
Single-Sourcing Overview

by Sarah S. O'Keefe

About the Speaker:

Sarah O'Keefe is founder and president of Scriptorium Publishing Services, Inc. The company provides technical documentation services to high-tech companies, including everything from start-ups to Fortune 100 companies. Sarah is an Adobe Certified Expert in FrameMaker and certified WebWorks Publisher trainer. Her background includes technical writing, technical editing, production editing, and extensive online help development with several hel

authoring tools. Sarah is the author of *FrameMaker for Dummies* and currently works as a consultant to assist companies in implementing single-sourcing systems and other publishing solutions.

Sarah has presented at several national conferences, including last year's first frameusers conference.

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Introduction

The term “single sourcing” refers to process of creating multiple output formats (usually printed and online) from a common set of source files.

When the printed books (such as user’s guides and reference materials) and online help have a significant amount of overlap, single sourcing offers the possibility of huge savings in time and money.

However, early attempts at single sourcing often resulted in book-like online help—the materials were not designed for the correct medium.

Today, with professional tools and careful planning, you can deliver high-quality printed and online content from the same set of FrameMaker source files. This paper describes some of the available options and how to structure content.

The case for single sourcing

Single sourcing is not right for every project. But it makes sense when:

- The content of the help and the book overlap. If more than 50 percent of the content is identical, the project is a good candidate for single sourcing.
- Limited time and money are available for the documentation effort, which makes it impossible to develop each deliverable separately.

If your project has significant resource constraints, and the expense of maintaining two sets of source files is a concern, single sourcing can help you deliver the materials on time and on budget.

The single-sourcing advantage

Single sourcing has the potential to save significant time and money by:

- Eliminating labor-intensive maintenance for multiple sets of source information.
- Eliminating the repeated expense of manual conversion from print to online, which must be done for every delivery (and for every language, if the deliverables are translated).
- Taking advantage of content overlap. Writers only write the materials once and then reuse the content.

Typical objections to single sourcing

When single sourcing is proposed, there are a few common objections:

- Presentation requirements for print and online are too different for a common source file.
- Extensive customization is required to use each medium effectively, so single sourcing doesn’t really work.
- Content of print and online materials is totally different.

We’ll examine each one of these in turn.

Presentation requirements differ

Because the conversion process is based on the structure of the document and not its appearance, it’s possible to deliver online help that has similar content, but a different presentation from the printed book. For example, the book might contain chapters and sections. The online help would contain topics, which are equivalent to sections. The chapter title would make an appearance in the hierarchical table of contents.

The online help can look completely different from the printed material.

Extensive customization is required

This is true. Some information is needed in the book, but not in the help and vice versa. Most often, the solution is to use conditional text—create conditions for print-only and online-only content. You can then selectively include and exclude the print-only and online-only information. For example, you want to include interface help in the online help but not in the printed book, so you would apply a HelpOnly condition tag to the text. During conversion, you

include that conditional text in your output. At the same time, you exclude the PrintOnly conditional text, which might include introductory conceptual information.

This customization can be built into the conversion process so that no manual work is required.

Content of print and online materials is totally different

If the print and the online materials do not have any information in common, there's no reason to attempt to deliver from a single source! In this case, I recommend that you simply pick the best tool for print development (FrameMaker!) and the best tool for your online materials, and develop each one separately.

Single sourcing with FrameMaker and WebWorks Publisher

For the most part, Scriptorium Publishing uses FrameMaker in combination with WebWorks Publisher to implement single-sourcing solutions. This is not the only set of tools available, but we are finding that it works well for us.

The process works like this:

- Plan for single sourcing
- Develop content in FrameMaker
- Export from FrameMaker via WebWorks Publisher to WinHelp, HTML, HTML Help, JavaHelp, or other tagged formats

Plan for single sourcing

Before you begin creating content, it's critical that you plan your approach. During this planning phase, you need to identify what type of information is going where. For example, you might decide to deliver detailed conceptual information about your product in the books and procedural information in both the books and the online help. In this case, the conceptual information would need to be excluded from the online help. You might also have certain types of information in the online help that's not in the printed information. These scenarios require that you set up some conditional text tags and apply them to the appropriate content.

The FrameMaker template is another critical component of the single-sourcing process. Because WebWorks Publisher (and any other conversion tool) uses FrameMaker tags to identify structural elements in the FrameMaker files, you need to make sure that your FrameMaker template includes tags for all the different components you'll need to create your deliverables. You may have information that looks identical on paper but

different online. For example, your body text and your glossary term definition tags might have the exact same appearance in the FrameMaker files. But when you convert the content, you want the glossary term definitions to become pop-ups, and you want the body text to appear as "main" text in your online help topics. To accomplish this, you'll need a "body" tag and a "glossary definition" tag. They may have the same appearance in the FrameMaker files but you need to make sure that you use them consistently to identify the two different types of information.

Develop content in FrameMaker

Once your template and your planning are complete, you create the content. Structure the content to ensure that it will work in online delivery. For example, in a printed book, it is not particularly important to make sure that sections are consistent lengths. But when you convert the book to online help, those sections become topics. It's important to have topics that are fairly consistent in length; otherwise, the topics are difficult to read (some are too long and require scrolling; others are too short and require too much clicking). Pay attention to the depth of each section to make sure that it's consistent with others—something you might not do for a print-only deliverable.

If you are single sourcing, you will become intimately acquainted with several advanced FrameMaker features. As mentioned earlier, conditional text is especially important—you use it to identify text that is intended only for the print version or only for the online version. Markers, cross-references, and hypertext commands also play important roles. Markers provide a way to embed hidden text used when the file is converted to the online output; this technique is used for links, context-sensitive IDs, and other interesting features. Cross-references and hypertext commands become hyperlinks.

Export from FrameMaker via WebWorks Publisher

Once your FrameMaker files and tagging structure are ready, map the FrameMaker tags to online equivalents using WebWorks Publisher. Paragraph tags, character tags,

cross-references, conditional text, tables, markers, and other items are supported. However, items on the FrameMaker master pages are completely ignored. To create topic headers and footers, you build page templates in WebWorks Publisher

Basic single-sourcing techniques

A typical documentation library includes several different types of information:

- Conceptual
- Procedural
- Reference

These types of information require different approaches in your single-sourced documentation.

Conceptual information

Conceptual information helps the reader understand the topic being discussed. For example, a software manual that explains how to use a complicated desktop publishing package might start by explaining the idea of desktop publishing, what the package's strengths and weaknesses are, and how best to approach learning the new software.

Conceptual information is often the most difficult for readers because it requires them to grasp new ideas. It often includes diagrams and other art.

This type of information is almost always included in printed materials because it requires close (and perhaps repeated) examination. Sections may be quite lengthy and not appropriate for online help topics.

Another location for conceptual information is often in introductory sections. For example, a section that explains how to accomplish a particular task might begin with some background information about why you need to accomplish that task.

The overview material and the introductions before the tasks are often included in printed material but eliminated or cut back in the online versions.

Procedural information

Procedural information consists of step-by-step instructions on how to complete a task. In software manuals, procedural information most often describes how to manipulate the interface.

Procedural information is usually relatively easy to understand—the reader just follows each step to complete the task. Procedures often include screen shots or illustrations to show the results of steps.

Procedural information is a good candidate for online help because it's often used for a quick refresher. The reader doesn't remember how to accomplish a task, and a quick check of the online help provides the information needed. In most documentation projects, procedural information is also included in the printed versions. It usually makes up a significant portion (50 percent or more) of the total documentation provided.

Procedural information usually does not need much modification to work for the printed and online versions. One common technique is to add links to additional information in the online version.

Reference information

Reference information is detailed information about a product (such as specifications or syntax descriptions) that readers need to use the product. But, as the name implies, the information is often referenced bit by bit. For example, a programming language manual would include reference information for each command that explains what that command does, what its parameters are, and how it interacts with other commands and settings.

Reference information is perfect for online delivery because users often need to search through it. Although a good index and logical organization are helpful in a book, online formats can provide full-text search and other powerful search features. Another advantage of online

reference information is that you can provide hyperlinking to tie together related information. Users can jump from topic to topic to find exactly the information that they need.

One danger with reference information is that users can become lost in all the links, so it's important to provide understandable navigation and cues to tell readers where they are.

Reference information can be lengthy. Delivering it online does not incur "per-page" costs, so it's an attractive option because it reduces paper costs.

Summary

Single sourcing is not right for every environment. But if there is significant content overlap between printed and online deliverables, you should consider single sourcing. If you decide to single source, planning is critical to ensure a successful project.

The tools that now support single-source deliverables are powerful, but they also present formidable learning challenges. If you plan to single source, make sure that you allocate enough time to learn the new tools and processes. Consultants such as Scriptorium Publishing can help you cut down the learning time and get you up and running quickly.

