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# Communicator

The Institute of Scientific and Technical Communicators  
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**Reviewing SmartDocs from  
ThirtySix Software**

**Designing and illustrating  
content for localisation**

# Integrating single sourcing into Word

Alex Masycheff explains how a product called SmartDocs integrates many single-sourcing capabilities into Microsoft Word.

If you ask a technical writer to name the five most popular single-sourcing tools, there's a good chance that the list will include FrameMaker, RoboHelp, Flare, Doc-To-Help and probably some XML-based tools. I can bet Microsoft Word will not even be mentioned. There's a good reason for this: implementing techniques such as content conditionalising, content reuse and multi-channel publishing in the way that we can in single-sourcing tools is virtually impossible in Word.

This results in a serious dilemma. On one hand, many technical communicators need to single source their documentation. On the other, they are often tied to Word for historical or budgetary reasons and have to use inefficient methods (such as copy-and-paste) that increase the cost of creating and maintaining content. This is where a product called SmartDocs can come into its own. It's an off-the-shelf product that lets you integrate many single-sourcing capabilities, including reuse and conditionalising of content, into the Word environment. SmartDocs is developed by ThirtySix Software ([www.thirtysix.net](http://www.thirtysix.net)), a US-based company that specialises in building content management solutions on the Microsoft platform.

We began to use SmartDocs intensively for the first time when our company was developing a solution for a client that had:

- Over 20 products, each with several flavours
- A tremendous amount of reusable and constantly updated content
- Content variations for each product depending on individual customer's requirements
- Several technical writers in a team.

SmartDocs was a great help because it enabled us to address most of the client's needs and reduce the cost of creating and maintaining the documentation.

## *Introducing single sourcing to Word*

SmartDocs operates with chunks of information called *snippets*. A *snippet* is a portion of content that can be used in multiple places. Snippets are stored in the SmartDocs repository on a server.

When you create a new document, you query the repository and pick up the snippets you need for the document. Because you can assign metadata (for example, content category, product name or release) to each snippet, snippets can easily be found in the repository. Of course, a document can contain regular content that is not stored as snippets.

A snippet may include conditional content and variables. You can expose or hide certain conditions and define variable values depending on your requirements for the content to be included into the final deliverable.

When you update a snippet, SmartDocs can propagate the change to all the documents in which the snippet appears. Alternatively, you can choose to stay with an older version of the snippet in a specific document.

However, while SmartDocs provides excellent capabilities for content reuse and conditionalising, it does not enable multiple formats to be generated from a single source. If you need output formats other than Word, PDF or simple HTML, you will need a separate publishing tool to generate them.

## **SmartDocs components**

SmartDocs consists of two components:

- *Repository of reusable content*, in which snippets are stored. The repository is stored on a server and the underlying infrastructure is Microsoft SharePoint. You can use Microsoft Office SharePoint Server (MOSS), if your organisation is already using it, or you can use Microsoft Windows SharePoint Services (WSS), which is a free add-on for Windows Server 2003 and 2008 that you can download from Microsoft's website. If you do not want to host the repository on your own servers, it can be hosted on ThirtySix Software's servers.
- *SmartDocs Client*, a Word add-on installed on local computers. This enables you to access the repository from Word, to insert and manage snippets in documents, and to conditionalise content.

## *Configuring the repository*

Configuring the repository requires some understanding of SharePoint, but you can quickly gain this knowledge by reading the SharePoint and SmartDocs documentation. The configuration process is pretty well documented: it took us about 30 minutes to get the repository up and running.

As a minimum, configuration involves setting up several components:

- *Snippets metadata*, which you need for categorising and locating snippets. For example, if you created metadata such as Category, Product Name and Product Release, you will be able to run search queries such as 'Find all snippets that relate to the Installation of the Release 5.0 of Product ABC' and use that content in your other documents.

- *Snippet folder structure*, which you can use to categorise your snippets further in the repository.
- *Access permissions*, which you need to assign different privileges to the members of a documentation team. For example, you may want to give a documentation manager the right to create, update and remove snippets, while other writers are restricted to using existing snippets.

### Installing the SmartDocs Client

Installing the SmartDocs Client is just a matter of clicking the **Next** button in the Setup Wizard and defining some optional settings, such as the location of the SmartDocs client on a local computer.

There is a single installation file for Word 2003 and Word 2007. If you have both versions installed on your computer, the installation program will ask you for which version you want to install the SmartDocs Client.

The SmartDocs Client is required for only those users who will work with the SmartDocs repository (for example, creating, updating and removing snippets) and conditional content. Reviewers who only want to read Word documents do not need to install the SmartDocs Client; they can work with snippets in the same way as regular content.

### Working with SmartDocs

After the SmartDocs Client is installed on your computer, you will see a new SmartDocs tab in the Office 2007 ribbon (or new menu in the Word 2003 menubar). You can use this to perform various operations, including creating new snippets, searching the repository, and managing conditional content. Alternatively, you can use the SmartDocs task pane to accomplish these tasks (Figure 1).

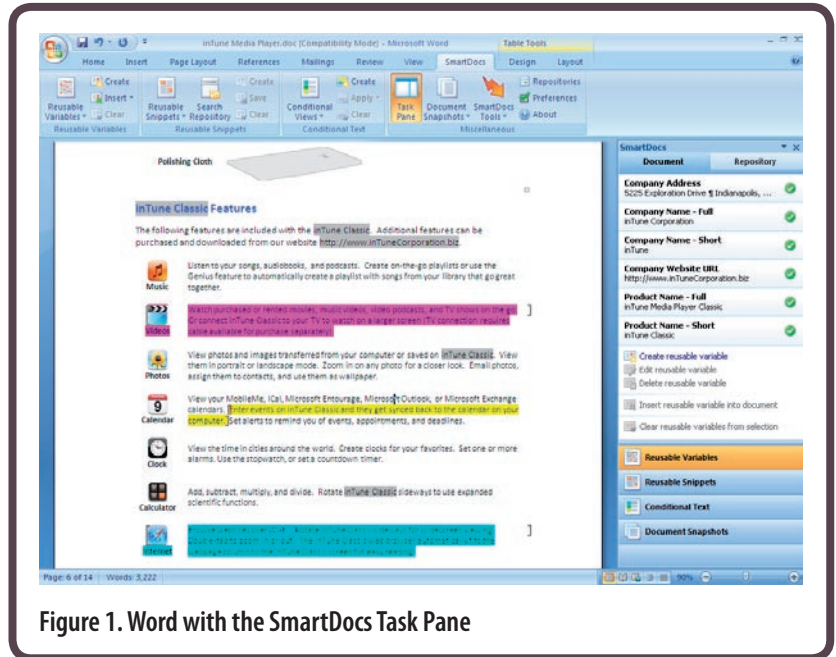


Figure 1. Word with the SmartDocs Task Pane

### Creating a snippet

A snippet can contain any content. To add a new snippet to the repository, you just select the portion of content, click **Create new reusable snippet** and enter data about the snippet in the wizard (Figure 2). The information you are prompted to enter is based on the metadata configuration that you defined when setting up the repository.

After the snippet is stored in the repository, you can reuse it in multiple documents.

### Inserting a snippet

When you assemble a new document in which you want to use a snippet from the repository, there are several ways to locate the snippet:

- You can define a search query using the snippet metadata defined when configuring the repository. Figure 3 shows an example of such a query.

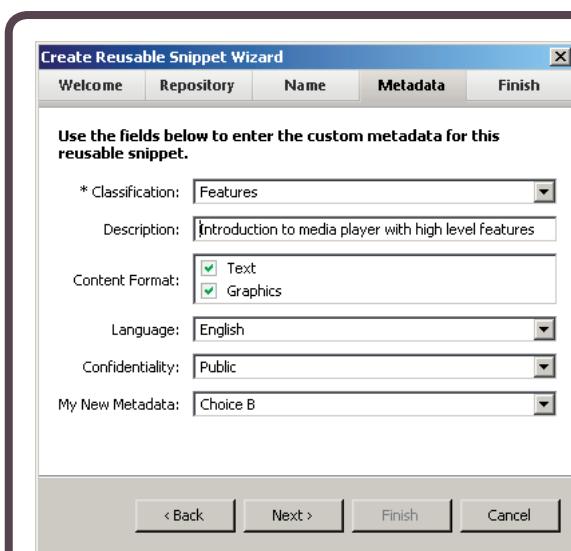


Figure 2. Create Snippet Wizard

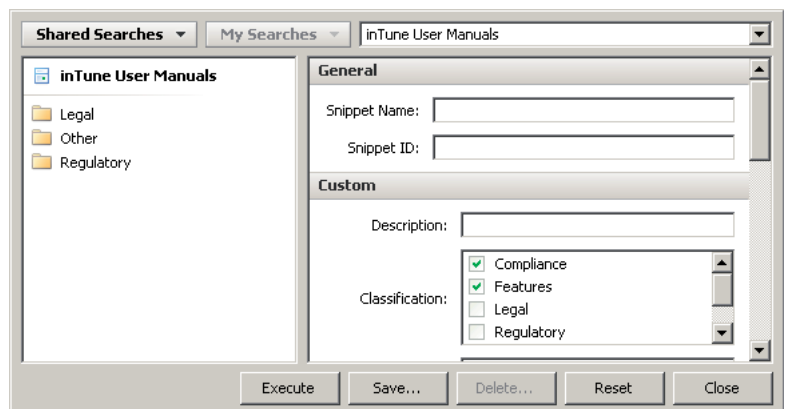


Figure 3. Querying the repository

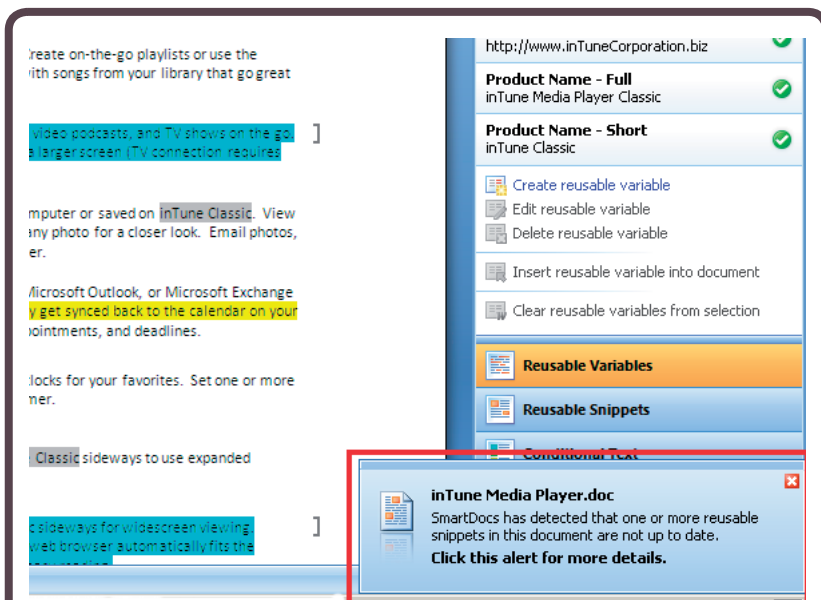


Figure 4. Update Notification

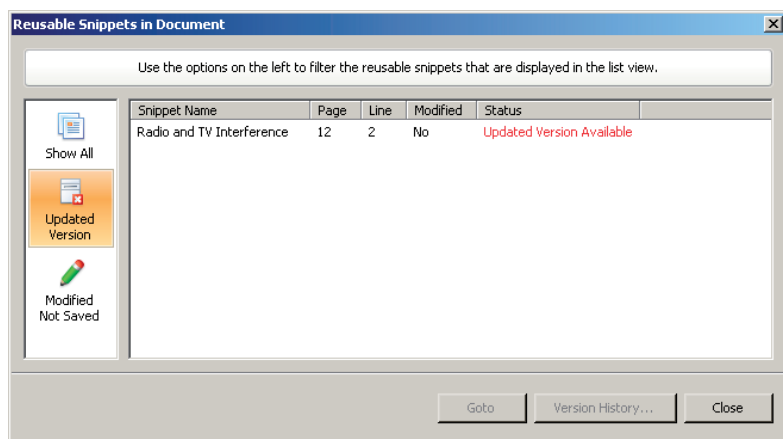


Figure 5. Update Snippet dialog box

- You can use the folder structure of the repository to help narrow your search.
- You can search for a snippet by name. Matching snippets are displayed on the SmartDocs task pane. From there, you can double-click or drag-and-drop the desired snippets into your document.

After a snippet is inserted, it is highlighted by a blue frame. If you position the cursor anywhere inside the snippet, the task pane displays the snippet's metadata.

Unfortunately, the current version of SmartDocs does not enable you to view a report of all the documents in which a particular snippet is reused. This is an important capability because technical communicators usually want to understand the impact of changing content that is reused in multiple places.

#### Updating a snippet

This is one of SmartDocs' strongest features. The ability to update content in one place and

have it change in all the places where it occurs can save hours of work.

When you update a snippet and then open one of the documents in which it is reused, SmartDocs notifies you of the change by displaying a message in the bottom right corner of the screen (Figure 4). Clicking the message lists the updated snippets in the document (Figure 5).

You can compare the updated version of the snippet with an earlier version and decide whether you want to propagate the change into the current document or retain the previous version of the snippet.

#### Working with conditional content

Working with conditional content in SmartDocs is similar to working with single-sourcing tools such as FrameMaker or RoboHelp. You start by creating conditional views (an analogue of conditional tags in FrameMaker) by defining their names and colour. Then you can select a portion of content and apply a conditional view. (Of course, you may apply more than one conditional view to the same content.)

To filter conditional content, you select which conditional views you want to expose and hide (Figure 6).

One feature that I miss is the ability to store conditional views in the repository. This would enable documentation teams to maintain consistency across the work of different technical communicators and avoid duplication of effort through the creation of conditional views with the same purpose but different names.

#### Working with variables

SmartDocs differentiates between *global* and *local* variables.

Global variables are stored in the repository and can be used in multiple documents. You can define a value of a global variable either in the repository (whenever you change the variable value in the repository, the change will occur in all documents in which the variable appears) or in each document (you use consistent variable names in multiple documents but define their values for individual documents). SmartDocs lets you lock a variable value so that writers cannot make arbitrary changes to its value; this is especially useful for legal and copyright information.

Local variables and their values are declared in individual documents and are not shared across documents.

#### Using snapshots

Snapshots is a feature that I especially like in SmartDocs. Imagine this: you have several conditional views and variables. When you prepare a document for delivery to a specific customer, you need to use a

certain combination of exposed and hidden conditional views, and also to define variable values.

Instead of doing this every time you prepare a delivery, you save a combination of exposed and hidden conditional views and variable values and then just invoke this saved configuration in one click. This is what snapshots are all about.

Figure 7 shows existing snapshots that represent different deliverables. When you double-click a snapshot on the task pane, the document updates accordingly.

## Summary

SmartDocs is a powerful tool that finally integrates the world of single sourcing into the traditional environment of Word. With SmartDocs, not only can you reuse and conditionalise content without moving to a new tool, you can also use the capabilities of SharePoint to enhance your document management and content management abilities. If you have a fair amount of reusable content that needs to be effectively updated and managed, SmartDocs can save you many hours of work and bring you a payoff very quickly. Your customers can now receive customised and up-to-date documentation that you can easily maintain.

On the negative side, if you publish your content to multiple formats, such as online help or HTML help, you will still need an additional tool to convert Word documents to other formats; this may mean that SmartDocs is not the tool for you. Otherwise, SmartDocs provides an effective way to single source documentation in Word. **C**

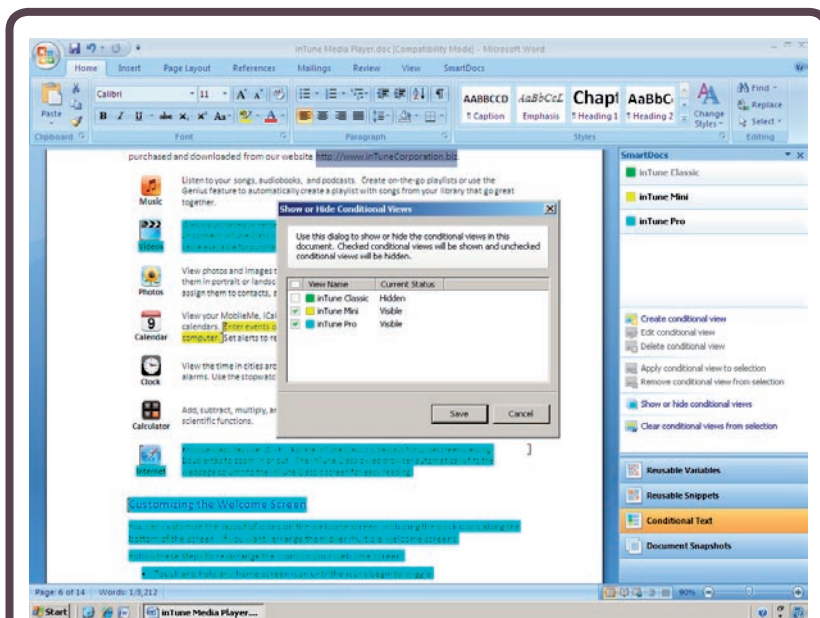


Figure 6. Conditional Views

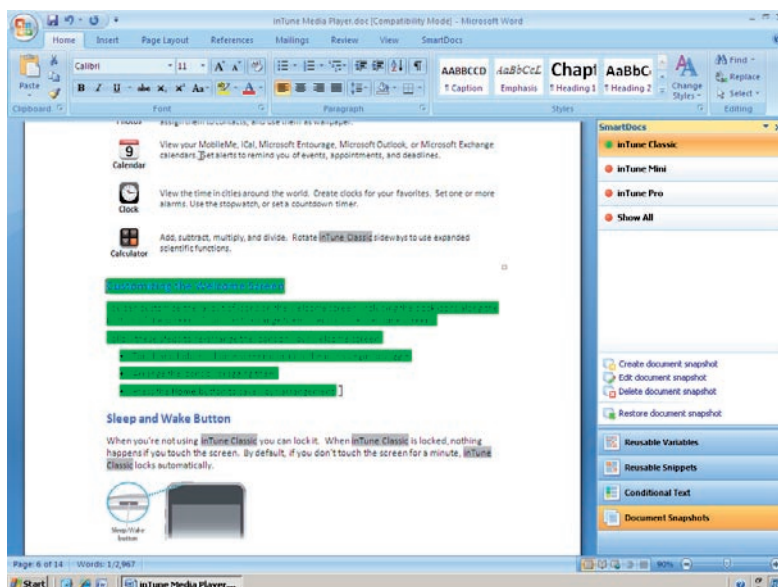


Figure 7. Snapshots

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