

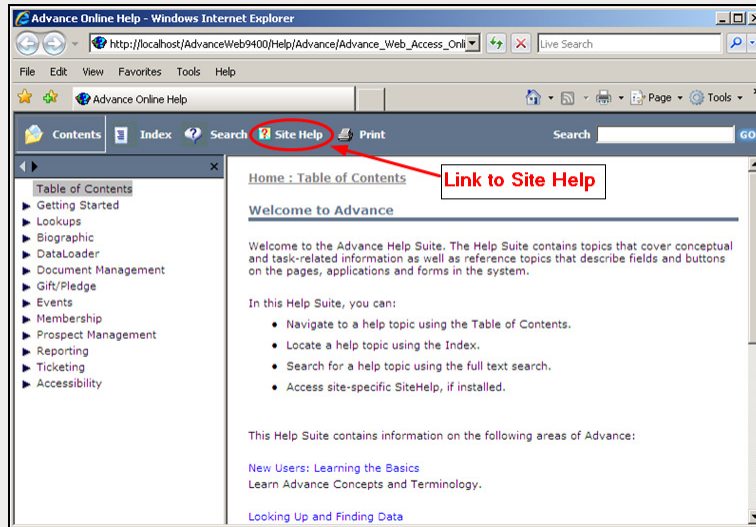
What is Help?

- **Online 'self-help' tool that provides users step-by-step instruction and policies for using Advance**
 - Advance Standard Help**
 - **Displays standard 'generic' procedures for navigating and using the application**
 - Site Help**
 - **Custom help file that includes policies and procedures specific to the institution and their use of Advance**

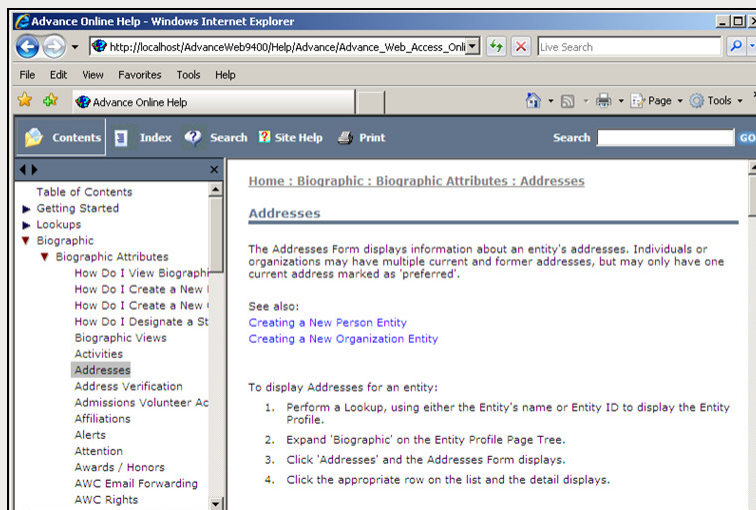
Help Author Goals

- **Define the audience and what information would be helpful for them to know**
- **Develop the site help file in a way that allows users to easily navigate and find information**
- **Include fully-tested and institution specific procedures/policies for using Advance**
- **Maintain consistency in look and feel of the help project**
- **Keep the help file current and communicate updates to users regularly**

Advance Standard Help



Sample Site Help File



What is Adobe RoboHelp Office?

- **The TOOL we use!**
- **RoboHELP is the industry standard in help authoring**
- **RoboHelp is the fastest, most user-friendly way to develop professional Help systems and documentation for desktop and web-based applications**

RoboHelp Office

- **Includes RoboHelp for Word and RoboHelp HTML applications**
 - RoboHelp for Word is used to create help files for Advance Windows; RoboHelp HTML is used for Advance Web Interface
- **Can generate WebHelp, HTML Help, FlashHelp, WinHelp, JavaHelp, Oracle Help, and pure HTML outputs and printed documentation all from one source project**
 - We support:
 - WebHelp for Advance Web
 - WinHelp for Advance Windows

What is WebHelp?

- **The VEHICLE we use to create Help for the Advance Web Interface!**
- **HTML-based format designed to run on various browsers/platforms**
- **Generates .HTML, .XML and graphic files that can be deployed to individual users or placed on a server**

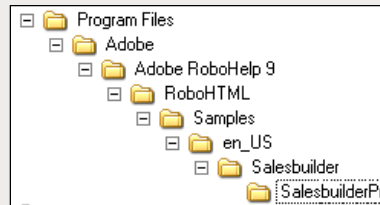
System Requirements

- **Microsoft® Windows Vista® with Service Pack 2, Windows® XP with Service Pack 3, or Windows 7**
- **Microsoft Word 2010, 2007 or 2003 (for printed documentation)**

Task



- Open Adobe RoboHelp9 HTML
- Open sample WebHelp Project using File > Open or 'Open' link under Recent Projects heading
- Navigate to where RoboHelp 9 Was installed and access the sample 'Salesbuilder-Help.xpg' file



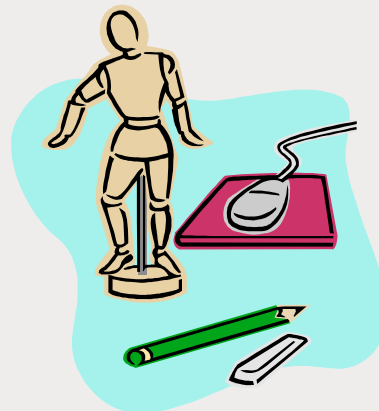
Questions? Comments...



Developing Your Help File

1. Design and create project
2. Develop table of contents/add topics
3. Add topic content and format
4. Build hyperlinks
5. Add graphics
6. Develop Index
7. Generate help file

Design and Create Project



What is a Project?

- All of the files that are used to generate the site help file
- Includes all of the policy/procedure text (content), graphics, other formatting properties and what the output will look like
- Assists in organizing/managing the help file
- The project file will have an extension of .xpj
- This is the file you will access when trying to re-open your project after it has been created

Designing a Project

- There are many approaches to designing a project
- Some important areas to think about before building your help file include:
 - Develop an outline of topics
 - Identify naming convention for topics, files, projects
 - Determine style sheet/look of help file
- Quick start your project by purchasing the site help starter kit
 - Pre-defined topics, naming conventions, links

Multiple Help Projects

- No difference in the finished help system if you use one or multiple projects
- Necessary when you have multiple help authors needing to work at the same time
- Helpful when your help system includes different types of information that may/may not all be deployed to same users
- Assists in organization

Planning

- Understand your audience, application and subject matter and put this in your design specification document
- Create user task lists
- Determine the type and number of help topics you'll need
- Coordinate your efforts with other authors, subject matter experts, and application developers

Designing Your Help System

- **Create an outline of the Contents tab**
- **List any topics you won't include in the Contents tab**
- **Create a storyboard/flowchart showing how users will navigate through the help system**

What are Help Topics?



- **Help topics are the basic building blocks**
—Generally they cover a single idea
- **Help topics are like papers in a folder or pages in a book**
- **There are many types of help topics**

Information Types / Topic Types

A good help system is a collection of answers to anticipated user questions:

- Overview (“What?”)
- Task or Procedure (“How?”)
- Definition or Glossary
- Policy (“Why? When?”)
- Example (“Give me an example”)
- Navigation (“Where?”)
- HTML/Link to Topics

Topic Titles

- Verb first and concept second
- Action verbs best (*e.g., Reversing a Gift*)
- Avoid jargon
- Avoid single-word titles
- End user oriented

Procedure Topics

- Written to answer the question “How do I...?”
- Contain step-by-step instructions
- May have links to reference, definition, show me, or example topics
- User learns how to take action

Guidelines for Procedure Topics

- Number your steps
- One action per step
- Simple language
- One method for doing the action
- Precise in naming buttons and fields as they appear
- Enough information for a beginner or experienced user
- Values or variables needed to complete the step are available

Definition Topics

- **Written to answer the question “What does this word/term mean?”**
- **Typically display in popup windows or a glossary and are therefore short**
- **User gets the accurate definition**

Guidelines for Definition Topics

- **Repeat the word being defined**
- **Present tense**
- **If the term is an object, describe how it looks or acts, or what it does**
- **Provide an example if it helps define the term**
- **Avoid nesting other popup definitions in the definition topic**

Navigation Topics

- **Show the user how to get from one place to another in the application**
- **May include step-by-step instructions**
- **May have links to example topics**
- **May appear in popup windows**
- **Give your user a way to get back to your navigation topics easily**

HTML/Link to Topics

- **You may link to or make Internet/Intranet pages their own topics**
- **Provides the look and feel of the Web within your help system**
- **Opens a world of information to your users**

Planning Tools

- **Create a Design Document:** define audience, requirements, platforms, organization, navigation, content
- **Build a Prototype:** show a small subset of planned topics, show structure, appearance, and navigational devices
- **Build a Schedule:** Show dates and dependencies, and priorities

Prototype & Schedule

- **The prototype communicates your vision for the help system**
- **Demonstrates everything that you will do but on a smaller scale**
- **Get feedback & approval on the prototype**
- **Build your project schedule and budget:**
 - Rough estimate is that each topic takes between 2-5 hours

Implementation Tools

- **Let's look at some tools to help you get started and track your work...**
 - Building a topic list
 - Establishing Format and Design
 - A Help Author's checklist
 - Tracking development

Task



You are assigned to design and produce a prototype of Site Help for your institution. Consider using the topic list document to brainstorm topics and tracking spreadsheet to help begin outlining your help project.

Note: While eventually we need online help for all of your institution's policies and procedures, let's start with a small subset!

Task (Continued)

Begin to design your Site Help system

- Take a look at what you want to document online
- Consider what topics you'll need, if there is existing content, how you will format this information in site help, etc.
- What topic titles will you use?
- How do you want to structure the Table of Contents tab?

Sketch out your design

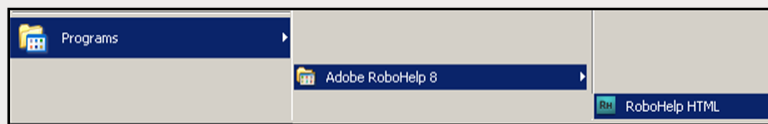
Questions? Comments...



Getting Started

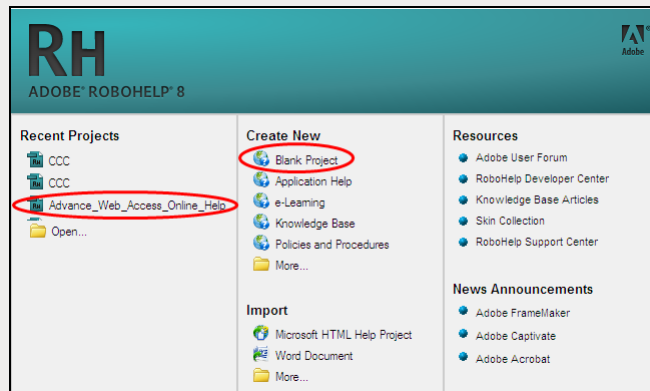


- Click the RoboHelp Starter shortcut on your desktop
OR
- Navigate to the RoboHelp program files directory from the Windows Start menu and select RoboHelp HTML



RoboHelp Starter

- Create a new blank project or open an existing project



Project Wizard

**If replacing standard Help, Project Name must be: Advance_Web_Access_Online_Help * OR if you purchased the site help content kit*

The screenshot shows the 'New Project Wizard' dialog box with several annotations:

- Title users will see in browser/viewer**: Points to the 'Enter the title of this project:' field containing 'Site_Help'.
- Project file name**: Points to the 'Enter the file name for the project:' field containing 'Site_Help'.
- Where project files are stored**: Points to the 'Enter the location for the project:' field containing 'C:\Simo\WebHelpSample'.
- First topic in project**: Points to the 'Enter the title of the first topic:' field containing 'Confidentiality Statement'.
- WebSearch functionality**: Points to the 'Enable Web Search' checkbox, which is checked.
- Default language**: Points to the 'Language:' dropdown menu, which is set to 'English'.

Buttons at the bottom include '< Back', 'Finish', 'Cancel', and 'Help'.

Datatel+SGHE | www.sungardhe.com 37

Program Window

The screenshot shows the RoboHelp HTML program window. The main content area displays the 'Confidentiality Statement' topic, which contains the following text:

Information in the Advance system is the exclusive property of the SGHE University Foundation and may be used only within the parameters outlined below. As a Foundation employee, if you view, enter, request or retrieve information from the Advance system, you agree to abide by this policy. In addition, if you share any information obtained from the Advance system with a University employee, volunteer, or any other person who is not an employee of

The interface includes a 'Project Manager' pane on the left with folders for Project Files, Broken Links, URLs, Table of Contents, Index, Glossary, and See Also. Below that is the 'Single Source Layouts' pane, and at the bottom is the 'Topic List' pane, which contains a table of topics.

File Name	Title	TOC	TOC Name
Adding_an_Address.htm	Adding an Address	Yes	Advance_Web_Acce...
Adding_an_Assignment.htm	Adding an Assignment	Yes	Advance_Web_Acce...
Adding_Marital_Information.htm	Adding Marital Information	Yes	Advance_Web_Acce...
Confidentiality_Statement.htm	Confidentiality Statement	Yes	Advance_Web_Acce...
Estimate_a_Draft_Ford_G3.htm	Estimate a Draft Ford G3	Yes	Advance_Web_Acce...

Datatel+SGHE | www.sungardhe.com 38

Pods

- A pod is a quadrant or pane of the program window that can be moved/organized as the user desires.
Available pods:

- | | |
|-------------------------|------------------|
| •Project Manager | •Toolbox |
| •Conditional Build Tags | •Bug Hunter |
| •User-defined Variables | •RoboHelp Server |
| •Single Source Layouts | •Link View |
| •Project Set-up | •Topic List |
| •Snippet | •File Status |
| •Output View | •Starter |

Environments

The Environment defines the pods, toolbars and options that display in your program window. You can use several methods to alter this look:

1. Click different options in one of the pods
 - For example, open the Table of Contents folder in the Project Manager pod and double click one of the TOC's that is listed. Your TOC will now appear in a new pod to the right;
2. Save new environment
 - Click the Workspace Switcher button in upper right > Save
3. Reset to the default environment
 - Click the Workspace Switcher button in upper right > Default
4. Load an environment that you have previously defined
 - Click the Workspace Switcher button in upper right > Load



Table of Contents - Topics

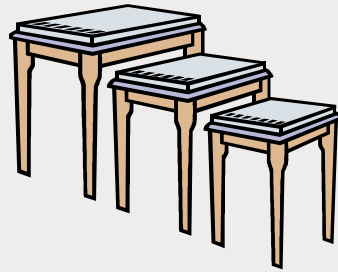


Table of Contents Entries

- TOC entries appear in the TOC tab of the Help Topics window as books & pages
- You can create the TOC as you work or at the end of the project
- You do not have to include every topic in the TOC
- You must keep the TOC entries in synch with the actual topics in your help project

Table of Contents

- **Helpful organizational tool when used prior to adding the content**

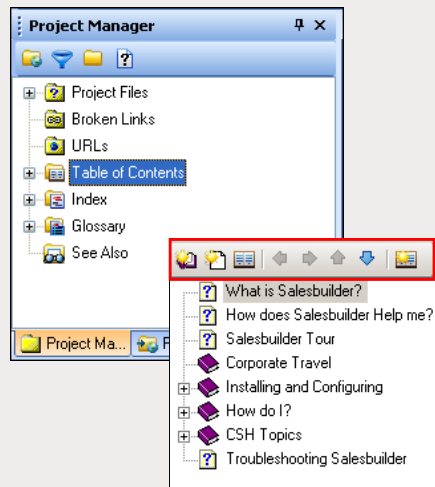
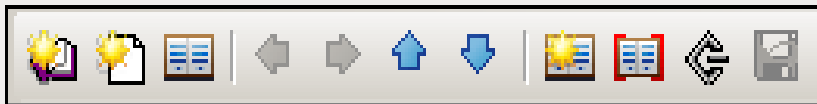


Table of Contents Buttons

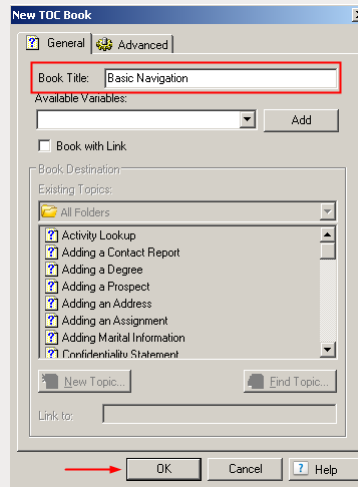


- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 10

- | | |
|---|--|
| <ol style="list-style-type: none"> 1. Create new book 2. Create new page 3. Auto Create TOC 4. Move left 5. Move right | <ol style="list-style-type: none"> 6. Move up 7. Move down 8. Create/View TOC 9. Insert placeholder 10. New merged project 11. Discard changes |
|---|--|

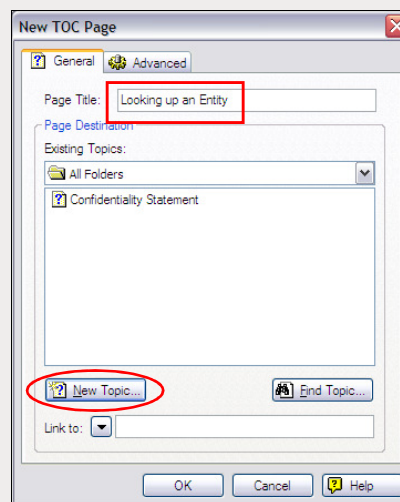
Creating Books in the TOC

1. Click the New TOC Book button
2. Enter a title for the book
3. Click OK



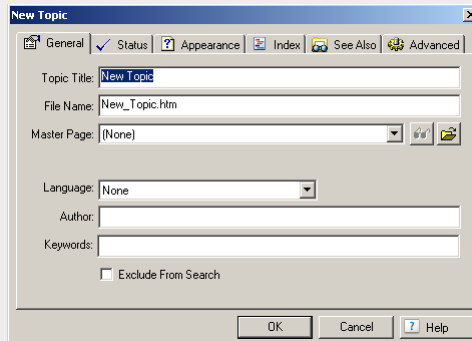
Creating Pages in the TOC

1. Click the New TOC Page button
2. Enter the topic title
3. Click the New Topic button



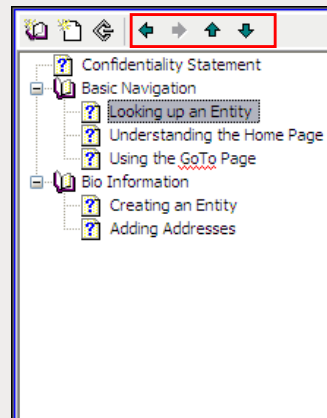
Creating Pages (cont.)

4. Topic Title will default
5. File Name will default. Change as necessary or desired
6. Click the various other tabs to add attributes to the topic if desired
7. Click OK (twice)




Reordering TOC Entries

- Drag and drop
- OR
- Select a book or topic, and then use the arrow buttons to move it where you want





Task




Add Books and Pages to Project

Datatel+SGHE | www.sungardhe.com 49

Saving and Viewing Your Work

- Throughout developing your help file, you will want to save and compile your work
 - To Save, click 
 - To Generate (compile the project), click 
 - To View, click the 'View Results' button in the popup box that appears


Result: WebHelp has been successfully generated [X]

 WebHelp (WebHelp) was built successfully.

Click View Result to view: Advance_Web_Access_Online_Help.htm

Datatel+SGHE | www.sungardhe.com 50

Task

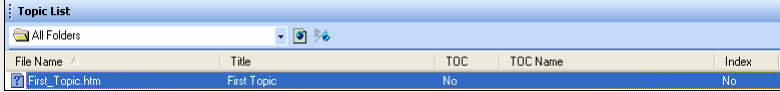


Save and Generate Project View Help File

Datatel+SGHE | www.sungardhe.com 51

Topics Properties

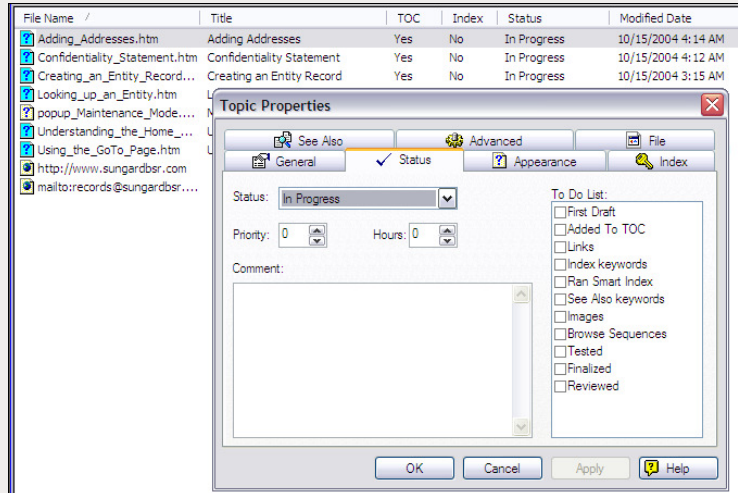
- **Topic properties are characteristics such as the title, index entries and topic status**
- **You can view and change topic properties in the “Topic Properties” dialog box by right clicking on a topic**
 - Often used to assist in managing a project
 - Will display in Reports for tracking purposes



File Name	Title	TOC	TOC Name	Index
First_Topic.htm	First Topic	No		No

Datatel+SGHE | www.sungardhe.com 52


Topic Properties



Changing Properties for a Group of Topics

- 1 **In the Topic List, select all the topics whose properties you want to change (use Shift-click and Ctrl-click, as necessary)**
- 2 **Right-click one of the selected topics, and then from the shortcut menu choose Status, Author, Priority, or another property you want to change**

Task



View Topic Properties
Change a Group of Topic Properties

Datatel+SGHE | www.sungardhe.com 55

Questions? Comments...



Datatel+SGHE | www.sungardhe.com 56

Topic Content and Format



Topic Content

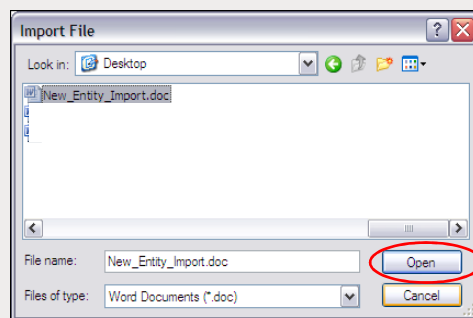
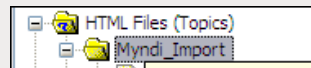
- **There are several methods for getting content into the help file**
 - Type text directly in to the topics
 - Copy and paste text from other documents
 - Import document using RoboHelp

Creating Topics by Importing Existing Documents

- You can import existing .DOC files into your help project
 - Can also import .PDF, .HTML plus more
- It's a good idea to import external files into a new, empty help document
- RoboHELP can automatically convert imported text into help topics

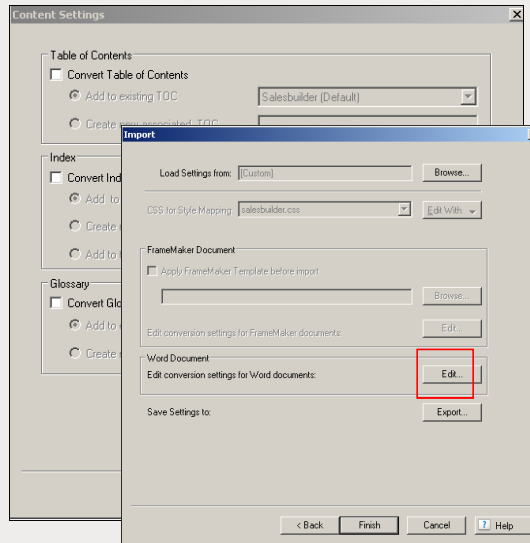
Importing Word Docs

1. **Create a New Topic folder for your imported docs (Project Manager pod > right click Project files folder to create new) then highlight the folder**
2. From File menu, select Import > Word Document
3. Navigate to where the file is stored
4. Double-click the selected WORD file OR click 'Open'



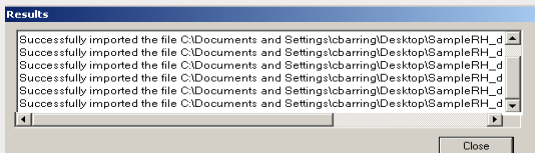
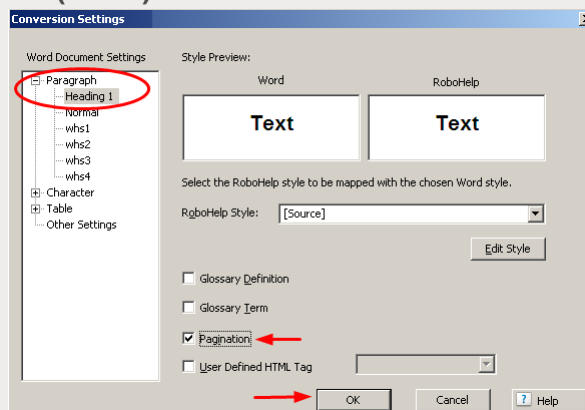
Importing Word Docs (cont.)

4. DO NOT select any options in the Content Settings popup box.
5. Click 'Next'
6. Click the 'Edit' button in the section titled 'Word Document' to apply a style or apply later

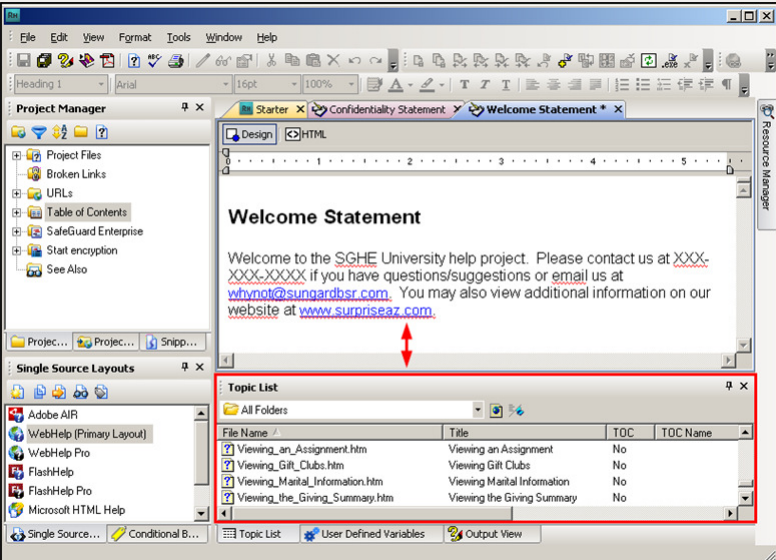


Importing Word Docs (cont.)

6. Click the plus (+) sign next to the Paragraph listing
7. Click Heading 1
8. Click the Pagination checkbox
9. Click OK
10. Click Finish
11. Import completed



Word Import Results



The screenshot shows the RoboHelp interface with a 'Welcome Statement' document open. A red box highlights a URL in the text, and a red double-headed arrow points to it. Below the document, a 'Topic List' pod is open, displaying a table of topics.

File Name	Title	TOC	TOC Name
Viewing_an_Assignment.htm	Viewing an Assignment	No	
Viewing_Gift_Clubs.htm	Viewing Gift Clubs	No	
Viewing_Marital_Information.htm	Viewing Marital Information	No	
Viewing_the_Giving_Summary.htm	Viewing the Giving Summary	No	

At the bottom of the screenshot, the footer reads: Datatel+SGHE | www.sungardhe.com 63

Add New Topic to TOC

1. Click the Topics List pod
2. Highlight the topic to add to the TOC and drag and drop it in the proper location in the TOC

Task

Import Word Documents Add Topics to TOC Save and Generate Project

Importing Topic Content Manually

- **You can also import content by utilizing the copy/paste functionality**
- **Create your topic then copy the content from the external document and paste into the desired topic**
- **Formatting will often be lost when text is copied**

Task



Manually Enter Content into an Existing Topic Save and Generate Project


Importance of Styles

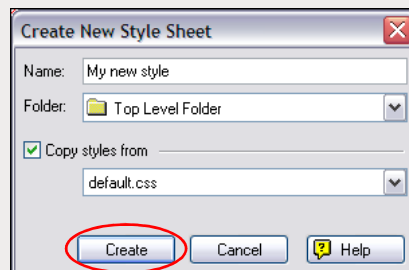
- **RoboHELP uses styles to determine how to convert imported text to help topics**
- **Check for consistent use of style in the document you are importing; if styles are inconsistent or incorrect, adjust them before converting the imported text**

Cascading Style Sheet (.CSS)

- A style is a formatting element that controls font size/color, line spacing, alignment and other attributes alignment
- Style sheets are a collection of styles that can be attached to HTML files to control the layout and appearance of multiple HTML topics without editing the topics individually
 - Example, change Heading of each topic to Arial 12 Bold

Creating a Style Sheet

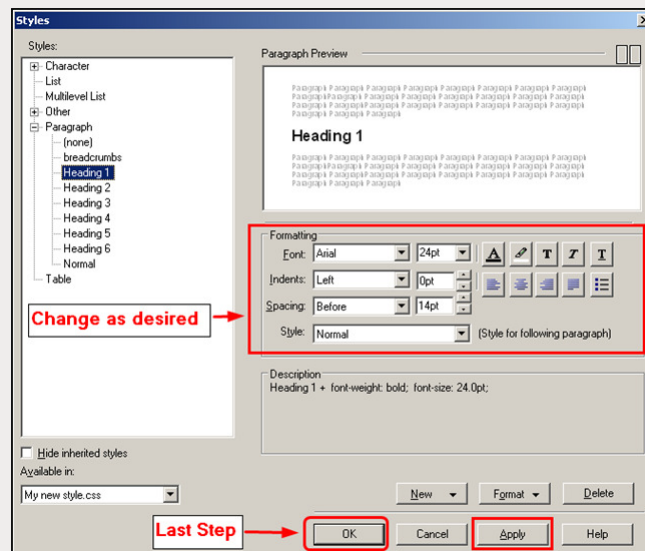
1. Open any topic
2. Click Style Sheet button on toolbar 
3. Click New
4. Enter name of new style and folder location
5. Click Copy Styles from checkbox if you want to build your new style from an existing one. Select base style from dropdown
6. Click Create



Creating a Style Sheet (continued)

7. Under 'Styles', click plus sign (+) to expand the section that contains the element you want to reformat
8. Click the element (e.g. Heading 1) to view the current settings and a preview of the element as it will display with these settings
9. Change format (font size, color, style, indentation, etc.) as desired
10. Click Apply
11. Repeat #8-10 as needed
12. Click OK

Creating a Style Sheet (continued)

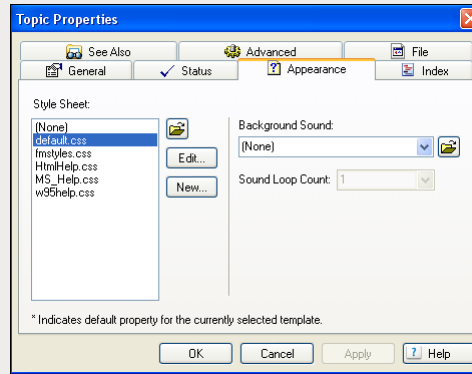


Viewing Topic Style

To determine what style is applied to a topic:

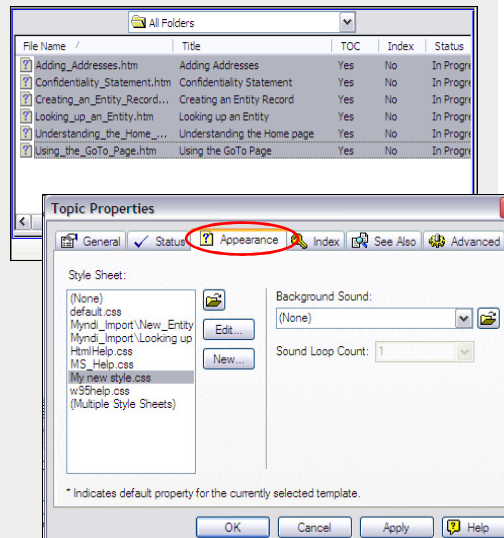
1. Highlight the topic in the Topic List
2. Right click and select properties
3. Click on the Appearance tab

* To change style, click desired .css file and click Apply then OK



Apply Style to All Topics

1. Click the Topics Tab
2. Highlight the topics in the list
3. Click the Properties button 
- OR
Right-click while hovering over the highlighted area and click Properties
4. Click the Appearance tab
5. Highlight the desired style sheet
6. Click Apply
7. Click OK



Task



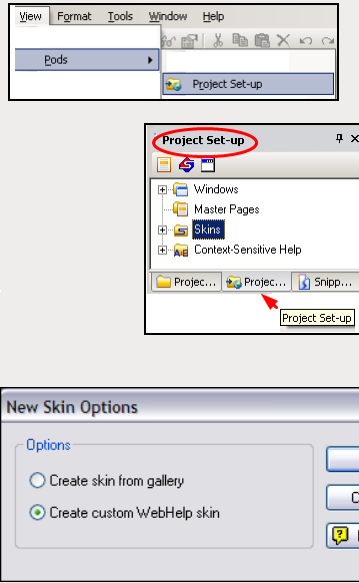
Modify a Style Sheet
Apply Style to All Topics
Save and Generate Project

Skins

- **Skins allow you to integrate your output visually with your institutions 'look'**
- **Change colors, buttons, fonts, backgrounds for TOC icons and navigation buttons in your final help product**

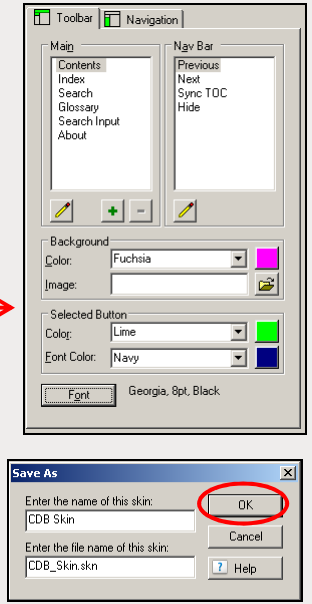
To Create a Skin

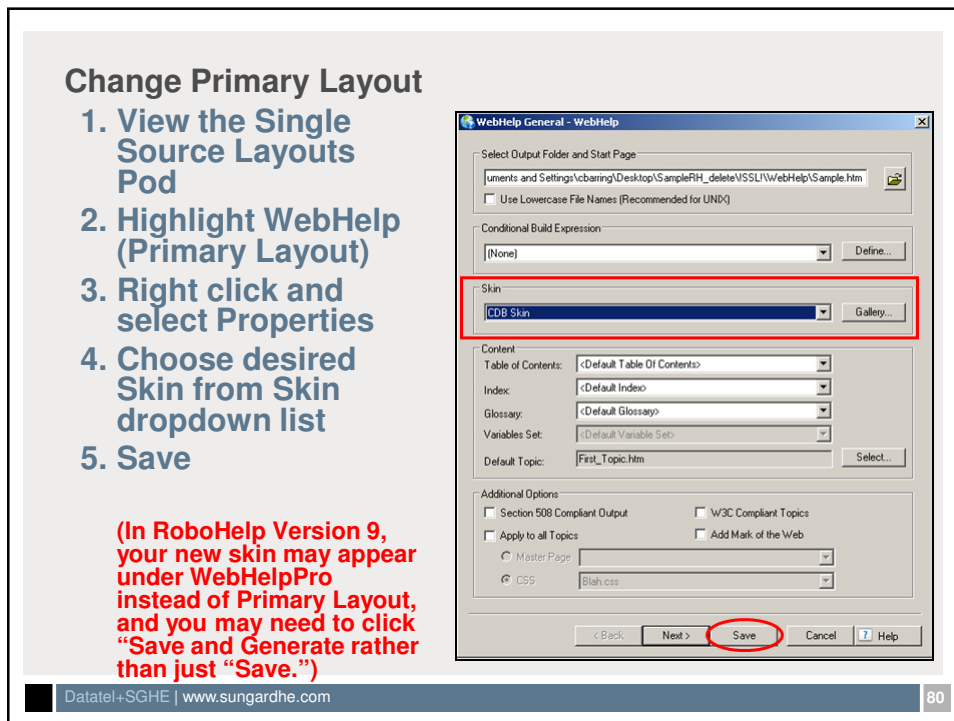
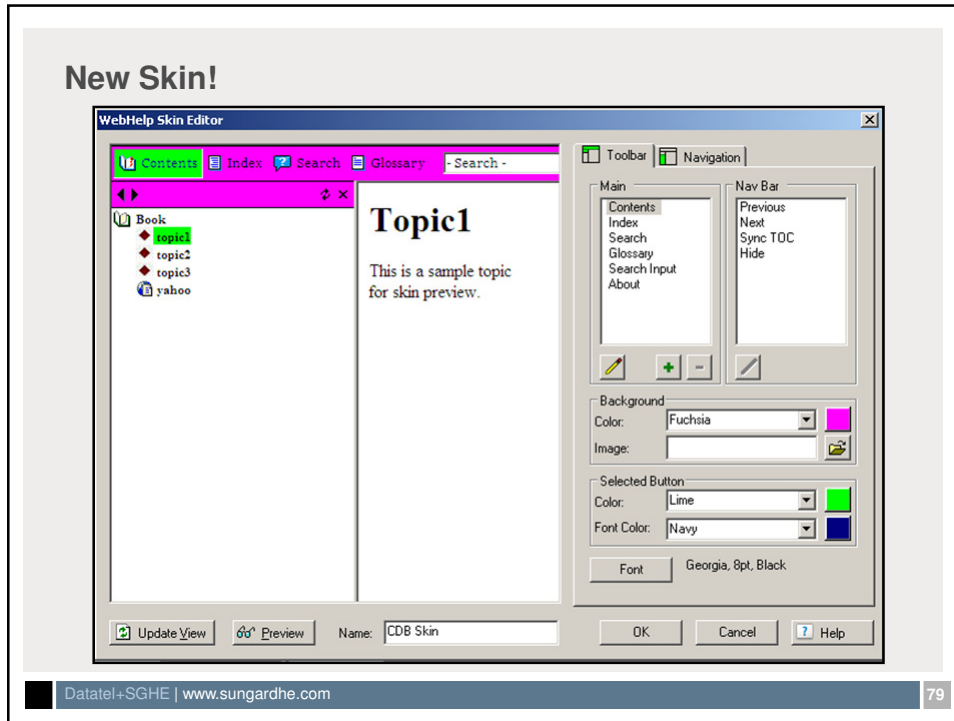
1. Access the Project Set-Up pod by clicking the tab OR by clicking View > Pods > Project Set-Up
2. Right click on the Skins folder and select New Skin 
3. Click radio button for 'Create custom WebHelp skin'
4. Click OK



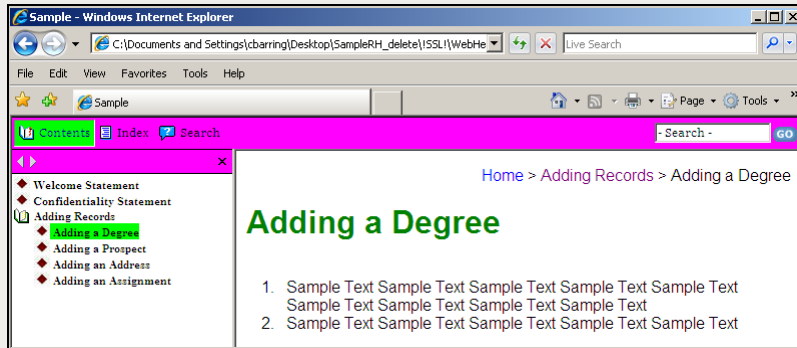
To Create a Skin (cont.)

5. Click the Toolbar or Navigation tab to view the items whose display you can edit
6. Click the item you wish to edit
7. Modify information as desired (change font, add image, etc.) →
8. Click OK
9. Enter a name for your new skin
10. Click OK to save your new skin





New Look!



Task



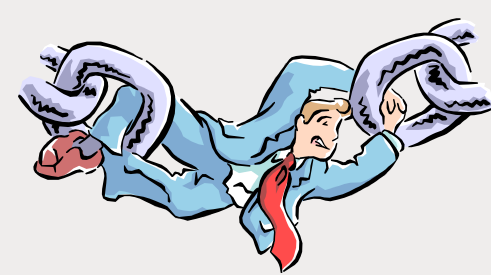
Create a New Skin Save and Generate Project

Questions? Comments...



Datatel+SGHE | www.sungardhe.com 83

Hyperlinks



Datatel+SGHE | www.sungardhe.com 84

Hyperlinks

- **Hyperlinks (links) allow users to navigate through the help system to quickly find information**

Types of Links

- **Common types of links include:**
 - **Text Links** – Text that when clicked jumps the user to a new destination (hotspot)
 - **Popups** – A link that displays an HTML topic in a window that pops up
 - **Expanding and Dropdown Hotspots** – links that display additional text in the topic content when clicked
 - **Link Controls** - List of additional similar topics

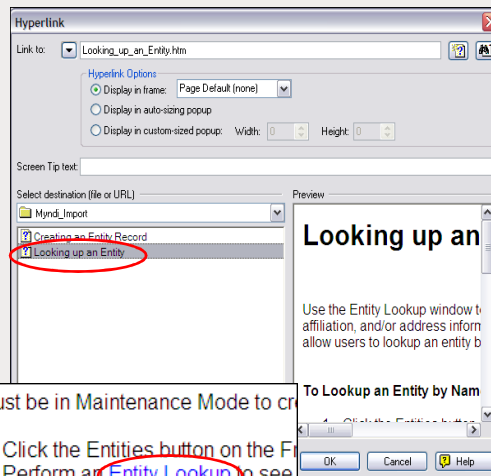


Text Link

- Text links typically display in a blue font with an underline (color can be changed)
- Clickable text that when a user moves the mouse over the text, the pointer turns into a hand

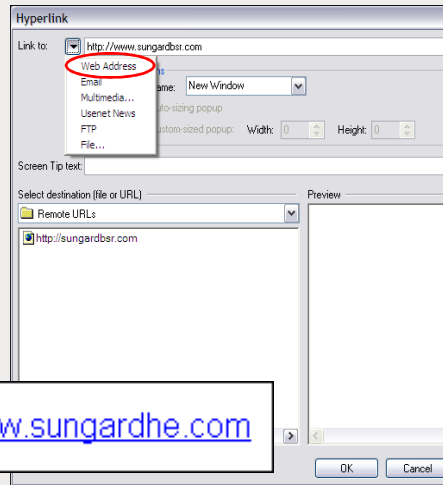
Text Link

1. Place the cursor where you want the link (or highlight the text for the hotspot)
2. Click Insert Hyperlink or Insert > Hyperlink/Popup
3. Select the Destination for the link
4. Click OK



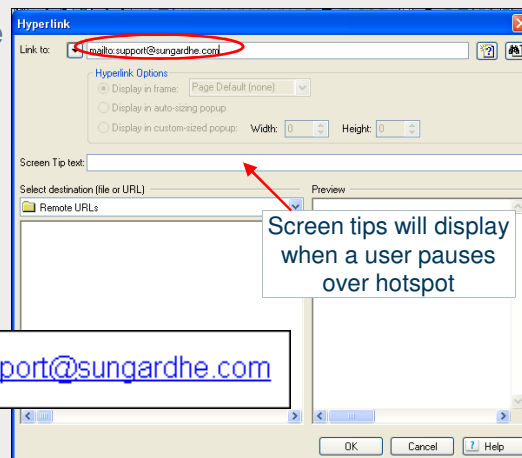
Link to Web Addresses

1. Place the cursor where you want the link (or highlight the text for the hotspot)
2. Click Insert Hyperlink 
3. Select Web Address from the Link to dropdown
4. Enter the web address
5. Indicate display in frame (New window)
6. Click OK




Link to Email

1. Place the cursor where you want the link (or highlight the text for the hotspot)
2. Click Insert Hyperlink 
3. Select Email from the Link to dropdown
4. Enter the email address
5. Click OK





Task

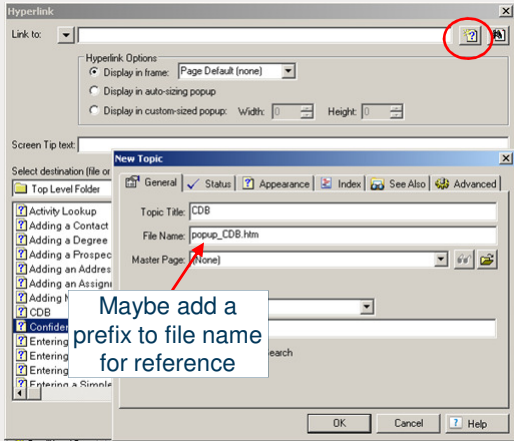


Link Text, Web Address, Email Save and Generate Project

Datatel+SGHE | www.sungardhe.com 91

Popups

1. Place the cursor where you want the link (or highlight the text for the hotspot)
2. Click Insert Popup 
3. Click the New topic button 
4. Enter a topic title
5. Adjust filename as necessary (prepend with 'popup_', etc.)
6. Click OK twice



Datatel+SGHE | www.sungardhe.com 92

Popups (cont.)

6. In the Topic List pod, navigate to the popup topic you just created
7. Double-click the topic to open it
8. Add/edit text that you want to display for the popup
9. May consider changing the style/font size for popup topics to smaller text

You must be in **Maintenance Mode** to create entity records.

Maintenance Mode

Click the Options link from the Home Page to switch from inquiry (view only) to maintenance (add/change) mode.

1. Click the Entities button
2. Perform an **Entity Lookup**
3. Click the New button
4. **Last:** Enter the person's last name and punctuation.
5. **First:** Enter the First Name
6. **Middle:** Enter the full middle name or middle initial if known

Quick Text Only Popups

1. Place the cursor where you want the link (or highlight the text for the hotspot)
2. From the Insert menu, select Text Only Popup
3. Enter the text
4. Click OK
5. To Edit text after creation, double-click on hotspot or right click and select Text Popup Properties

The Entity Person Policy states that new entity records will only be created if the individual donates a gift to BSR University, are a graduating student or a major gift prospect.

Text Popup Properties

Popup text: The Entity Person Policy states that new entity records are only created for an individual if they have donated money to BSR University, are a graduating student or a major gift prospect.

Font: Arial

Color: Black

Size: 8

Background color: Pale Yellow

Vertical: 10

Horizontal: 10

Buttons: OK, Cancel, Help

Task



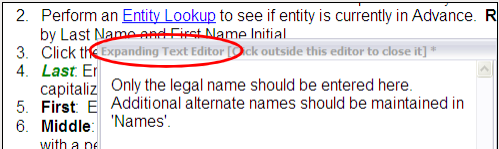
Create Popups and Text Only Popups Save and Generate Project

Expanding/Dropdown Hotspots

- **Expanding**: Users clicks text and it expands to display additional information after the linked word(s); click again and text disappears
 - Oftentimes used for definitions
- **Dropdown**: User clicks text and additional information displays below the hotspot
 - Frequently used for graphics
 - More detailed steps for a procedure

Expanding Hotspot

1. Place the cursor where you want the link (or highlight the text for the hotspot)
2. From the DHTML menu, select Create Expanding Hotspot and Text
3. Enter text and when complete click outside of the text editor box
4. Click Preview to view hotspot



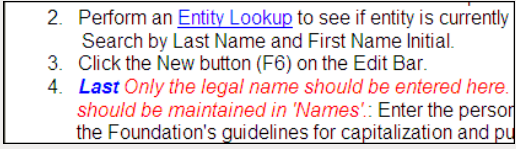
2. Perform an [Entity Lookup](#) to see if entity is currently in Advance. R
by Last Name and First Name Initial

3. Click the [Expanding Text editor](#) (click outside this editor to close it) *

4. **Last:** Enter the last name. Only the legal name should be entered here.

5. **First:** Enter the first name. Additional alternate names should be maintained in 'Names'.

6. **Middle:** Enter the middle name, if applicable. Additional alternate names should be maintained in 'Names'.



2. Perform an [Entity Lookup](#) to see if entity is currently in Advance. R
Search by Last Name and First Name Initial.

3. Click the New button (F6) on the Edit Bar.

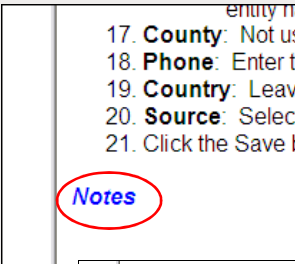
4. **Last:** *Only the legal name should be entered here.*
First: *Additional alternate names should be maintained in 'Names'.* Enter the person's first name.
Middle: *Additional alternate names should be maintained in 'Names'.* Enter the person's middle name.
the Foundation's guidelines for capitalization and punctuation.

Note: Hotspot formatting can be changed by modifying the style

Datatel+SGHE | www.sungardhe.com 97

Dropdown Hotspots

1. Place the cursor where you want the link (or highlight the text for the hotspot)
2. From the DHTML menu, select Create Dropdown Hotspot and Text
3. Enter text and when complete click outside of the text editor box
4. Click Preview to view hotspot



entity m

17. **County:** Not us

18. **Phone:** Enter t

19. **Country:** Leav

20. **Source:** Selec

21. Click the Save t

Notes

19. **Country:** Leave blank for United States; othe

20. **Source:** Select the source of the information

21. Click the Save button (F8) on the Edit Bar.

Notes

The Mail Name, Report Name, and Salutation will def modified if needed. It is important to check that a pre personal suffix (e.g., I or II) are chosen, that the comm Advance will also remind you to add a degree record been saved.

Datatel+SGHE | www.sungardhe.com 98

Task




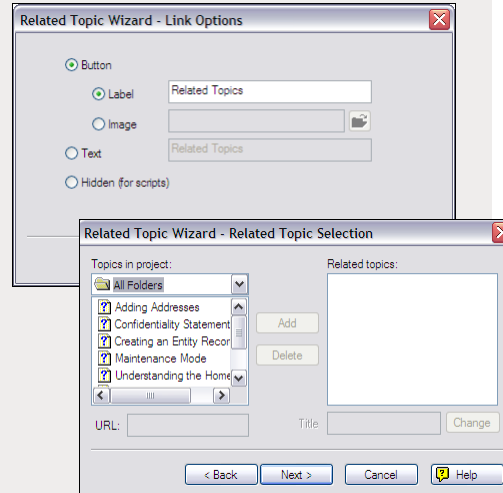
Create Expanding and Dropdown Hotspots Save and Generate Project

Link Controls

- **Link controls provide another navigation option in the form of text, buttons or images that display a list of related topics**
 - Related Topics
 - See Also
 - Keyword Links

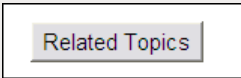
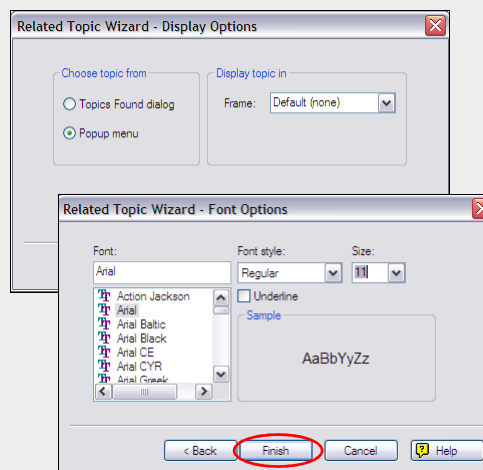
Related Topics

1. Click Insert Nav Control button 
2. Select Related Topics and the Wizard will open
3. Select radio button options and click Next
4. Highlight the Topics in Project and click Add to include them in the Related Topic; click Next when done




Related Topics (cont.)

5. Indicate Display Options for when the users click the control
6. Click Next to set up font options
7. Click Finish
8. If you need to change your Related Topics options, double-click the button/listing within your help document



Task

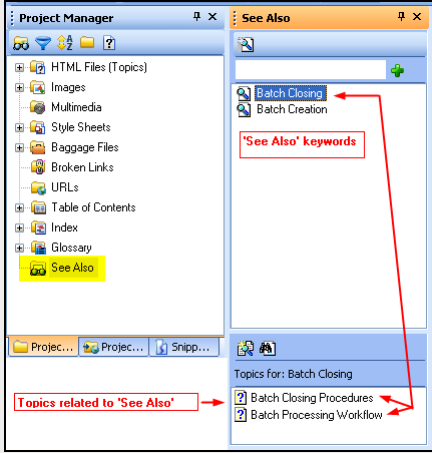


Create a Related Topic Link Save and Generate Project

Datatel+SGHE | www.sungardhe.com 103

See Also Topic Properties

- Right click 'See Also' link in Project Manager pod
- Click 'Edit'
- Type See Also keyword in box and click '+' sign or Enter
- Highlight See Also keyword and then drag topics from Topic List pod to 'Topics for:' box

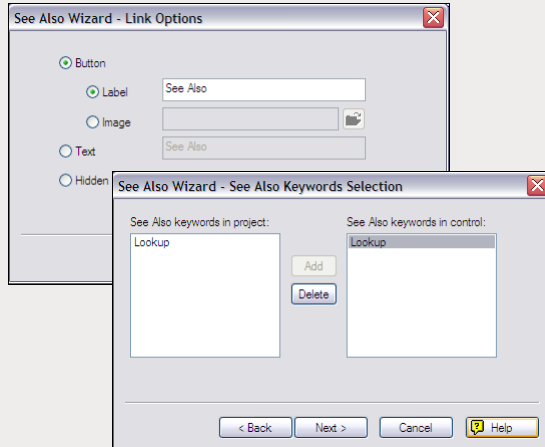


You can also link 'See Also' keywords to topic through 'See Also' tab in Topic Properties

Datatel+SGHE | www.sungardhe.com 104

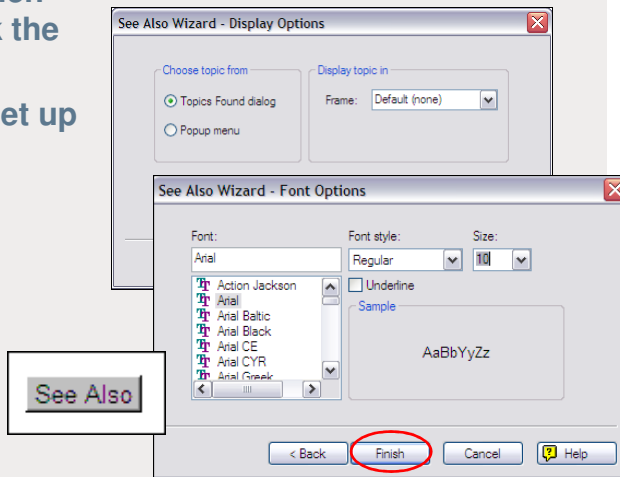
See Also Links

1. Click Insert Nav Control icon
2. Select See Also
3. Wizard will open
4. Select radio button options and click Next
5. Highlight the See Also Keywords in Project and click Add to include them in the See Also Control
6. Click Next when done



See Also Links (cont.)

5. Indicate Display Options for when the users click the control
6. Click Next to set up font options
7. Click Finish



Task



**Create a See Also Link
Save and Generate Project**

Datatel+SGHE | www.sungardhe.com 107


Questions? Comments...





Datatel+SGHE | www.sungardhe.com 108

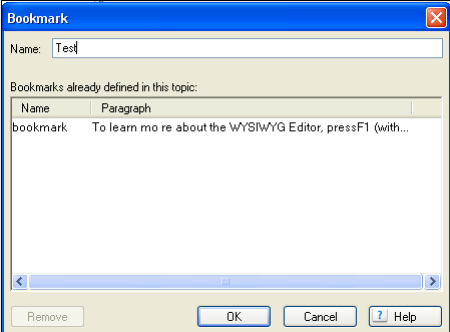


Bookmarks

1. Position your cursor where you want bookmark
2. Click Insert Bookmark button 
- or*
- Insert > Bookmarks
3. Enter a name for the bookmark
4. Click OK
5. RoboHelp will insert a bookmark icon

* Create a hyperlink to this bookmark from any topic using 

 Test for bookmark insertion



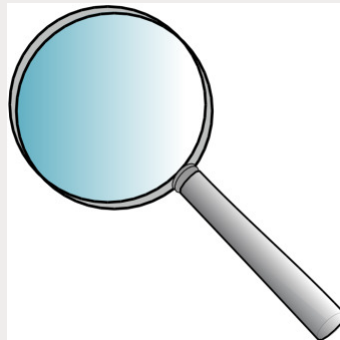
Datatel+SGHE | www.sungardhe.com 110

Task



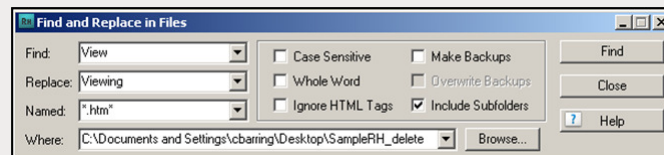
Add a Bookmark Create a Link to a Bookmark

Find & Replace



Find and Replace in Multiple Files


1. Click Edit > Find and Replace in Files
2. Enter the text/symbols to find in your documents
3. Enter the text/symbols to insert in place of your 'Find' options
3. Use Browse to identify the location of your RoboHelp project
4. Place checks in checkboxes as needed. Case Sensitive is one that you might want to use
5. Click Find



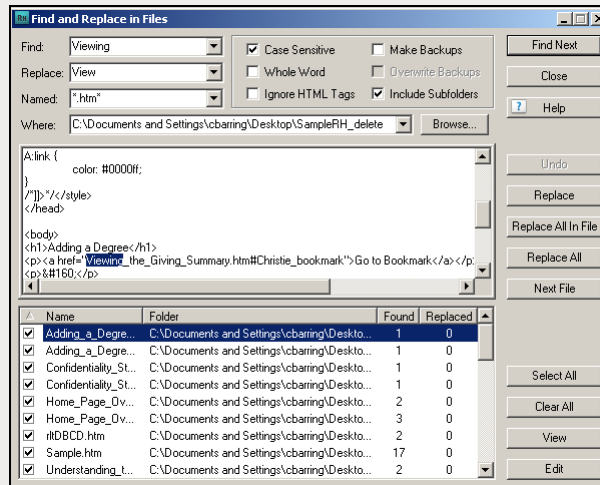
Find and Replace in Multiple Files (continued)

6. RoboHelp will find all files in your chosen folder/location that contain the 'Find' data you specified.
7. Select files and click action buttons (Replace, Replace All, etc.) as needed

IMPORTANT NOTES:

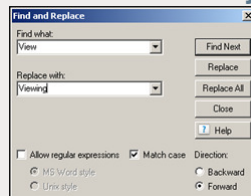
- Refer to RoboHelp Help  for additional information and definition of various options
- RoboHelp saves your changes upon completion of the action. So...you might want to save a backup of your project before doing a Find and Replace

Find and Replace in Multiple Files (continued)



Find and Replace in a Single File

1. Open the Topic you wish to edit
2. Click Edit > Replace
 - * **NOT** Edit > Find and Replace in Files *
3. In the 'Find what:' box, enter the text/symbols to find in your documents
4. In the 'Replace with:' box, enter the text/symbols to insert in place of your 'Find' options
3. Place checks in checkboxes as needed. Match Case one that you might want to use
5. Click the button for the action you want to take



Questions? Comments...



Datatel+SGHE | www.sungardhe.com 117



Images

Datatel+SGHE | www.sungardhe.com 118

Types of Images

- **Recommended file type for graphics is .GIF or .JPG image files**
 - **.BMP files do not display properly in some browsers**

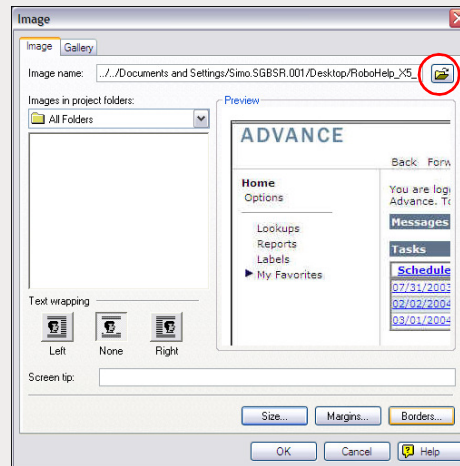
Capturing Graphics

- **ALT+Print Screen captures the active screen; CTRL+V will paste it into a topic**
OR
- **Use a screen capture program (i.e. Hypersnap) to obtain image files**

Inserting a Graphic

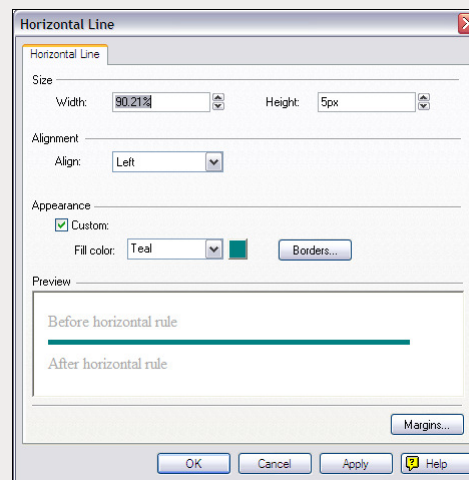
1. Position cursor where you want the graphic to display
2. Click the Insert Image button 
3. Click Browse button to locate image file
4. Indicate image attributes
5. Click OK

* We recommend sizing before inserting



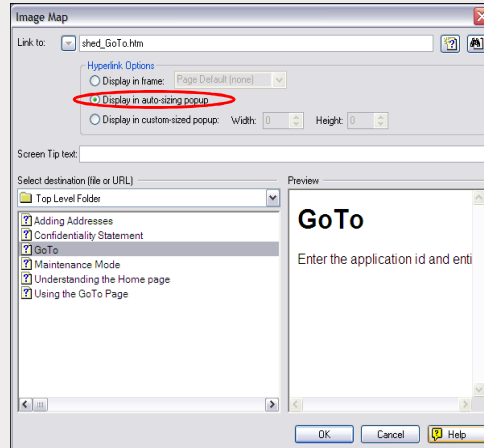
Horizontal Lines

1. Insert > HTML > Horizontal Line
2. Position cursor on line that RH creates
3. Double-click to display line attributes
4. Modify line attributes
5. Click OK



Clickable Graphic (Shed)

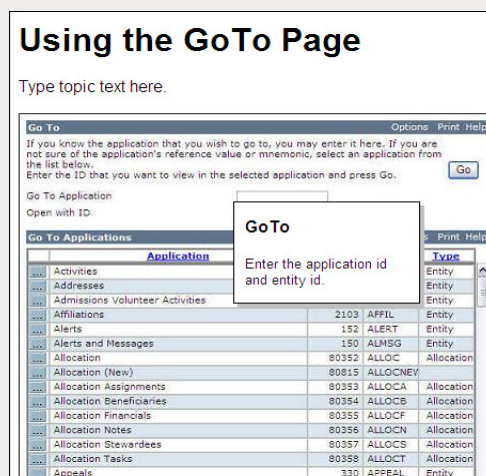
1. **Open the topic containing the image**
2. **Click Insert > Image Map**
3. **From the submenu, select a shape that will outline the click area**
4. **Drag shape to place**
5. **In 'Select Destination (file or URL), select Topic to which you want to link. If you need to create a new Topic, click New Topic button and create**
6. **Click OK**
7. **Open Topic (if you created new) and add text – MME Update**



Clickable Graphic (cont.)

Using the GoTo Page

Type topic text here.



Other Image Options

- Select a graphic from the gallery
- Create a dropdown link graphic
- Create a popup link graphic
- Add a background image to a topic
- Use images as links (jumps) to other topics
- Multimedia
- Insert tables and text boxes

Task

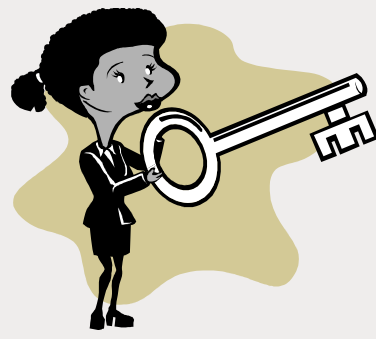


Add a Graphic to a Topic
Create a Dropdown Graphic Link
Add a Horizontal Line
Save and Generate Project

Questions? Comments...



Datatel+SGHE | www.sungardhe.com 127



Index

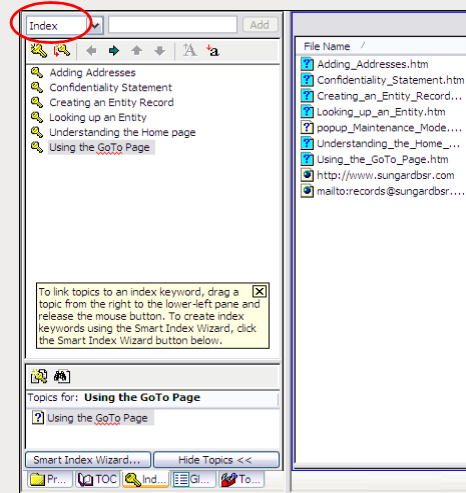
Datatel+SGHE | www.sungardhe.com 128

Indexing


- An index is a list of words that a user thinks of when he/she has a question about an application
- Allows users to find words associated with their question and to display relevant topics
- An index gives users quick access to information in your help file
- Using an index is faster than searching through the table of contents to find something
- An index is created by associating a keyword with a topic
- Smart Index Wizard will auto create index words

Creating an Index Manually

1. Click on Index tab with Topic tab displaying in the right pane
2. Drag and drop topics into the Index box on the left
3. And/or Type a word in the open box at the top and click Add then drag the appropriate topic to the left to link



Task



**Manually Create an Index Item
Save and Generate Project
View Index**

Datatel+SGHE | www.sungardhe.com 131

Questions? Comments...



Datatel+SGHE | www.sungardhe.com 132



Generate Site Help File



Generating Primary Output

- **WebHelp is an uncompiled output that supports standard Help features (TOC, index, and search) and customized appearance**
- **Generate the project when ready to view**
 - RoboHelp creates output files in a single folder (called "WebHelp") within your project folder that you distribute to end users or publish to another location

Generating Primary Output

- Throughout developing your help file, you will want to save and compile your work
 1. To Save, click 
 2. To Generate (compile the project), click 
 3. To View, click 'View Results'

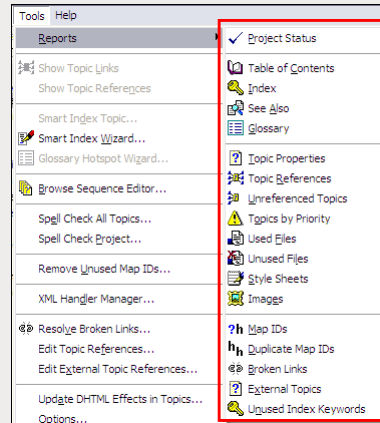
Review ☺

Project Reports

- Project reports provide various details about a project including a list of table of content entries, keywords, missing links, unused files, status of topics etc.
- Reports can be printed, emailed or exported as .txt

Viewing Reports

- To view various reports, select from the Tools menu > Reports



Project Status Report

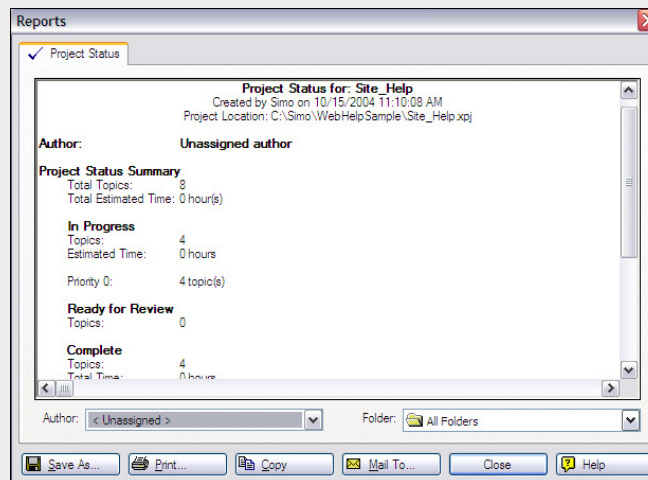
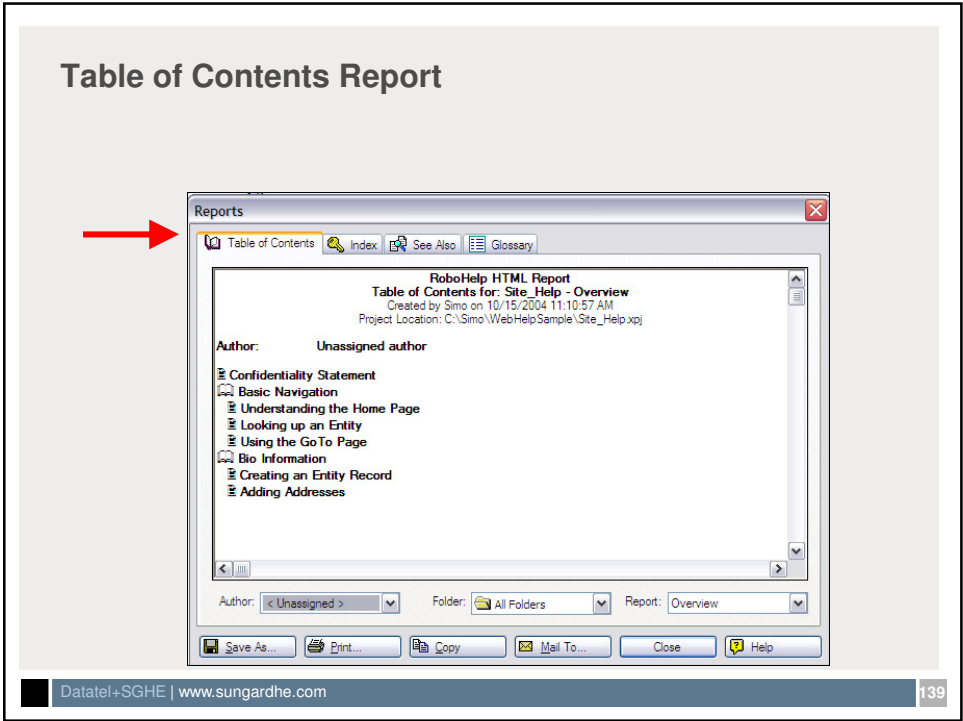


Table of Contents Report



The screenshot shows a window titled "Reports" with a tab labeled "Table of Contents" highlighted by a red arrow. The window content includes:

- RoboHelp HTML Report
- Table of Contents for Site_Help - Overview
- Created by Simo on 10/15/2004 11:10:57 AM
- Project Location: C:\Simo\WebHelpSample\Site_Help.xpj
- Author: Unassigned author
- Confidentiality Statement
- Basic Navigation
- Understanding the Home Page
- Looking up an Entity
- Using the Go To Page
- Bio Information
- Creating an Entity Record
- Adding Addresses

At the bottom of the window, there are dropdown menus for "Author" (Unassigned), "Folder" (All Folders), and "Report" (Overview). Below these are buttons for "Save As...", "Print...", "Copy", "Mail To...", "Close", and "Help".

Datatel+SGHE | www.sungardhe.com 139

Task



View Several Project Reports

Datatel+SGHE | www.sungardhe.com 140

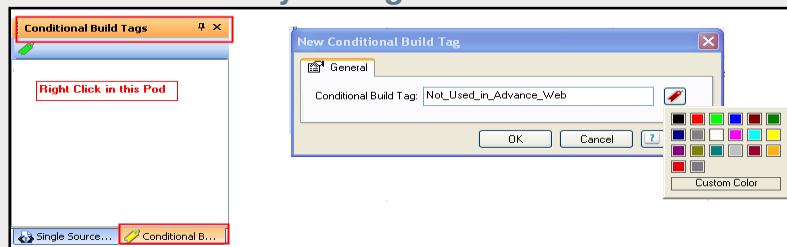
Conditional Build Tags

Datatel+SGHE | www.sungardhe.com

141

Creating Conditional Build Tags

- **Access the Conditional Build pod:**
 1. Click the Conditional Build tab at the bottom of the Single Source Layouts pod or;
 2. Click View -> Pods -> Conditional Build Tags
- **Right click anywhere in the pod and choose 'New Conditional Build Tag'**
- **Enter a name for tag**
- **Click the icon to the right of the new name to choose the tag color**
- **Click OK to save your tag**

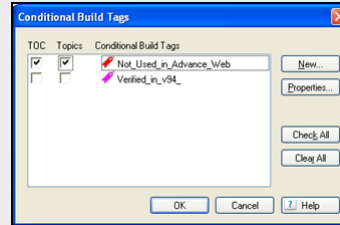


Datatel+SGHE | www.sungardhe.com

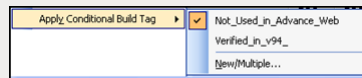
142

Applying Conditional Build Tags from Table of Contents

1. Right click on the TOC item for which you want to apply a conditional build tag
2. Click 'Apply_Conditional_Build_Tag'
3. To apply to both TOC item and Topic (topic won't be included in published TOC or Help files):
 - i. Choose New/Multiple
 - ii. Click the TOC and Topics checkbox beside the Build tag(s) you want to apply
 - iii. Click OK



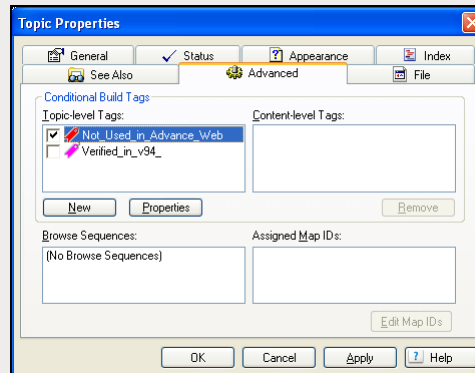
4. To apply to the TOC item only:
 - i. Click the row of the Build tag you want to apply

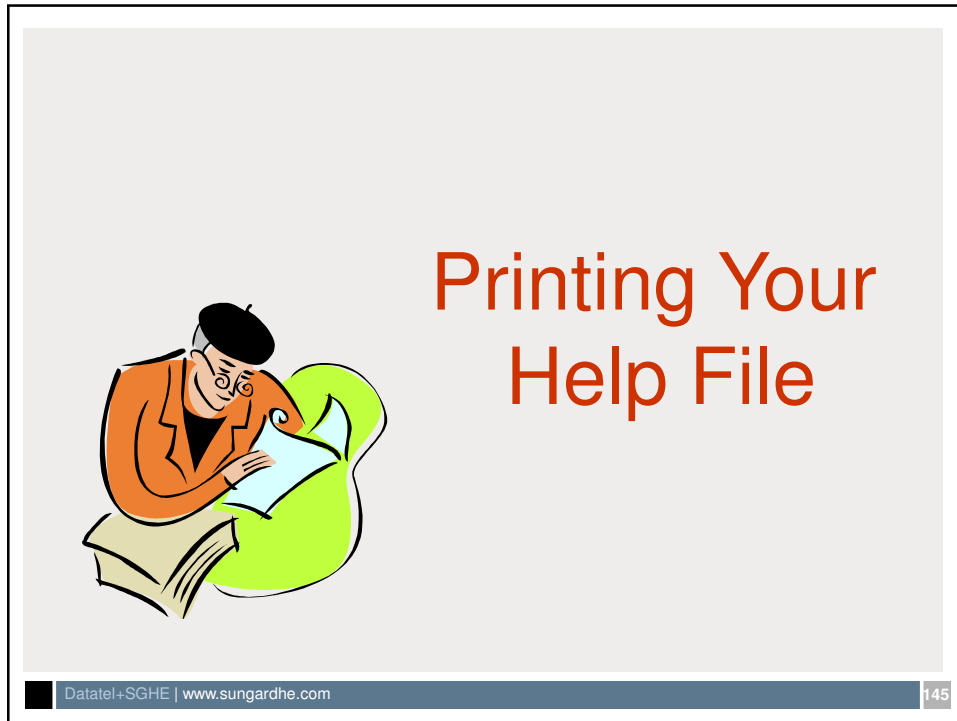


Applying Conditional Build Tags from Topic Pod

1. Right click on the row of the Topic for which you want to apply a conditional build tag
2. Click 'Properties'
3. Click the 'Advanced' tab
4. In the Topic-Level Tags box, click the checkbox beside the Build tag(s) you want to apply
5. Click OK

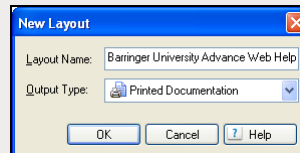
Topic Build Tag column should now display the name of the build tag you applied





Creating Printed Documentation Layouts

1. **Access the Single Source Layouts pod:**
 - i. Click the Single Source Layouts tab at the bottom of the Conditional Build pod or;
 - ii. Click View -> Pods -> Single Source Layouts
2. **Right click anywhere in the pod and choose 'New Layout'**
3. **Enter a name to identify the printed documentation layout (e.g. Barringer University Advance Web Help, TEST Print, etc.)**
4. **Choose 'Printed Documentation' from the Output Type dropdown list.**
5. **Click OK to save your layout**

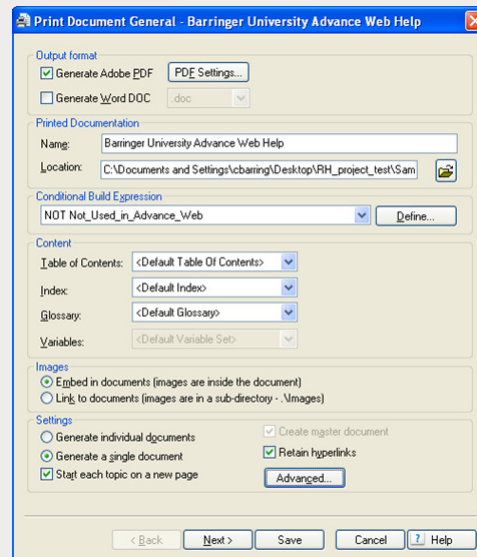


Formatting Printed Documentation Layouts

1. If Print Document General box is not open, right click on the name of the printed doc layout you want to edit and click 'Properties'
2. Click the checkbox(es) of the output formats you want to generate (WORD, .pdf, both?)
3. Enter a name to identify the printed documentation layout (e.g. Barringer University Advance Web Help, TEST Print, etc.)
4. Change 'Name' in Printed Documentation box, if necessary. This is the name that will print on the cover page of the generated document
5. Change output folder/location as necessary
6. If you want to exclude topics/TOC items to which a conditional build tag has been applied, click the 'Define' button in the Conditional Build Expression section. Click a tag on the left and use arrows to move to right. Click OK to apply to print layout

Formatting Printed Documentation Layouts (continued)

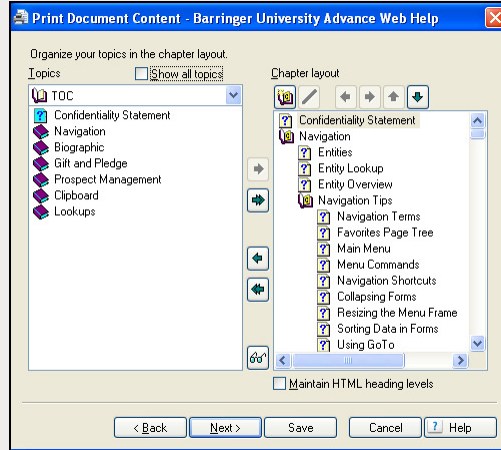
7. Choose applicable Table of Contents, Index and Glossary from dropdowns in Content section. In most cases, defaults are acceptable.
8. If you do not want to include images in your main output file, click the 'Link to documents' radio button in the Images section. In most cases, you will embed images
9. Adjust the settings radio buttons as necessary.
10. Click 'Next' button



Formatting Printed Documentation Layouts (continued)

11. Use arrows to remove and/or add Topics that will be printed. By default, all topics not excluded by a conditional build tag will be printed

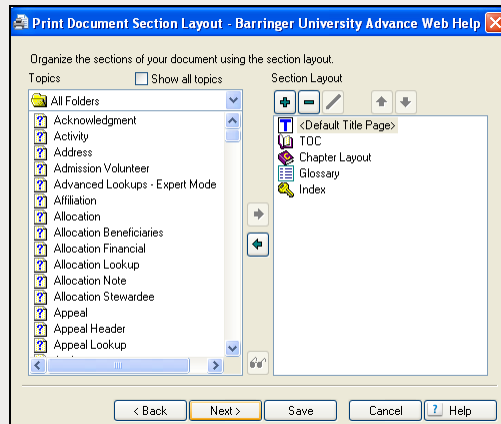
12. Click 'Next' button



Formatting Printed Documentation Layouts (continued)

13. Use '+', '-', and arrows on the right side of the page to remove and/or add sections that will be printed. By default, all sections will be included

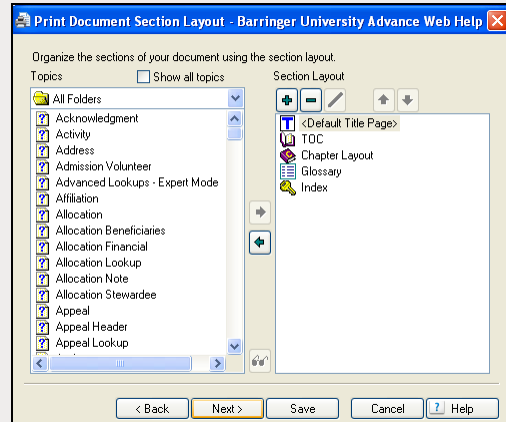
14. Click 'Next' button



Formatting Printed Documentation Layouts (continued)

15. If you want to globally apply a stylesheet to your printed topics (this is unusual as you would normally apply styles within project), choose a style from the 'Apply CSS to all Topics' dropdown

14. Click 'Save' button



Generating Printed Documentation

1. Access the Single Source Layouts pod:
2. Right click on the printed documentation layout you want to generate
3. Click 'Generate'
4. If you need to make changes to your print options, change items as necessary and use the 'Next' button to move from page to page
5. Click the 'Finish' button when you are ready to produce your printed documentation
6. RoboHelp will begin generating your printed documentation in your selected output format
7. When RoboHelp has completed your document generation, you will see a popup box. Click 'View Result' to see your document.



Final Build/ Publishing

Datatel+SGHE | www.sungardhe.com 153

Formatting the Final Build/Publishing

- 1. Access the Single Source Layouts pod:**
 - i. Click the Single Source Layouts tab at the bottom of the Conditional Build pod or;
 - ii. Click View -> Pods -> Single Source Layouts
- 2. Right click on the 'Web Help (Primary Layout)' item**
- 3. Click 'Properties'**
- 4. In the 'Select Output Folder and Start Page' box, indicate where you want to publish your project.**
 - i. Publish the file locally. Publishing to the server can be very slow.
 - ii. Remember that your output file needs to be named `Advance_Web_Access_Online_Help.htm` if you are replacing standard Advance Web Online Help.

Datatel+SGHE | www.sungardhe.com 154

Formatting the Final Build/Publishing (continued)

5. If you want to exclude topics/TOC items to which a conditional build tag has been applied, click the 'Define' button in the Conditional Build Expression section. Click a tag on the left and use arrows to move to right. Click OK to apply.
6. The 'Skin' section should already be populated with your chosen skin. Change if necessary
7. Choose applicable Table of Contents, Index **and**
8. Glossary from dropdowns in Content section. In most cases, defaults are acceptable.
9. Click 'Next' button

Formatting the Final Build/Publishing (continued)

The screenshot shows the 'WebHelp General - WebHelp' dialog box with the following settings:

- Select Output Folder and Start Page:**
 - Path: gers_Site_Help\Published Files\OCT11_2010\Advance_Web_Access_Online_Help.htm
 - Use Lowercase File Names (Recommended for UNID)
- Conditional Build Expression:**
 - Expression: NOT Not_Used_in_Advance_Web
 - Define... button
- Skin:**
 - Selected: Rutgers_1
 - Gallery... button
- Content:**
 - Table of Contents: <Default Table Of Contents>
 - Index: <Default Index>
 - Glossary: <Default Glossary>
 - Variables Set: <Default Variable Set>
 - Default Topic: Confidentiality_Statement.htm
 - Select... button
- Additional Options:**
 - Section 508 Compliant Output
 - W3C Compliant Topics
 - Apply to all Topics
 - Add Mark of the Web
 - Master Page: (empty)
 - CS: AWA_Style.css

Buttons at the bottom: < Back, Next >, Save, Cancel, Help

Formatting the Final Build/Publishing (continued)

10. Edit the Toolbar, Navigation, Search Options and Additional Options checkboxes as necessary.

- If you do not want to display the 'path' to the Help File topic on the topic page, uncheck the 'Add Breadcrumb Links' box
- Use 'Help' button for more information about these options

11. Click 'Next' button

12. Click 'Next' button again

13. If you want RoboHelp to prompt you before overwriting files during publication, click the 'Prompt before overwriting files' box. This option is usually off.

14. Click 'Next' button and then the 'Save' button

Generating the Published Files

1. Access the Single Source Layouts pod
2. Right click on WebHelp (Primary Layout)
3. Click 'Generate'
4. If you need to make changes to your publication options, change items as necessary and use the 'Next' button to move from page to page
5. Click the 'Finish' button when you are ready to publish your Help file
6. RoboHelp will begin generating your files.
7. When RoboHelp has completed your document generation, you will see a popup box. Click 'View Result' to see your published Help file.

Moving the Help File To Advance Web

- **Once the project is complete, the necessary files will need to be copied to the web server**
 1. **Navigate to the c:\inetpub\wwwroot\ directory where AWA is installed, and open the "\Help\Advance folder and delete the contents (you may make a copy if desired)**
 2. **Navigate to the directory where you published the site help file and select/copy the contents of the entire directory**
 3. **Paste the contents you copied in step 2 to the now empty folder you emptied in step 1**
 4. **Use Advance Web to access the Online Help to verify the correct file is in place**

Archiving Project Files

- **Archive and backup all project files regularly to a separate location on your server/removable storage device**
- **Archive current copies of .CSS and Skins**

- **Copy zipped files to network folder**
- **Keep record (perhaps in excel) of modifications made**
- **Keep daily copies on your c: drive**
- **Keep 3 – 4 backups in chosen locations**

