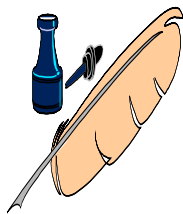


WinHelp HAT Selection:

Define Your Project(s) First©

A Guide to Selecting a WinHelp Authoring Tool



By

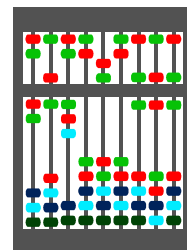
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WinHelp HAT Selection: Define Your Project(s) First©

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1997 Note: This paper has not been revised; so the details are now a year out of date. Its two main points, however remain absolutely unchanged: 1) let your project needs drive your tool type selection; and 2) within that type pick a major vendor that will be able to withstand the costs of keeping current during the chaotic transition from WinHelp to HTML-based help.

1. Introduction

There are at least a dozen WinHelp HATs (help authoring tools) out there, and probably a hundred arguments for the purchase of one tool over another. This article does not argue for or against a specific tool; rather it argues that if you:

- define your needs correctly, and
- select one of the major tools from the category that suits your needs

your selection process will be quicker and easier, and also produce more satisfactory results.

WinHelp can produce more than a help file for software users; and particularly if your project is a stand-alone (such as a catalog or a directory), you need to choose a tool that fits your specific needs.

Caveat: This article will not discuss the selection of tools to import sophisticated DTP documents into WinHelp: the author simply can't speak with enough authority on the subject. And because I'm no longer a WordPerfectionist, HATs utilizing that software are also slighted. *Mea culpa.*

This article is divided into four major sections:

1. Introduction
2. Selection Criteria
3. Categories of HATs
4. Bibliography.

Why You Should Select a Major Tool

There are some HATs that are as good as (in selected aspects, better than) the "big boys" identified here; but technical superiority doesn't guarantee significant market share. Sometimes it doesn't even guarantee survival. There are several reasons to choose a major tool:

- longevity;
- support;
- future development;
- add-on utilities;
- servicing clients.

Each will be considered below.

Longevity. Hypertext in general and help authoring in particular have matured to the point where it is much more likely that a shakeout will occur soon among current players than that a minor player will emerge dominant.

Note: Don't get me wrong: I like small companies. Scribble & Count is a *very* small company. But hypertext has become so complex that small software developers are losing ground. Our small writing company can't afford to hitch its wagon to a small software developer that won't be around three upgrades from now.

This longevity is related to **Support** and **Future Development**, discussed in the next paragraphs.

Support. This, too, favors the big boys. All major HATs have relatively good phone and quite good fax/email support.

Note: Good, free, unlimited support on a toll-free line is just about a thing of the past, even for MegaSoft. Get used to signing a support contract, or submitting your problem in a format (fax or email) which permits them to batch several problems together for response.

Future Development. Microsoft won't develop WinHelp any further, but its move to HTML-based help will be extremely demanding on HAT developers. HTML is a rapidly moving set of standards; as those standards change, the major players will be on the scene first with bug-free, full-featured upgrades.

Add-On Utilities. The majors have a wide variety of utilities integrated into their programs: screen capture tools, macro recorders, trouble-shooting diagnostics, map generators, SHED/SHG editors, multi-media support, content trees etc. So you won't have to purchase a lot of add-ons, and if you do add one, it's more likely to be compatible with what you already have.

Note: In this regard, Blue Sky's WinHelp Office suite is *huge*, including virtually every utility and convenience you'd ever want. It's also expensive. See **RTF Insertion** section, below.

Servicing Clients. If you're an independent contractor, you have to respond to your clients. Probably 95% of them have one of the majors (and expect you to be able to use it) or have heard of the majors (and will wonder why you're recommending something they've never heard of).

Conclusion. Don't use any of the factors above to select one HAT over another (don't compare WexTech's phone support to FOREFRONT's, for example); use these factors to convince you to choose the major tool in whatever category of tools best suits your project needs.

Note: Help authors who are also experienced programmers or database manipulators can ignore *some* of these reasons to use a major tool – but they should have a good reason to do so.

A Word about Ease of Use

All the majors are easy to use, but personal style will cause an author to favor one tool over another. This is valid (though I think we authors should be flexible enough to subordinate this personal preference to the applicability of the tool to the project at hand) – so comments concerning style are included in the descriptions of the categories.

Acknowledgment

Cheryl Lockett Zubak started my thinking in the direction taken by this article; for the part that still reflects her views, she gets some of the credit. For the part where I've wandered/strayed/deviated, I'm alone responsible. Either way, buy her books, read her articles, and attend her seminars. (Now will someone please remove this soapbox?)

2. Selection Criteria

Selection should be governed by the tool best suited for the project at hand. The following table lists several factors and the corresponding type of tool best suited for that aspect. The tools are described in the next section.

<u>Factor</u>	<u>Type of Tool</u>
Highly linear project	Single source
Highly non-linear project	Help simulation (Interactive)
Use of pre-existing database	Database conversion
Inexperienced WinHelp audience	Single source
Ease/cost of maintenance	Single source or RTF insertion (because more of the upkeep can be performed by clerical help familiar with MS Word or WordPerfect)*
Multi-purpose (diverse projects)	RTF insertion
On-the-fly revision	Help simulation (Interactive)
HTML conversion	Almost all major tools have good conversion utility; choose the tool based on other factors and use their converter.
ISO 9000 compliance	Single source
Short learning curve	Single source if you're good at the word processor the HAT employs; help simulation otherwise.

- * With WordPerfect, the tool choices are fewer (and since I'm no longer a WordPerfectionist, I'm not qualified to review them); WordPro devotees, as far as I know, have no comparable add-on tool.

A secondary set of criteria involves personal style and experience. Most technical writers gravitate naturally to single source or RTF insertion tools because word processors come naturally to them. Systems analysts often prefer help simulation; programmers frequently choose RTF insertion. However, the best results will come from *your* adapting to the needs of your project, not the other way around.

3. Categories of HATs

This article describes four basic categories of authoring tools

- Single source
- Help simulation (Interactive)
- Database conversion
- RTF insertion.

Within each category, strengths, weaknesses, personal style, and one or two major HATs are described.

Note: Other breakdowns are possible. Dana Cline, WizOp of CompuServe's Hypertext Technologies Forum, author of several HAT reviews (see the bibliography at end of the article), and a colleague with whom I've worked closely, thinks that any division more detailed than "stand-alone" vs "word processing add-on" is splitting hairs.

Single Source

The name refers to the convenient production of both help and print from a single source. Most HATs produce print if you insist, but the process is often cumbersome and the result is generally mediocre. Single source tools shine in this regard because they use the style sheets of high-end word processors such as MS Word or WordPerfect.

Caveat: If you choose a single source tool, *learn styles*. If you're overseeing project maintenance, be sure the clerical input staff understands them. Backwards and forwards, inside and out.

Advantages. Linearity is so ingrained in our way of thinking that some of these comments will seem to belabor the obvious. However, much of hypertext is *not* linear – so many of these "common" advantages aren't found in other categories of HATs.

- These tools are excellent for importing large bodies of acceptable text. It is therefore the easiest way to convert print documentation to WinHelp.

Note: Database conversion tools (described below) perform a very similar function when the imported material is in relational database form.

- They are also good for producing printed output that's as impressive as the word processor can produce. Quick-reference works require complex formatting to speed retrieval of specific data; your printed output won't lose anything when the help is created by one of these tools. The DOC file is a virtual WYSIWYG of the print document.
- The accompanying print manual is organized in the same way as the help. Therefore, audiences new to hypertext can follow along with the with the manual as they adapt to the help environment.

Note: I've raised the comfort level of more than one client with the ease of transition that this technique permits.

- A printed document is linear. This tool is an advantage if the project (such as a tutorial or a software user's guide organized around menu options) is also linear.

- Routine maintenance can be performed by responsible clerical staff experienced in the word processor on which the HAT is based. These para-professionals are easier and cheaper to obtain than high-priced help authors.
 - Caveat:** Make sure the persons are responsible and proficient in the *specific* word processor. Using qualified clerical staff will save you money – but not if someone from the typing pool wipes out your embedded commands.
 - Note:** The final touches and compilation into help will still have to be done by a help author.
- ISO 9000-compliance requires virtually identical print and online documentation.

Disadvantages. As usual, the drawbacks are related to the advantages. There's no free lunch.

- Because they use a sophisticated, high-end word processor, these tools are particularly demanding of system resources *during project creation*. And you have to purchase the word processor.
 - Caveat:** If that word processor is MS Word, make sure it is at least version 6.0c.
- A printed document is linear. This tool is *not* an advantage if the project (such as a troubleshooting guide or an online catalog) is not linear.
- Because the help is driven from the same document that produces the print manual and because the reformatting and compilation processes are lengthy, on-the-fly revisions and "stub" testing are cumbersome. (**Note:** Help simulation tools shine there.)

Personal Style. Technical writers (who are normally more comfortable with word processors than relational databases) find this category of tools the easiest to use. People who think only linearly are also comfortable. Most others are not *un*comfortable.

Major Tool in Category:

Doc-To-Help (WexTech Systems)
310 Madison Ave., Suite 905, NYC 10017
800/939-8324 | Fax: 212/949-4007 | URL: www.wextech.com | CIS: Go WEXTECH
Note: Doc-To-Help uses only MS Word; it is not WordPerfect-compatible.

See also: For reviews of Doc-To-Help, see § V-B of Scribble & Count's *WinHelp Resources* (cited in the bibliography at end of the article).

Help Simulation (Interactive)

This is nearly the opposite pole from single sourcing; you start from scratch with a WYSIWYG display of the help version. Print output is distinctly secondary.

Note: As their database capacity grows, these tools will begin to look more like the **Database Conversion** tools (described below).

Advantages. The advantages of this group of tools are very different from the single source tools:

- These tools are WinHelp WYSIWYG, and you'll soon find that WYSIWYG here is as powerful a feature as it was when it was introduced into word processors in the 1980s.
- These tools are also the closest to the HTML we'll all be using shortly.
- You can compile the help rapidly, so you can test individual topics in real time, and revise the entire project rapidly.
- A wide variety of non-linear relationships are easy to produce, so projects such as travel guides and course catalogs are well suited to these tools.
- You don't need to buy a sophisticated word processor; a basic one comes with the tool.

Note: Most of the omitted features are not necessary in help authoring, but some *are* useful in complexly formatted print output.

Disadvantages. Because we're so accustomed to the features of print media, this group's disadvantages loom large.

- For complex input, and for any output other than WinHelp, another tool will probably work better.
Note: A partial exception is database input, which these tools import fairly well.
- Formatting is satisfactory, but not elaborate.

Personal Style. If you're already an MS Word or WordPerfect expert, you'll be thrown off your stride by a different word processor with less octane. Nonlinear minds chafing against a rigidly constructed linear environment are as happy to find these tools as left-handed golfers were when clubs designed for them were first introduced. Visually oriented persons will feel the same way.

Major Tools in Category. There are two recommended tools in this category; therefore a pair of brief notes accompanies the directory info.

ForeHelp (FOREFRONT, Inc.)

4710 Table Mesa Dr., Suite B, Boulder, CO 80303

800/357-8507 | Fax: 303/494-5446 | URL: www.ff.com | CIS: FOREFRONT or 74777,2132

Note: Easy to learn; growing market share.

Help Writer's Assistant (Olson Software, Ltd.)

URL: [//nz.com/olson/](http://nz.com/olson/) CIS: 100352,1315

Distributed in US by HyperAct: PO Box 5517, Coralville, IA 52241

319/351-8413 | URL: [//www.hyperact.com](http://www.hyperact.com)

Note: Also easy to learn; techies find intuitive.

See also: For reviews of ForeHelp and HWA, see § V-C and § V-E, respectively, of Scribble & Count's *WinHelp Resources* (cited in the bibliography at end of the article).

Database Conversion

"Data mining" is a common buzz-term these days. It refers to taking material that has been accumulating for years in various databases and making new uses for it. These tools are excellent for this purpose; and since database conversion will remain popular for the foreseeable future, they will find a continuing market.

Note: Database conversion tools are moving toward WYSIWYG help displays just as simulation tools are adding to their database capacity, so these categories may merge in the near future.

Advantages. This is a specialized category, and the advantages are specific.

- They handle databases well.
- Because they're interactive, they are excellent at notifying the developer of changed or broken links.
- They have excellent, inter-relational content trees.

Disadvantages.

- They're the most specialized, with few broad-based features.

Personal Style. Persons who like help simulation normally like this type of tool. Those who like linearity, normally don't.

Major Tools in Category. There are two recommended tools in this category; therefore a pair of brief notes accompanies the directory info.

HDK (Hypertext Development Kit)

DEK Software International

1843 The Woods II, Cherry Hill, NJ 08003

609/424-6565 | Fax: 609/424-0785 | E-mail: 75143.3631@compuserve.com | URL:

www.deksi.com

Note: Handles large databases well. Contains customizable DLLs. Support relatively inaccessible.

ForeHelp (FOREFRONT, Inc.)

4710 Table Mesa Dr., Suite B, Boulder, CO 80303

800/357-8507 | Fax: 303/494-5446 | URL: www.ff.com | CIS: FOREFRONT or 74777,2132

Note: One of easiest tools to learn. When its limited database is enlarged, it may become the dominant tool in two categories.

See also: For reviews of HDK and ForeHelp, see § V-D and § V-C, respectively, of Scribble & Count's *WinHelp Resources* (cited in the bibliography at end of the article).

RTF Insertion

This category could be considered a middle ground between single source and help simulation; and these tools are therefore more all-purpose. All authoring tools do RTF insertion (that's the main reason you're buying one). Most perform the job transparently; tools in this category do it more or less out in the open.

Advantages. As a middle-of-the-road compromise, this category has some strengths common to the other categories, plus the strength of being the most general, all purpose tool.

- It is the best single tool for diverse range of projects.
Note: Blue Sky, the company that produces the recommended tool, has an office suite of utilities designed to cement its position as the general, all-around leader.
- Customizing individual windows is easy.
- The tools use standard word processors; so if you already know the software the HAT uses, learning is simplified.

Disadvantages. Because it is a general, all-around tool, one of its biggest drawbacks is it has few specific strengths. If you have specific, clearly defined needs, a tool from another category is probably better.

Personal Style. Because RTF codes are what the WinHelp compiler compiles, this type of tool is designed for the technician who wants to get "under the hood" and tweak the results manually.

Major Tool in Category:

RoboHELP / WinHelp Office 95 / Web Office
7777 Fay Ave., Suite 210, La Jolla, CA 92037
800/677-4946 | Fax: 619/459-6366 | URL: www.blue-sky.com

Note: If you will be compiling 16-bit help (WinHelp 3, using Windows 3.x), make sure that you are using Rev. A of RoboHELP.

See also: For reviews of RoboHELP and the entire Blue Sky suite, see § V-F of Scribble & Count's *WinHelp Resources* (cited in the bibliography at end of the article).

4. Bibliography

The following items are taken from a bibliography published by Scribble & Count (cited below). The entries here were chosen because they deal specifically with HAT selection, are basic in treatment and/or general in scope, and are recent (with one exception, including at least WinHelp 4). The full bibliography (still in draft form, because nothing in a field as rapidly changing as this is ever worthy of being called "final") can be obtained from S&C™.

Because this list is so short, it is not subdivided into books, articles, online sources, etc.

Cline, Dana. "Help Is on the Way". *VBTech Journal* (Sept. 96), pp. 20-22, 24-26, 28-30.

[Reviews all the tools recommended here except HDK and HWA.]

CompuServe Hypertext Technologies Forum. Go: HYPERTEXT.

[Library #9 specifically addresses authoring tools, but other libraries (particularly #10 and #11) are also useful in HAT selection.]

Rubenking, Neil J. "WinHelp 4: Windows 95's Enhanced Help System". In *PC Magazine* (25 June 96), pp. 207-09, 213-15.

[The accompanying sidebars evaluate every major recommended here except HDK and HWA.]

Scribble & Count. *WinHelp Resources: Selected, Classified, & Annotated*. September, 1996 draft. 40pp. (Available from the authors.)

[Organization: §1. General; §2. HTML Help; §3. Windows 95 / NT (WinHelp 4), §4. Windows 3.x (WinHelp 3); §5. Specific Products. Due to rapidly changing environment and fact that S&C devotes most its time to using tools rather than evaluating them (or collecting the evaluations of others), this bibliography will *never* be more than a draft.]

Zubak, Cheryl Lockett. *A Real World Look at Windows Help Authoring Tools*. Feasterville, PA: Work Write, 1995. ISBN: 0-9145293-0-0.

[Pricey and now a bit dated. But when it was written, the ultimate treatment of HAT selection. See her later articles (below) for less expensive, more current, but narrower treatments.]

_____. "Choosing a Windows Help Authoring Tool". In *Hyperviews*, (Summer 1995), pp. 8-11, 26.

[Written before Windows 95® was released – and before the authoring tool developers had responded.]

_____. "Selecting WinHelp Authoring Tools". In Deaton, Mary & Zubak, *Designing Windows® 95 Help*, pp. 33-68. (Indianapolis: Que, 1996). ISBN: 0-7897-0362-9.

[Covers the Windows 95 tools.]

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