



InsetPlus 3.0 Tutorial

This tutorial is a very basic hands-on introduction to InsetPlus. Using sample files that came with the software, it will allow you to perform the fundamental types of operations that InsetPlus supports. Afterwards, this general familiarity should be sufficient to get you started with the software.

These procedures assume a first-time usage of the sample files. During these procedures, you will be making some changes to those files. Therefore, you may want to make backups first, especially if you plan to reuse the files. If you are using files that someone else has used before, they may not exactly match the descriptions in this tutorial.

Note the following:

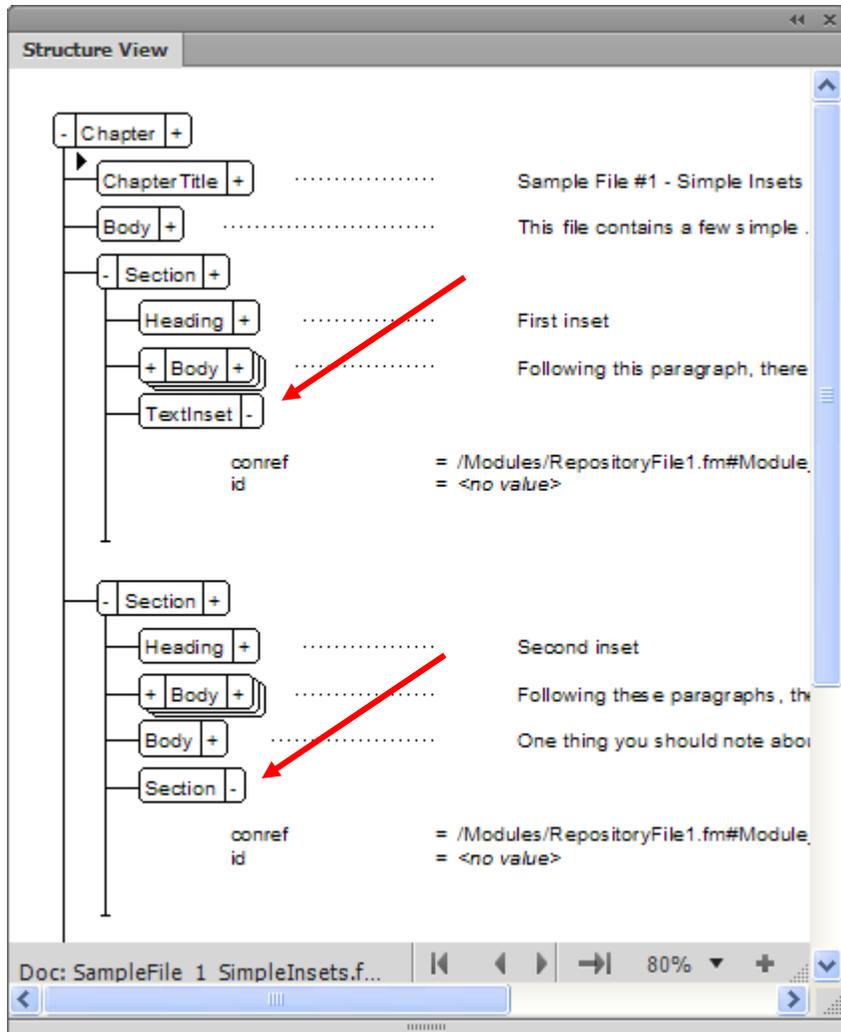
- The tutorial assumes that you are using the default settings that install with InsetPlus. Any change to those settings may cause problems with completing the steps within.
- Sample files are provided in FrameMaker 8 format. To use with later versions, simply open them with the later version and allow the conversion to occur.
- It is recommended that you make a copy of the sample files for use with the tutorial. In particular, if the folder path of source files is very long (such as files in a Technical Communications Suite installation area), hyperlinks in a source module tracking report may not work. Therefore, a new location with a shorter folder path is normally better.

Part 1 - Simple insets

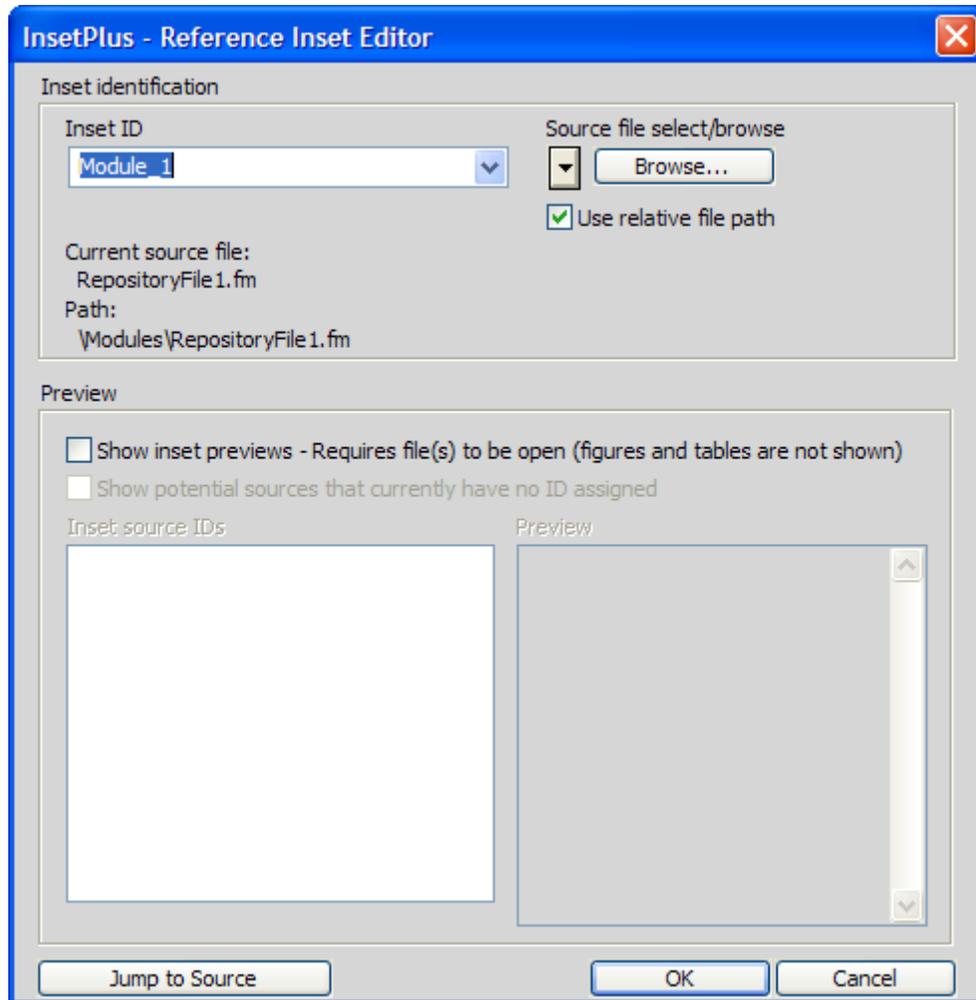
In the context of this tutorial, a “simple” inset is a basic module of content in one document that is reused in another, disregarding any of the complexity introduced by nested insets or book processing.

Updating an inset reference

1. Open the sample file `SampleFile_1_SimpleInsets.fm`.
2. Select **InsetPlus > Inset Management > Clear All Inset References** to ensure a simplified file.
Take a moment to read the document and note the structural setup. In particular, note that there are two `TextInset` elements and one `Section` element with populated `conref` attributes, indicating that they are reference inset elements.



3. On or within the first `TextInset` element, right-click and select **InsetPlus - Edit Inset Element**, or, double-click the element to launch the editor.



Some items of note:

- The inset references a source module named "Module_1" in a file named RepositoryFile1.fm.
- The path to RepositoryFile1.fm is relative.

4. Click **Cancel** to dismiss the editor.

5. Right-click on the inset element and select **InsetPlus - Update Inset Reference**.

The inset should update; that is, populate with the source content. If prompted to open the source file, click **Yes**. If the update fails, two situations are possible:

- Your local settings do not allow file opening. Check your local settings file (**InsetPlus > Open Settings File**).
- The repository file is not correctly located. Make sure there is a `Modules` subfolder relative to the sample file, and that `RepositoryFile1.fm` is in there.

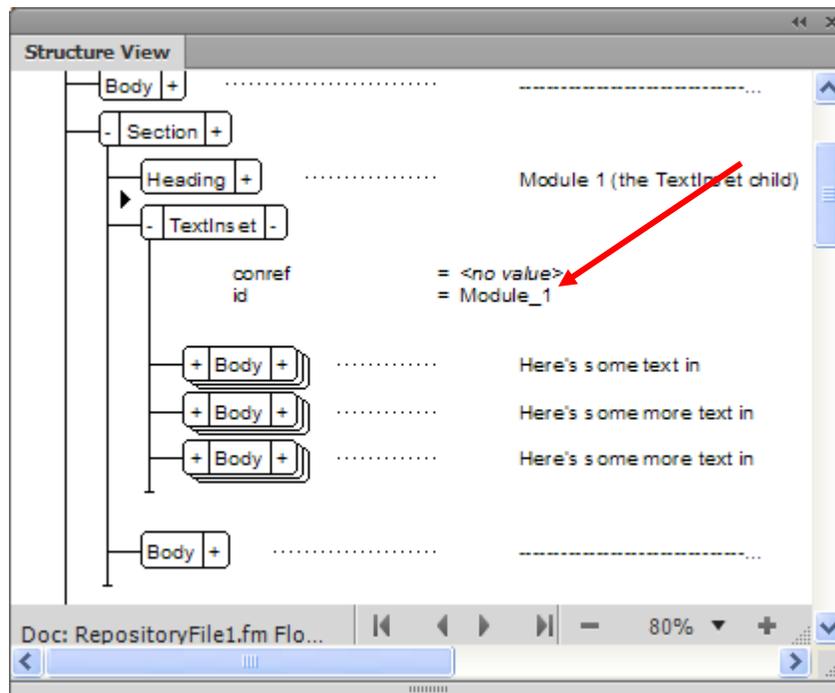
6. Take a look at what happened. Some content should have been "inset," and it is all contained within the `TextInset` element.

Locating and editing the source module

1. On the inset element that was just updated, right-click and select **InsetPlus - Jump To Inset Source**.

If successful, you should now be looking at the text inset source, within `RepositoryFile1.fm`. The menu command you selected is a simple shortcut for accessing the source file directly. `RepositoryFile1.fm` was automatically opened when you updated the inset previously so InsetPlus could access the content.

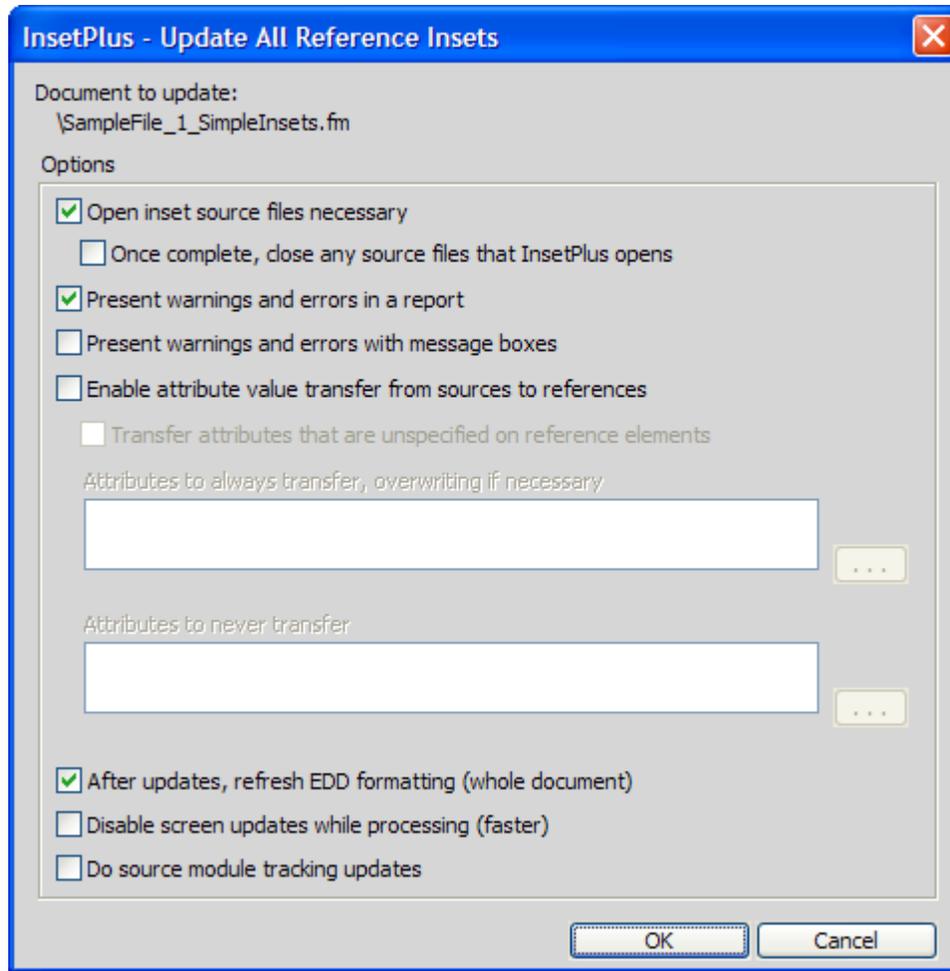
2. On or within the Module_1 source inset element, note the populated `id` attribute. This markup qualifies the element as an inset source. If you recall, the `conref` attribute on the reference element also contained this text, forming part of the link between the two elements.



3. Anywhere within the text of the source inset content (within the `TextInset` element), make a change. Change a word, insert a new element, etc. Make sure you are making an edit somewhere within the source `TextInset` element.
4. Return to `SampleFile_1_SimpleInsets.fm` and re-update the reference to `Module_1`, and note how it has been refreshed with your changes.

Document-wide updates

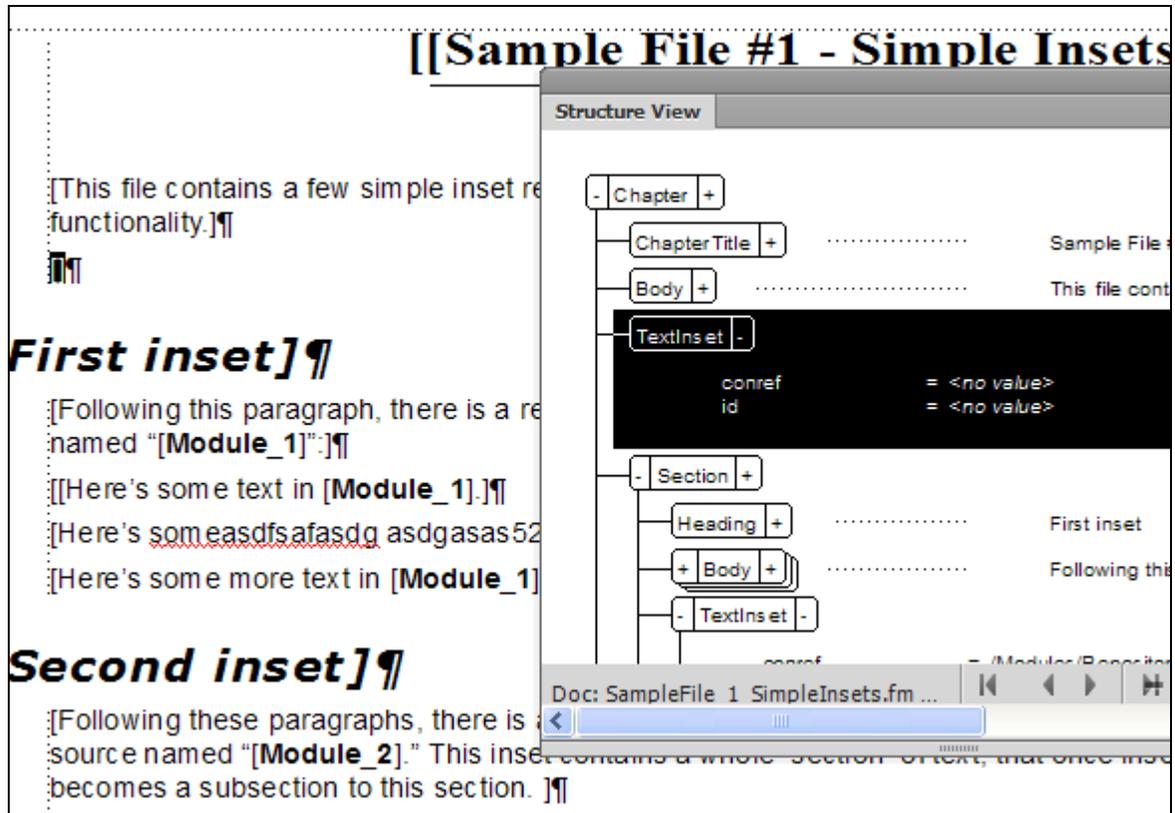
1. Make sure `SampleFile_1_SimpleInsets.fm` is still the active window.
2. From the main FrameMaker menu, select **InsetPlus > Update All Insets In Document**.



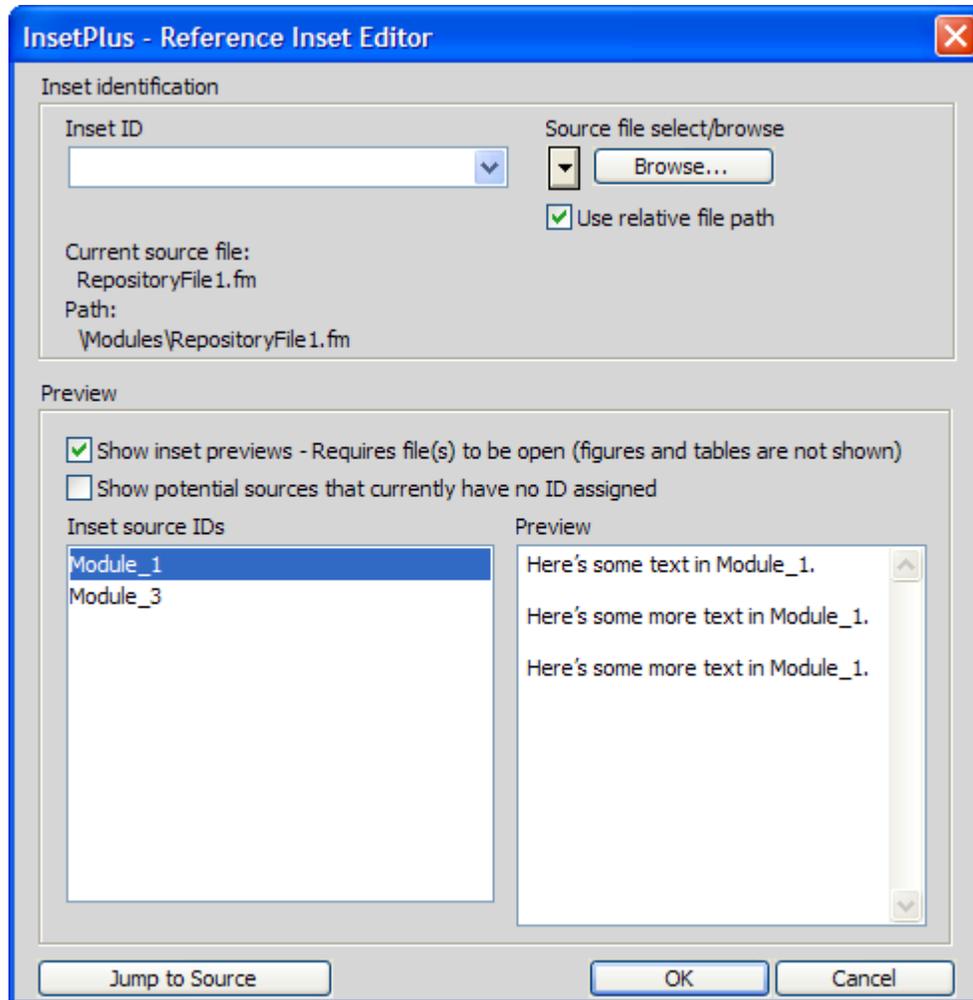
3. In the update dialog box, click **OK**.
Note that the other two inset references are now updated as well, from content in `RepositoryFile1.fm`.
4. Switch between the two files and note the relationship between the references and the respective sources. This is the essence of the InsetPlus functional model.

Inserting a new inset reference

1. Make sure `SampleFile_1_SimpleInsets.fm` is the active window.
2. Place your insertion point somewhere in preparation to insert a new `TextInset` element.
In this document, `TextInset` elements are allowed just about anywhere. For the purposes of this tutorial, it would be best to insert it on the main `Chapter` branch, before the first `Section`.
3. With your element catalog, insert a new `TextInset` element.



4. If the inset editor did not appear automatically (which it should have, if you are using default settings), right-click on the new `TextInset` element and select **InsetPlus - Edit Inset Element**.
5. Under **Source file select/browse**, select or browse to `RepositoryFile1.fm`. If you still have the file open, you can select it from the popup list.



6. Click through the **Inset source IDs** list and note how the previews are presented. This list represents all the source-type `TextInset` elements found in `RepositoryFile1.fm`.

NOTE: If you followed the previous steps in this tutorial, the selected repository file (`RepositoryFile1.fm`) should already be open. Therefore, the previews area should automatically be active and the **Inset source IDs** list already populated. If the file was not already open, you would need to click **Show inset previews** to request that InsetPlus open the file and populate the information.

7. Double-click any inset name in the list to populate the **Inset ID** field above.
8. Click **OK**.
9. At the prompt to update your inset, click **Yes** and note the results.

Finishing and cleaning up

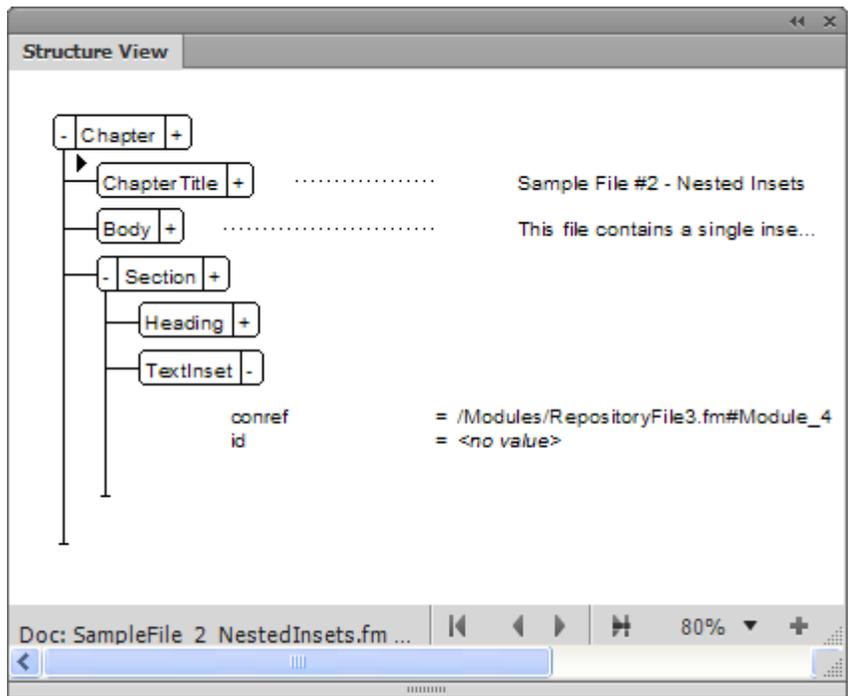
Close the sample and repository file **WITHOUT** saving changes.

Part 2 - Nested insets

Nested insets are fully supported, but can be difficult to manage until you have a solid and familiar architecture in place. This lesson is intended as a simple introduction, and not as any recommendation on how nested insets should be set up or used. In general, it is advised not to nest insets unless absolutely necessary.

1. Open `SampleFile_2_NestedInsets.fm`.

2. Locate the `TextInset` element.



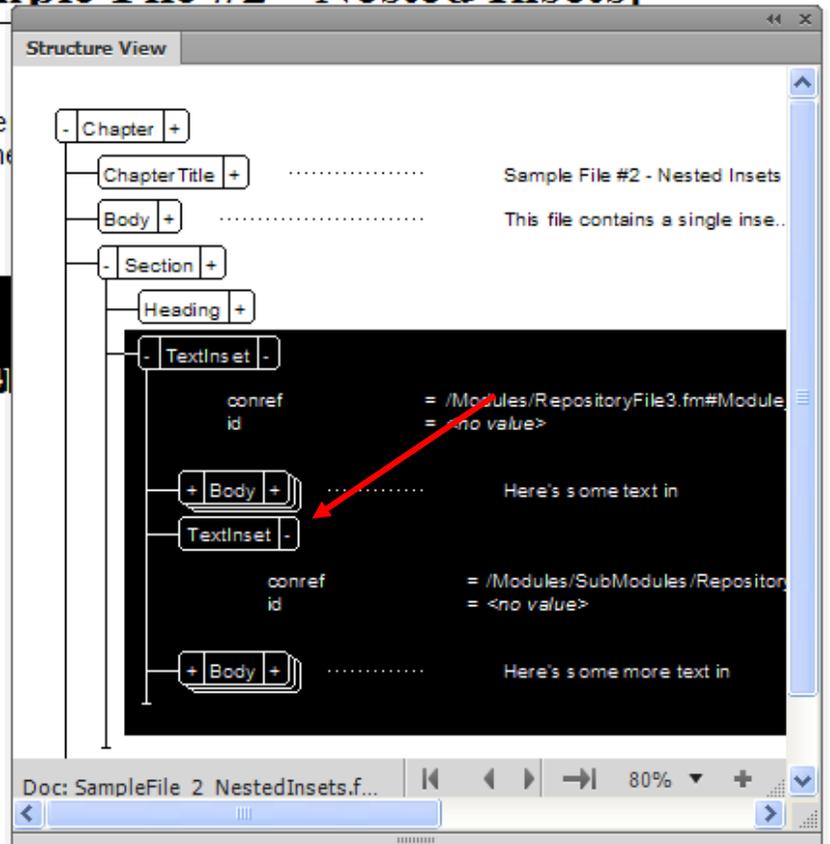
3. Right-click on the inset element and select **InsetPlus - Update Inset Reference**, and note the results.

[[Sample File #2 - Nested Insets]]

[This file contains a single inset reference. This effectively creates a nested inset.]

[[]]

[[Here's some text in [Module_4].]]
[[Here's some more text in [Module_4].]]



When updated, the content that came in included another `TextInset` reference element to a module named “SubModule_1.” This is a nested inset.

4. Right-click on the nested inset element and select **InsetPlus - Update Inset Reference**. Note that the nested inset is now updated with its respective source material.
5. On the original inset element (not the nested one), right-click and select **InsetPlus - More InsetPlus Element Commands > Clear Inset Reference**.
6. On the original inset element, right-click again and select **InsetPlus - More InsetPlus Element Commands > Update Inset Reference And Nested Insets**.

Note that the nested inset was automatically updated this time. With a basic update, nested insets are not automatically updated, and the content from the source module is left as-is. Conversely, when nested insets are included, InsetPlus updates the inset, then steps through the content that came in looking for any more inset references and updates them as well.

When the original inset was updated (not the nested one), the relative path specified for its source file was automatically updated to reflect its new home in `SampleFile_2_NestedInsets.fm`. In the case of relative paths, InsetPlus always readjusts paths to nested insets when their parents are inserted somewhere, otherwise InsetPlus would not be able to locate the nested inset source afterwards.

7. Open the source for the main (not nested) inset, which is `RepositoryFile3.fm`, if it is not already open, and locate the source `TextInset` element.

TIP: Remember the **InsetPlus - Jump To Source** right-click shortcut.

8. In `RepositoryFile3.fm` (source file for the “parent” inset), look at the `conref` attribute on the source element for the nested inset and compare it to the `conref` attribute in the reference file (`SampleFile_2_NestedInsets.fm`). In the source, it is:

Submodules/RepositoryFile4.fm

In the file where you updated it (Sample_2_NestedInsets.fm), the value is:

Modules/Submodules/RepositoryFile4.fm.

This is because during the update in SampleFile_2_NestedInsets.fm, InsetPlus adjusted the file specification to be relative to the reference document. In the source for "Module_4," it is relative to the source document, RepositoryFile3.fm. In other words, relative paths are adjusted as necessary when content is moved across folders so that nested insets continue to work after they have been placed in another file.

We understand that this is confusing. That's why we recommend that you avoid nesting insets, even though they should work.

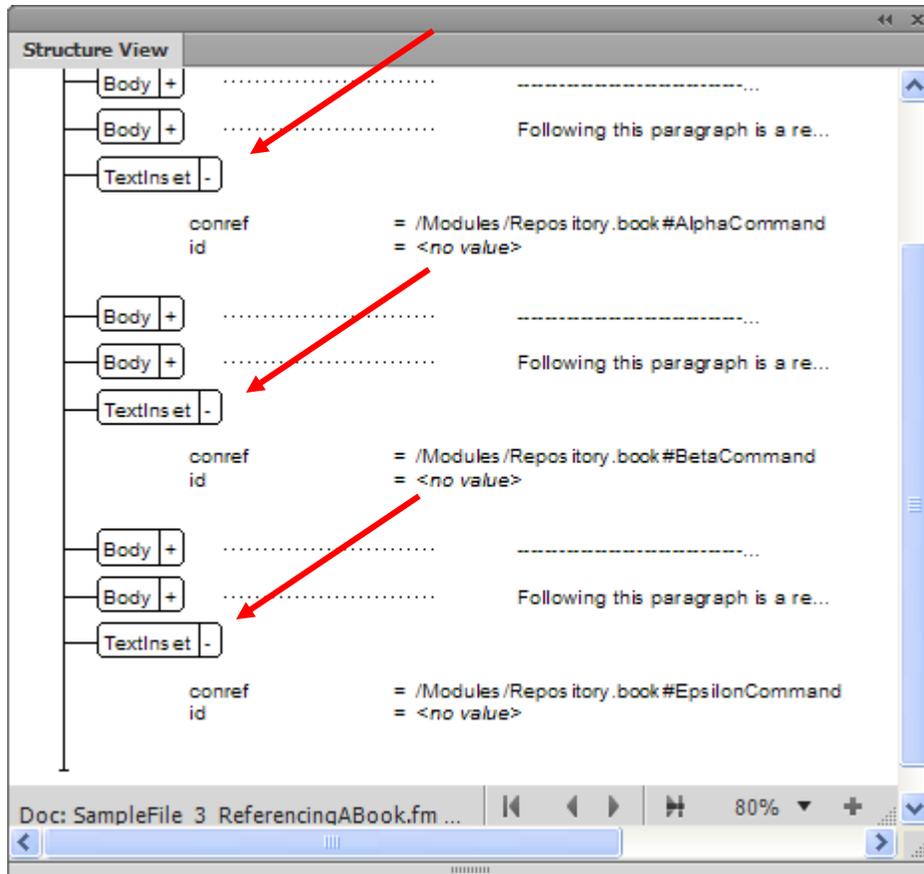
9. Close any files opened for this lesson WITHOUT saving changes.

Part 3 - Referencing inset sources in a book

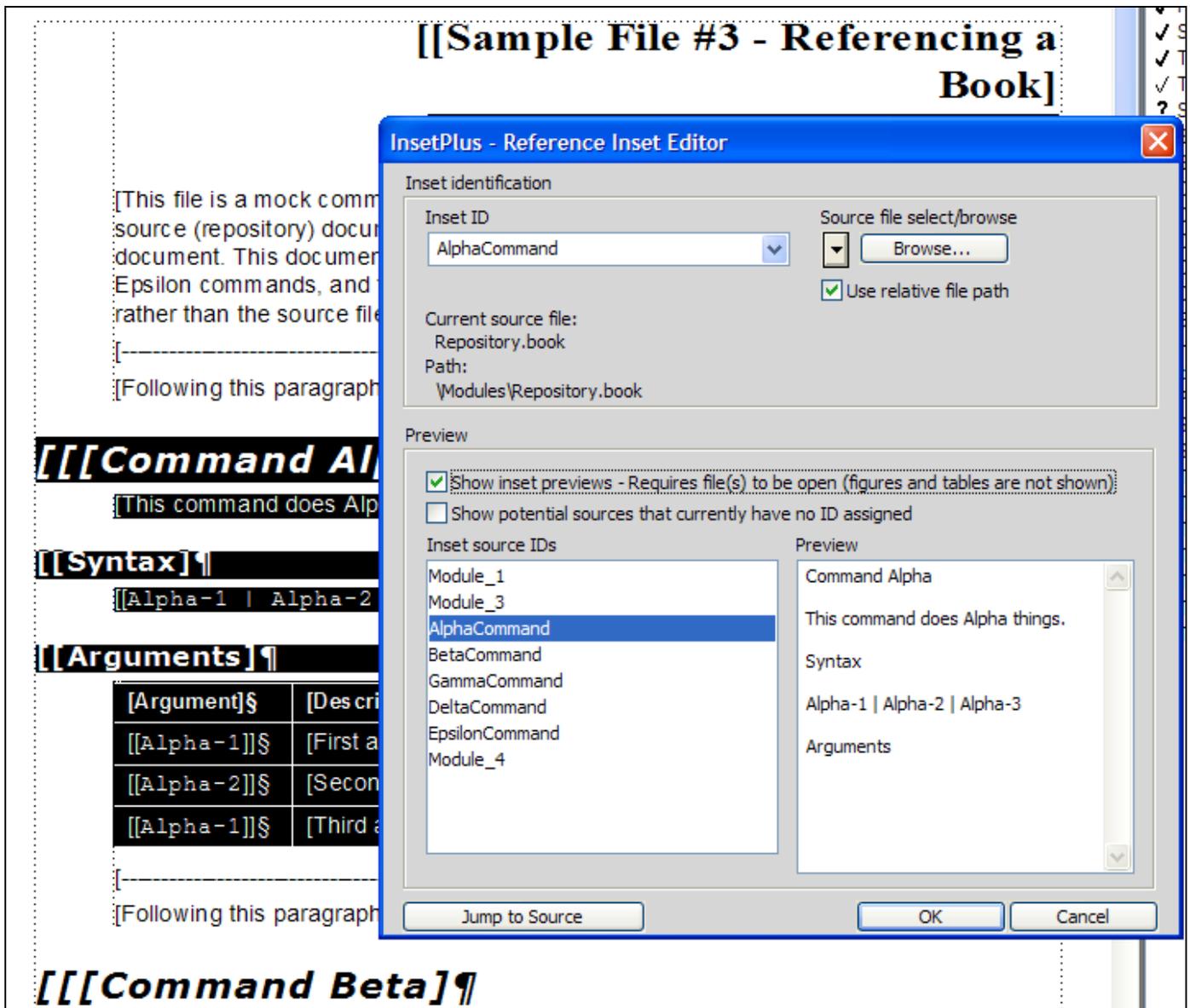
With InsetPlus, your source modules must naturally reside in a document somewhere. However, you can collect those source documents into a book, then reference the whole book from an inset reference. During an update, InsetPlus will search all the documents in the book until it finds the source with the specified name.

NOTE: Referencing an entire book may not be good practice, especially if you intend to remain compliant with DITA content referencing standards. This tutorial lesson demonstrates available functionality only and should not be interpreted as a recommendation for InsetPlus usage.

1. Open the sample file SampleFile_3_ReferencingABook.fm.
2. Note the setup of the TextInset elements, especially how they specify Repository.book as the source file. If you are curious, open Repository.book and look at the files it contains and their content. All these reference insets point to some module within that book.



3. Select **Update All Insets In Document** and note the results. The three inset references in the document are updated with the mock command manual contents.
4. On any of the three inset reference `TextInset` elements, right-click and select **Edit Inset Element**.
5. In the inset element editor, check **Show Previews** and confirm any messages about opening files. Note that the available previews include inset sources from all three documents in `Repository.book`.



6. Close the editor, and close the files associated with this lesson without saving changes.

Part 4 - Inset management tools

InsetPlus provides a set of tools for managing your inset references and sources, including coloring and reporting.

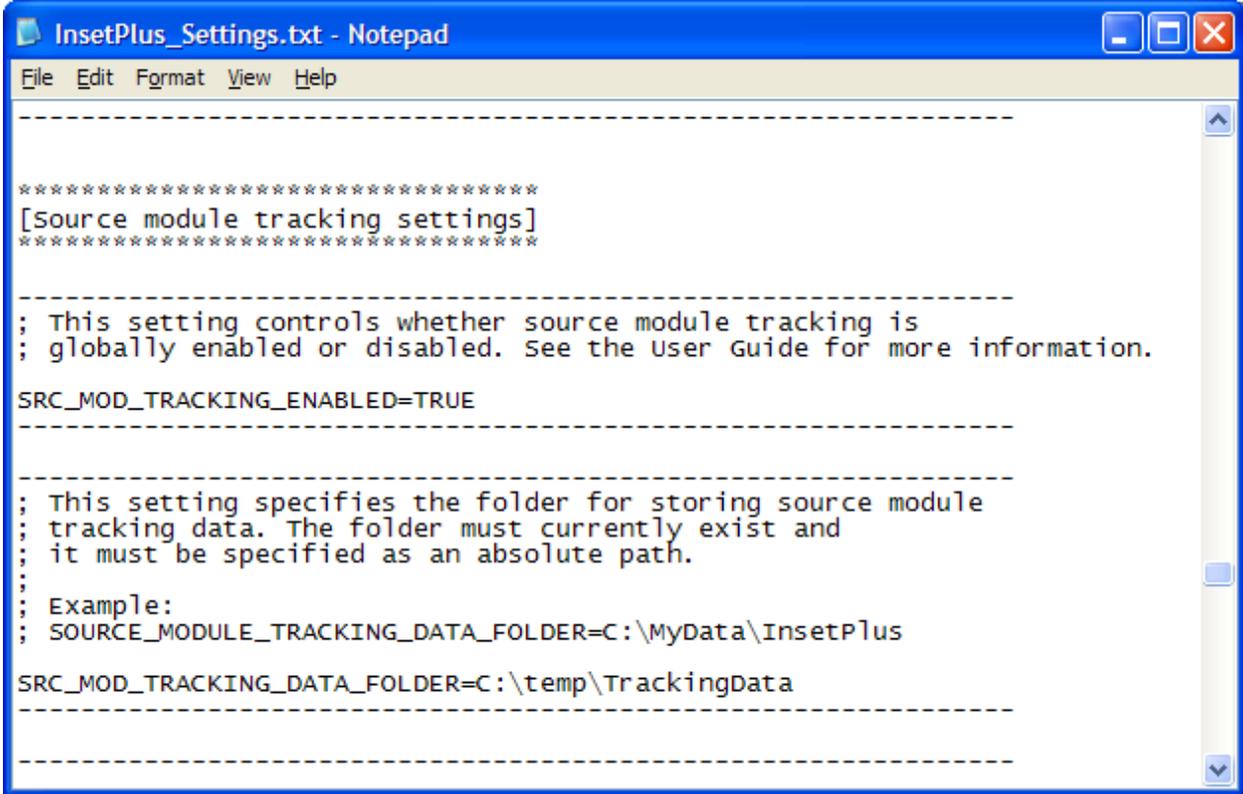
1. Open the sample file `SampleFile_3_ReferencingABook.fm`.
2. Select **InsetPlus > Update All Insets In Document** to update all the insets in the document.
3. Select **InsetPlus > Inset Management > Color Insets**.
4. Select a color for **Inset References** and click **OK**. Note how the contents of the inset references are colored.
5. Select **InsetPlus > Inset Management > Generate Inset Report**.
Note the contents of the inventory report, and how each entry is hyperlinked.
6. Close `Sample_3_ReferencingABook.fm` without saving changes.

Part 5 – Source module tracking

InsetPlus provides a basic tracking mechanism that allows you to see where your source modules are being used. This lesson will cover the basic functionality of the tracking mechanism. For a more detailed explanation of how it works, see your *User Guide*.

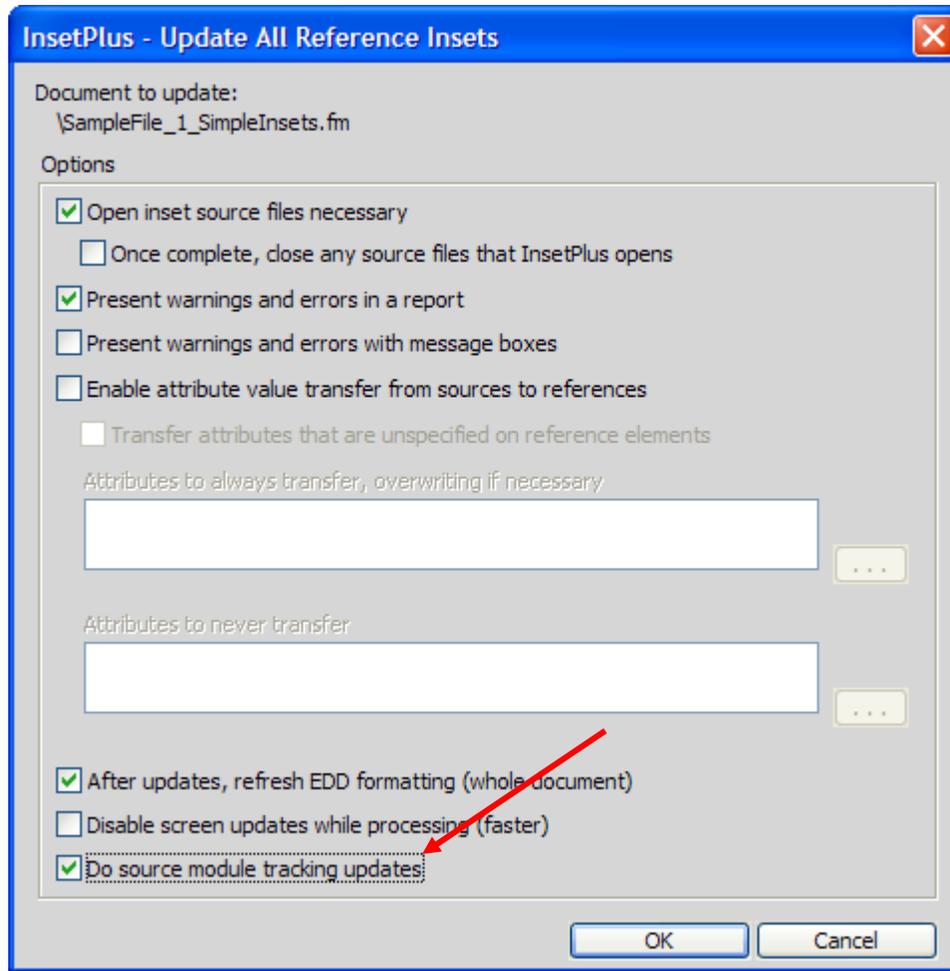
1. Select **InsetPlus > Open Settings File** to open the settings file in Notepad.
2. In the file, enable source module tracking and specify a folder to contain tracking data.

NOTE: You may specify any folder, but it is recommended that you create a new folder for this tutorial that you can delete afterwards.



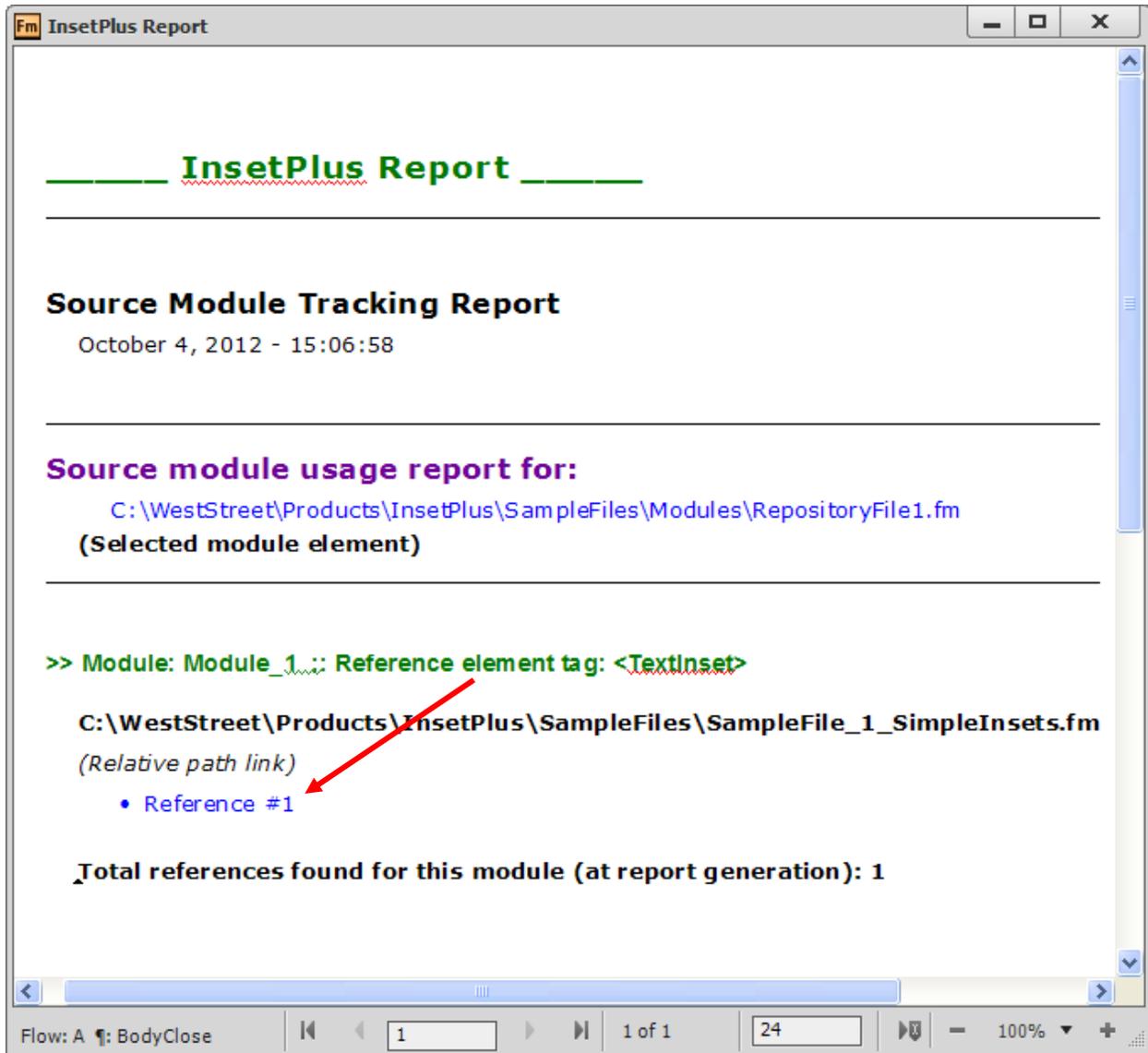
```
InsetPlus_Settings.txt - Notepad
File Edit Format View Help
-----
*****
[Source module tracking settings]
*****
-----
; This setting controls whether source module tracking is
; globally enabled or disabled. See the User Guide for more information.
SRC_MOD_TRACKING_ENABLED=TRUE
-----
; This setting specifies the folder for storing source module
; tracking data. The folder must currently exist and
; it must be specified as an absolute path.
;
; Example:
; SOURCE_MODULE_TRACKING_DATA_FOLDER=C:\MyData\InsetPlus
SRC_MOD_TRACKING_DATA_FOLDER=C:\temp\TrackingData
-----
```

3. Save the settings file in Notepad.
4. In FrameMaker, select **InsetPlus > Read Settings From Settings File**.
5. Open the sample file `SampleFile_1_SimpleInsets.fm`.
6. Select **InsetPlus > Update All Insets In Document** to update all the insets in the document. Be sure that the option to **Do source module tracking updates** is checked.



This action will populate the tracking data with information about all sources used in the sample file. Tracking data is refreshed on an element-by-element basis with each reference update:

7. In `SampleFile_1_SimpleInsets.fm`, right-click on the first `TextInset` element and select **InsetPlus - Jump To Inset Source**.
8. On the source `TextInset` element, select **InsetPlus - More InsetPlus Element Commands > Report Source Module Usage** and note the report.



The report states that there is one known reference to this source module, contained in `SampleFile_1_SimpleInsets.fm`. All entries in the report are hyperlinks, including the link to the reference element.

9. Close the tracking report.
10. Return to `SampleFile_1_SimpleInsets.fm` and make a duplicate of the first `TextInset` element.

[This file contains a few simple inset references to provide a basic overview of InsetPlus functionality.]

[[First inset]]

[Following this paragraph, there is a reference to a source file named "[Module_1]".]

[[Here's some text in [Module_1].]]

[Here's some more text in [Module_1].]

[Here's some more text in [Module_1].]

[[Here's some text in [Module_1].]]

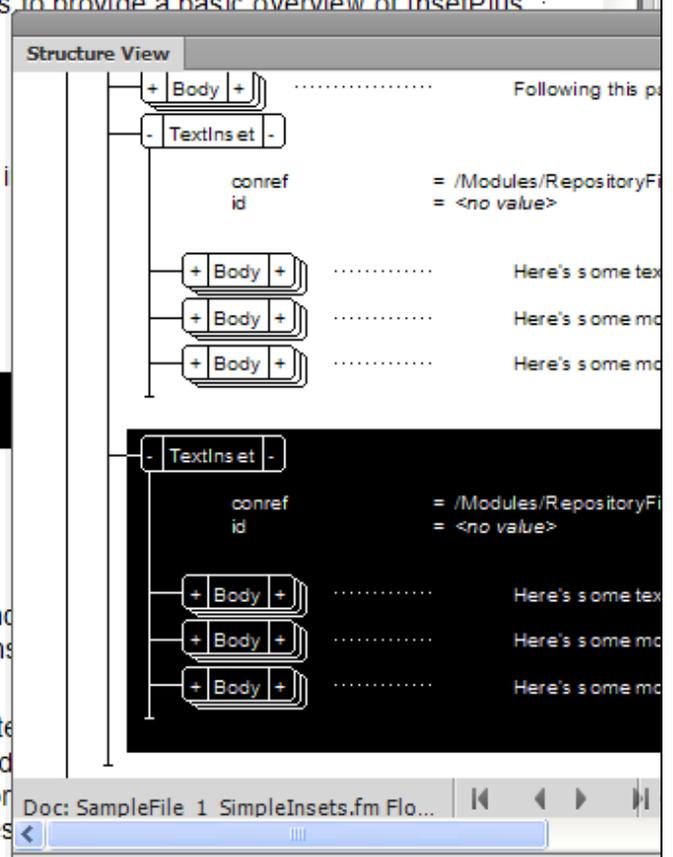
[Here's some more text in [Module_1].]

[Here's some more text in [Module_1].]]

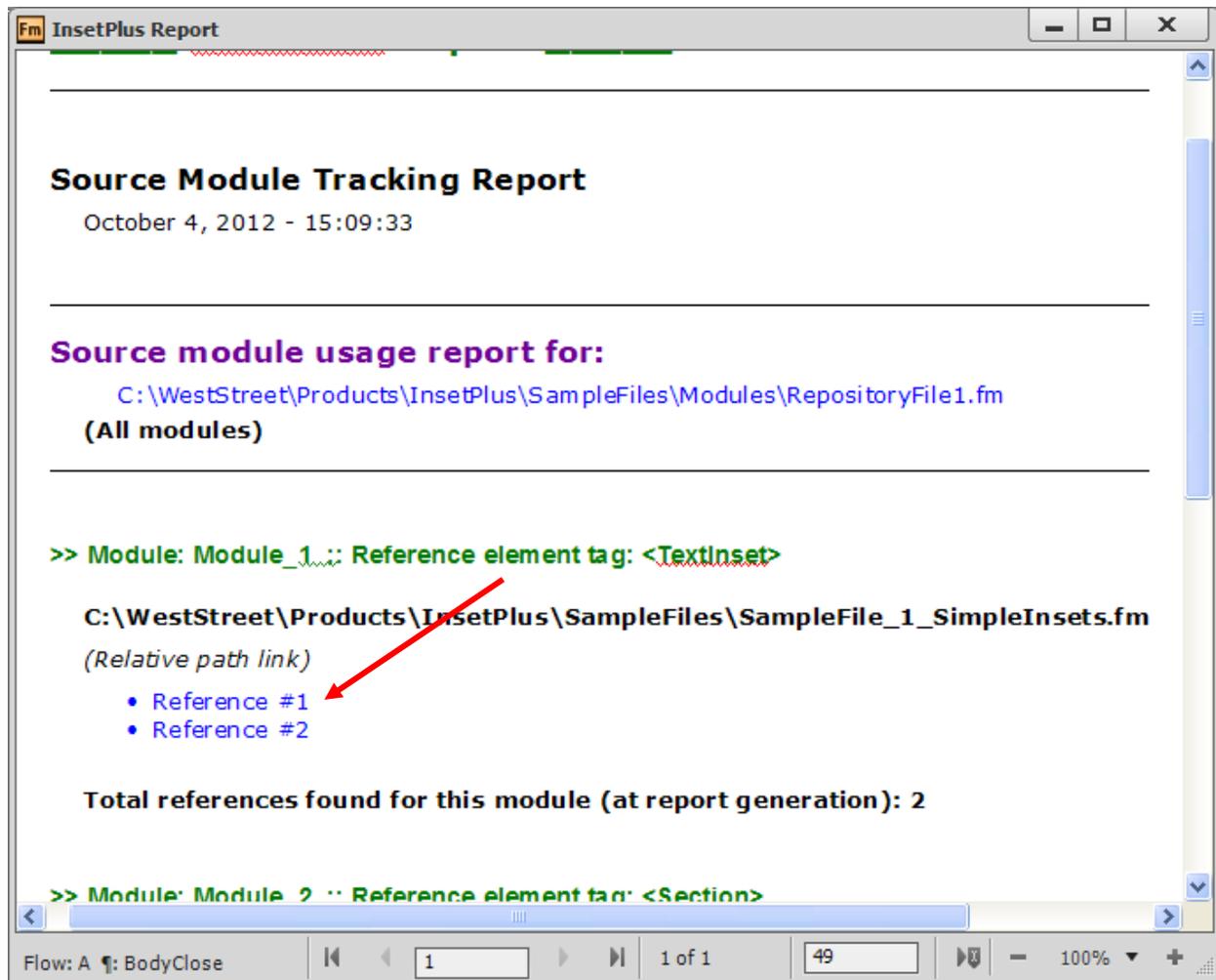
[[Second inset]]

[Following these paragraphs, there is a reference to a source file named "[Module_2]". This inset contains a subsection that becomes a subsection to this section.]

[One thing you should note about this inset (after the first paragraph format automatically adjusts to Heading 2) is that the heading format of this document is controlling the automatic formatting of this document. This holds true for any content that is inset, regardless of the source file. In other words, you can inset this section anywhere in the document, and the heading format will automatically adjust according to nesting. This is not due to any cleverness on the part of



11. Update all insets in the document again.
12. Bring the source file, `RepositoryFile1.fm`, to the front.
13. In the main InsetPlus menu, select **InsetPlus > Source Module Tracking > Generate Tracking Report (Whole File)**. Note the two instances now reported for `Module_1` with respective hyperlinks.



14. Return to SampleFile_1_SimpleInsets.fm and delete the duplicate TextInset element you created, but do not update any insets.
15. Return to the tracking report and click the link for the second reference, which no longer exists.
16. Read the warning prompt and click **Yes**, noting the automatic change to the tracking report.

NOTE: Tracking data is only updated during inset updates or through this feature of the tracking report. If you generate a subsequent report, it will show only one reference element for Module_1.

17. Close all files without saving any changes.

Following up

By now, you should have a basic understanding of how InsetPlus works. If you choose to use this software, keep in mind that software functionality is only a portion of your considerations... you must also consider how you will create and manage the architectures necessary for storing and reusing content. Content reuse requires careful and prudent decisions about content management, and while the capabilities of InsetPlus can help you achieve higher levels of content reuse, your efforts will only be successful if you build a sensible workflow and infrastructure around it.