

Single Sourcing on a Shoestring with FrameMaker and WebWorks Publisher

Linda G. Gallagher
Tammy Van Boening

TechCom Plus, LLC
Intelligent technical communication

Agenda

- Introduction to text insets
- Documentation problem
- FrameMaker text inset solution
- WebWorks Publisher online help output

TechCom Plus, LLC
Intelligent technical communication

Text Insets: What Are They?

- FrameMaker file that you import by reference into another file

Chapter 1: Common Console Activities¶

Container file

Text inset

The NetRegulus application is a collection of software modules that form a system designed to follow and support your medical product through its entire product lifecycle. Although each module addresses a different aspect of the medical product lifecycle, the modules also have common application features, such as opening, logging into, spell checking, data sorting, and so on.

After completing this chapter, you will be able to:

-) "Opening the NetRegulus application" on page 2
-) "Logging in to the NetRegulus application" on page 3

TechCom Plus, LLC
Intelligent technical communication

Text Insets: Planning

- Consider small sections that need reuse across books
 - Safety or other general information
 - Tables
 - Notes and cautions
 - Common procedures
- Determine if the content can be exactly the same or needs variation

TechCom Plus, LLC
Intelligent technical communication

Text Insets: Tips for Inset Files

- Use small anchor paragraph at top
- Put nonbreaking space as first character
- End text at end of flow

Anchor and nonbreaking space

The NetRegulus application is a collecti form a system designed to follow and s through its entire product lifecycle. Alt a difference aspect of the medical prod have common application features, such checking, data sorting, and so on.

End of flow

TechCom Plus, LLC
Intelligent technical communication

Text Insets: Tips for Inset Files

- Name files clearly
- Put all inset files into book to permit:
 - Search and replace
 - Spell checking
 - Importing of variables

TechCom Plus, LLC
Intelligent technical communication

Text Insets: Tips for Containers

- Put headings here, not text inset file
- Import into small anchor paragraph in container file
- Place index markers in headings
- Use same template for all files

TechCom Plus, LLC
intelligent technical communication

Text Insets: Tips for Containers

- Container file

Headings in container file

Opening the NetRegulus application

You have two ways of opening the NetRegulus application. You can **Open** the application from your desktop or you can **Type** the application from your Start menu. After you open the application, you can log in to the application.

To open the NetRegulus application from your desktop

- 1) Locate the NetRegulus application icon on your desktop.
- 2) Double click the NetRegulus icon.

The NetRegulus Login window opens. Your default login settings—database type, login server and database—appear at the bottom of this window.

TechCom Plus, LLC
intelligent technical communication

Text Insets: How Things Work

- Text insets inherit condition settings of container file
 - Do not use conditions on table rows
- Headings, captions, etc. picked up in generated files, regardless of location
 - Links in PDF from generated files go to correct location
- Autonumbering works correctly, regardless of location

TechCom Plus, LLC
intelligent technical communication

Text Insets: Importing

- Import file by reference into FrameMaker files

Uses formats from container

Updates when open file or update book

TechCom Plus, LLC
intelligent technical communication

The Problem: Limited Resources

- Small department – 3 writers and 1 trainer
- Need to share information
- No \$\$\$ for tools or resources for true single sourcing repository or new tools
- Tools at hand
 - FrameMaker
 - WebWorks Publisher

TechCom Plus, LLC
intelligent technical communication

The Problem: Complex Doc Need

- Framework for functions common to all “snap-in” vertical modules
- Six snap-in vertical modules
- System-wide common functions

TechCom Plus, LLC
intelligent technical communication

The Problem: Complex Doc Need

- All customers always have the Framework
- Some have only the Framework
- Some have different verticals and could add or remove modules
- Multiple user groups at a customer site
 - Each group needed unique User Guide with Framework and module-specific information

TechCom Plus, LLC
intelligent technical communication

The Problem: Complex Doc Need

The diagram illustrates a shared 'Framework' base at the bottom. Three yellow vertical bars, labeled 'CO', 'QA', and 'AE', are positioned on top of this base, representing different vertical modules that all rely on the same underlying framework.

TechCom Plus, LLC
intelligent technical communication

The Problem: Complex Doc Need

The diagram illustrates a shared 'Framework' base at the bottom. Four yellow vertical bars, labeled 'CO', 'QA', 'ST', and 'AE', are positioned on top of this base, representing different vertical modules that all rely on the same underlying framework.

TechCom Plus, LLC
intelligent technical communication

The Problem: What We Wanted

- Write common information once
- Share this information across multiple books and files
- Maintain distinct and separate User Guides for:
 - The Framework
 - Identical Framework information
 - Unique module-specific information

TechCom Plus, LLC
intelligent technical communication

The Problem: What We Wanted

- Framework
 - User Guide
 - OLH system
- Each vertical module
 - User Guide
 - OLH system

TechCom Plus, LLC
intelligent technical communication

The Problem: Needs

- Large volume of common Framework information:
 - Needed to “chunk” to maximize re-use
 - Needed to streamline updates and edits
- One writer for Framework
- One writer per vertical module
- Everyone had to use most current Framework information

TechCom Plus, LLC
intelligent technical communication

The Problem: Needs

- Way to toggle text on/off
- Way to toggle graphics on/off
- Live cross-references
 - From one text inset to another
 - From a text inset to a container file
 - From a container file to a text inset

TechCom Plus, LLC
Intelligent technical communication

The Problem: Moving Files

- Move files to new revision folder within the same build
- Move files to new build folder

TechCom Plus, LLC
Intelligent technical communication

The Solution: File Setup

- Headings as text in container file, for:
 - Cross-references
 - TOC
 - Related topics
 - Indexing
- Body in text inset files

TechCom Plus, LLC
Intelligent technical communication

The Solution: File Setup

- Three types of text insets
 - Introduction
 - Overview/informational
 - Procedural
- Heading1 uses a gerund with a noun
 - Editing an Entity
 - Adding a Product

TechCom Plus, LLC
Intelligent technical communication

The Solution: File Setup

Selecting the fields for a Master Data ad hoc report

H1, H2, H3 in container file

To select the fields for a Master Data ad hoc report

The first step in generating a Master Data ad hoc report is to select the fields for which to generate the report. ReportExpert supports ad hoc reports for the eight different entities types in the NetRegular application—Patient, DEB, Facility, Manufacture, Other, Employee, Field, Member, and Medical Professional. The <Entity Type> AdHoc Reports page lists the fields that you can select for each Entity > ad hoc report. The Products Ad Hoc Reports page lists the fields that you can select for a Products Ad Hoc Report.

1) Open ReportExpert

See "Opening and Logging in to ReportExpert" on page 35

2) On the ReportExpert main menu, select Ad Hoc > Entities > Entity Type or Ad Hoc > Products

The associated <Entity Type> or <Products> Ad Hoc Reports page opens

TechCom Plus, LLC
Intelligent technical communication

The Solution: Active X-refs in PDF

- Conventional wisdom says:
 - X-refs from text insets to container files not active in PDF
 - X-refs from text inset to text inset not active in PDF
- Solution:
 - Add a hypertext link over the x-ref

TechCom Plus, LLC
Intelligent technical communication

The Solution: Active X-refs in PDF

- Key steps to the solution:
 - Create x-refs using x-ref markers.
 - Insert a hypertext marker before the x-ref.
 - Apply a character tag to both the x-ref and hypertext marker.

TechCom Plus, LLC
Intelligent technical communication

The Solution: Moving Files

- Moving the entire folder structure
 - Copy and paste works

TechCom Plus, LLC
Intelligent technical communication

The Solution: Moving Files

- Moving container files and text insets independently of each other
 - FrameScript script to fix text inset links and x-refs

TechCom Plus, LLC
Intelligent technical communication

The Solution: File Naming

- Name insets based on
 - Type of inset
 - Introduction
 - Overview/informational
 - Procedural
 - Gerund/noun in Heading1
 - Entity_Add_Intro, Entity_Add_Proc, Entity_Add_Proc_1,
 - Links_Manage_Intro, Links_Manage_Overview, Links_Manage_Proc

TechCom Plus, LLC
Intelligent technical communication

The Solution: File Naming

- Related insets grouped in Windows Explorer

TechCom Plus, LLC
Intelligent technical communication

The Solution: File Naming

Setting constraints for selected Master Data ad hoc report fields

A *constraint* is a search pattern through which data is passed. Only data that matches the pattern is allowed to pass through the constraint. When you set constraints for selected Master Data ad hoc report fields, ReportExpert generates the ad hoc report for only those records in your NetRegulus database that match the pattern that you have specified.

Field type You can set a constraint for four types of fields in ReportExpert—Short Text, Long Text, Number, and Date. Each field type has an associated default constraint. Table 1: "Field types and default constraints on a Master Data Ad Hoc Reports page" summarizes this information.

If you can set a constraint for a field on a Master Data Ad Hoc Reports page, the field always has a **Constraint list**. The field may also have one of three **constraint icons**—a List icon, a Search icon, or a Category icon.

MasterDataConstraints_Setting_Intro

MasterDataConstraints_Setting_Overview

TechCom Plus, LLC
Intelligent technical communication

The Solution: File Naming

To set a constraint for a selected long text report field

This procedure is applicable only for the default Contains constraint. You do not enter field values for either the Null or the Not Null constraints. ReportExpert ignores the values.

Note: You can click *Clear Page* at any time to clear all selected fields and return all constraints to their default values.

Step 1. For the selected long text field, enter a partial or complete field value.

Step 2. On the Constraint dropdown list, accept the default constraint (Contains) for the selected field.

Step 3. Continue setting constraints for other report fields, continue setting other options for the report, or click Run Report to generate the report.

- To set other options, see Chapter 8, "Additional Ad Hoc Report Settings," on page 195.
- If you generate the report and the report exceeds the maximum allowable number of records, you must modify your report settings. See "Maximum allowable number of records for an ad hoc report" on page 205.
- If you successfully generate the report and you intend to use this ad hoc report again, you must save the report before you exit the "Entity Type" or Products Ad Hoc Reports page. See "Saving an ad hoc report" on page 211.

To set a constraint for a selected number report field

This procedure is applicable for all constraints other than the Null or Not Null constraint. You do not enter field values for either the Null or

MasterDataConstraints_Setting_Proc1

MasterDataConstraints_Setting_Proc2

TechCom Plus, LLC
Intelligent technical communication

The Solution: Conditions in Insets

- Toggle graphics or text on/off
 - Cannot use conditions on individual table rows in text inset file
 - Can use conditions on entire table in text inset
- Toggle whole text inset on/off
- Inherit conditional settings of container file

TechCom Plus, LLC
Intelligent technical communication

The Solution: Conditions in Insets

CO_UG and ST_UG conditions in container file

Complaints Application Module Study Data Manager Module

Managing links for standard reports on the ReportExpert Home page

CO_UG and ST_UG conditions in text inset

You can add links for any standard report directly on your ReportExpert Home page. You can add links just for StudyExpert standard reports from the Run StudyExpert Standard Reports page. You can add links just for IssueExpert standard reports from the Run IssueExpert Standard Reports page. Both of these options allow for quick and easy access to the standard reports that you most frequently run. You can also delete links for standard reports.

TechCom Plus, LLC
Intelligent technical communication

The Solution: Conditions in Insets

- Container file with condition set to ST_UG

Study Data Manager Module

Managing links for standard reports on the ReportExpert Home page

You can add links for any standard report directly on your ReportExpert Home page. You can add links just for StudyExpert standard reports from the Run StudyExpert Standard Reports page. You can add links just for IssueExpert standard reports from the Run IssueExpert Standard Reports page. Both of these options allow for quick and easy access to the standard reports that you most frequently run. You can also delete links for standard reports.

TechCom Plus, LLC
Intelligent technical communication

The Solution: Conditions in Insets

- Container with condition set to CO_UG

Complaints Application Module

Managing links for standard reports on the ReportExpert Home page

You can add links for any standard report directly on your ReportExpert Home page. You can add links just for IssueExpert standard reports from the Run IssueExpert Standard Reports page. You can add links just for StudyExpert standard reports from the Run StudyExpert Standard Reports page. Both of these options allow for quick and easy access to the standard reports that you most frequently run. You can also delete links for standard reports.

TechCom Plus, LLC
Intelligent technical communication

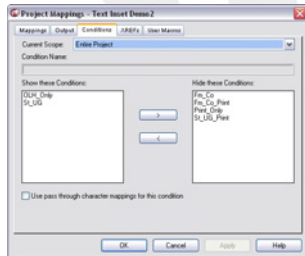
Help: WebWorks Publisher

- Picks up all text inset content
- Converts hypertext markers and cross references to links
- May want separate WWP projects
 - If conditions need to change often
 - If need different help file names
 - If using different FrameMaker books

TechCom Plus, LLC
Intelligent technical communication

Help: WebWorks Publisher

- Uses conditions on the fly
 - Help-only for related topics, other content
 - Version or product conditions, as needed



Contact Information

- Linda G. Gallagher
 - Founder and manager of TechCom Plus, LLC, a technical communication and consulting firm
 - lindag@techcomplus.com
 - www.techcomplus.com
 - 800-500-3144 or 303-450-9076

Contact Information

- Tammy Van Boening
 - Senior Technical Writer
 - Jeppesen Sanderson, Inc.
 - 303-328-4420
 - tammy.vanboening@jeppesen.com