CHAPTER 1   Topic Template Files

This set of files illustrates how to set up a chapter (PDF) or topic family (the equivalent of a chapter in online help--my own made-up term) for both English and localized help.

topics_englishOnly.book contains the following files:

1. intro

2. topics_all_docs

3. topics_english_only

4. topics_conditionalized.webui

   The "webui" in the filename indicates that this file contains doc for one or more pages in the web interface. Including this tag in the file makes it easier to find all doc files that correspond to specific webUI pages.

   This file contains content that is in

   – aa_npm_Local condition (translated doc only),

   – aa_npm_English condition (untranslated English doc only), and

   – unconditional (both doc sets).

5. topics.RT

   Each chapter/topic-family will end with a "related topics" topic in a topic-family.rt.fm file, as before. Related Topics will be "English-only" and will be included in both online help and PDF manuals:

topics_localOnly.book contains a a subset of these files:.

1. intro

2. topics_all_docs

3. topics_conditionalized.webui

Localized Doc

TechPubs needs to produce two versions of the doc for each localized release:

- English—Includes all online content, both basic and admin-level. Required for Alloy Eagle.

- Localized (translated)—A localized help system with the following characteristics:

  Localized help is targeted at non-administrative users.

  Detailed content about setup, configuration etc. is excluded.

  To reduce translation costs, only non-admin-user-level information is included:

  - Metric descriptions

  - Navigators, Quick Views, etc. descriptions (to the extent that they need documenting)

  - Conceptual information necessary to interpret metrics, navigators, quick views, etc.

  - Non-admin workflows for creating custom reports etc.

  - For admin-user buttons/widgets in the web interface, the help will provide high-level descriptions and refer users to the English help for detailed info

Implementation Details

To implement these two help systems, and to include/exclude content as needed, TechPubs will use two methods:

- Organize basic (translated) and administrator (English-only) help topics into separate FrameMaker source files

- If a single file includes both types of content, apply condition indicators to basic-only and administrator-only content

These sample files use both methods to organize topics.

Topic N: English-Only

This file contains Administrator-level topics that will be included only in the English (untranslated) documentation. Applying the aa_npm_English condition is unnecessary unless you want to include any content in this file in the translated doc.

Topics for a Web Interface Page

To enable and set up this feature, go to Menu > Page Group: Page. This section includes .

Note the following:

- The topic heading above includes a "Filename" marker at the end. The marker text determines the HTML filename when this topic is fed through WebWorks ePublisher/Automap. You should coordinate with the UI team to ensure that the help button on the UI page links to the correct HTML page in the help.

- The note below is in aa_npm_Local condition. Many users might have Administrator access but are simple users, not administrators. This note is to indicate that the web interface page is really for administrators and the doc for this is in the English help.

Note: You must be logged in as an Administrator to configure WTA. For information about these options, choose Help > Administrator Help in the web interface. Then search for "WTA Page Analysis Configuration".

See also "Related Topics: *Topic_Title*" on page 9.

Data Collection Options

Option	Description / Comments
Simple Widgets Group	
Simple Widget 1	Simple Widget 1 Description
Simple Widget 2	Simple Widget 2 Description
Simple Widget 3	Simple Widget 3 Description
Simple Widget 4	Simple Widget 4 Description
Dialog Box 1 (Admin Only)	Include a short, high-level description of the dialog box and set the table row to aa_npm_Local condition. Full dbox description (in aa_npm_English condition) is below, at "Dialog Box 1 (Admin Only)" on page 7.
Dialog Box 2 (Admin Only)	Include a short, high-level description of the dialog box and set the table row to aa_npm_Local condition. Full dbox description (in aa_npm_English condition) is below, at "Dialog Box 2 (Admin Only)" on page 7.
"Complex Widget 1 (Main Page)"	
"Complex Widget 2 (Main Page)"	

Complex Widget 1 (Main Page)

Description of a widget/option that is too complex to describe in a table cell. In most cases a complex option is Administrator-only (==> not in the translated doc) and thus should be in aa_npm_English condition.

-
-

Note the following:

-
-
-

Complex Widget 2 (Main Page)

Description of a widget/option that is too complex to describe in a table cell. In most cases a complex option is Administrator-only (==> not in the translated doc) and thus should be in aa_npm_English condition.

-
-

Note the following:

-
-
-

Important Notes for This Web Interface Page

<<WRITER's NOTE:

Topics for a Related Web Interface Page

In some cases, you might want to include topics for multiple webUI pages in the same Frame file if the pages are tightly interrelated.

To enable and set up this feature, go to Menu > Page Group: Page. This section includes .

Note the following:

- The topic heading above includes a "Filename" marker at the end. The marker text determines the HTML filename when this topic is fed through WebWorks ePublisher/Automap. You should coordinate with the UI team to ensure that the help button on the UI page links to the correct HTML page in the help.

Note: You must be logged in as an Administrator to configure WTA. For information about these options, choose Help > Administrator Help in the web interface. Then search for "WTA Page Analysis Configuration".

See also "Related Topics: *Topic_Title*" on page 9.

Data Collection Options

Option	Description / Comments
Simple Widgets Group	
Simple Widget 1	Simple Widget 1 Description
Simple Widget 2	Simple Widget 2 Description
Simple Widget 3	Simple Widget 3 Description
Simple Widget 4	Simple Widget 4 Description
Dialog Box 1 (Admin Only)	Include a short, high-level description of the dialog box and set the table row to aa_npm_Local condition.
Dialog Box 2 (Admin Only)	Include a short, high-level description of the dialog box and set the table row to aa_npm_Local condition.
"Complex Widget 1 (Main Page)"	
"Complex Widget 2 (Main Page)"	

Complex Widget 1 (Main Page)

Description of a widget/option that is too complex to describe in a table cell. In most cases a complex option is Administrator-only (==> not in the translated doc) and thus should be in aa_npm_English condition.

■

■

Note the following:

■

■

■

Complex Widget 2 (Main Page)

Description of a widget/option that is too complex to describe in a table cell. In most cases a complex option is Administrator-only (==> not in the translated doc) and thus should be in aa_npm_English condition.

■

■

Note the following:

■

■

■

Important Notes for This Related Web Interface Page

Dialog Box 1 (Admin Only)

Custom Page Analysis rules enable you to customize how WTA processes specific types of web objects. A Page Analysis rule includes a web-object filter and the set of actions to perform on objects that match this filter. Examples of actions you can specify include:

Dialog Box 1 Settings

To create or edit Page Analysis rules, go to Administration > Web Transaction Analysis: Page Analysis. Then go to Custom Page Analysis Rules.

Setting	Description / Notes

Important Notes for Dialog Box 1

..

Examples of How to Config Dialog Box 1

Dialog Box 2 (Admin Only)

Custom Page Analysis rules enable you to customize how WTA processes specific types of web objects. A Page Analysis rule includes a web-object filter and the set of actions to perform on objects that match this filter. Examples of actions you can specify include:

Dialog Box 1 Settings

To create or edit Page Analysis rules, go to Administration > Web Transaction Analysis: Page Analysis. Then go to Custom Page Analysis Rules.

Setting	Description / Notes

Setting	Description / Notes

Important Notes for Dialog Box 1

..

Examples of How to Config Dialog Box 1

Related Topics: *Topic_Title*

CHAPTER 2 Topic Information Architecture

This task includes some sample outlines and templates for writing topic-based documentation, based on the principles described in Every Page is Page One. This document is intended as a set of guidelines, not set-in-stone rules. The following topics are discussed:

- "Characteristics of "Every Page is Page One" Topics"
- "Topic Template (Task)"
- "Topic Template (Workflow)"
- "Topic Template (Reference)"
- "Topic Template (Concept)"
- "Topic Template (Pathfinder)"

Characteristics of "Every Page is Page One" Topics

Here is what Mark Baker says (EPPO p78):

- **Self-contained:** An EPPO topic is self-contained. It has no previous topic and no next topic. It does, however, rely on the whole information environment in which it is located for supporting and ancillary information.

- **Specific and limited purpose:** An EPPO topic has a specific and well-defined purpose. This is highly related to the purpose of the person who is reading it, but it is not the same thing. One topic has to serve many readers, and is designed to serve a community, not an individual.

- **Conform to type:** It turns out that, unlike book length content, Every Page is Page One topics seem to naturally conform to fairly well-defined types, often the result of a community process that develops the best way to treat a particular kind of subject. The type of a topic is based on its purpose: the type defines the information necessary to serve its purpose.

- **Establish context:** Readers can come to an Every Page is Page One topic from anywhere. An EPPO topic must establish its context in the real world so readers knows where they are and what to expect.

- **Assume the reader is qualified:** An EPPO topic assumes readers are qualified to complete the specific and limited purpose of a topic. Readers who are not fully qualified can read other topics to get the information they need.

- **Stay on one level:** Books tend to change their level of abstraction and detail over the course of the narrative. But information-foraging readers prefer to choose for themselves whether to go for detail or the big picture. An Every Page is Page One topic stays on one level and allows readers to change levels whenever they wish by changing topics.

- **Link richly:** An EPPO topic is meant to support effective information foraging. Therefore, it links richly along the lines of subject affinity to help the reader follow the scent of information.

Every Topic Starts with the Following

Each topic starts as follows:

1. Heading withHeading1Topic or Heading2Topic tag

2. Intro/context paragraph

3. List of links to sub-topics (if the topic is long and complex, with subsections that will appear on the same help page.

4. A one-sentence reference paragraph pointing to the Related Topics section:

See also "Related Topics: *Topic_Title*" on page 9.

Topic Template (Task)

```
Try to make all headings and subheadings as self-descriptive as possible. Can a user
determine the topic just from the heading? For example: "Define Monitoring Interface Groups
(MIfGs)" is better than "MIfG Configuration"
```

Each topic should start with an Introduction/Context section. A self-contained topic must establish its context. Readers should be able to come to this topic from anywhere and know whether they've arrived at the right place. The introduction should provide some real-world context for the topic:

- *What?* — Define the feature.

- *How?* — If necessary, define how the feature works.

- *Why?* — Tell the user why they would enable this feature, when to enable it, and what they gain from enabling it.

Example:

Oracle Forms is a platform for developing user interface applications to interact with an Oracle database. (*What?*)

It uses a Java applet to interact with the database in either native, HTTP, or HTTPS mode. The Steelhead appliance decrypts, optimizes, and then re-encrypts the Oracle Forms traffic. (*How?*)

Use Oracle Forms optimization to improve Oracle Forms traffic performance. RiOS v5.5.x and later supports 6i, which comes with Oracle Applications 11i. RiOS v6.0 supports 10gR2, which comes with Oracle E-Business Suite R12. This feature does not need a separate license and is enabled by default. However, you must also set an in-path rule to enable this feature. (*Why?*)

This example taken from the "Information Types, Topic-Based Writing, Authoring Tools" presentation on the Tech Pubs internal Twiki:

https://twiki.nbttech.com/twiki/bin/view/NBT/FormattingAndWriting

Import Notes, Prerequisites, Gotchas, Warnings

If a task has several prerequisites, warnings, notes, and/or gotchas that need to be documented, you might want to break them into a separate section. Are there any prerequisites that users need to be aware of before they perform the task? If a warning is especially nasty, you might want to put into a separate section in an of itself (WARNING: If you do this wrong, the appliance will become unusable and all data will be lost).

Task Description

To do something:

1.

2.

3.

Examples (*Optional*)

In the event of a very large or complex task, it might be helpful to include some real-world examples for the user.

Troubleshooting (*Optional*)

It is good practice to include any troubleshooting tips/tricks/etc. that you might pick up from developers, support engineers, or QA

Topic Template (Workflow)

```
Try to make all headings and subheadings as self-descriptive as possible. Can a user
determine the topic just from the heading? For example: "Define Monitoring Interface Groups
(MIfGs)" is better than "MIfG Configuration"
```

Each topic should start with an Introduction/Context section. A self-contained topic must establish its context. Readers should be able to come to this topic from anywhere and know whether they've arrived at the right place. The introduction should provide some real-world context for the topic:

- Why would you want to do this task?
- Are there any prerequisites/warnings that users need to be aware of before they perform the task?

What is a Workflow?

A workflow is intended as a high-level sequence of tasks. Here is what EPPO has to say:

■   The Every Page is Page One solution to the sequence-of-tasks problem is to write a single, separate workflow topic that captures the overall sequence and points to the constituent tasks in the appropriate order. This approach is preferable to using a fixed sequence of topics. It allows you to create multiple workflows, each of which may be more clearly expressed through a separate topic. This avoids some of the convoluted conditional expressions required if multiple workflow variants are expressed in a single linear topic sequence. It also avoids the need to reuse the task topics in multiple locations. Therefore, no matter the medium, a workflow should always be described in a topic of its own. Since workflows generally consist of multiple tasks or procedures, a workflow topic can refer to those tasks and procedures and link to the topics that describe them.

Import Notes and Warnings

If a workflow has several warnings/notes/gotchas attached, you might want to break them into a separate section. If a warning is especially nasty, you might want to put into a separate section in and of itself.

WARNING: Follow this Workflow Exactly or Else!

If you skip any steps in the following workflow, the appliance will

1. Erase all data,

2. Ruin your credit rating,

3. Empty out your bank account, and

4. Post embarrasing baby pictures to all your Facebook friends.

Workflow Description

To do a workflow:

1. Do this task.

    For more information, see TASK_XREF.

2. Do this task.

    For more information, see TASK_XREF.

3. Do this task.

    For more information, see TASK_XREF.

Examples

In the event of a very large or complex workflow, it might be helpful to include some real-world examples for the user.

Topic Template (Reference)

> Try to make all headings and subheadings as self-descriptive as possible. Can a user determine the topic just from the heading? For example: "Define Monitoring Interface Groups (MIfGs)" is better than "MIfG Configuration"

Each topic should start with an Introduction/Context section. A self-contained topic must establish its context. Readers should be able to come to this topic from anywhere and know whether they've arrived at the right place. The introduction should provide some real-world context for the topic. To what users, workflows, and/or problems is this reference information relevant? Are there any prerequisites for this info? For example, if the topic is a reference on CLI commands, you might want to describe (or link to another topic that describes) how to open a CLI window and log in to the appliance.

If the topic is fairly simple and self-contained, simply include the info here in a table, bulleted list, or some other format. No subsections (except necessary.

UI Page / Dialog Box Settings

If you're describing settings in a UI page | dbox, include a short paragraph (preferably one sentence) that the nagivation path. For example: To create or edit Page Analysis rules, go to Administration > Web Transaction Analysis: Page Analysis. Then go to Custom Page Analysis Rules.

If you include a screenshot of a UI page or dbox, set the heading and graphic to riverbed_hardcopy condition. Tech Pubs uses this condition to hide screenshots from the help systems that are loaded onto appliances. These screenshots are included in the PDFs and online help on the Support site. Import the graphics directly into the Frame file, not by reference.

Figure 2-1. Monitoring Interface Group Settings
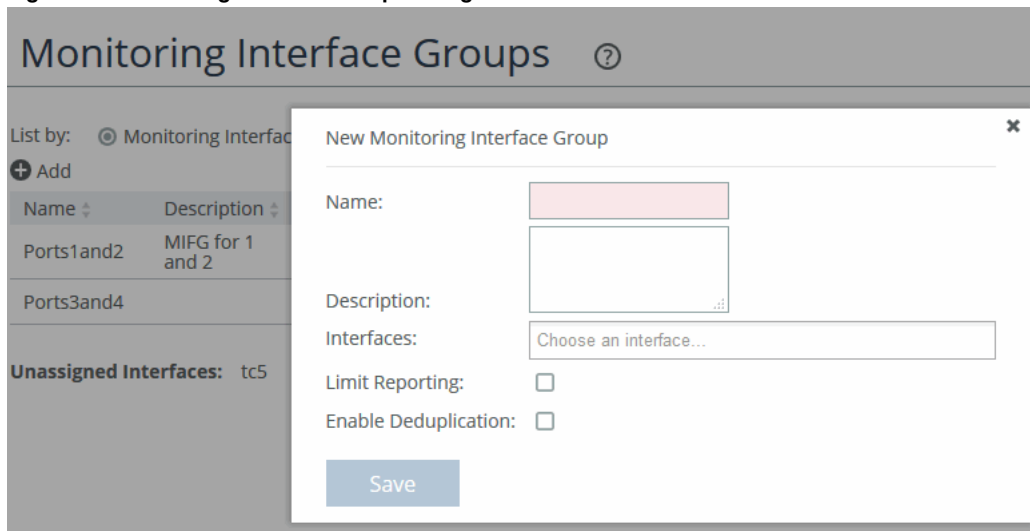
Monitoring Interface Group Settings

Item	Description
Simple Option (*no description needed*)	
Standard Option	Description
Standard Option	Description
Standard Option	Description
"Complex Option 1"	
"Complex Option 2"	

Complex Option 1

If a specific option requires a great deal of explanation, it might make sense to break it out into a subsection.

Complex Option 2

If a specific option requires a great deal of explanation, it might make sense to break it out into a subsection.

Topic Template (Concept)

```
Try to make all headings and subheadings as self-descriptive as possible. Can a user
determine the topic just from the heading? For example: "Define Monitoring Interface Groups
(MIfGs)" is better than "MIfG Configuration"
```

Each topic should start with an Introduction/Context section. A self-contained topic must establish its context. Readers should be able to come to this topic from anywhere and know whether they've arrived at the right place. The introduction should provide some real-world context for the topic. To what workflows/ tasks is this concept relevant?

If the topic is fairly simple and self-contained, simply include the info here in a table, bulleted list, or some other format. No subsections necessary.

What is a Concept?

Here are some EPPO excerpts about concepts:

- The real heart of technical instruction doesn't lie in the step-by-step how-to information. It lies in understanding concepts and how they work together to produce an end. This focus on the conceptual interplay of the parts should drive the technical writing experience, both from a reader and writer's point of view. Procedures are more like footnotes. As soon as the user understands the why and the what and the who and the where, the how is merely a mundane detail. -- "Misconceptions about Topic-Based Authoring"

- One of the meanings of concept is relevant to many technology products. Many products are designed around certain fundamental ideas that users need to understand to use the product. When users switch from one technology to another – for example from an unstructured desktop publishing process to a structured writing process or from writing books to writing Every Page is Page One topics – they need to learn the fundamental concepts of the new technology and understand how those concepts differ from their old technology. In this case, a concept is not "everything else" but something quite specific. Mixing "everything else" topics, even if they are useful, with these fundamental, "big-C" concepts is dangerous because the big-C concepts can get lost in the noise of hundreds of topics labeled concept.

- In the context of DITA, concept is one of the three basic topic types, along with task and reference. In the context of Information Mapping, concept is one of the six types of information blocks. In the context of this book, a concept is a major foundational idea of a system or process that the user needs to grasp to use that system or process effectively.

Topic Template (Pathfinder)

```
Try to make all headings and subheadings as self-descriptive as possible. Can a user
determine the topic just from the heading? For example: "Define Monitoring Interface Groups
(MIfGs)" is better than "MIfG Configuration"
```

A Pathfinder topic is basically a high-level overview and a list of links. It doesn't have a Related Topics subsection because it's essentially a collection of related topics and some overview text to tie it all together. From EPPO:

> Pathfinder topics are not task topics (in particular, they should not be confused with workflow topics, which are a kind of task topic), nor are they big-C concept topics. Rather, they are topics that help users find their way around the technology, giving them a sense of where everything is and how all the parts work together. If big-C concept topics are aimed at understanding, pathfinder topics are aimed at orientation and planning.

> A pathfinder topic shows the reader the overall path for accomplishing some real goal with your product. It is not a beginner topic because it does not assume that users want to do something very simple for practice. Instead, a pathfinder topic covers the full range of tasks and features in a way that helps the user get a grip on how to attack a problem. But it gives none of the details. The details are left to the task-oriented topics that make up the bulk of the information set. Good Every Page is Page One topics stay on one level. Pathfinder topics fit at a level below the big-picture topic and above workflow or task topics. The role of the pathfinder topic is to set the user's feet on the right course. In most cases, that is why users want a view of the big picture in the first place – they want to work out a plan of attack for a certain kind of problem. A straight-up big-picture topic is certainly worth having, but the real work of guiding users down the right path belongs to the pathfinder topic.

> For an example of a pathfinder topic, check out the WordPress Codex topic titled "Photoblogs and Galleries.

APPENDIX A PDF Numbering and Pagination Settings

This appendix shows the Numbering and Pagination settings for different types of topic files when generating PDFs.

Topics at Start of Chapter

Example: "Topic Template Files" on page 1.

Because the topics in this file go into the start of a chapter (with more topics following), you need to set the numbering/pagination settings correctly in the PDF version of the book. Do the following:

1. Right-click on this file in the PDF book, choose Numbering, and set the following:
    – Volume = Use Same Number As Previous File
    – Chapter = Continue Numbering from Previous Chapter in Book
    – Page = Continue Numbering from Previous Page in Book

2. Right-click on this file in the PDF book, choose Pagination, and set the following:
    – Pagination = Double Sided
    – 1st Page Side = Right
    – Before Saving and Printing = Delete Empty Pages

Topics in Middle of Chapter

Example: "Topics for a Web Interface Page" on page 4.

Because the topics in this file go into the middle of a chapter (with topics before and after), you need to set the numbering/pagination settings correctly in the PDF version of the book. Do the following:

1. Right-click on this file in the PDF book, choose Numbering, and set the following:
    – Volume = Use Same Number As Previous File
    – Chapter = Use Same Number As Previous Chapter
    – Page = Continue Numbering from Previous Page in Book

2. Right-click on this file in the PDF book, choose Pagination, and set the following:

– Pagination = Double Sided

– 1st Page Side = Next Available

– Before Saving and Printing = Delete Empty Pages

Topics at End of Chapter

Example: .

Because the topics in this file go into the end of a chapter (with topics preceding and none following), you need to set the numbering/pagination settings correctly in the PDF version of the book. Do the following:

1. Right-click on this file in the PDF book, choose Numbering, and set the following:

    – Volume = Use Same Number As Previous File

    – Chapter = Use Same Number As Previous Chapter

    – Page = Continue Numbering from Previous Page in Book

2. Right-click on this file in the PDF book, choose Pagination, and set the following:

    – Pagination = Double Sided

    – 1st Page Side = Next Available

    – Before Saving and Printing = Delete Empty Pages

All Topics in One Chapter

Example: .

This is the standard FrameMaker file organization, with all related topics for a chapter in one file. You need to set the numbering/pagination settings correctly in the PDF version of the book. Do the following:

1. Right-click on this file in the PDF book, choose Numbering, and set the following:

    – Volume = Use Same Number As Previous File

    – Chapter = Use Same Number As Previous Chapter

    – Page = Continue Numbering from Previous Page in Book

2. Right-click on this file in the PDF book, choose Pagination, and set the following:

    – Pagination = Double Sided

    – 1st Page Side = Next Available

    – Before Saving and Printing = Delete Empty Pages