

Single Sourcing on a Shoe String Supplemental Handout

Working with Text Insets

Text insets in FrameMaker offer a way to single source content by sharing chunks of text across multiple files and books. Text insets are FrameMaker files that you import by reference into another file. The terms used to describe the files used are:

- Container file (destination file)—This is the file into which you import one or more text insets. This is also the file you use to build the book you are creating.
- Text inset (source file)—This is the file that you import into the container file. It typically contains content that you want to share across multiple files or books.

Setting Up Text Inset Files

You can put each chunk of text into a separate file or place chunks into separate flows of a single file. You also have options when you import the text inset.

General tips

Below are tips for setting up text inset files:

- To ensure that all styles, conditions, and variables have the same names, use the same template as you use for container files.
- Name files carefully to make the contents of the files easily identifiable. For example, you could name your files as follows:
 - Base the name on the heading the text inset goes with and end the name with Intro, Overview, or Proc.
 - Use the Intro suffix for introductory text.
 - Use the Overview suffix for conceptual/explanatory material.
 - If writing more than one conceptual topic, use the Overview suffix numbered sequentially (for example, Overview_1, Overview_2, and so on) to indicate the correct order of the text insets.

- Use the Proc suffix for procedures.
 - If writing more than one procedure for a topic, use the Proc suffix numbered sequentially (for example, Proc_1, Proc_2, and so on) to indicate the correct order of the text insets.
- Text insets inherit the conditional text settings of the container file. Use conditions as needed in the text inset files.
 - If you need a whole text inset to be set up with a condition, apply the condition in the text inset file to all of the text. If you apply the condition to the whole text inset in the container file, you will lose the condition setting when you update the text inset.
 - You *cannot* use conditions on *individual* rows in table that is in a text inset file. You can, however, use conditions on an *entire* table in a text inset.
- Import variables into the text inset file—importing variables into the container file does not change them in the text insets.
- Make the first paragraph of each text inset file a small anchor tag and put a nonbreaking space as the first character in that paragraph.
- All headings, figure captions, and table titles will be listed in the main book's TOC, LOF, and LOT, whether the heading, figure caption, or table title is in a container or text inset file.
- All auto-numbered items such as figures and tables will be numbered correctly, whether the item is in a container file or a text inset file.
- Place all text inset files into a book. This permits:
 - Spell checking of all text insets. (The Spell Checking function does not work for the text insets in the container file.)
 - Searching and replacing in all text insets. (The Search and Replace function skips the text insets in the container file.)
 - Any other book-level functions, such as show/hide conditions or importing variables.

Tips for using flows

- Follow all of the tips above for separate files.
- Name each flow carefully to make the flow content identifiable.
- Consider using flows for all insets for a particular chapter, so that each chapter has a single text inset file, with a separate flow for each text inset.

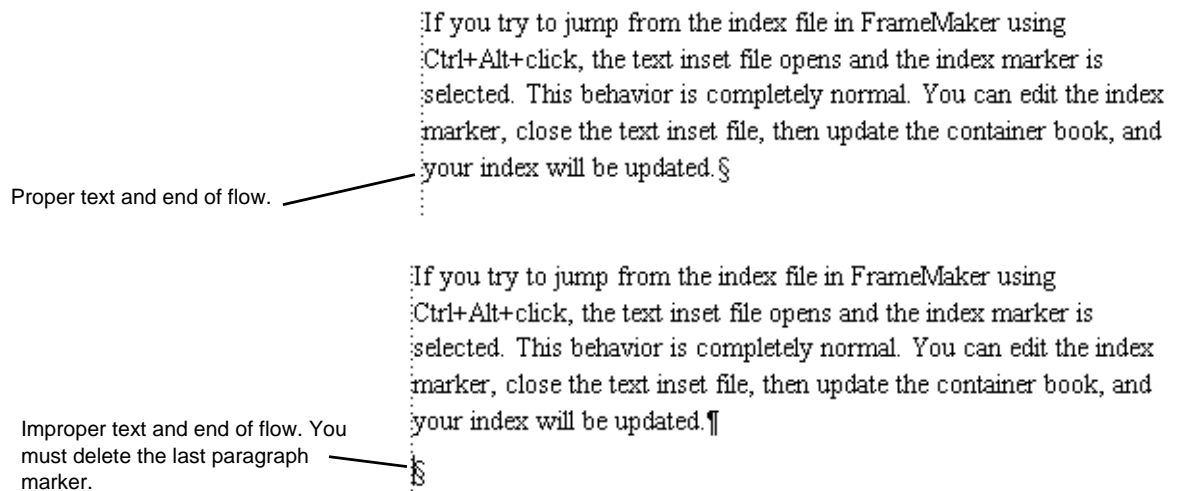
To create a text inset

1. Create a new, empty file based on your chapter template.

Note: *Make sure the file has all of the variables and conditions you need to use.*

2. Apply your anchor style to the first paragraph and put a nonbreaking space as the first character in that paragraph.
3. Start text in a new paragraph below the one you just created.
4. Save the file to the folder where all the text insets for this book will be, giving the file a clear name
5. Add all text, tables, and figures as you normally would.
6. Make sure that your text ends right at the end of flow symbol and that there is no extra paragraph below your text as shown below.

Figure 1: Proper and improper end of flow



Note: *If you delete the last paragraph marker, you lose part of the condition setting. This means that if you applied a condition to the text at the end of the flow before deleting the last paragraph as shown above, you must reapply the condition.*

7. If you need to create cross references to or from the text inset file, see [“Creating Cross References and Hypertext Markers” on page 6.](#)
8. Add the file to the text inset book that is in the same folder as the text inset.
9. Run spell check on the text inset book, as needed.

Setting Up Container Files and Importing Text Insets

Below are tips for setting up container files:

- Place all headings (Heading1, Heading2, and so on) in the container file. This makes it possible to use normal cross reference procedures to all headings, set up index markers, and so on.
- Import each text inset file into a small anchor paragraph in the container file.

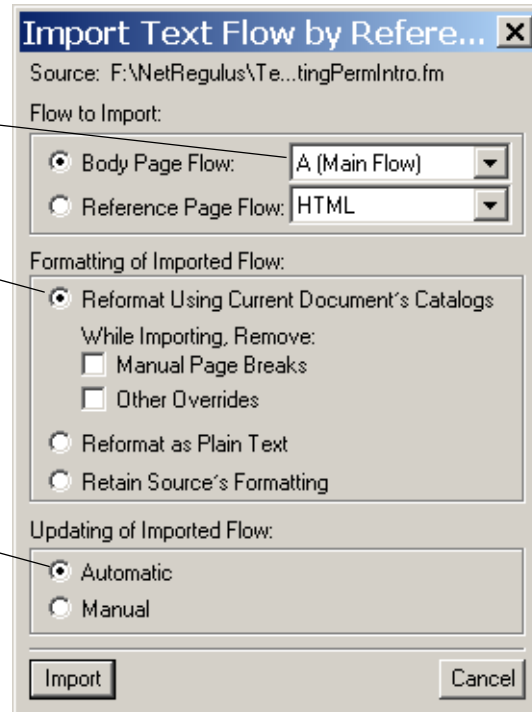
- Place index markers in the heading paragraphs in the container files.
- To open a text inset after you insert into the container file, you must double-click *any text* in the text inset. The text inset does not open if you double-click a graphic in the text inset.

Recommended options when importing text insets

If using flows, select the flow you want.

Text uses all formats from the container file as long as formats in the text inset file have the same names.

Text inset updates when you open the file or update the book.



Moving or renaming container files

If you need to move a container file from one folder to another or rename the file, open the container file and use Save As to move it to a new folder or to rename it. This method retains the following:

- Links to text insets.
- Links to graphics in both the container file and any text insets.
- Links to cross-referenced files, but these links are to the cross-referenced files in their original locations. If you are also moving the cross-referenced container files and want the cross references to refer to the files in their new locations, these cross references break.
 - You can use FrameScript to resolve this issue. A custom script can look for the referenced files in the same folder as the container file and update the path to the cross referenced file.

To create a container file

1. Create a new, empty file based on your chapter template.
2. Enter all headings needed in this chapter.
3. After each heading, press **Enter** to create a new, empty paragraph.
4. Apply your anchor style to the paragraph that you just created.

5. With the cursor in the empty paragraph, select **File > Import > File**.
The Import dialog box opens.
6. Select the text inset file you want to import.
Leave the Import by Reference option (the default) selected.
7. Click **Import**.
The Import Text Flow by Reference dialog box opens.
8. Select the options you need.
Leaving the default options selected, as shown in [“Recommended options when importing text insets” on page 4](#), works well.
9. Click **Import**.
10. Save the file.
11. Continue adding headings and text insets, as needed.
12. Add index markers to the heading paragraphs.
13. If you need to create cross references to or from the container file, see [“Creating Cross References and Hypertext Markers” on page 6](#).
14. If you make changes to a text inset, you must do one of the following to ensure that the container file has the latest version:
 - After closing the text inset, double-click the text inset and click **Update Now**.
 - From the container file, select **Edit > Update References**, select the two text inset options, and click **Update**.
 - Update the book.

To change the name of a text inset file

1. From the text inset file, select **File > Save As** and rename the file.
2. Delete the old text inset file.
3. From the container file, delete the text inset by selecting the text inset and pressing **Delete**.
4. Import the newly named text inset file.

To use a container file in a book

1. Open the book where you want to use the container file.
2. Add the container file, just as you would add any other file to the book.
3. Update the book, making sure that the Update All Text Insets option is selected.
 - Before finalizing the book, run a spell check on the text inset book.
 - If a term or phrase requires you to use search and replace, run the search and replace on both your book file *and* the text inset book file.

Creating Cross References and Hypertext Markers

Cross references and text insets are a complex matter and the subject of many e-mail messages on the various FrameMaker lists. The tables below are an attempt at bringing together all of the information about this in one place in an understandable form.

Table 1: Summary of how cross references work with text insets

Cross ref from	Cross ref to	Works?	Notes
Text inset file	Any container file	Partly	<ul style="list-style-type: none"> ■ Must use cross-ref marker as Source Type. ■ Cross reference content updates normally. ■ Link not live in PDF. ■ If you place a hypertext marker before the cross reference and apply a character tag to the cross reference (this defines the hotspot), the link is live in the PDF.
Text inset file	Text inset file (including within the same text inset file)	Partly	<ul style="list-style-type: none"> ■ Must use cross-ref marker as Source Type from the <i>container</i> file (not the text inset file). ■ Link tries to be live in the PDF, but is looking for the PDF of the text inset book, not the production book. ■ If you place a hypertext marker before the cross reference and apply a character tag to the cross reference (this defines the hotspot), the link is live in the PDF.
Container file	Any container file (including within the same container file)	Yes	<ul style="list-style-type: none"> ■ These work normally—no special procedures needed.
Container file	Text inset file	Yes	<ul style="list-style-type: none"> ■ Must use cross-ref marker as Source Type from the <i>container</i> file, <i>not</i> the text inset file. ■ Link is live in the PDF.

Table 2: Summary of how hypertext markers work with text insets

Hypertext marker from	Hypertext marker to	Works?	Notes
Text inset file	Any container file	Yes	<ul style="list-style-type: none"> ■ For links to headings in the inset's own container file, no file name is needed in the marker. ■ For links to headings in a different container file, use the file name of the target container file in the marker. ■ You will receive an error message from FrameMaker saying that it is not finding the named destination. You can ignore this message.

Table 2: Summary of how hypertext markers work with text insets (continued)

Hypertext marker from	Hypertext marker to	Works?	Notes
Text inset file	Text inset file (including within the same text inset file)	Yes	<ul style="list-style-type: none"> ■ For links within a text inset, no file name needed in the marker. ■ For links to a different text inset, use the file name of the target inset's <i>container</i> file in the marker. ■ You will receive an error message from FrameMaker saying that it is not finding the named destination. You can ignore this message. ■ Hypertext markers within a text inset file do not work in FrameMaker after you import the text inset into the container file; however, they work in the PDF.
Container file	Any container file (including within a container file)	Yes	<ul style="list-style-type: none"> ■ These work normally; no special procedures are needed. ■ Use the target container's file name in the marker when the link is to a different container file.
Container file	Text inset file	Yes	<ul style="list-style-type: none"> ■ For links to content in a text inset in the same container file, no file name is needed in the marker. ■ For links to content in a text inset in a different container file, use the file name of the target <i>container</i> file in the marker.

To create a cross reference using a Cross-Ref marker

1. Open the file to which you need to create the cross reference.

This cross-referenced file may be:

- a container file that you want to cross reference from a text inset
- a text inset file that you want to cross reference from a container file
- a text inset file that you want to cross-reference from another text inset or from within the same text inset.

2. Create a new blank paragraph below the item (Heading, Figure, etc.) that you want to cross-reference.
3. Insert a cross-reference to the heading, figure caption, or table title in this blank paragraph.

Note: Make sure that the cross-reference is of the correct format. The marker retains the format.

4. Delete *only* the cross-reference text.

Note: Because you are deleting only the text, the marker that you need to use remains in the file.

5. Save, but do *not* close, the cross-referenced file.

Note: *If the cross-referenced file is a text inset file, this means to leave both the text inset and the text inset's container file open.*

6. Do *one* of the following:
 - If the cross-referenced file is a text inset, go to [Step 7](#).
 - If the cross-referenced file is a container file, go to [Step 8](#).
7. If the cross-referenced file is a text inset file, update the text inset by doing *one* of the following:
 - Selecting **Edit > Update References** from the text inset's container file.
 - Double-clicking the text inset in the container file, then clicking **Update Now**.
8. Open the file where you want to insert the cross-reference.
9. Select **Special > Cross Reference**.
10. In the Cross-Reference window, select the *container* file from the drop-down list.
 - If the cross-referenced file is a container file, select the container file.
 - If the cross-referenced file is a text inset, select the text inset's container file.
11. From the Source Type list, select Cross-Reference Markers.
12. From the Cross-Reference Markers list, select the marker that you created in [Step 2](#).

Note: *A figure, table, or any other number in the cross reference will have a ? in it instead of the number. You must update the container file or book when you are done. This updates these cross references to be correct based on the numbering in the container book.*

13. If the cross reference is *from* a text inset file to any other type of file, add a hypertext marker before the cross reference and apply a character tag to the whole cross reference.

For more information, see [Table 2 on page 6](#).

14. Update the container book, making sure that the Update All Text Insets option is selected.

Moving Files to a New Location

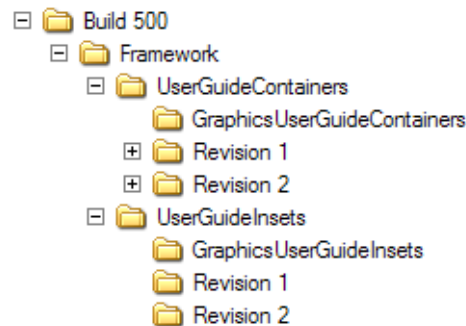
You may need to move your files to a new location for any number of reasons. Depending on how you move the files and what you move, your cross references and links to text insets may continue to link to the files in their old locations, not the new location.

Custom FrameScript scripts can resolve these issues, saving writers a great deal of time. Below is an example of one way to use a script when moving files to a new location.

Example of when a script can help

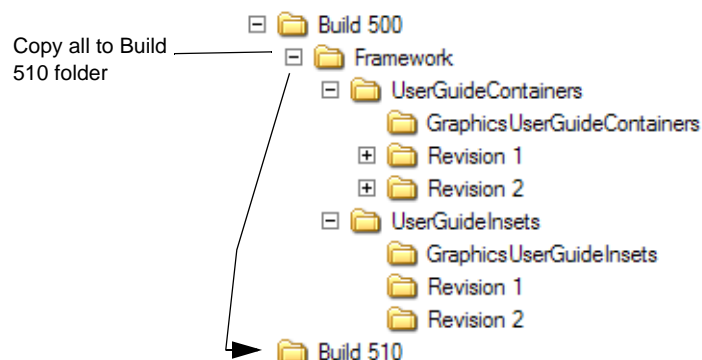
For example, as the developers make new builds and revisions available, you may want to create new folders for each build and revision to ensure that you can go back to a specific version of the documentation that matches each build and revision.

Your folder structure might look like this:

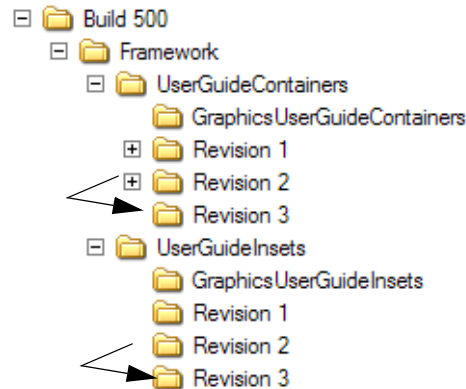


- Framework\UserGuideContainers—Contains the container files and main book for your User Guide in each Revision folder.
- Framework\UserGuideInsets—Contains the text inset files and text inset book for your User Guide in each Revision folder.

Continuing with the example folder structure above, if you copy the entire Framework folder to a new Build 510 folder, as shown below, all text insets and cross references will continue to work with no problem.



However, if you create a new Revision 3 folder below each UserGuide folder, you must copy the files from the corresponding Revision 2 folders into the Revision 3 folders. The text insets in the copied container book will work, but they will stay linked to the text inset files from the Revision 2 folder.



You can use a custom FrameScript script to relink the text insets to the files in the new Revision 3 folder. You tell the script the new Revision folder in which to look. The script then looks for each referenced text inset, making sure it exists in the selected Revision folder, then changes the path of the linked inset to the new Revision folder.

Text Insets and Generated Files

The numbering and content in index markers, headings, tables, and figure captions you create in text inset files will be picked up by any generated files in the container book. This means that your table of contents (TOC), list of figures (LOF), list of tables (LOT), and index files include all paragraph tags that you expect them to from both the container files and the text inset files used in your container book.

Jumping from the TOC, LOF, or LOT

If you try to jump to a specific item that is in a text inset file, for example to a figure from the LOF in FrameMaker using Ctrl+Alt+click, the container file opens and the whole text inset where the figure appears is selected but does not open; however, after you create a PDF file and click a paragraph in the LOF, you will go directly to the figure.

Jumping from the Index

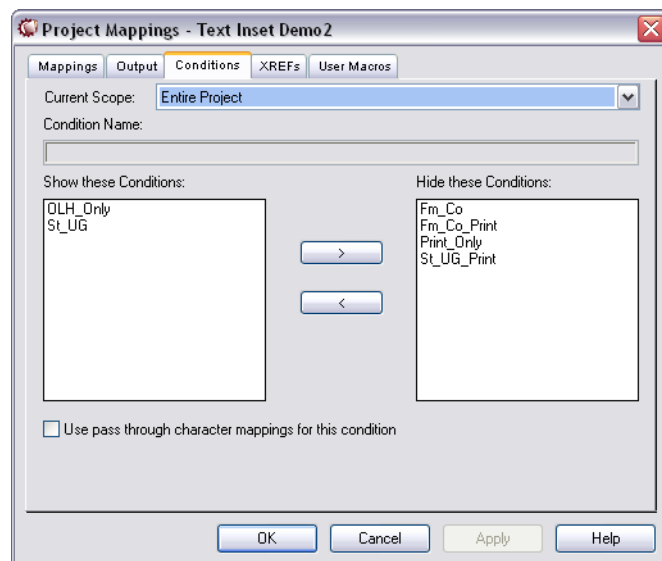
If you try to jump from the index file in FrameMaker to an index marker in a text inset file using Ctrl+Alt+click, the text inset file opens and the index marker is selected. This behavior is completely normal. You can edit the index marker, close the text inset file, then update the container book, and your index is updated.

Creating Help with WebWorks Publisher 2003

Once you have your content set up and working in FrameMaker, you can set up the help project in WebWorks Publisher (WWP). WWP works very well with text insets and conditions, so the hard part (setting all that up in FrameMaker) is already done.

Below are some tips for setting up your WWP projects:

- The WWP project picks up all content in the FrameMaker book's container files and text inset files.
- WWP converts all hypertext markers and cross references to hot links, regardless of where they are (in a container or text inset file).
- You can use a help-only condition for related topics and other content that you want only in the help output.
- You can change the conditions in the WWP project on the fly and all content from the container and text inset files changes in your help output.



- You have two choices for setting up projects:
 - Use a single project and change the conditions in WWP, as needed— This will change all conditions in both the container and text inset files.

- Use multiple projects, one for each:
 - Condition, which represents a different product or version.
 - Different FrameMaker book, if you use different books
 - Different help file name—For example, for Product A, you need to name the help productA.chm and for Product B, the file needs to be productB.chm. This type of situation would be easier to handle in different WWP projects that reference the same FrameMaker book.

Resources

Your presenters

- Linda Gallagher
 - 303-450-9076
 - lindag@techcomplus.com
 - www.techcomplus.com
- Tammy Van Boening
 - Senior Technical Writer
 - Jeppesen Sanderson, Inc.
 - 303-328-4420
 - ltammy.vanboening@jeppesen.com

WebWorks Publisher

- WebWorks Publisher Web site: <http://www.webworks.com/>
- E-mail list: <http://www.yahogroups.com> search for wwp-user list (you must join Yahoo Groups before you can join the list)

FrameMaker

- Adobe Web site: <http://www.adobe.com/products/frame maker/main.html>
- Framers e-mail list: <http://lists.frameusers.com/mailman/listinfo/framers>

FrameScript

- Finite Matters Web site: <http://www.framescript.com/>