AuthorIT Licensing Administration screen appears.
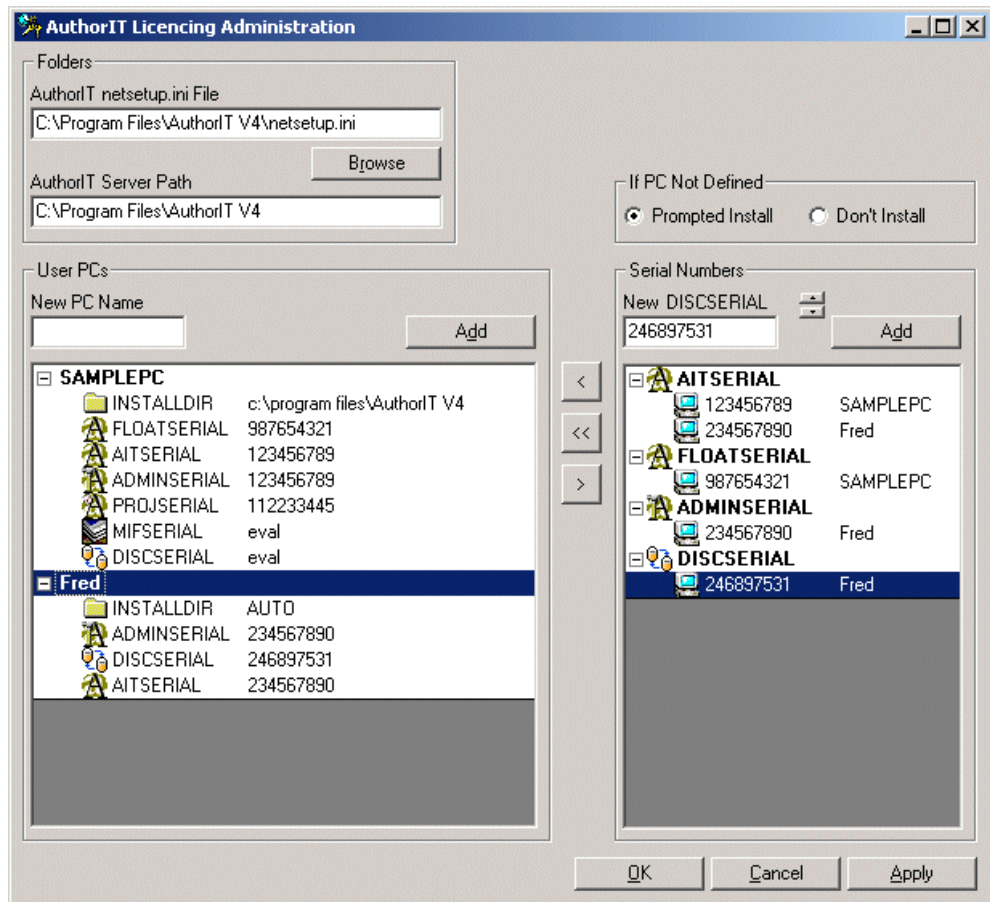
To Add New User PCs

1) To add new user PCs, you must first identify the client machine names. These names should be displayed in your **Network Neighborhood**, or in the **My Computer > Properties** of each PC.

2) Once identified, enter the new PC Name and choose **Add** or press the Enter key. You can quickly enter in all your PCs in one session without moving from the New PC field.

3) An INSTALLDIR entry is created for each new PC, with the value 'AUTO'. This tells the network setup program to install AuthorIT to the default Program Files directory set on that PC. If you wish to manually set the install directory for a PC, select the entry and press the Enter key, or right-click and choose Properties from the shortcut menu.

4) To remove an entry from the PC list, select the entry and press the **Delete** key, or choose the ⬚ button. Removing a PC entry, also removes all serial numbers allocated to that PC.

To Add Components and Their Serial Numbers

1) To add serial numbers to the list, use the serial number entry field. Select the component by clicking on the ⬚ buttons to show the type you require, then enter the serial number and choose **Add** or press the Enter key. The new serial number appears in the list.

When you add a new Author serial number an Administrator entry for the same serial number is automatically created as they both share the same serial number. This entry is created so you can choose whether or not to install the Administrator on a PC.

2) To remove a serial number from the list, select the entry and press the Delete key.

3) Repeat until the serial numbers for all components you have licences for are listed.

To Allocate Serial Numbers to Each PC

1) Once you have created your lists of PCs and serial numbers, you need to allocate the numbers to the PCs.

2) To automatically allocate available serial numbers to a PC, select the PC entry and choose the ⬚ button, or right-click and choose **Add Unallocated Serials** from the shortcut menu. This selects unallocated serial numbers and applies one of each to the PC.

3) To allocate a particular serial number, select the PC entry then select the serial number of the component to be installed and choose the ⬚ button.

4) To remove a serial number entry from a PC, select the entry and press the delete key, or choose the ⬚ button. The `Netsetup` program only installs a component for which a serial number appears in the list for the PC.

You can email all users you have setup in the INI file a shortcut to netsetup.exe. All the users have to do is double-click the shortcut to install AuthorIT. You could also make netsetup.exe run as part of the user's login script so AuthorIT installs automatically the next time the user logs in.

To Install AuthorIT on each PC

1) Browse the server and locate the setup file called netsetup.exe located in the AuthorIT folder.

    Run this file to begin the automated installation process.
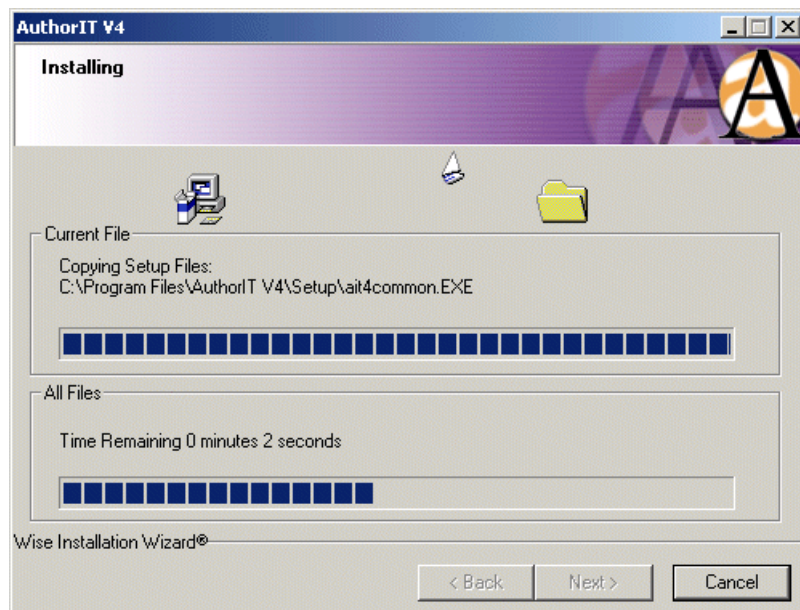
    Note for Windows 2000 Users: If your system has an older version of a particular DLL used for data access the setup program will install some later version components onto the PC. It is recommended that you reboot the computer at the end of the installation.

2) The AuthorIT files are automatically installed to the client PC. When the installation is complete, the program creates shortcut icons on the desktop and exits.

Editing the netsetup.ini File

The AuthorIT Administrator allows you to modify the netsetup.ini file in a friendly environment and we recommend that you use it. However, if you wish to edit the .ini file directly, the following discusses how to do this, and what the various data entries mean.
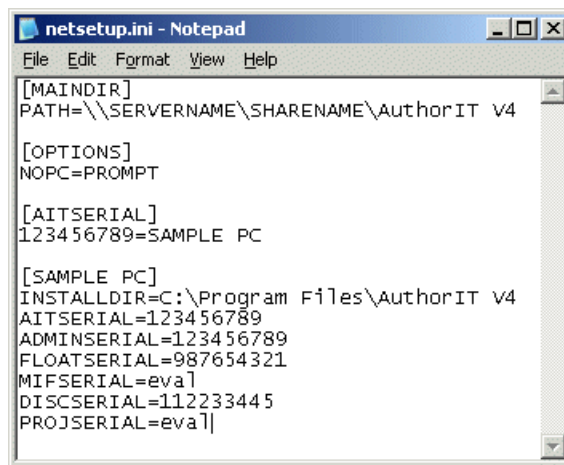
Note: The entries are mostly case sensitive.

To Edit the netsetup.ini file manually

1) Open the `netsetup.ini`.file located in the ..AuthorIT V4\Setup folder (created when you installed the Server Components). The file opens in Windows Notepad.

2) Using the `[SAMPLE PC]` example above, create a new profile for each user that requires a client installation of AuthorIT. In this profile you will need to identify the users machine name. These names should be displayed in your **Network Neighborhood**, or in the **My Computer > Properties** of each PC. You also need to specify the required components to install and the appropriate license number for each component. By entering this information into the `netsetup.ini` file you bypass the prompted client installation steps and streamline your overall installation. After you have updated the `netsetup.ini` file you can then run `netsetup.exe` (from the server location) on each client PC to automatically install AuthorIT on the client PC.

[MAINDIR] Section

This section indicates the path to where the AuthorIT Data files (including your Library)are installed, typically on a server.

`PATH=\\server\share\folder`

This path should be a UNC path and should reflect the share name on the server, otherwise client PCs may not be able to see it and `netsetup.exe` may fail.

The actual library is installed in a branch of this path usually called `\Data`. The main directory contains several required files, including this INI file and `netsetup.exe`.

[OPTIONS] Section

This section contains options that may be selected.

`NOPC=PROMPT`

The `NOPC` option tells the setup system what to do when `netsetup.exe` is run from a PC that does not have an entry in the INI file. `PROMPT` tells `netsetup.exe` to prompt for all the information required to install components. Anything else causes the setup to terminate.

XXXSERIAL Section

There are a number of sections containing serial number allocation information. They identify the type of serial number and the allocation status. This information is not used directly by the netsetup program, but is used internally by the AuthorIT administrator.

[AITSERIAL] contains the AuthorIT serial numbers.

[ADMINSERIAL] contains the AuthorIT Administrator serial numbers. They are the same as the AuthorIT ones.

[PROJSERIAL] contains the AuthorIT Project Manager serial numbers.

[DISCSERIAL] contains the AuthorIT Offline Authoring serial numbers.

[MIFSERIAL] contains the AuthorIT FrameMaker MIF file conversion facility serial numbers.

Each line in the section lists a serial number and its status. The status may be either the name of a client PC to which it is allocated, or unallocated.

Serial Numbers

AuthorIT serial numbers are 9 digit numbers.

Serial numbers are not validated when they are entered at this stage. They are checked during the actual client install, so that if a typo is made entering a number, it will get picked up when the client installation process is run.

There is a special case serial number. The Offline Authoring, MIF Filter, and Project Manager modules supplied with the standard AuthorIT installations are evaluation versions. To enable these to be selectively installed to client PCs, a serial number of `"eval"` can be used.

[PC NAME] Section

This section indicates a PC name, what components may be installed on the PC, the serial numbers of the components for that PC, and where AuthorIT is installed on that PC.

`[SAMPLEPC]`

This is the name of the PC, as set in the PC's network properties.

`INSTALLDIR=C:\Program Files\AuthorIT V4`

This is the folder AuthorIT is installed to, typically the Program Files folder. This entry may be set to `AUTO`, in which case the standard Windows program files directory as set in the PC registry is used, with AuthorIT installed to a branch of this folder.

`DATADIR=\\SERVERNAME\SHARENAME\AuthorIT V4`

This is the folder containing the shared Server based components.

AITSERIAL=123456789	AuthorIT fixed license
FLOATSERIAL=987654321	AuthorIT floating license
ADMINSERIAL=123456789	Administrator - same license as AuthorIT
PROJSERIAL=555555555	Project Manager
DISCSERIAL=444444444	Offline Authoring
MIFSERIAL=333333333	MIF Import Filter

This is a list of serial numbers for each component installed. If there is no serial number for a component, `netsetup.exe` will not install it.

Evaluation versions of the *optional modules* (see "Installing Optional Components" on page 44) (Project Manager, Offline Authoring, and the MIF Import Filter) are included by default, and can be installed by entering `eval` as the serial number.

To install a licenced version of the Project Manager or MIF Import filter, you'll first need to download the corresponding setup files from the *Customer Area* http://www.author-it.com/customer.mv and copy these to the Setup folder on your server.

Minimum Computer Requirements

These are the minimum requirements for computers on which you install the AuthorIT program.

System Requirements

- Windows 98, NT 4.0, 2000, XP or 2003. Windows 2000 or higher recommended
- Pentium 500 processor or better.
- 64Mb RAM; 128 Mb or higher recommended.
- Standard VGA monitor; SVGA recommended.
- Microsoft Mouse or compatible pointing device.
- Microsoft Word 2000, Word XP or Word 2003 (required for Word document publishing and importing only).

Note: AuthorIT can be run on a machine with lower specifications, however the performance will not be optimized and some processes will be slower.

Runtime File System Space - Multi-user Editions

Allow approximately 60Mb depending on the number of options installed. This may be split between client and server machines depending on installation configuration.

Allow More Space If You're Using JavaHelp

If you are publishing your documents in JavaHelp format, you'll also need to install the JavaSoft Runtime Environment on any computers which need to display published JavaHelp files. Allow another 16Mb for this.

Suggested Windows Settings

To get the most out of AuthorIT it is recommended that you have the following Windows Display Settings:

- **Display Resolution** - 800 x 600 or higher resolution.
- **Display Colors** - 256 or more colors

AuthorIT will run just fine without these settings - however, some features may be more difficult to use and some display elements may appear less attractive.

Default File Directory Structure Created on Client

When you install AuthorIT's client-based components, this default file directory structure is created on your computer:

..AuthorIT

        Backup

        Dictionaries   Language dictionaries

Hcw	WinHelp Compiler files
Hhw	HTML Help Compiler files
JavaHelp	
OracleHelp	
Publishing	Published document outputs

During installation, you tell AuthorIT where to find the **Data** directory on the server, which contains shared Libraries and templates.

Changing the File Directory Structure

You can change AuthorIT's *default directory structure* (see "Default File Directory Structure Created on Client" on page 35).

When you install the AuthorIT program on each computer, specify the default location of shared directories for Libraries and Templates by choosing **Tools > Options > File Locations** from the main menu. You'll see this window:
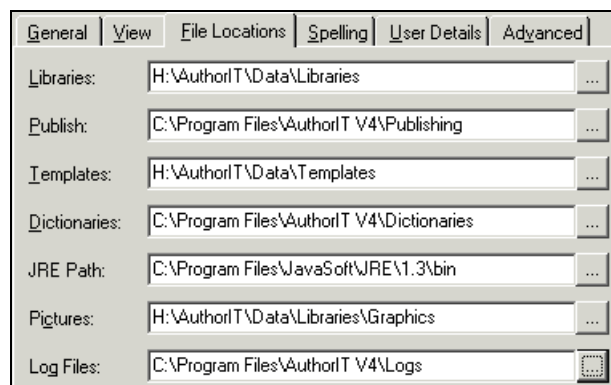
This tells AuthorIT where to look first for those types of file each time you start a new session of the AuthorIT program. After that, the most recently accessed directory during the current AuthorIT session is defaulted.

Shared Publishing Directory Not Recommended

You can also define a shared Publishing directory, although this would mean that people publishing the same Book would overwrite each other's outputs each time, which may pose problems when using a published output for review. Publishing is also generally slower when performed across a network connection than on the local computer.

Changing Relative File Paths

If you change the relative positions of the Library database and the **Templates directory** from AuthorIT's default file directory structure, you will also need to change settings in several AuthorIT objects (usually object templates). These settings point to files whose location is always specified **relative to the position of the Library file** that you are working with.

Note: In particular, change these settings in the Library that others are created from (**default.adl**, or any other library that is stored in the Templates directory).

SQL Server

If you are using a SQL Server database, the locations of files are specified relative to the Library path directory specified in the **Summary** section of the AuthorIT Administrator. Think of this as your base directory.

To Change File Paths

1) Start the AuthorIT program and log in to your Library.

Enterprise Edition, Workgroup Edition

You'll need to log in as a User who has sufficient permissions to edit object templates - "(supervisor)" usually works.

2) Open the object templates for these types of object, and change their relative paths if necessary:

‣ **Book** object, Document tab, **Word template** field.

‣ **Index** object, HTML tab, HTML Help sub-tab, **Index template** and **Sitemap template** fields.

‣ **Table of Contents** object, HTML tab, HTML Help sub-tab, **Contents template** and **Sitemap template** fields.

Adjusting Each Computer's System Clock

AuthorIT's object-locking code currently relies on all client computers having their system time within 5 minutes of each other. It's good to do this when you install the client software, if you do not have server-based resynchronization each time the client computers log in to your network.

Step 8 - Setting up AuthorIT using an Application Server

Enterprise (with Floating Licenses) and SQL Server

Windows Terminal Services, Citrix MetaFrame and Citrix Presentation Server allow applications to be distributed over a wide area and used on many different operating systems. The Citrix products even allow AuthorIT to be run on Macintosh or Unix computers.

Put simply, many instances of AuthorIT run on an Application Server, which sends information to the Client computers for them to display on screen. The Client computers in return sends mouse click, key stroke and clipboard information back to the Application Server.

Working with an Application Server creates additional installation requirements:

- Each Client computer should see the Library and external files (HTML templates etc) at the same location
- Each Client computer must publish to their own publishing folder
- Each Client computer must maintain their own dictionaries
- Each Client computer must create their own separate log files when importing and publishing

These requirements are best addressed using a *login script*.

Note: Before AuthorIT is installed on the Application Server, the File Server and Database Server should be installed and running. At least one Fixed license should be installed to allow administrator functions to be used against the library. The Floating License Key should be inserted into your library using the AuthorIT Administrator (**Security > Floating Licenses...**)

User Login Script

All users opening an AuthorIT session from a Client Computer working through an Application Server should use Mapped Drives to separate their individual data from other clients using the same Application Server. Ideally, they will use a Mapped Drive for all private data.

AuthorIT allows only one session per Client Computer and the Client Computer Name is used to determine this. Application Servers use the environment variable %CLIENTNAME% to distinguish between Client Computers.

When a user logs in to a domain, there is the option to run a login script. This is the ideal time to ensure that:

▸ unique folders exists for the Client Computer

▸ each Client Folder is mapped to a consistent drive letter

The Microsoft Knowledge Base Article *Q195461* (http://support.microsoft.com/?kbid=195461) deals with How to Set Up a Logon Script Only for Terminal Service Users. This has mixed results and doesn't work on some servers. If it doesn't run, try this registry fix.

1) On the Terminal Services server, start the Registry Editor.

2) Locate and then open the following key in the registry:

HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Windows\CurrentVersion\Run

3) From the **Edit** menu, select **New** > **String Value**.

4) Type in something like **WindowsTerminalServicesLogon** for the value, and then click **Modify** on the **Edit** menu.

5) In the **Value** Data box, type the path and file name for the program that you want to start when users log on.

6) Select **OK**, and then quit Registry Editor.

Note: If you still can't get the Logon Script to run after reading the Microsoft Knowledge Base Article *Q195461* (http://support.microsoft.com/?kbid=195461) try moving the script to:
`C:\Documents and Settings\All Users\Start Menu\Programs\Startup`

Example Login Script

This login script assumes the following client/server names and paths:

File Server	\\MYDATA	
Installation Folder	\\MYDATA\AuthorIT V4	This is a share name, not an actual folder.
Data Folder	\\MYDATA\AuthorIT V4\Data	Created by installing AuthorIT on the File Server
Clients Folder	\\MYDATA\AuthorIT V4\Clients	This folder is created manually.

This script should be run at login for all users accessing AuthorIT via an Application Server:

```
net use P: "\\MYDATA\AuthorIT V4" /persistent:no
if exist "P:\Clients\%CLIENTNAME%\." goto :COPYDONE

cd /d "P:\Clients"
md "%CLIENTNAME%"
cd /d "%CLIENTNAME%"
md "Publishing"
md "Logs"
md "Dictionaries"
cd /d "Dictionaries"
xcopy /e /s /v "P:\Dictionaries"
:COPYDONE
net use P: /delete
net use P: "\\MYDATA\AuthorIT V4\Clients\%CLIENTNAME%" /persistent:no
```

Before Installing AuthorIT on the Application Server

Before AuthorIT is installed on the Application Server, the File Server and Database Server should be installed and running. The *Floating License Key* (see "Activating Floating Licences" on page 43) should be inserted into your library using the AuthorIT Administrator.

User Options - Using the mapped drive

After installing AuthorIT on the Application Server the User Options should be set.

To set the User Options

1) Start AuthorIT and open your Library

2) From the main menu choose **Tools > Options...**

The following dialog displays. Fill in the fields as appropriate for your File Server and Client Folder drive mapping created by your *Domain Login Script*:
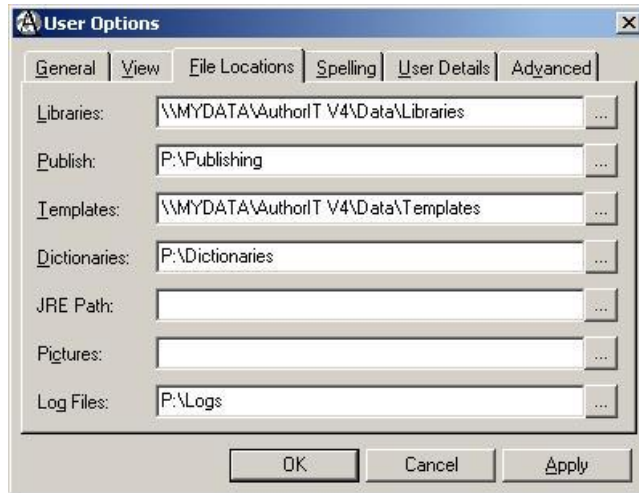
3) Apply the settings and exit AuthorIT.

Windows Terminal Services - RDP(Remote Desktop) Files

To connect to an Application Server running Windows Terminal Services, the Client computer will use Remote Desktop.

Remote Desktop is installed by default on Windows XP but not on Windows 2000. For clients using Windows 2000, Microsoft has a free *Remote Desktop Connection Software Download* (http://www.microsoft.com/windowsxp/downloads/tools/rdclientdl.mspx) that must be installed prior to Windows 2000 clients connecting.

For a network administrator, it is easiest to give clients a RDP (Remote Desktop) file that includes all the information needed to connect to AuthorIT via Windows Terminal Services.

Creating a RDP file

1) Log into a Client computer.

2) Start a Remote Desktop Connection:

Start > **All Programs** > **Accessories** > **Communications** > **Remote Desktop Connection**

3) On the **General** tab, enter the appropriate information in the **Computer** and **Domain** fields:

4) On the **Programs** tab, enter the path to the AuthorIT executable, and starting folder on the Application Server:

5) Back on the **General** Tab, select **Save As...** and create a file called **AuthorIT.RPD**

The AuthorIT.RDP file can be distributed to all clients within the domain wishing to connect to AuthorIT using Remote Desktop.

Activating Floating Licences

If you're running AuthorIT's Floating License option, you'll need to activate your Floating Licenses. 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
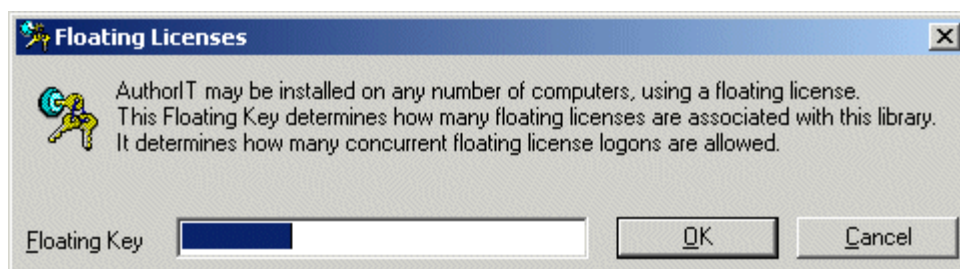
Note: This key will be provided by the AuthorIT Sales team in a separate email. If you have not received this email, please contact *sales@author-it.com* .

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

Advanced Configuration of AuthorIT

Each organization is different, so AuthorIT lets you adjust many settings to match the way you work, including setting up Import Rules and Profiles, and customizing the publishing templates for your printed documents. Please contact your AuthorIT Reseller for help configuring AuthorIT to meet your business requirements.

Backups

We strongly recommend stringent daily backup procedures for your AuthorIT data files, especially the Library database/s.

When you upgrade an earlier JET Library database so you can work with it using AuthorIT V4, a copy of that earlier database is automatically created before the upgrade. Otherwise, AuthorIT has no internal backup procedures.

There are many good backup tools available - contact your regular software and hardware supplier.

Installing Optional Components

AuthorIT also comes with a number of optional modules:

- ‣ Offline Authoring (available with Workgroup and Enterprise Editions only)
- ‣ Project Manager (available with Workgroup and Enterprise Editions only)
- ‣ Localization Manager (available with Enterprise Edition only)
- ‣ MIF Filter (available with All Editions)

Evaluation versions of these modules are included by default, and can be installed during the client installation by entering the serial number as `eval`.

To Install the licensed version of Offline Authoring:

1) Enter the serial number when installing the *client components* (see "Step 7 - Install the Client Components on Each Computer" on page 25)

-or-

2) If AuthorIT is already installed on the machine you want to install Offline
Authoring on, simply start AuthorIT and choose **Help > Enter Offline Library
Serial Number...**

3) Enter the serial number and choose **OK**.

To Install the licensed version of Project Manager:

1) Enter the serial number when installing the *client components* (see "Step 7 - Install
the Client Components on Each Computer" on page 25)

-or-

2) If the Project Manager evaluation is already installed on the machine, simply start
Project Manager and choose **Help > Enter Serial Number...**

3) Enter the serial number and choose **OK**.

To Install the licensed version of Localization Manager:

1) Once AuthorIT is installed, start Localization Manager evaluation and choose
Help > Enter Serial Number...

2) Enter the serial number and choose **OK**.

To Install the licensed version of the MIF Filter:

1) Download the corresponding setup files from the Customer Area and copy these
to the Setup folder on your server.

2) Then either:

   a) Enter the serial number when installing the *client components* (see "Step 7 -
   Install the Client Components on Each Computer" on page 25).

   -or-

   b) If AuthorIT is already installed on the machine you want to install the MIF
   Filter on, simply run the setup file for that component, entering the serial
   number when prompted.

Chapter 4

Understanding AuthorIT's Concepts

Like most tools, to really learn how AuthorIT works there are some underlying concepts that you need to understand first. Even if you're familiar with other authoring tools, AuthorIT has some unique concepts behind it -- especially because of its revolutionary object-oriented, single-source technology.

This Chapter explains those concepts (including single-source and other such phrases), so that you're best prepared to learn the How To Use AuthorIT stuff later in this Guide. You'll also be able to wow people at cocktail parties with your cutting edge knowledge.

In This Chapter

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 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

Why Separate Structure From Format?

Most people who write business and technical documents spend about 50% of their time making their document look right. Even writers in teams spend far too much time concentrating on their document's format rather than its content and structure.

AuthorIT takes care of the formatting, so you can concentrate on the writing. This means you save time, and can either produce a faster result or improve the quality of your document. This is particularly important with documents for the Web, where having great content can make the difference between being read or ignored.

Using our years of technical writing experience, we have set the formatting standards so you can quickly produce professionally-presented documents in all output formats: printed, Windows Help, HTML Help and true cross-platform HTML. Simply use AuthorIT's built-in templates, or modify them to produce your own house style.

If you're managing a team of writers, AuthorIT lets you tightly control the format standards so you get a consistent look and feel across all your documents, no matter who wrote them.

What's Single-Source?

Single-Source means you produce your document in many different output formats, but only store and work with it **in one place**. AuthorIT offers true single-source documentation, designed to produce high-quality, professional results in all output formats, not just one or two. AuthorIT stores the components that make up your document in a single database, then intelligently publishes the different output formats for you, with all the features that each format offers.

What are Libraries and Books in AuthorIT?

In AuthorIT, your **Library** is the database where all your related documents and their components are stored. It's a storehouse of information, just like a public library in the real world. Each Library contains one or more Books, and shared components.

Each document is called a **Book**. A Book can reuse any of the components in its Library, including shared styles and templates, and even other Books.

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.

Inheriting Settings By Using Object Templates

As an author or editor, one of your main challenges is maintaining consistency and standards throughout all your documentation.

AuthorIT offers you unprecedented control of standards. One of its main features is the ability to use property inheritance to preset some settings of any component of your document. When you base any AuthorIT object on an object template, it inherits settings from the template. This makes it faster to create new objects, ensures consistency, and makes it easy to update the standards of many components at the same time. AuthorIT's built-in user security means that you can say who is able to change standards once they're set.

What are Object Templates?

An object template is just a normal AuthorIT object (like a Topic or Hypertext Link) that you use to control the properties of other objects - like a rubber stamp. It can not be used directly in a document.

Choosing an Object Template

AuthorIT comes with "templates" for each type of object, such as topics or pictures (note that this is **not** the same as Word document templates, which AuthorIT only uses to publish your printed document). These object templates contain the settings most appropriate for each situation you'll encounter. This means you can be instantly productive, even before you learn enough about the various settings to customize the templates yourself.

The AuthorIT User's Guide will help you choose the right template for the job, and most of the time you can make an educated guess from the template's name.

Basing Objects on a Template

After you have created an object template, you can base other objects of the same type on that template, and they will inherit its settings.

When you set a property in an object template it will have any setting available in a normal object, plus a *"don't inherit"* setting. This setting tells the template to allow that particular property to be changeable in the objects that are based on it. Otherwise, the property in the object inherits its setting from the template.

Any properties in an object that are inherited from a template are locked and you can not change them. However, if you change a property in the template, all objects based on it are updated with the new value. You can tell when the value of a property is inherited, because that property or its descriptive label will be colored *blue*.

Can I Base an Object Template on Another Template?

You can certainly base templates on other templates. In fact, we recommend it. That way, it's easier to manage global changes but also possible to specify variations in your standards.

For example, the standard AuthorIT object templates for Linked Files (like Linked GIF and Linked Icon) are all based on the **Linked Graphic Directory** template, which only specifies the location of the directory containing all your graphic files. When you want to change the location of that directory, you only need to do it in the **Linked Graphic Directory** template, and AuthorIT automatically updates that setting in all your File Objects, within seconds.

Note: For technical reasons, Related Topic Groups can only be inherited once, so they will not be inherited by a topic based on a template based on another template -- although every other feature of the topic template will be inherited correctly.

Changing Inherited Settings

Each object has settings or "properties" which tell AuthorIT how that object behaves. Objects are usually based on an object template, and they inherit some of their settings from the template. This means you can update the settings of all related objects at once, and your standards will remain consistent. It's also quicker than having to set each property every time you create a new object.

If the label of any setting is blue, it means the setting is inherited from the object's template. Such inherited settings cannot be directly changed. For example, when you base a Book object on the "Normal" template, you'll notice that the **Include object in** settings on the **General** tab are all inherited.

To Change an Inherited Setting

> **Base the object on a different template.** Another template may have the setting you need.

> - OR -

> **Open the object's template, then make your change there.** AuthorIT will update all objects based on that template. This may take a while. Think carefully before you do this, because the change may not be appropriate for all other objects *based on the same template* (see "Inheriting Settings By Using Object Templates" on page 51).

> - OR -

➤ **Create a new object template with the correct settings.** The easiest way is to create a new template then base it on the template most like the one you want, then base it back on (none) and make the required changes. Now make sure the object is based on your new template (from the object's **General** tab, choose the new template's name from the **Based On** drop-down list). This approach is good if you want to make a change to your object's settings, but that change is not appropriate for all other objects based on the same template. You can even *base templates on other templates* (see "Can I Base an Object Template on Another Template?" on page 53).

- OR -

➤ **From the object's General tab, choose "(none)" from the Based On drop-down list**, instead of the name of the current template. AuthorIT makes sure the current settings are kept, but now you will be able to change the inherited setting. This solution is *not* recommended because future changes to related objects will no longer affect this one, reducing consistency and increasing the work you need to do when updating standards.

Version Control

Another very powerful AuthorIT feature is the ability to create multiple versions of an individual object, while still keeping the old versions.

The Life Cycle of an Object

When you're using version control in AuthorIT, each object goes through these life cycle states:

➤ **Active** - The current active version of an object. All new objects are created as active, and there can only be *one* active version of an object.

➤ **Inactive** - A proposed version of an object. When you create a new version of an object it will be proposed and inactive. There can be many inactive versions of an object.

➤ **Redundant** - An old version of an object. When an inactive version of an object becomes the active version, the current active version becomes redundant. There can be many redundant versions of an object. However, these versions are read-only.

The Life Cycle of an Object

1) An object is first created as **Version 1**, with a status of **Active**.

2) Later, you may create a new version of the object. The new version is always created with a version number that is one greater than the latest version, and with a status of **Inactive.**

3) When the new version becomes **Active**, then the old version becomes **Redundant**.

Later on more new versions may be created. These will follow exactly the same path.

The following diagram shows the life cycle of an object.
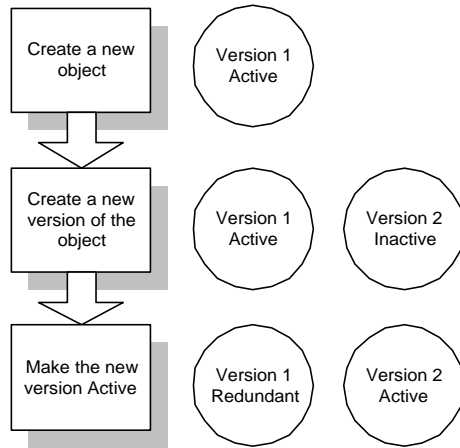
Making an Object Active

When you create a new version of an object, that new version will be created as Inactive, or proposed. Once you have finished making changes to the new version you will want to make it the **Active** version.

When you make an object the Active version, several things happen:

▸ The current Active object changes status to Redundant, and becomes read-only.

▸ Any child relationships that the current Active version of the object was involved in are replaced with the new version, only where the parent in that relationship is not already Redundant.

▸ The new version of the object changes its status to Active.

Example

Lets look at an example where you have already produced version 1 of a Book and it is related to several Topic objects which are also version 1. Now you want to create a new version of the Book. However, only a few of the Topics need to be changed, and you still want the ability to publish the old version of the Book as it is.

First you would create a new version of the Book object, and make that new version Active. This has the effect of making the old version Redundant.

Next, you would create a new version of the Topic you wanted to change. After making the changes to the new version of the Topic, you would make that new version Active. Just like for the Book, the old version of the Topic would become Redundant. Additionally the relationship that the new Book has with the old version of the Topic now changes to be with the new version of the Topic. However, the relationship that the old version of the Book has to the old version of the Topic is retained, because the parent in the relationship (i.e. the old Book) was already Redundant.

This replacing of relationships occurs automatically through the entire Library for the object version being made Active. This ensures that your changes are propagated through all the documentation in the Library.

Effect of Version Status on Relationships

The Version status of a object will affect its ability to be involved in a relationship. Only the Active version of an object can be involved in a relationship where it is the child. This is because the act of making an object Active automatically replaces the child relationship of the current Active version, with itself.

Chapter 5

Introducing the AuthorIT Interface

This Chapter describes the work environment and the interface elements you will encounter while you're using AuthorIT.

In This Chapter

Main AuthorIT Window

AuthorIT's main window has several components, which are described in this section:

⇥ The Menu Bar.

⇥ The Main Toolbar.

⇥ The Object Toolbar.

⇥ The Preview Toolbar.

⇥ The Library Explorer.

⇥ The Status Bar.
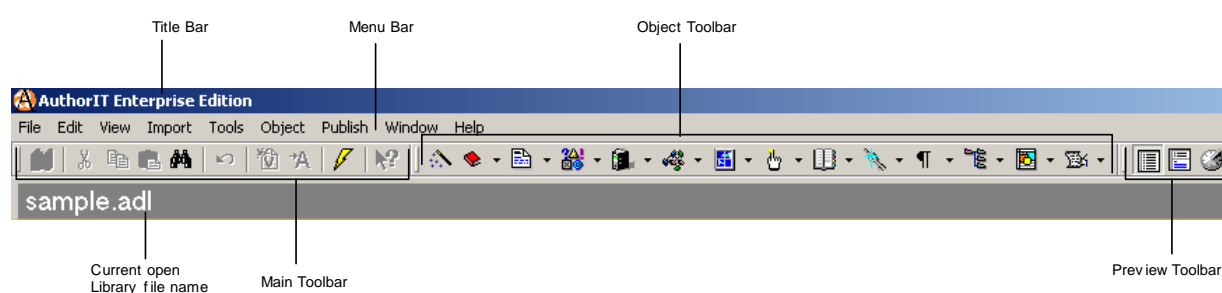
Menu Bar

The menu bar contains a number of menus that tell AuthorIT what to do. Each menu contains a list of commands and sometimes sub-menus.
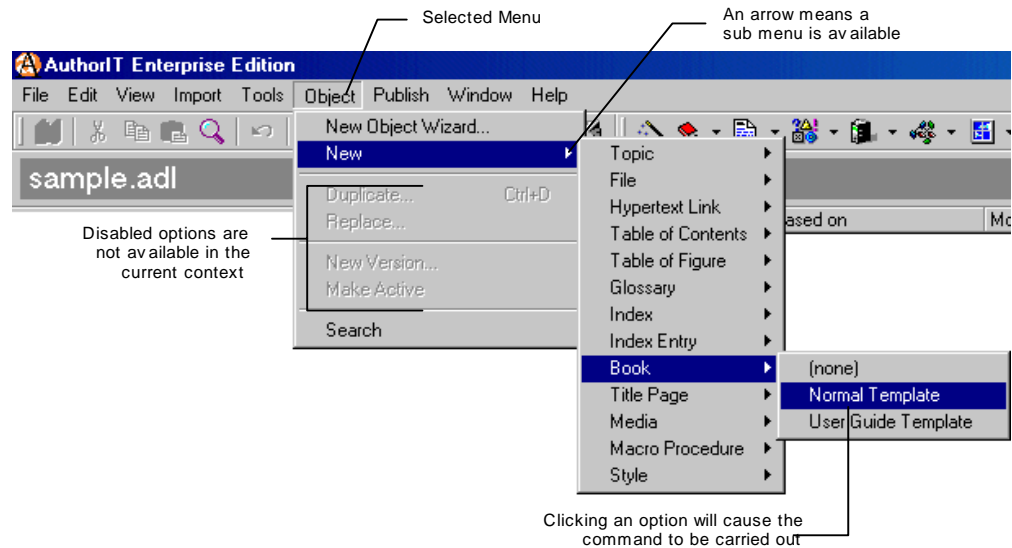
Some of the options carry out commands immediately, and others display a window so that you can enter additional information. If an option is followed by "...", it will display a window. Otherwise, the command is carried out immediately.

Main Toolbar

The **Main Toolbar** gives you quick access to commonly used commands in the AuthorIT environment.

This Button	Does The Same As This
Open Library	File > Open Library
Cut	Edit > Cut
Copy	Edit > Copy
Paste	Edit > Paste
Find & Replace	Edit >Find
Undo	Edit > Undo
New Version	Object > New Version
Make Version Active	Object > *Make Active* (see "Making an Object Active" on page 56)
Publish Book	Publish > In Batch
AuthorIT Help	Help > *AuthorIT Help* (see "Using AuthorIT's Help System" on page 6)

Object Toolbar

You'll use the Object toolbar to create new objects or templates. The Object toolbar contains a button for each type of object. Click on a drop-down arrow to display a list of available templates the object can be based on.
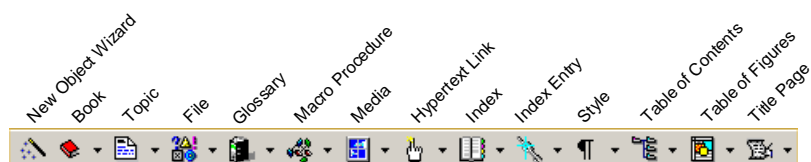
To create new objects you can also:

▸ Use the New Object Wizard.

▸ From the Book Contents toolbar, choose the **New Topic** button.

▸ In the Book Contents, right-click and then choose **New** from the shortcut menu.

▸ In the main Library Explorer right-click an empty area then choose **New** from the shortcut menu.

This Button	Does The Same As This
New Object Wizard	Object > New Object Wizard
New Book Object	Object > New > Book
New Topic Object	Object > New > Topic
New File Object	Object > New > File
New Glossary Object	Object > New > Glossary
New Macro Procedure Object	Object > New > Macro Procedure
New Media Object	Object > New > Media Object
New Hypertext Link Object	Object > New > Hypertext Link
New Index Object	Object > New > Index
New Index Entry Object	Object > New > Index Entry
New Style Object	Object > New > Style
New Table of Contents Object	Object > New > Table of Contents
New Table of Figures Object	Object > New > Table of Figures
New Title Page Object	Object > New > Title Page

Preview Toolbar

Use the Preview toolbar to control how File objects and topics are previewed in the Object List of the Library Explorer.
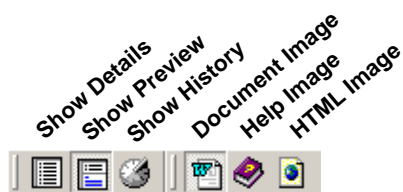
This Button	Does This
Show Details	Shows each object's details in the Object List of the Library Explorer, but no preview.
Show Preview	Shows a preview for each object, where available, in the Object List of the Library Explorer. Each object's details are also shown.
Show History	Shows the edit history for each object in the Object List of the Library Explorer.
Document Image	In previews, shows the File or picture that will be used in your printed Word output.
Help Image	In previews, shows the File or picture that will be used in your Windows Help output.
HTML Image	In previews, shows the File or picture that will be used in your HTML, XHTML, HTML Help, Java Help and Oracle Help outputs.

Library Explorer

The Library Explorer is your base for working with all the objects in your Library. This is where you store and select the components that you'll assemble into documents.

> 💡
>
> Drag and Drop objects from the Library Explorer into your Books, Topics or other objects. You can use the shortcut menu to work with your objects.
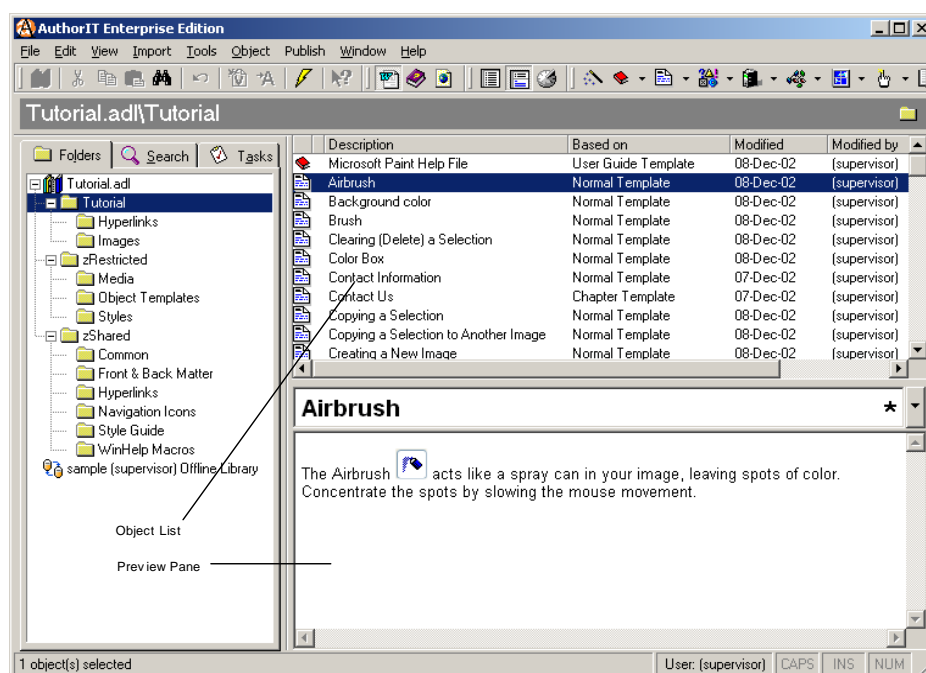
Folders tab

You can organize the items in your Library using customizable Library Folders with associated user security. The folders in the Folders tab of the Library Explorer expand and collapse the same way as the folders in Windows Explorer, so you can see more or less of each folder's contents.

Search tab

You can find and open all objects and object templates in the Library using the Object Search.

Tasks tab

Tasks are listed alphabetically in different Task Folders in the Tasks tab of the Library Explorer, according to their progress through the task's life cycle.

➤ This tab is *not* visible in the Evaluation Edition or Desktop Edition.

➤ The tab is visible in the Workgroup Edition and the Enterprise Edition, but unless your organization is using the optional separate AuthorIT Project Manager program, there will be no tasks in any of the folders.

Object List pane

The Object List pane shows you all objects:

➤ In the selected Library folder.

-OR-

➤ As a result of a Search you have conducted.

-OR-

➤ Associated with the selected Task, if you are using the optional AuthorIT Project Manager to manage a project.

For each object, these details are shown:

➤ The object's **type** (for example, Topic, Book, Style) -- shown by the icon, which you'll become very familiar with.

➤ The object's **Description**.

➤ The **object template** the object is based on.

➤ The last time the object was modified.

➤ Who last modified the object.

➤ The object's unique **ID number**.

➤ The **Version** of the object.

➤ The object's **Document Release State**.

Preview pane

Depending on what option is selected in the *Preview Toolbar* (on page 60), the Preview pane displays either:

➤ a preview of the selected object's contents. This only works for Topics, File Objects, and Style Objects.

- OR -

    ➚ a list of the selected object's Edit History.

Although you cannot edit an object directly in the preview pane, you can right-click and open it from a shortcut menu. Clicking a File Object or Embedded Topic when previewing a Topic, displays the File Object or Embedded Topic in the preview pane. Clicking a Hypertext Link displays the target Topic in the preview pane.

When a Topic being previewed contains a File Object, Embedded Topic, or Hypertext Link Object, you can right-click on that object and open it from the shortcut menu.

Library Status Bar

The Library Status Bar at the bottom of the main AuthorIT window tells you about the current status of AuthorIT.

This	Tells You
General	Description of the currently selected object.
User	User Name under which you are logged into the Library.
Caps Lock	Whether or not the Caps Lock key is active. Black text means On. Gray text means is Off.
Insert Mode	Whether characters are Inserted into existing text when you type, or Overtype existing text. Black text means Insert is On. Gray text means Insert is Off and Overtype is On.
Num Lock	Whether or not the Number Lock key is active. Black text means On. Gray text means is Off.

All AuthorIT Objects

With AuthorIT, you assemble your document from components called "objects". There are different types of objects, which have some common settings and some unique settings. This section describes some of the common settings and interface elements you'll be working with.

Layout of an Object

Each object you work with uses a common layout, so it's easy to find your way around. When you open each object, you'll see a window with several tabs. The tabs contain that object's settings.

- ❯❯ Some tabs contain settings which apply to only one **output type**, while others contain settings which apply to more than one output.

- ❯❯ Similarly, some tabs are common to more than one **type of object**, while other tabs are only used for one type of object.

Let's look at an example:
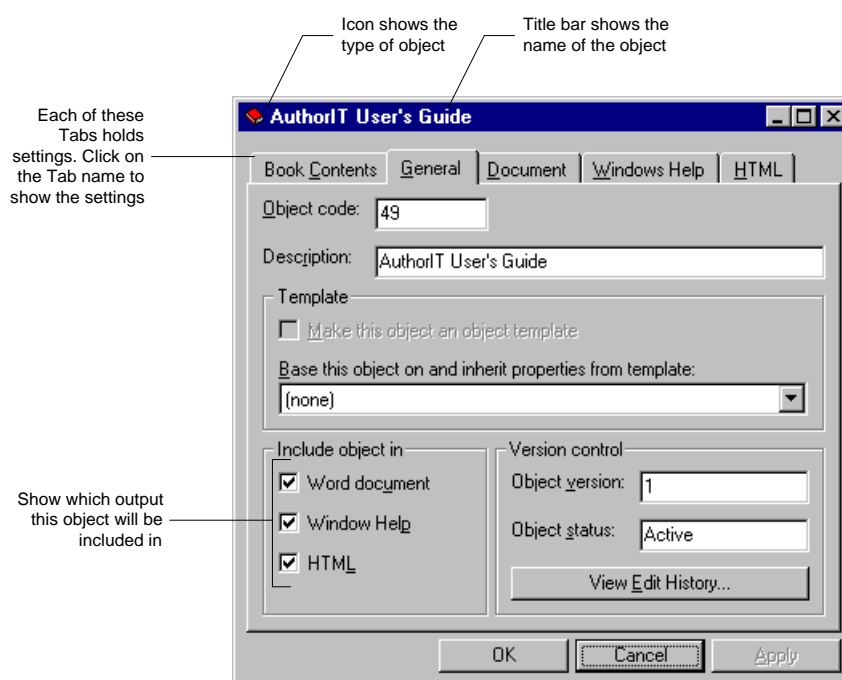
The Book object has 5 tabs:

- ❯❯ **Book Contents -** contains the structure of your document. Only applies to the Book object, but applies to all output types.

- ❯❯ **General** - all objects have a General tab, and its settings are only relevant inside AuthorIT, not in any of the output types. It tells you things like:

  - ❯ The *description* of the object that will appear within AuthorIT.

  - ❯ The *output types* which the object will be published in.

  - ❯ The *object template* it is based on.

   ❱ **Document** - contains settings that apply only to your *printed Word document* output.

   ❱ **Windows Help** - contains settings that apply only to the *online Help* output types: Windows Help, HTML Help, Java Help, and Oracle Help for Java.

   ❱ **HTML** - contains settings that only apply to the HTML-based output types: HTML, XHTML, HTML Help, Java Help, and Oracle Help for Java.

Some objects may have only some of these tabs. For example, because the Title Page object only applies to your printed Word output, it only has a General tab and a Document tab.
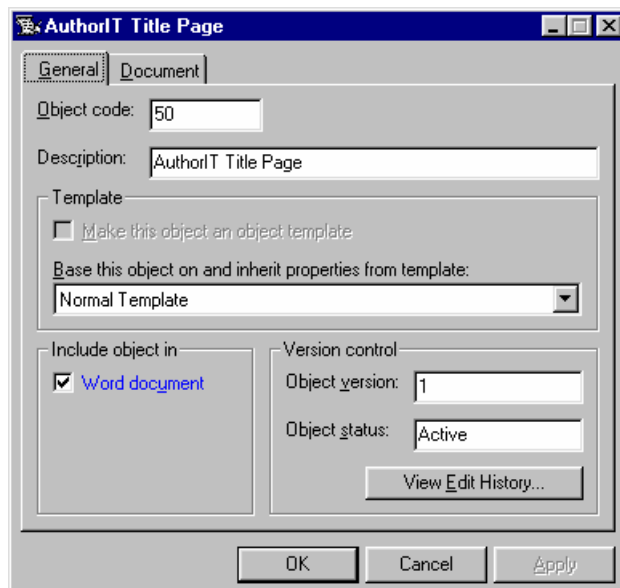
The Book Editor

The Book Editor is a sophisticated document editing environment incorporating both the *Book Contents* (see "Book Contents Editor" on page 68) and the *Topic Text Editor* (on page 71). It provides a familiar word processor type view of your Book, complete with a familiar *menu structure* (see "Book Editor Menu Bar" on page 70) and *keyboard shortcuts* (on page 75) to make using AuthorIT very easy.

This is where you will spend most of your time in AuthorIT.
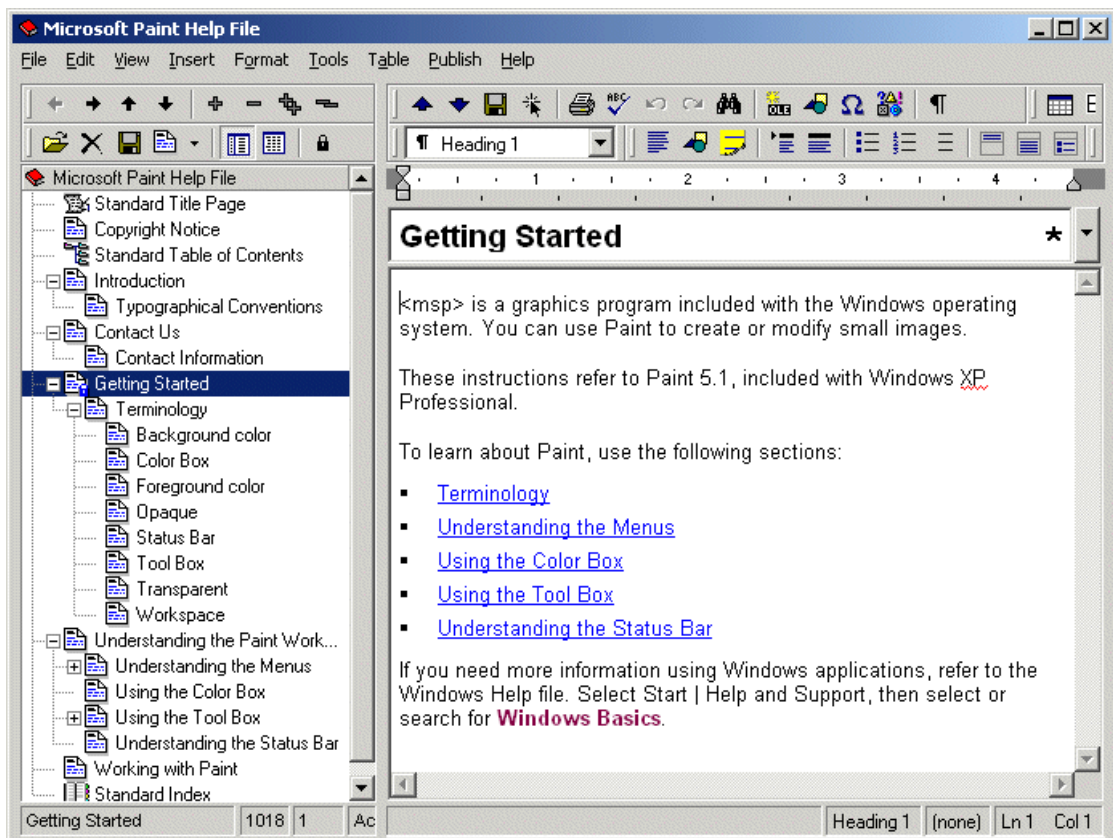
Book Contents Editor

The **Book Contents Editor** appears in both the *Book Editor* (see "The Book Editor" on page 67), and the Contents tab of the Book object.

It contains a structured hierarchical list of the objects that make up the content of your document. If you are familiar with Windows Explorer or with MS Word's Outline View, you'll find it easy to manage the structure.
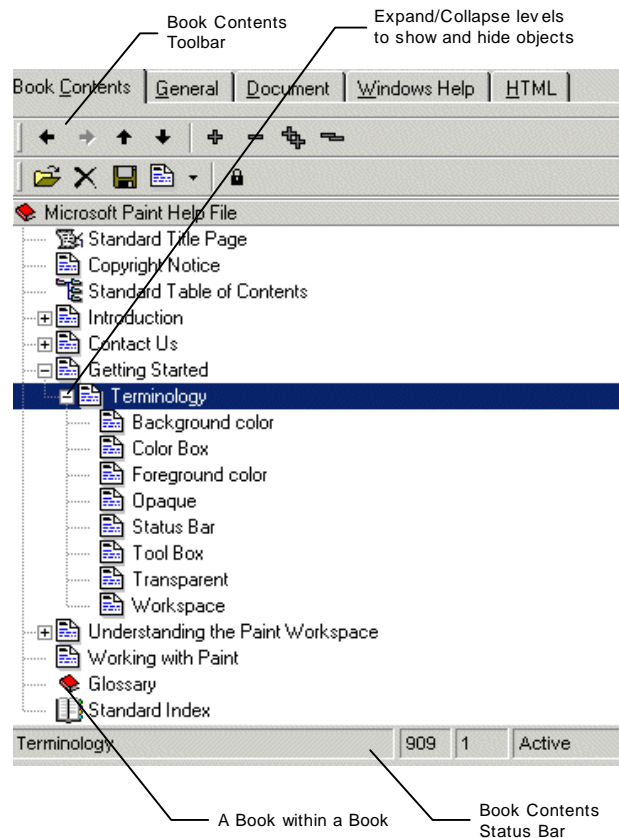
Book Contents Toolbar

Use the Book Contents Toolbar to manage the structure of your document, and to add or remove object from the Book contents.
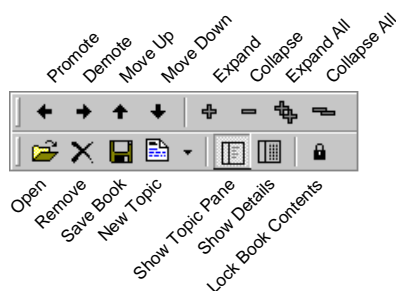
This Button	Does This
Promote	Promotes the selected object to be at the same level as its parent in the hierarchy.
Demote	Demotes the selected object to be the first child of the object immediately preceding it in the hierarchy.
Move Up	Moves the selected object before its preceding object in the hierarchy.
Move Down	Moves the selected object after the object following it in the hierarchy.
Expand	Expands the hierarchy to reveal the children of the selected object.
Collapse	Collapses the hierarchy to hide the children of the selected object.
Expand All	Expands the entire contents hierarchy to reveal all objects.
Collapse All	Collapses the entire contents hierarchy to hide all but the top level objects.
Open	Opens the selected object.
Remove	Removes the selected object and all of its descendents from the contents of the Book. When you remove an object from a Book, AuthorIT will prompt you to permanently delete it from the Library if it has no relationships with other objects.
Save Book	Saves the Book.
New Topic	Creates a new Topic. The drop down menu displays a list of available Topic object templates to choose from. That template is then remembered and used by each new Topic until a new template is selected.
Show Topic Pane	Only available in the Book Editor. Shows the topic pane.
Show Details	Only available in the Book Editor. Shows the details of the objects in the book contents.
Lock Book Contents	Locks the Book Contents to protect against accidental changes.

Book Contents Status Bar

The Book Contents status bar, at the bottom of the Book Contents tab of the Book window, shows information about the currently selected object in the contents.

This	Tells You
Description	Description of the currently selected object.
Object Code	Unique AuthorIT ID code of the currently selected object.
Object Version	Version number of the currently selected object.
Object Status	Version Status of the currently selected object.

Book Editor Menu Bar

The Book Editor menu bar contains the menus that you can use when working in the Book Editor. Each menu contains a list of commands and sometimes sub-menus.
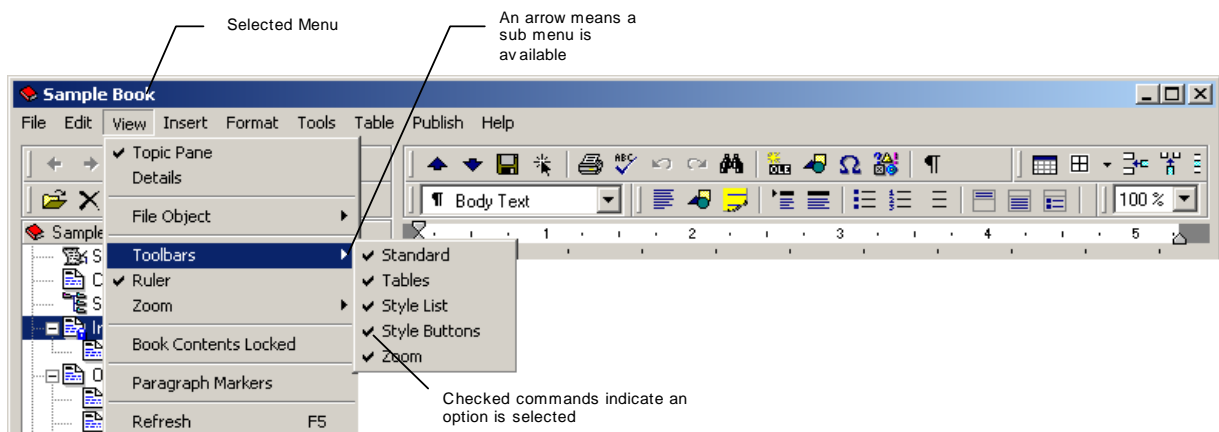
Some of the options carry out commands immediately, and others display a window so that you can enter additional information. If an option is followed by "...", it will display a window. Otherwise, the command is carried out immediately.

Topic Text Editor

The **Topic Text Editor** appears in both the right hand pane of the Book Editor, and the Topic Text tab of the Topic object. It contains a complete text editing environment, which works similarly to most word processors.
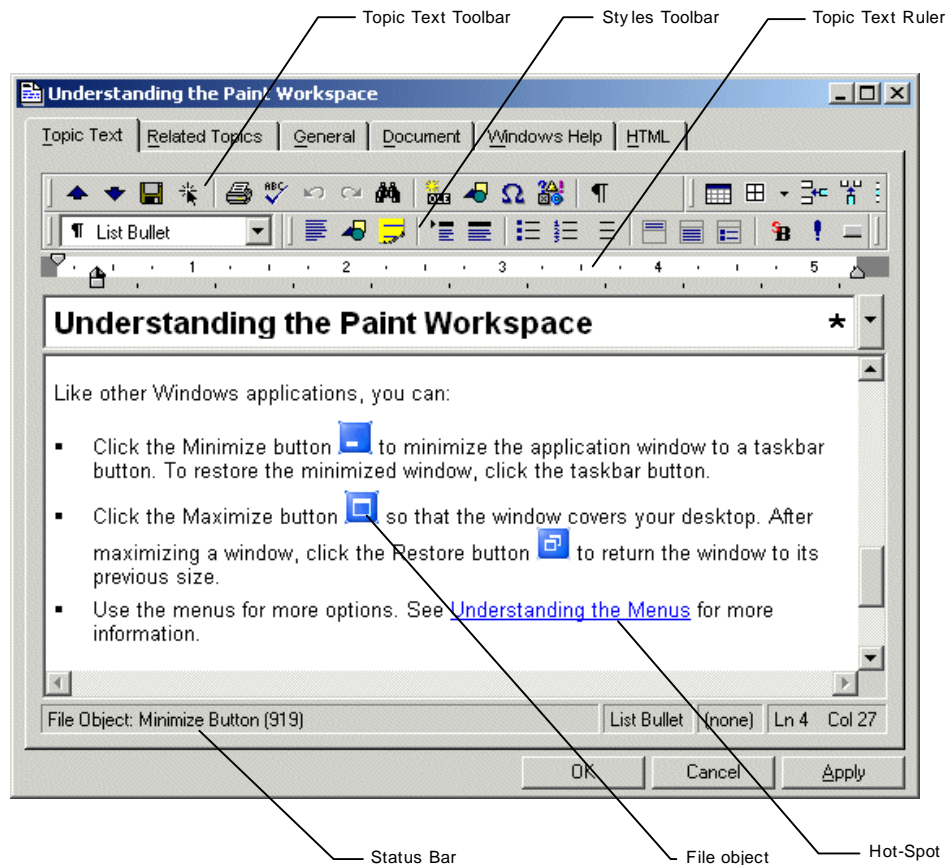
Topic Editor Toolbar

The Topic Editor Toolbar gives you quick access to commonly used commands in the Topic Editor.

This Button	Does This
Previous Topic	Moves to the previous Topic. If the Topic is opened from within a Book, the previous Topic in the Book Contents displays. If the Topic is opened from the Library Explorer, the Topic directly above it displays.
Next Topic	Moves to the next Topic. If the Topic is opened from within a Book, the next Topic in the Book Contents displays. If the Topic is opened from the Library Explorer, the Topic directly below it displays.
Save Topic	Saves the current Topic
Hotspot	Creates a link between the selected text and a Hypertext Link object, or a Macro Procedure object.
Print Topic	Prints the text and heading of the current topic. Included in the page footer, is the Topic name, date and time, and page number.
Spell Check	Spell checks the current topic
Find and Replace	Finds and optionally replaces text.
Insert New OLE Object	Inserts a file created by another application into the topic, as an OLE object.
Insert Picture	Inserts a picture file into the topic.
Insert Symbol	Inserts a symbol or special character into the topic.
Insert File Object	Inserts a File object of any type into the topic.
Show/Hide Control Characters	Shows or hides paragraph, tabs, line break, and end of cell control characters.

Styles Toolbar

The Styles Toolbar lets you quickly apply common styles to the paragraphs or characters in your topic. You can also apply styles by choosing them from the **Styles** drop-down list. You can customize the Styles toolbar with your own styles and icons. Before you start playing, the default looks like this:
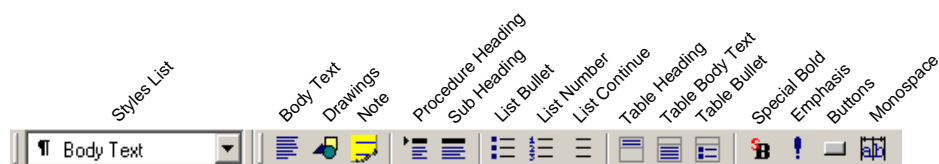
Topic Editor Status Bar

The topic editor status bar, at the bottom of the topic editor, tells you about the current state of the topic or the task you are performing.

This	Tells you
File/Link Information	If your cursor is on a **Hyperlink** an **Embedded Topic** or a **File** object, the Description and Code number of that object
Paragraph Style	Name of the paragraph style at the current cursor position.
Character Style	Name of the character style at the current cursor position.
Insertion Point	Current paragraph number and character number of the current cursor position.

File Preview pane

The **Preview pane** of the File object lets you preview the graphics, OLE object or other files for each of your document's outputs. You can also use this tab to insert and save an embedded picture or OLE object, instead of linking to an external file. AuthorIT takes care of converting the embedded image to the appropriate format for each output.
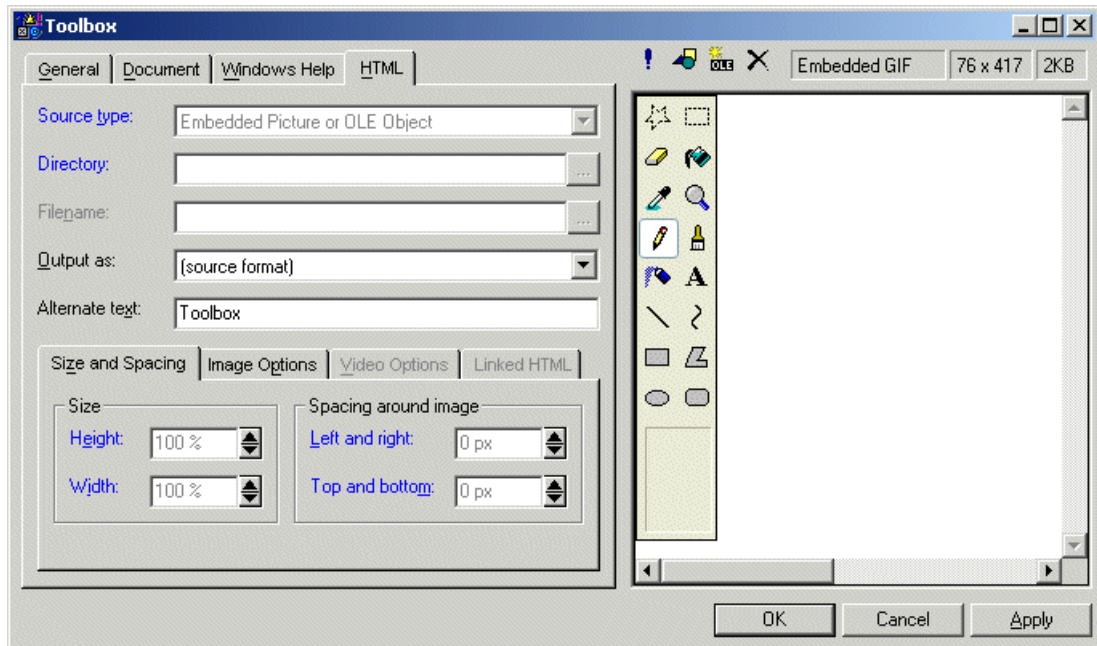
File Preview Toolbar

The File Preview Toolbar provides quick access to all the commands in the preview pane.

Button	Function
Refresh Preview	Refreshes the preview.
Insert Embedded Picture	Inserts an embedded picture.
Insert Embedded OLE Object	Inserts an embedded OLE object.
Delete Embedded Image	Deletes the embedded picture or OLE object.

Keyboard Shortcuts

You can quickly carry out common tasks using a combination of keys. Most of the shortcut keys carry out the same functions in other applications.

This Combination	Does This
CTRL + O	Open
CTRL + S	Save
CTRL + P	Print
CTRL + Z	Undo
CTRL + Y	Redo
CTRL + X	Cut
CTRL + C	Copy
CTRL + V	Paste
CTRL + A	Select All
CTRL + F	Find
CTRL + H	Replace
CTRL + K	Insert Hyperlink
CTRL + N	New
CTRL + D	Duplicate
CTRL + <	Show Previous Topic
CTRL + >	Show Next Topic
CTRL + SHIFT + -	Insert Non-breaking Hyphen
CTRL + SHIFT + (Space)	Insert Non-breaking Space
CTRL + SHIFT + 8	Show/Hide Control Characters
CTRL + (Space)	Remove Character Style
F1	Help
F5	Refresh
F7	Spell Check
ALT + F4 or ESC	Close Window
SHIFT + F3	Toggle Case
DEL	Delete or Remove the selected objects or text

You can assign your own keyboard shortcuts to quickly apply styles.

The AuthorIT Beginners Tutorial

Welcome. If you're new to AuthorIT and you want to find out how it works, then you're in the right place. The following chapters will take you step by step through creating your first document. Pull up a chair. During the next half hour or so, you'll learn how to create a document using AuthorIT, the true single-source authoring tool.

Note: Before you start, make sure you have the sample files, which should have been installed with AuthorIT into the **..\AuthorIT\Data\Tutorial** directory. **..\AuthorIT** is the directory on your computer where you installed the AuthorIT program. If you accepted the default values when you were installing, the full path is **C:\Program Files\AuthorIT\Data\Tutorial**.

Other Information

This tutorial only covers the basics of AuthorIT. More detail can be found in the *Using AuthorIT* Guide, the online *AuthorIT Knowledge Center* (http://www.author-it.com/kc/index.mv), or other *product documentation* (see "Using AuthorIT's Product Documentation" on page 7). If you find a reference in this document which does not specify a page number, you'll find that topic in the *Using AuthorIT* Guide.

Chapter 6

Creating Your First AuthorIT Document

This chapter takes you through a step-by-step tutorial to create your first AuthorIT document. If you are not already familiar with the AuthorIT interface, we recommend that you first read the Introducing the AuthorIT Interface chapter - and you can always go back to that section later if you need to.

In This Chapter

Creating a New Library

An AuthorIT Library contains all of the books, objects, relationships and other information you work with. Unless you work with a variety of different standards (for different clients, for example), you will usually only need one Library. So, creating a new library is not something you will have to do often - but we need one for this Tutorial.

Note: If AuthorIT is already running, please close it before beginning this Tutorial.

To Create a New Library

1) Start AuthorIT. The *Create/Open Library* window appears.

Note: If the window does *not* appear it means that you have turned off the "Show Open Library Dialog" option. In this case, choose **File > New Library**, then go directly to Step 3.
If the New Library command is grayed out, choose **File > Close Library**, then try the New Library command again, then go to Step 3.

2)   Click the **New Library** tab. It should look something like this:
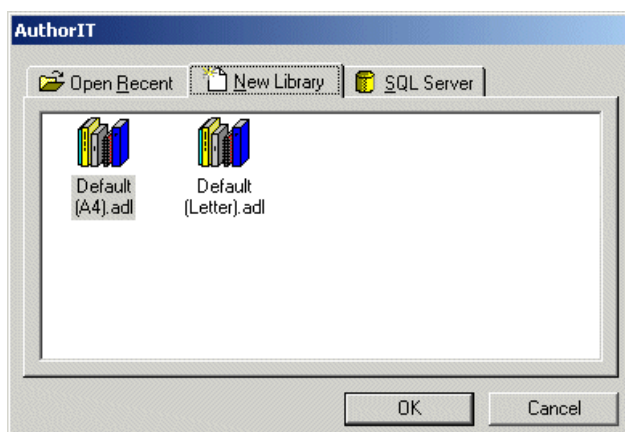
3)   Choose the **Default(A4).adl** or **Default(Letter).adl** Library template, then choose **OK**. The *Save New AuthorIT Library as* window appears.
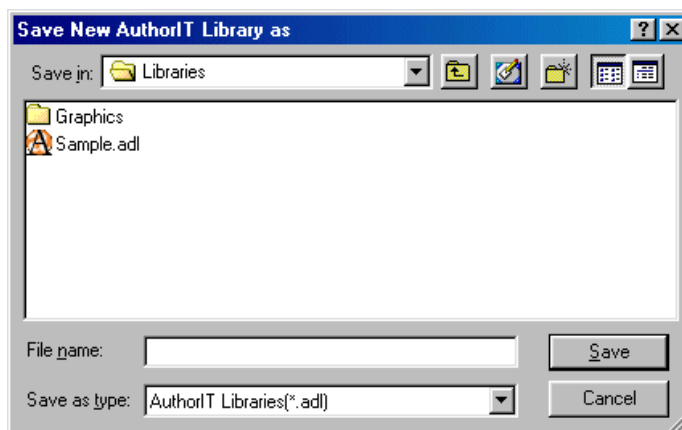
4)   Type `Tutorial` as the file name for the new Library, then choose **Save**. A new library is created.

Logging in to the Library

AuthorIT Libraries can be used by a single user, or by many people at the same time. Each user must log in to the library. This helps keep track of who does what and when they did it. It also controls what privileges are available to each person.

If you are using the Desktop Edition then this step will not apply to you so just move on to the *next step* (see "Working in a New Folder" on page 82) in this tutorial. If you are using the Workgroup or Enterprise Editions, then the Library Login window appears.

💡 If you know you'll be logging in to the same Library under the same User Account name, then you can turn on the Automatic Login feature by ticking the checkbox before you login.
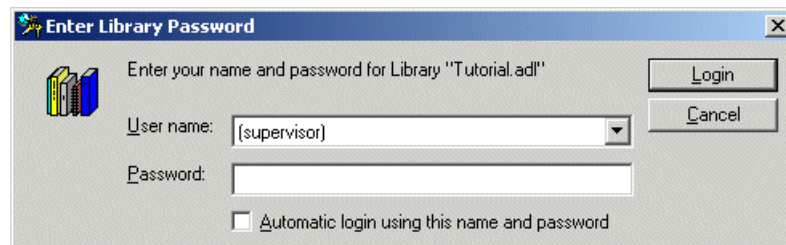
For this tutorial, you will be the only person using the library and you can just log in as the (supervisor).

To Login to the Library

1) Leave the **User name** as (supervisor).

2) Leave the **Password** blank.

3) Choose the **Login** button.

Note: When you start using your real library, the Library Administrator should create a log in for each user. While it may seem cool to log in as supervisor, using your own name is far more useful.

Working in a New Folder

The Library Explorer is your base for working with all the objects in your Library. This is where you store and select the components that you'll assemble into documents.
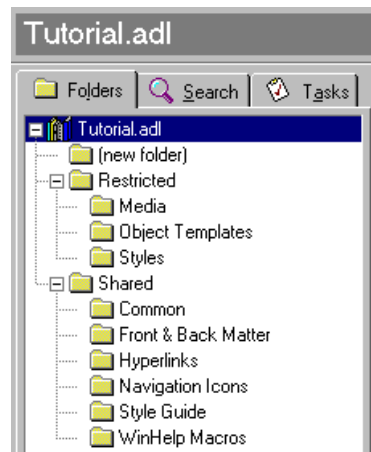
Before beginning work on a new project, it is good practice to create a Folder to contain the new information. The sample library has a new folder already which we will rename to **Notepad** (the name of our new project).

To Rename a Folder

1) Right-click the **(new folder)** Folder, then from the shortcut menu choose **Rename...**
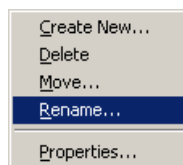
The Rename Folder window appears.

2) Type `Notepad` (the new folder name), then click **OK**.

A little bit about Folders

Folders are a logical way to arrange objects within your Library. They can have security privileges set that determine who can create, modify, delete or even view objects within them.

▸ Moving an object from one Folder to another will not break any links it has with other objects.

▸ When a Folder is created, it inherits all the security settings from its parent Folder.

▸ If a Folder is moved, it retains its security settings.

▸ If using folder security, you must have permissions to delete the object in the Folder it is leaving and create the objects in the Folder it is entering when moving an object.

Add some content

Within a Book there are two main types of content objects. These are the **Topic** object and the **File** object. To begin with, think of Topic objects as *text and tables* and File objects as *graphics*. We are going to add a series of Topic objects and some File objects into our Book using several different methods.

Importing existing documents

Often, the information we want in our Book exists outside our Library. We can bring this information into the Library using the Importer. For this example, we will import a rich text format (.RTF) document.

To Import a RTF document

1)   From the **Import** menu on the main screen select **Rich text format (.rtf)**. The *Select a file to Import* window appears.
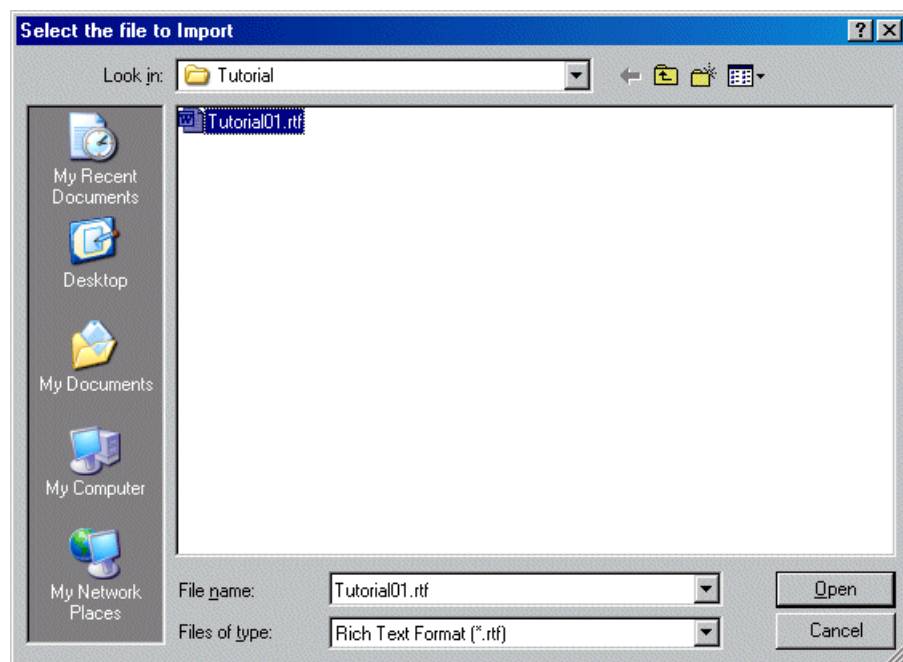
2)   Navigate to your `AuthorIT\Data\Tutorial` folder, select the file `Tutorial01.rtf`, then choose **Open**. The AuthorIT Import Wizard appears and guides you through the importing process.

3) The first stage analyzes the document and decides where the document will be broken up into topics based on the styles applied to the contained text. While many styles have been found in this document, the styles *heading 1* and *heading 2* will cause a new Topic to start with either the *Chapter* or *Normal template* applied. The other paragraph styles, while detected and mapped, do not start a new Topic.
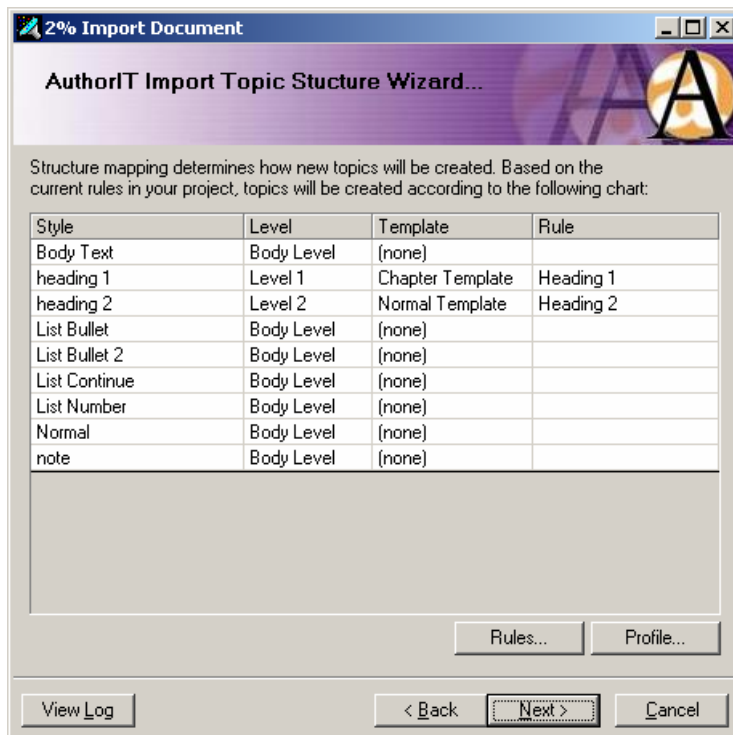
4) Nothing needs to be changed, so choose **Next** to continue.

The second stage looks at the styles in the document being imported, and maps them to the styles that exist in your Library.
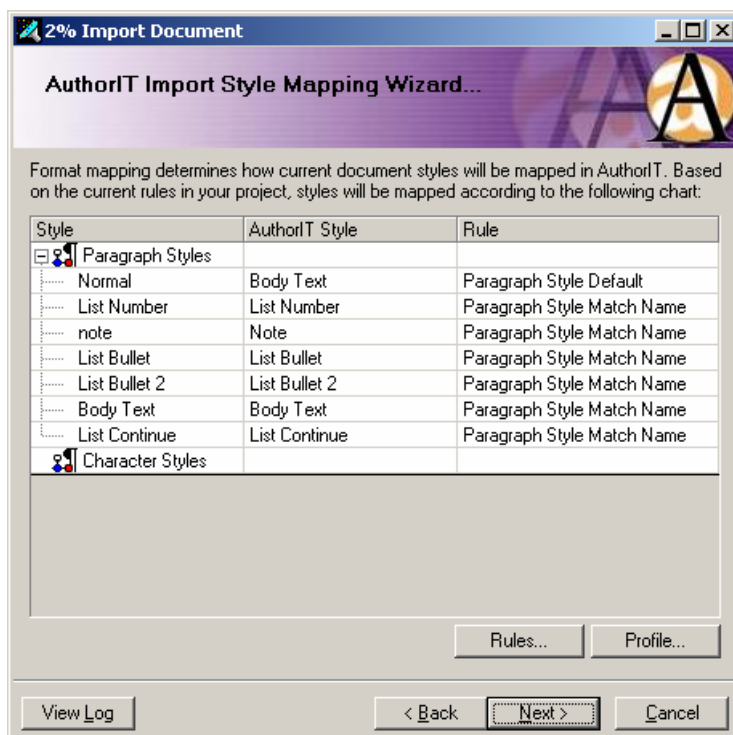
5)   Nothing needs to be changed, so choose **Next** to continue.

The third stage displays an outline level of how the document will be imported.

◄ ➤ ⬆ ⬇ When content is being imported, it is often necessary to rearrange the order it occurs in and the outline levels. The up and down arrows change the order of the content. The promote and demote (left and right) arrows change the outline level.
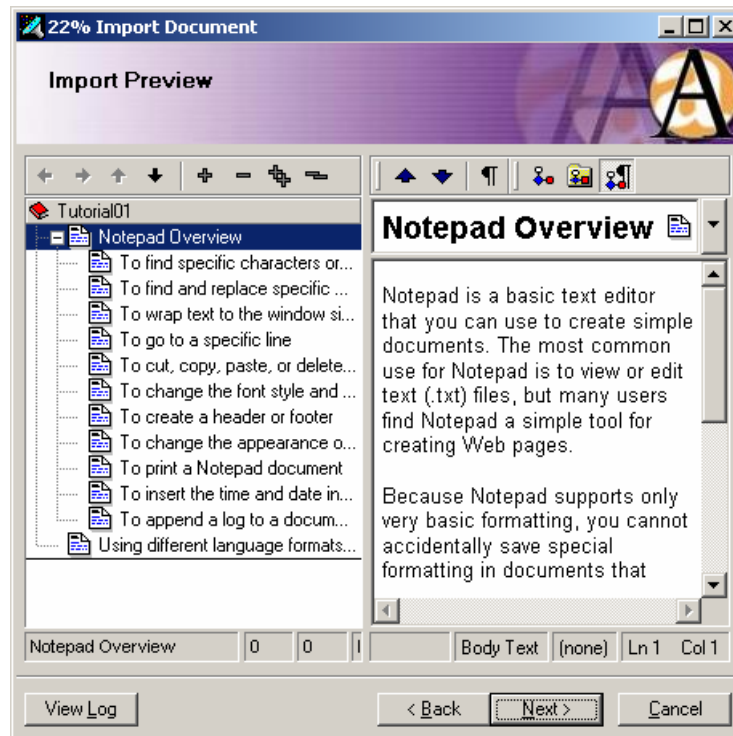
6) Nothing needs to be changed, so choose **Next** to continue. The document is imported.
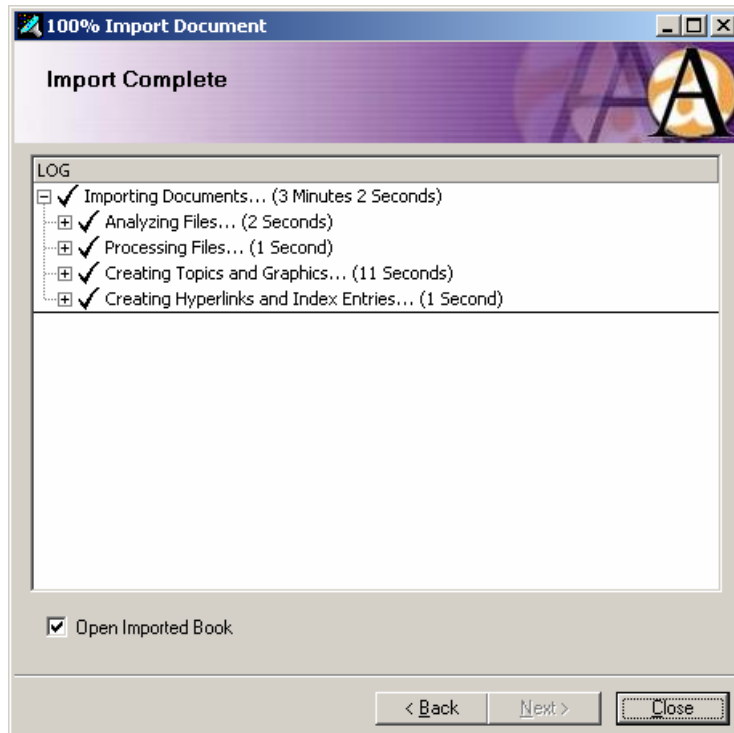
7) Ensure the **Open Imported Book** option is checked, then choose **Close**. The freshly imported Book appears.
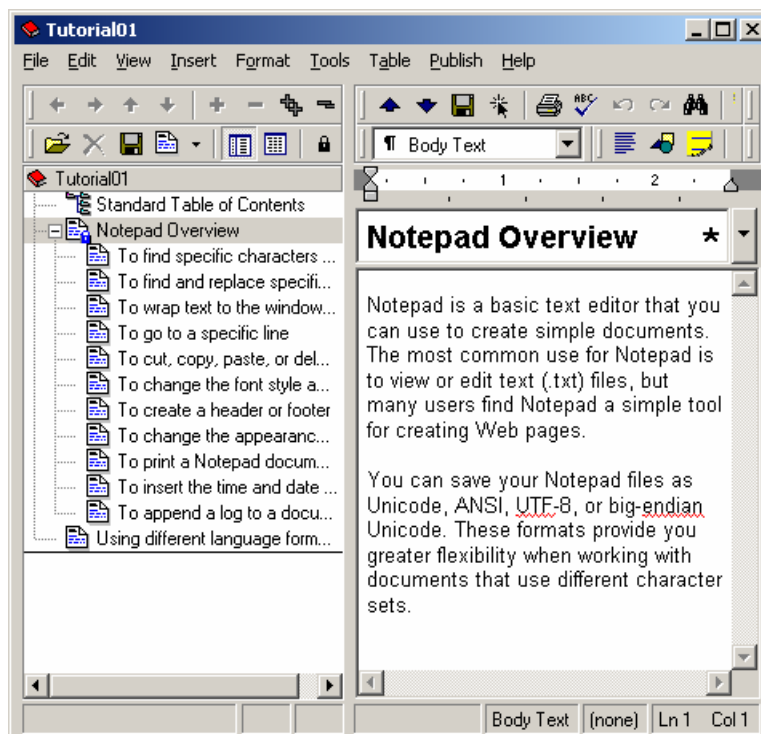
8) Examine the content, then close the new Book by choosing **Close** from the Books **File** menu.

A new Folder *Tutorial01* (named after the imported document Tutorial01.doc) was created. The new objects created during the Import were placed in this folder.
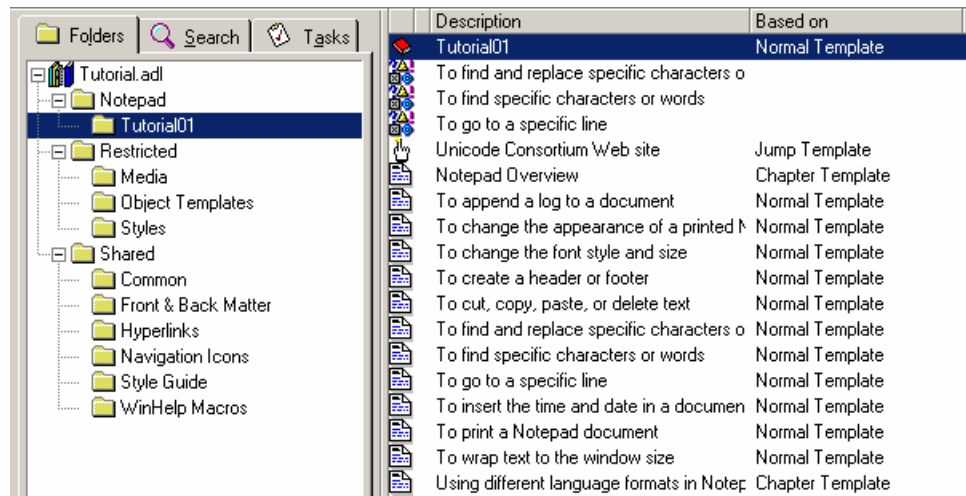
Opening your New Book

Anywhere objects appears in AuthorIT, they can be opened by double-clicking. However, Book objects may be opened two ways. To control which way a Book is opened, right-click the Book and select from the shortcut menu.

The last way that a Book was opened (as a Book object or in the Book Editor) will be the default behaviour when you double-click it. The default behaviour when double-clicking an object is indicated by the bold option (in this example, **Open in Book Object** is the default behaviour).
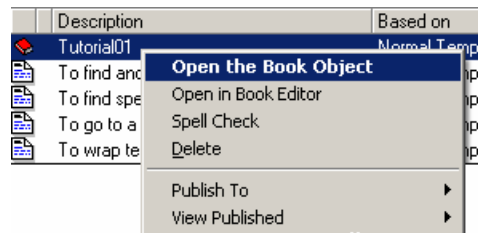
Open the Book Object

Opening a Book as an object allows setting of specific attributes for *Document*, *Windows Help* and *HTML*. The Book contents tab is displayed, which allows modification of the content within the Book. The Book object is the default view when creating a new Book and is primarily used when changing advanced settings, or creating a Book Template.

Open in Book Editor

When the Book is opened with the Book Editor, only the contents of the Book are visible. The tabs containing the advanced settings for the Document, Windows Help and HTML are hidden. However, there is a second pane (on the right) which is a Topic Editor. This view is best for creating content. It is the main editing screen in which most of the authoring work is done.

Examine the Book Object

1) Right-click the new Book, then choose **Open the Book Object** from the shortcut menu.

2) Move through the tabs and add information in the **Super title**, **Sub title**, **Version** and **By** fields.

3) Choose **OK** to save and close the Book.

> **Note:** The *Apply* button will save the changes, the *OK* button will save the changes and close the object. This works for all windows where you see these buttons.

Create a New Topic

We are going to create a new Topic, from scratch. When we create this Topic, we want it in the **Notepad** Folder we created earlier.

To create a New Topic

1) In the **Tutorial01** folder, right-click on the **Tutorial01** Book, then choose **Open in Book Editor** from the shortcut menu.

2) Choose the **Notepad** folder we created earlier. New objects are created in the current Folder, so we want the Notepad folder to be our current folder.

3) From the book contents, choose the **Standard Table of Contents** object. New objects are added in the Book Contents immediately below the selected object, we want our new Topic to be added immediately after the table of contents.

4)   From the *Book Contents toolbar* (on page 68), click the drop-down arrow next to the New Topic button, then choose **Normal Template**.
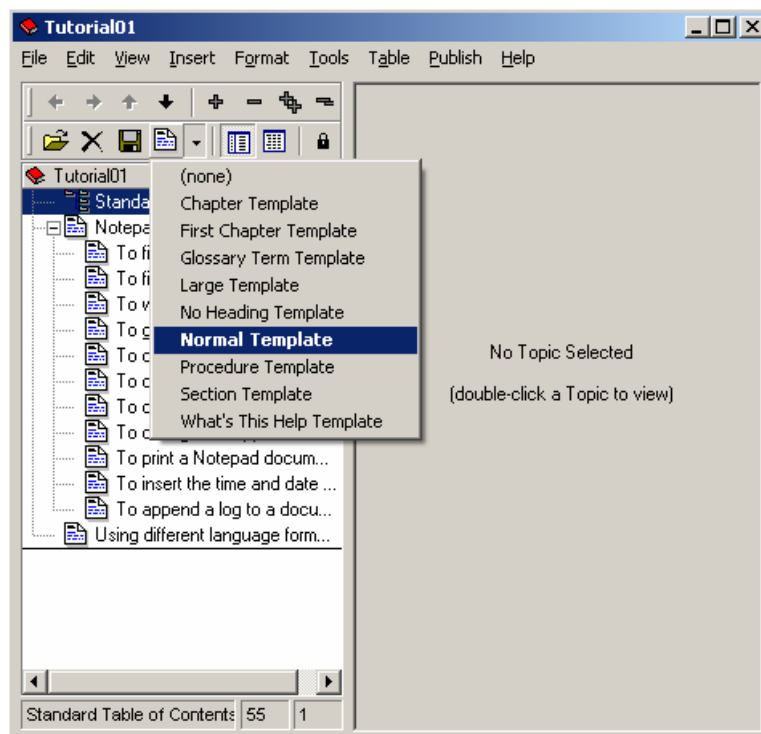
A new Topic object appears in the Book Contents called *New Topic*. As the Book Editor is being used (not the Book object) the right-hand pane is now enabled for editing.

There are two Save buttons in the Book Editor, one above the Contents (on the left) and one in the Topic Editor (on the right). These save different things. The one above the Book Contents saves the Contents (which objects are in the Book and in what order) and the open topic if it has changed. The one above the Topic Editor only saves the Topic text and headings.

5) Type `Introduction` into the Topic Heading field and add some text into the Topic Text area, as follows:
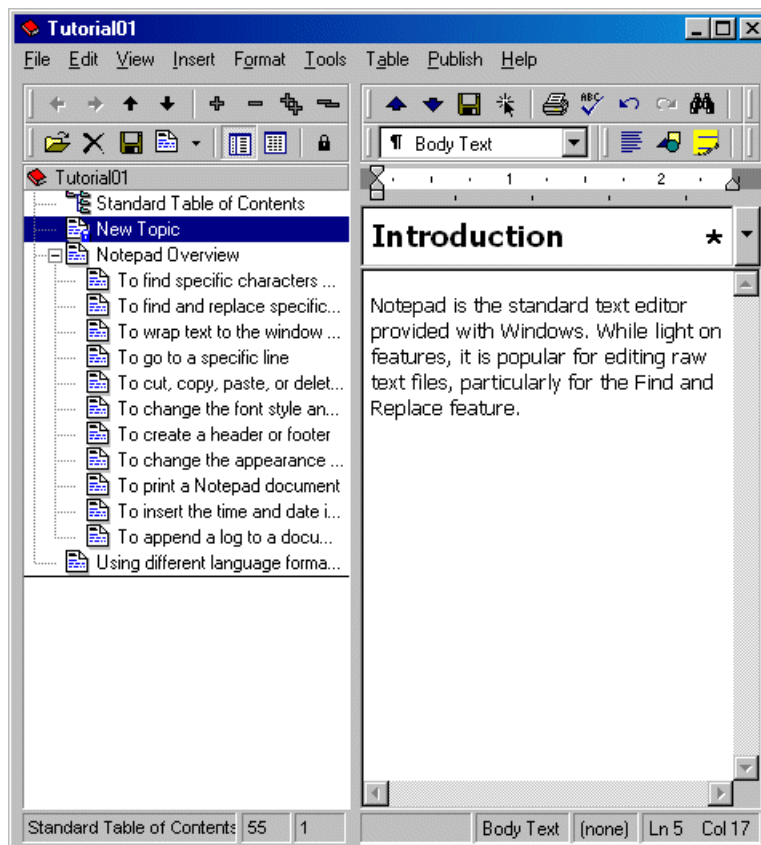
We will now add a Trademark (™) symbol after the word `Windows`.

6) Move the cursor after the word Windows (this is to be the insertion point for the symbol).

7) From the **Insert** menu select **Symbol...**
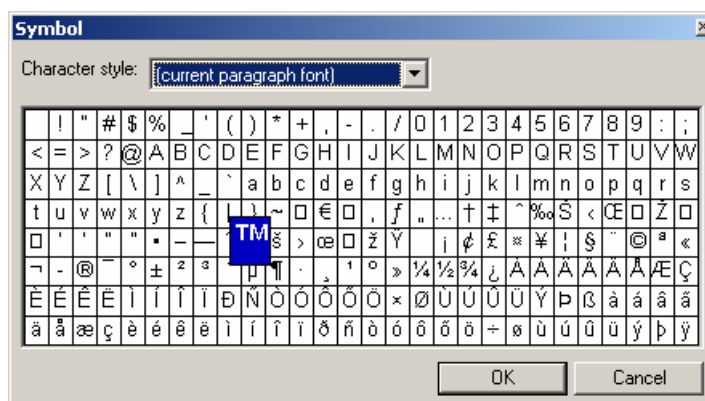
8)   The Symbol dialog appears, select the **TM** symbol with the mouse and choose **OK**. A *TM* symbol is inserted into the Topic text.
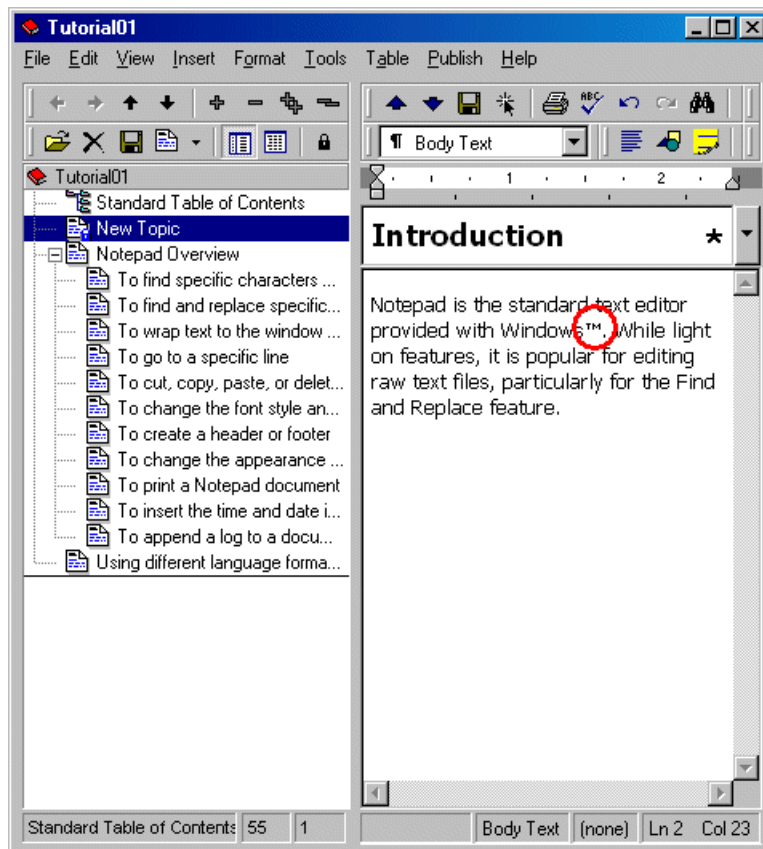
9)   Use the **Save** button [icon] in the Topic Editor toolbar to save the new content.

Reuse existing content

One advantage of managing all your documents in one Library is the ability to reuse information. A good example of objects that gets reused are:

[icon]   Title Page objects

[icon]   Table of Contents objects

[icon]   Index objects

[icon]   Topic Objects

We will add a Title Page object, an Index object and some existing Topics to the Book. A Table of Contents was already added during the earlier import.

Add a Title Page

The Title Page object is a document only object and represents the title page of a printed document. The inclusion of this object in a Book will cause a title page to be created in the printed document.

The Title Page object that exists in the Library pulls information out of our Book to create the title page.

To Add a Title Page Object

1)   Open the **Tutorial01** Book object in **Book Editor** view.

Note: The Book Editor is often sized to use most or all of the screen. To see Folders (and the objects within them) on the main screen, the Book Editor may need to be resized or moved.

2)   From the main window, select the **Shared\Front and Back Matter** folder. A list of objects contained within the folder appears.

3)   From this list of objects, drag and drop the **Standard Title Page** object into the contents pane of the Book Editor. objects dropped are always added immediately below and at the same level as the object they are dropped on.
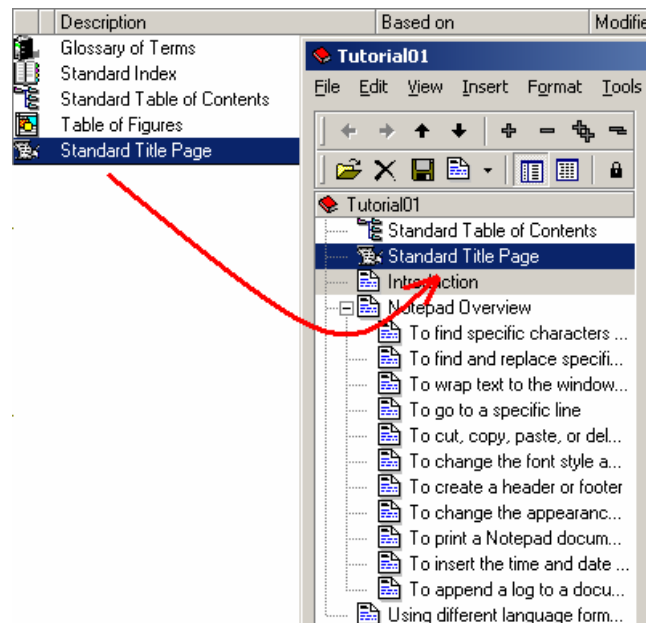
Add an Index

An Index object represents an index in both the printed and on-line documentation. The Index object contains a hierarchical outline list in which the Index Entry objects can be arranged to form the structure of the index. When published, the index can be based on all headings in the document, any cross-references, and any Index Entry objects that contain objects found in the Book being published.

For this example, we will use the **Standard Index** object that already exists in the Library.

To Add an Index Object

1)   Open the **Tutorial01** Book object in **Book Editor** view.

2)   From the main window, select the **Shared\Front and Back Matter** folder. A list of objects contained within the folder appears.

3)   From this list of objects, drag and drop the **Standard Index** object into the contents pane of the Book Editor.
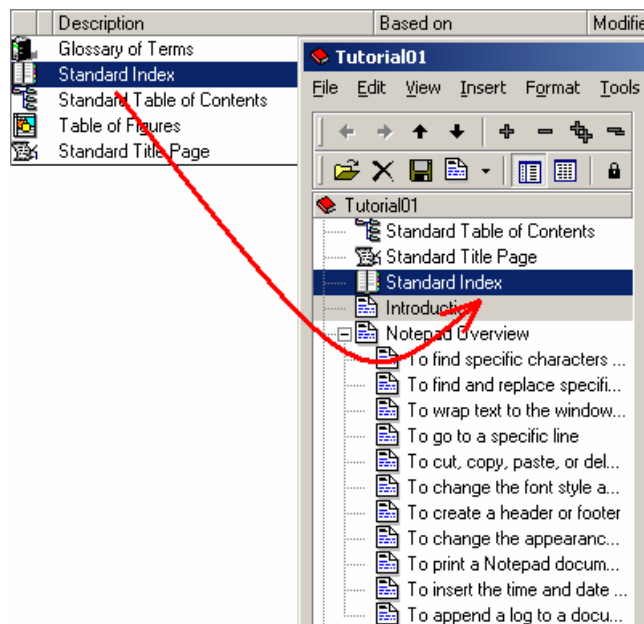
Reusing Existing Topics

When you write a new Book you'll usually have some topics already written, which you can simply reuse. If they're relevant to more than one Book, you'll probably want to store them in the Shared\Common folder. When you're working in a team with AuthorIT, everyone can see them easily (depending on their security permissions, of course).

To Add Topics

1) In the Library Explorer select the Shared\Common folder. AuthorIT displays all the shared objects in this Library in the *Object List* (see "Object List pane" on page 63). We have Copyright Notice and Typographical Conventions objects -- let's use them!

2) Adding these topics to your Book is as simple as dragging and dropping. You may need to move your Book window slightly, so that you can see the contents of the Object List.

3) Hold down the CTRL key while selecting both the **Copyright Notice** and **Typographical Conventions** objects, then drag and drop these into your Book's Contents.
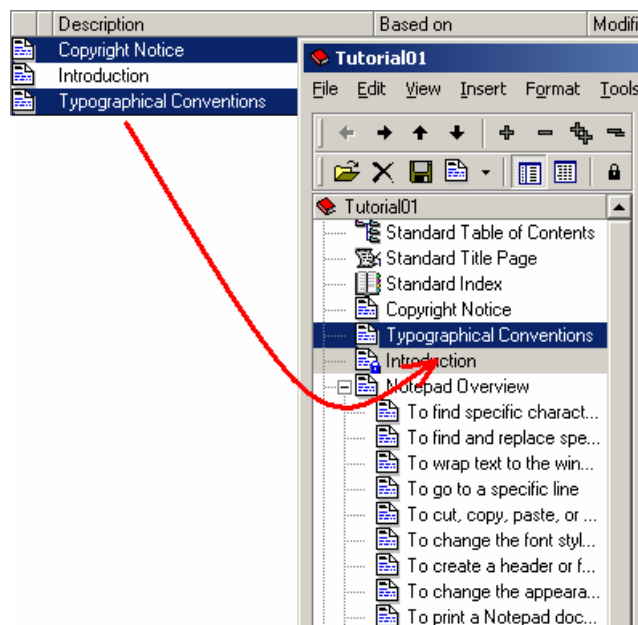
You'll notice that the Object List still contains the Copyright Notice and Typographical Conventions -- you can reuse the same topic over and over, and they are all actually the same object, not just disconnected copies. If you change one instance of the topic, they all change at once.

4) Choose **Save** 💾 from the Book Contents toolbar to save these changes.

Rearrange the Content

When content has been added to a Book it is often necessary to rearrange the order and outline level it occurs at.

Some objects, such as Table of Contents objects and Index objects, can only occur at the uppermost outline level. Some objects (such as Topic objects) can have children, while others cannot.

To Rearrange the contents of the Book

1) Select any objects you wish to move. Holding down the CTRL key while you click on Objects will allow you to select more than one Object at a time.

Use the up, down, promote and demote arrows to change where the object appear in the contents.

‣ The up and down arrows ⬆ ⬇ change the order of the objects.

‣ The promote and demote arrows ⬅ ➡ change the outline level of the objects.

-OR-

Drag and drop them to their new location

2) Arrange your Book Contents as follows:
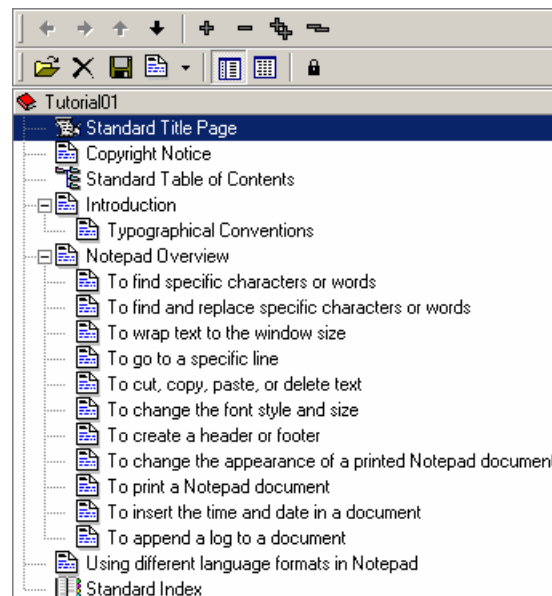
3) Click the **Save** button 🖫 above the Book Contents to save the changes to the book.

Ensure the correct Templates are applied

The Templates that objects are based on control such factors as page numbering, margins, sections and chapters. The Book Editor allows you view the structure of your Book and to change the Template an object is based on quickly and easily.
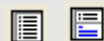
The toolbar buttons Show Topic Pane and Show Details allow you to toggle quickly between a more detailed object view and the Topic Editor.

To View and Change the Topic Templates

1) Click the **Show Details** button from the Book Contents toolbar.

2) Select the **Introduction** Topic.

3) Right-click the object and choose **Apply Template > First Chapter Template** from the shortcut menu. The First Chapter Template is applied.

Using multi-select you can apply templates to many objects at once.
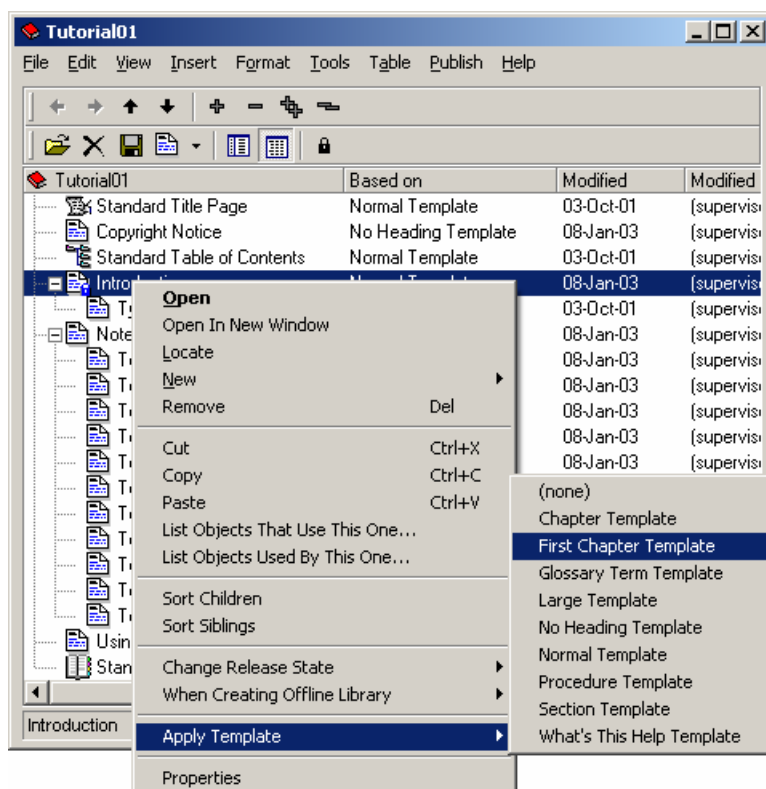
4) Click the **Show Topic Pane** button from the Book Contents toolbar to return to the previous view.

Inserting a Picture into a Topic

To include external files (especially graphics) in your document, you'll use a File object. Let's add a picture to a topic.

> The File object is used to include any external files in your document, usually graphics. You can link or embed any pictures, OLE objects, or files created and maintained with another application. The File object defines how the external file appears in your different output formats - including scaling and final file format for graphics.

To Insert a Picture into a Topic

1) Make sure the Notepad Library Folder is selected, so the new File object is created there.

2) From the Book's Contents, open the **To change the font style and size** topic (by double-clicking it).

3) We'll insert our picture *between the first two paragraphs*. Put the cursor at the very end of the first line, then press ENTER to create a new paragraph, ensure the cursor is now in the new paragraph.

4) From the **Insert** menu, choose **Picture...**, a File open dialog appears.

5) Navigate to the `AuthorIT\Data\Tutorial` directory and open the `Font dialog.gif` file.
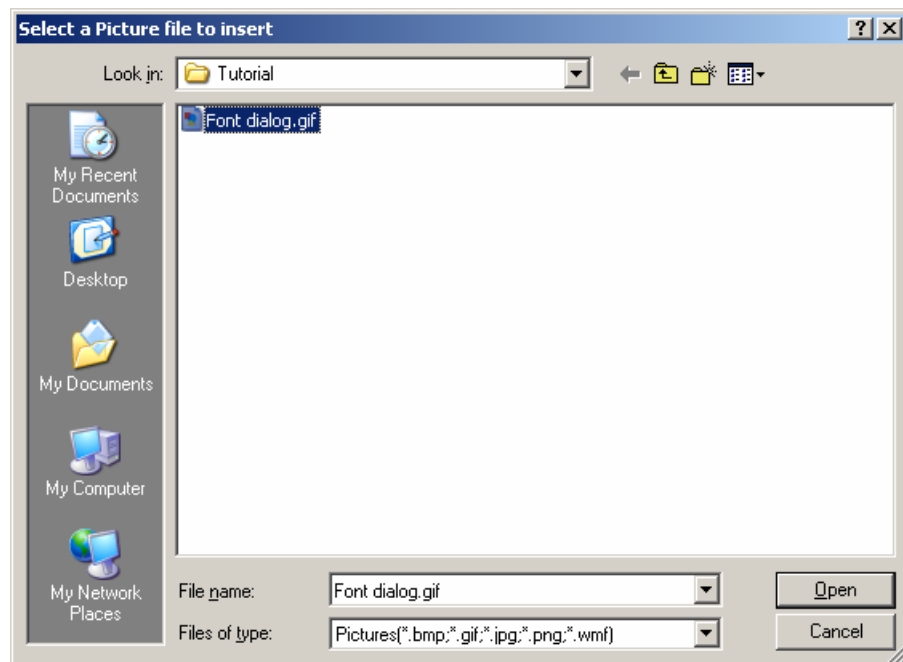
Note: If you're not sure where to find the Tutorial directory, ask your AuthorIT Administrator for help.

6) A File Object appears, choose the **General** tab.

7) In the **Description** field type `Font Dialog`

8)   In the **Based on** list select **Embedded GIF File Template**.
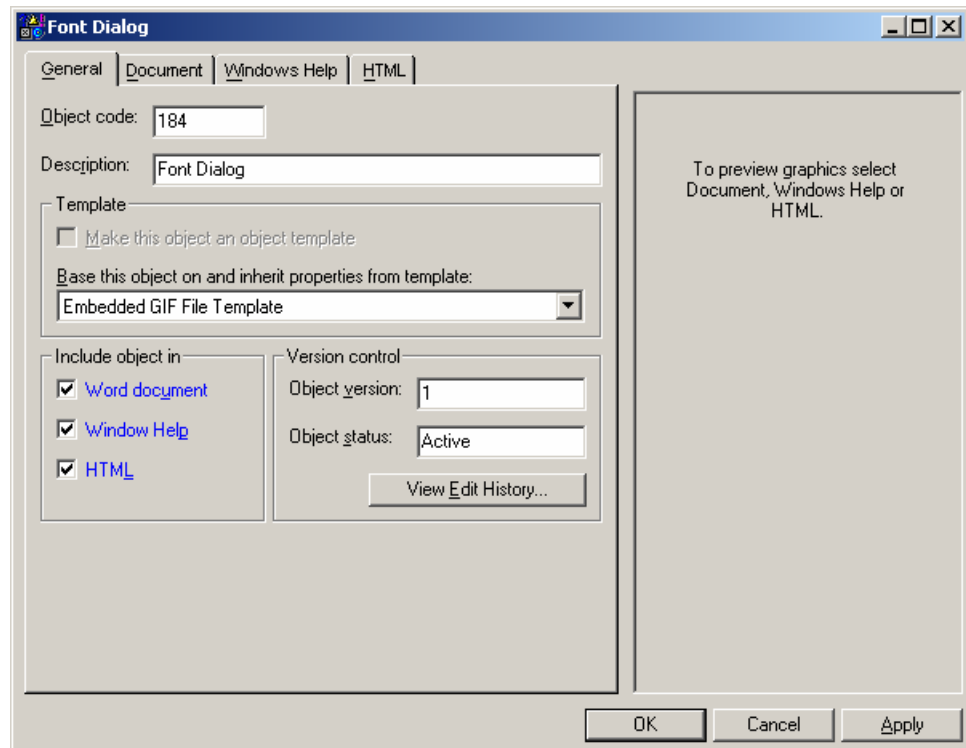
For more details about choosing the right template for your File objects, and for other considerations when working with graphics, read the *Using AuthorIT Guide*.

You'll notice that the template you chose has preset most of the File object's properties, so AuthorIT knows how to treat the picture in your different output formats. Feel free to look at the settings on the Help and HTML tabs, but please don't change any.

9) Choose OK to save and close the File Object. Your picture is inserted into the topic at the cursor position.
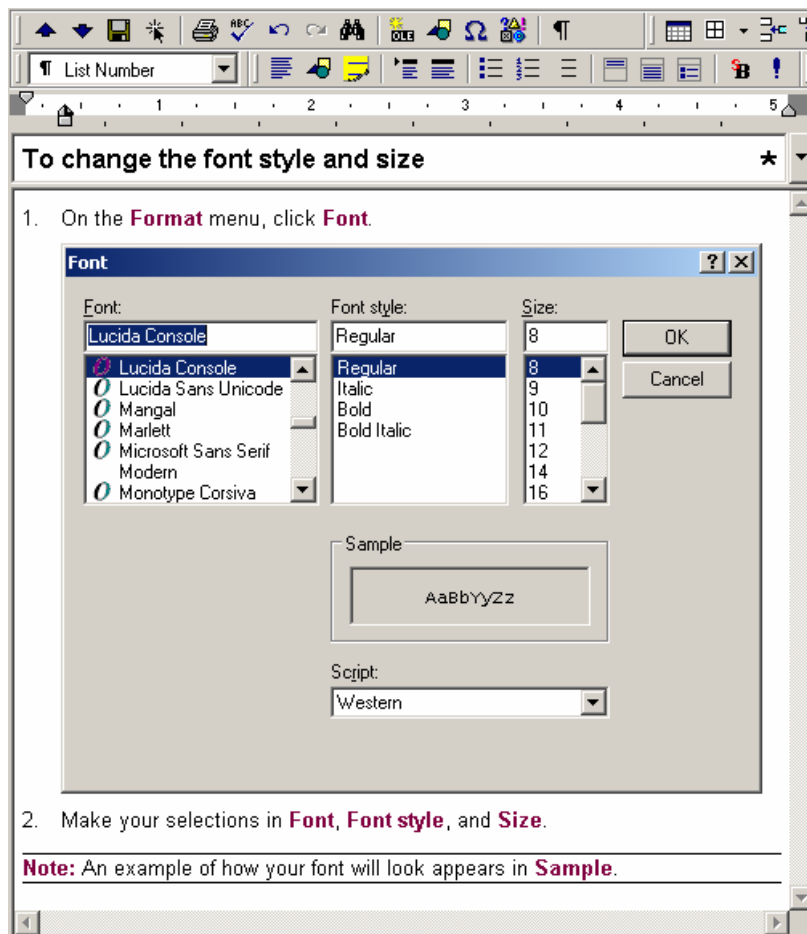
10) We don't want the list to number the picture so click on the picture, then from the **Styles drop down list** on the *Topic Text Toolbar* (see "Topic Editor Toolbar" on page 71), select List Continue.

11) Save the topic.

Create a Hypertext Link

A Hypertext Link object represents one or more links between individual characters in a Topic object and other Topic objects and/or Internet URL locations. When published these links become hypertext jumps in the Help and HTML, and page number cross references or footnotes in the printed documentation.

Hyperlinks exist in the Library as objects. Hyperlink objects contains more information than just the target of the link. Because all the content in our Library can be published to printed, help and web outputs, the Hypertext link object holds information on how the link will appear in all outputs. When you print a document out, having an underlined word (like on a website) isn't any use. Therefore, in printed output, the default Hypertext Link objects in the sample library will insert text beside the anchor text, giving a page reference.

To Create a Hypertext Link to a Topic within the same Book (by dragging and dropping).

1) Click the **Show Topic Pane** button 🖿 from the Book Contents toolbar.

2) Open (double-click) the **Introduction** Topic.

3) In the first paragraph, highlight the text **Find and Replace**. This will be the *anchor text* for our new Hypertext Link.

4) In the Book Contents, select (single-click) the **To find and replace specific text** Topic. This Topic is to be the *target* of the Hypertext Link object.

    In hypertext link terminology; "anchor text" is the text you click on, "target" is the location the link goes to.

5) Drag the Topic **To find and replace specific text** and drop it *onto the highlighted text* within the Topic Editor, then from the shortcut menu that appears, choose **Create Link Using > Jump Template**.
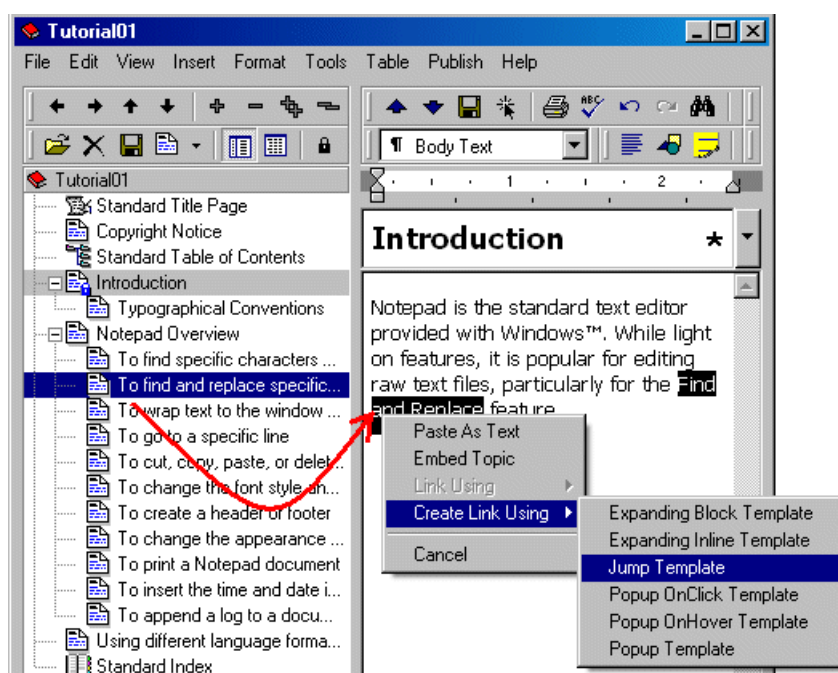
A new Hypertext Link object is created and the anchor text will change to blue and underlined.

6) Save the Topic.

Chapter 7

Publishing Your Document's Outputs

Now for the exciting bit - publishing your document in its various output formats.

In This Chapter

Publish

The whole point of putting this information into a Library is so it can be published to one or more outputs. Typically, information like this would be published as a Windows Help (.hlp) or Compiled HTML Help (.chm) file and a printed manual.

To Publish a Book to HTML Help

1)   From the **Publish** menu, select **Publish To > HTML Help** menu.
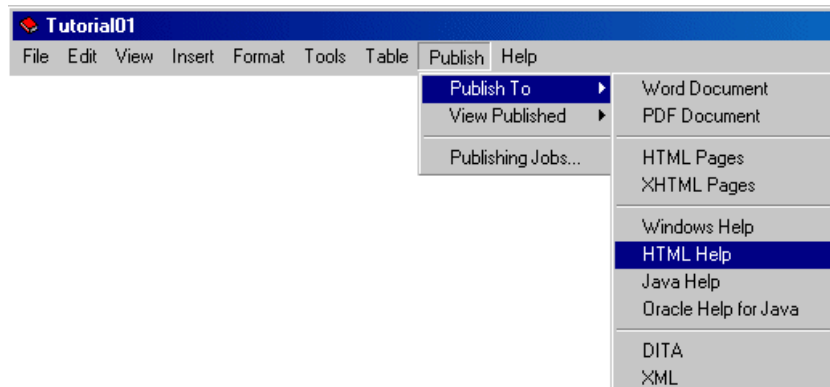
A progress dialog will display as the Book is published to HTML Help.
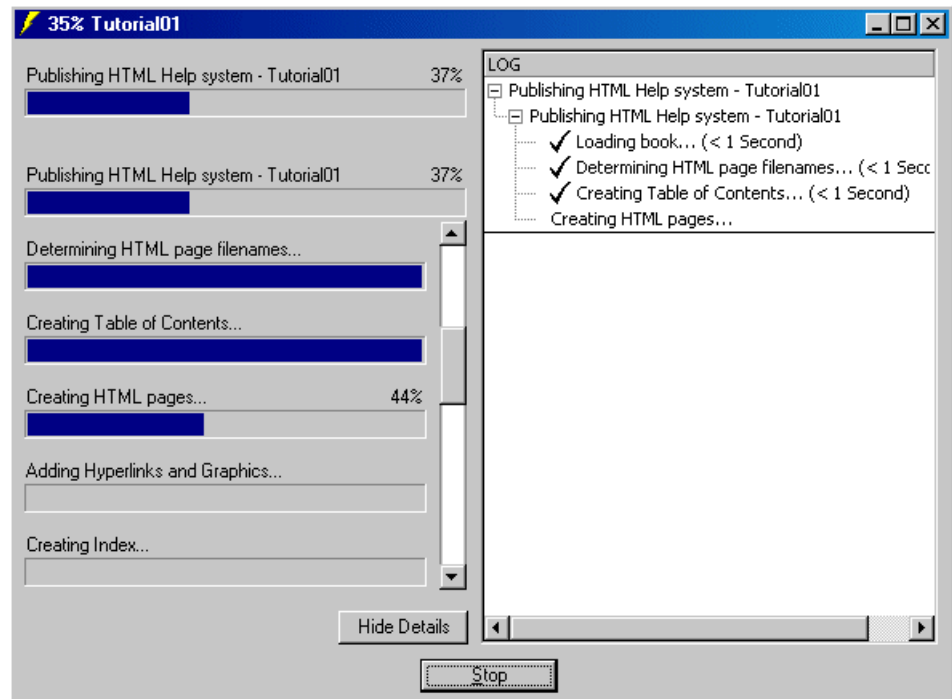
On completion, the dialog will change and allow the newly published output to be examined:
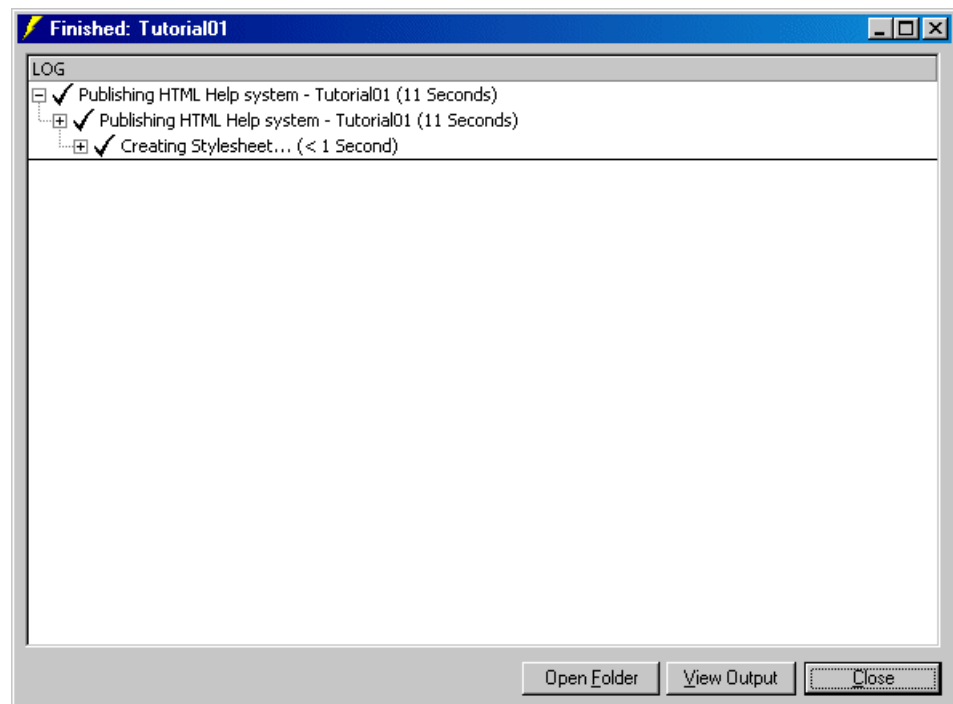
2) Choose the **View Output** button. This will open CHM file we have just published (Tutorial01.chm). Have a look through the file and close it.

3) Choose the **Open Folder** button. This opens the folder containing the published output (Tutorial01.chm) and all the working files associated with it (various HTML files, graphics, indexes etc).

4)   Choose **Close** to close this window.

What's Next?

You hopefully have a better idea now of how AuthorIT can help you author, manage and publish your documentation. There are now several paths for you to take, to explore AuthorIT further:

» *Log a Support Call* http://www.author-it.com/helpdesk.mv if you have any unresolved questions after the Tutorial, or if you encountered any problems.

» *Read the other AuthorIT Product documentation* http://www.author-it.com/?page=documentation, for information about AuthorIT's other features.

» **Set up one of your real documents as an example**. If you're using an evaluation version of AuthorIT, the only limitation is that AuthorIT randomly substitutes some words in the published outputs with the phrase "AuthorIT Evaluation". The source in the AuthorIT library is not affected and you can continue using the same Library when you purchase AuthorIT's Desktop, Workgroup or Enterprise Editions.

» Unlock AuthorIT's power with the aid of *formal training* http://www.author-it.com/?page=servicea. For details, email our training center: *training@author-it.com*.

» *Contact your local AuthorIT Reseller* http://www.author-it.com?page=resellers if you have any questions, especially about the best way to implement AuthorIT in your organization. **We're also happy to help** if you prefer to deal with us *directly* (see "Contacting Us" on page 3).

» *Order AuthorIT* http://www.author-it.com/index.mv?buy for yourself or your organization now. It's as simple as choosing **Order Now** from the **Help** menu in AuthorIT.

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 108).

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 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

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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.

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