

User Manual

Adoption Readiness Tool

Creating Content

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Your ART Enterprise Learning Edition Tool (ART) is built on a tool called ANCILE uPerform®, which is developed by ANCILE Solutions. Throughout your ART Author product, you will see the term "Powered by ANCILE Solutions™" and, throughout your documentation, you may see references to both ANCILE and uPerform. You may also see screen shots that include uPerform in the graphic rather than as it displays on your screen as ART. The terms ART and uPerform are, for the case of this documentation only, interchangeable. Any time you see uPerform or uPerform Author, you can substitute ART or ART Author. For example, if you see a direction to "Open the uPerform Content" you should instead "Open the ART Content".





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# **Chapter 1: Introduction**

Adoption Readiness Tool provides authors with a robust content development environment to expedite your development and delivery of training materials.

# What is Adoption Readiness Tool?

The Adoption Readiness Tool application is a content development and delivery tool designed to enable authors to create documents, simulations, and eLearning courses. The ART recording functionality allows authors to capture screens, buttons, fields, and other data as the author completes a task. Via one automated recording session, ART creates a dual-function, single-source document that is both a step-by-step procedural document and an interactive simulation.

Authors can produce a variety of document output types and simulation playback modes. Published content can support classroom training, performance support websites, and online help. HTML output is particularly well-suited to provide context-sensitive help, and simulations of the target application and actual scenarios are a useful component of realistic training programs.

In addition to recording, authors can use the re-recording functionality to automatically repeat the steps made during an initial recording in a supported SAP environment. Re-recording makes modifications to the original recording by substituting author-provided values and translations for the original content and can be repeated for all application-supported languages.

Authors can also rapidly produce eLearning courses. Courses can be published to a performance support website or to a Learning Management System (LMS). The LMS delivery method is well-suited for standardizing and delivering training courses for business-specific processes.

In order to deliver published content to end users, there is functionality that allows for easy creation and management of a performance support website.

#### **About This Manual**

This manual provides details regarding the authoring of content and the creation of a glossary and a performance support website.

#### Who Should Read This Manual

This manual includes overview information and step-by-step procedures for content authors who develop documentation for end users. Authors have the following rights and responsibilities:

 Create and edit documents, simulations, eLearning courses, course packages, and student guides.

# **Organization Of This Manual**

This manual contains information intended for content authors. This manual also contains a glossary with terms and definitions relevant to the concepts discussed within this manual.

# **Conventions Used In This Manual**

The following conventions are used in this manual:

Style	Description
Bold	Indicates a field name, button name, or an option.
	Example:
	Click General on the left pane.
Italic	Indicates a screen or window title.
Tiutic	
	Example: The Stan Proportion window is displayed.
	The Step Properties window is displayed.
SMALL CAPS AND	Indicates a menu path.
GREATER THAN SYMBOL	Example:
(>)	Select FILE > SAVE AS.
Α.	Indicates an important concept or a caution.
<u>A</u>	
	Indicates a halpful hint or amplifying information
Ö	Indicates a helpful hint or amplifying information.
T T	

# **Terminology Used In This Manual**

The following conventions are used in this manual:

Product	Term(s)	Usage
ART	Editor	These terms represent the Desktop application of the ART software. The Editor application is where authors record, create, and edit documents.
Hewlett Packard Enterprise Development LP Rapid Recorder	Rapid Recorder, RR	These terms represent the standalone recording application of the ART software.
ART Document	Documents, Output Types	These represents the different output types available in the ART software Editor such as BPP, configuration document, course, cue card, exercise, quick reference, simulation, student guide, simulation, and work instruction.

# **Available Technical Support**

In addition to the online help delivered with the application, there are several additional support mechanisms:

- The Product Support Center available at http://softwaresupport.hp.com/.
- Optional instructor-led training. For additional information about our training services, contact your sales representative.

The Editor has several hardware and software requirements for installation and operation.

After installation, you can access features via a *Quick Start* panel and obtain online help via the Editor.

# **Confirming the Required Hardware and Software**

Your environment must meet minimum hardware and software specifications to install and operate the application. A complete set of hardware and software requirements can be found in the *Technical Specifications*.

#### Installation

#### Overview of the Editor Installation

The Editor installation is delivered as a single file wrapper or, in the Microsoft terminology, bootstrapper executable. The bootstrapper executable contains the Editor Microsoft Installer package (the .msi file) and the redistributable packages for various prerequisites. When the install is executed, a check is performed to ensure that the following prerequisites are installed on the computer:

- Capturing Engine by ANCILE Solutions
- ANCILE JRE Configuration Utility
- Microsoft .NET Framework (required for JSharp to install)
- Microsoft Visual C++ Redistributable
- MSXML
- Visual JSharp .NET Redistributable Package
- Windows Automation API
- Windows Imaging Component (requirement for .NET)
- Windows Installer



For required versions of the above software, refer to the *Technical Specifications*.

If a prerequisite is not present on the target computer, the installation extracts the pertinent Microsoft redistributable package to a local source folder and executes the package automatically.

After all prerequisite conditions are met; the Editor Microsoft Installer package is extracted to a temporary folder and executed.

#### **Installation Parameters and Properties**

The parameters described in the following table can be used when running the delivered installation executable. Some of these properties exist in the .msi file and their defined value is

used when the .msi file is run. Others are parameters that are passed to the Windows Installer service to control whether a log file is created or how much of the user interface is displayed.

<b>Property Name</b>	Possible Value(s)	Usage Example/Description
COMPANY NAME	The value for this field is provided and is the company name under which Adoption Readiness Tool was licensed.	COMPANYNAME="Hewlett Packard Enterprise Development LP" When passed on the command line to the setup package, the value should be wrapped in quotation marks if it contains spaces. This property populates the "Company Name" field on the Customer Information dialog.
PRODUCT_ID	The value for this field is provided.	PRODUCT_ID=XXXXXX-XXXXXX-XXXXXX-XXXXXXXXXXXXXXXX
APP_ DESKTOP_ SHORTCUT	1 or "" (null)	Any non-null value will set the option to create a desktop shortcut for the application.  To turn off the creation of a desktop shortcut, pass:  APP_DESKTOP_SHORTCUT=\ "\".  The default value of this property is 1.
INSTALLDIR		INSTALLDIR=C:\Program Files\[applicationdirectory]\ Defines the folder path where the application will be installed. A trailing backslash should be included. When passed on the command line to the setup package, the value should be wrapped in quotation marks if the path contains spaces.

<b>Property Name</b>	Possible Value(s)	Usage Example/Description
INSTALL_	ISO Codes are case-sensitive.	INSTALL_LANGUAGE=en-US
LANGUAGE	Bulgarian (bg-BG)	This property sets the default user
	Catalan (ca-ES)	interface language for the Editor
	Chinese (zh-CN)	application.
	Chinese - Taiwan (zh-TW)	Note: This selection does not change the user interface for the setup program.
	Croatian (hr-HR)	user interface for the setup program.
	Czech (cs-CZ)	
	Danish (da-DK)	
	Dutch - Netherlands (nl-NL)	
	Dutch - Belgium (nl-BE)	
	English - US (en-US)	
	English - UK (en-GB)	
	Finnish (fi-FI)	
	French - Canada (fr-CA)	
	French - France (fr-FR)	
	German (de-DE)	
	Greek (el-GR)	
	Hungarian (hu-HU)	
	Indonesian (id-ID)	
	Italian (it-IT)	
	Japanese (ja-JP)	
	Korean (ko-KR)	
	Norwegian (nb-NO)	
	Polish (pl-PL)	
	Portuguese - Portugal (pt-PT)	
	Portuguese - Brazil (pt-BR)	
	Romanian (ro-RO)	
	Russian (ru-RU)	
	Spanish - Spain (es-ES)	
	Swedish (sv-SE)	
	Thai (th-TH)	
	Turkish (tr-TR)	

Parameter Name	Usage Example/Description
/s : silent mode	Setup.exe/s
	Running the install executable in silent mode suppresses the initialization dialog and launches any needed pre-requisites in silent mode.
	To run the full install silently, use Setup.exe/s/v"/qn"

Parameter Name	Usage Example/Description
/v : pass arguments to Msiexec	setup.exe /v"/l*v c:\test.log MYPROPERTY1=\"value1\" /qb"
	Use the /v option to pass command-line options and values of public properties through to Msiexec.exe.
	Note that as shown above, when you want to specify that a double quote character is not a delimiter for the command line but a delimiter for the property, use \"
/a : administrative installation	The /a option causes the installation executable to perform an administrative installation. An administrative installation copies (and uncompresses) your data files to a directory specified by the user, but it does not create shortcuts, register COM servers, or create an uninstallation log.
	If you want to extract the pre-requisites from setup.exe, add a path after the /a parameter to extract the prerequisites to that location. Do not use a trailing backslash. A sample command is: setup.exe /a"C:\temp"
/b: cache installation locally	With the /b option, the user can specify the directory in which to cache the installation files. If you want to extract the MSI from setup.exe, specify the path after the /b parameter to extract the prerequisites to that location. Do not use a trailing backslash. A sample command is: setup.exe /b"C:\temp"
/w : wait	setup.exe /w The /w option forces the installation executable to wait until the installation is complete before exiting.
/x : uninstall mode	The /x option causes the installation executable to uninstall a previously installed product.

Parameter Name	Usage Example/Description
/L	/L*v C:\test\install.log
	"/L" is the standard Windows Installer parameter used to ensure a log is created.
	This set of parameters would create a verbose log file with all available information using the filename install.log in the C:\test folder.
	Possible values include:
	i - Status messages
	w - Nonfatal warnings
	e - All error messages
	a - Start up of actions
	r - Action-specific records
	u - User requests
	c - Initial UI parameters
	m - Out-of-memory or fatal exit information
	o - Out-of-disk-space messages
	p - Terminal properties
	v - Verbose output
	x - Extra debugging information
	+ - Append to existing log file
	! - Flush each line to the log
	* - Log all information, except for v and x options
/q [n b r f][+ -][!]	Use any of the standard Windows Installer display option values. Windows Installer runs in full UI mode (/qf) by default.
	If you use any of the values other than "full UI" you must define values for the properties listed above in order for the install to succeed.
	Possible values include:
	/qn - no UI
	/qb - basic UI
	/qr - reduced UI
	/qf - full UI
	/qb+ basic UI with modal dialog at the end
	/qb- basic UI without a modal dialog at the end
	Use the ! parameter to suppress the Cancel button

For more information about Windows Installer command line parameters, refer to the Microsoft Website at http://msdn.microsoft.com/en-us/library/Aa367988.aspx http://msdn2.microsoft.com/en-us/library/Aa367988.aspx.

These parameters can be used either in a setup.ini file or passed via the command line. When used in a setup.ini file, each parameter should be on a separate line in the file. If you pass the /v

parameter at the command prompt when launching Setup.exe, any parameters that are specified for the CmdLine keyname in Setup.ini are ignored.

The proper format for the file data is **VariableName=value**. Do not include a space before or after the '=' sign.

Supported parameters are indicated by a Project Type of "Basic MSI."

#### Running the Install with a setup.ini File

If you are using a setup.ini file, you must run the installation with a special command line switch -/m=setup.ini. For example:

#### setup.exe /m=setup.ini

The installation (the .exe file) has only two user interface elements: an initial splash screen and a possible error message as described previously. The .msi file has a full user interface typically seen in an installation package. The QUIET parameter defined previously controls the user interface level of the .msi file. To set the .exe file to have no user interface (that is, hide the splash screen and any error messages), the .exe file must be run with a "/s" command line switch. For example:

#### setup.exe/s

To set the .msi to have no user interface when run from within the .exe file, the QUIET parameter must be used. All properties must be defined because the .msi will run without a user interface.

The parameters also may be used from the command line directly. In general, spaces are used to separate the parameters on the command line. Since some values may contain spaces, those particular values should be wrapped in double-quote marks. The preceding table identifies to which parameters this applies.

If you use the /S or /M switches that pertain to the .exe file, they must precede any of the other parameters on the command line.

### Running the .msi File Directly

There are other parameters that can be used when using Windows Installer. These parameters are not covered here and are not supported by the installation package (the .exe file). To use these parameters, or if you would prefer to run the .msi file directly, the .msi file and the prerequisite redistributables can be extracted to a local folder via an Administrative install. For example:

 $setup.exe \ /a"C:\uncompressed\prqs" \ /s \ /v"/qn \ TARGETDIR=\c:\uncompressed\msi"" \ and \ an extension of the compressed of the comp$ 

If you choose to run the .msi file directly, all prerequisites should be installed prior to the Editor application.

#### **Installing the Editor Software - Express**

- **1.** Insert the installation CD or navigate to the location of the setup.exe file.
- **2.** If necessary, double-click on the .exe file to begin the installation.
- 3. Click Next.
- **4.** Complete the following information:

Field	Description
Company Name	Enter your company or organization name delivered with the software. This value should be entered exactly as provided.
Product Key	Enter the product key delivered with the software. This value should be entered exactly as provided.

- 5. Click Next.
- **6.** Optionally, select **Browse** to specify a destination folder other than the default.
- **7.** Optionally, select the **Client** checkbox to create a desktop shortcut for the application.
- 8. Click Next.
- **9.** Select the desired interface language from the drop-down list.
- **10.** Click **Next**.
- 11. Click Install.
- 12. Click Finish.

### **Implementing with Citrix**

If you are planning to use the application in a Citrix environment, perform the following procedure to ensure a smooth implementation:

- 1. Close the Editor.
- **2.** Locate your current ART resources directory. (Example: **START > PROGRAMS > ART > ART RESOURCES**).

- 3. Note the templates directory. The default location is: C:\Users\[username]\AppData\Roaming\[applicationdirectory]\version X.xx\templates.
- **4.** Navigate to the client program files. The default location is: C:\Program Files\[applicationdirectory\]\client.
- **5.** Create a backup copy of the **install.config** file.
- **6.** Edit the **install.config** file to add the new location you would like to create. The area to be edited is displayed in bold below:

(Example using D: drive:

- <?xml version="1.0" encoding=UTF-8?>
- <InstallConfig>

#### <BaseAppData>D:\Resources</BaseAppData>

<CompanyName>HP</CompanyName>

<Language>en-US</Language>

<ProductId>XXXXXX-XXXXXX-XXXXXX-XXXXXX-XXXXXX-

XXXXXX</ProductId>

InstallConfig>



In Windows 7 or later environments, you must have Administrator rights in order to edit **install.config**.

- **7.** Save and close the **install.config** file.
- **8.** Start the Editor software.
- **9.** The new resources directory will display similar to C:\[username]\HP\ART\version X.xx.
- **10.** On the *Shortcut* tab, update the **Target** field to reflect the location you noted in Step 6.
- **11.** Copy the templates from the directory you noted in Step 3 into the new directory created in Step 9.
- **12.** These steps will need to be performed after upgrading to a new version of Editor from a previous version that has been configured to work with Citrix.

# **Starting the Editor**

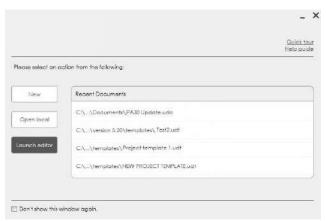
The Editor operates in a standalone mode; the server delivered with the full product suite is not available with the product. Consequently, options related to server functionality are disabled in the Editor.

## Starting the Editor

Select **START > PROGRAMS** and select the installation path for the application.

# **Using the Quick Start Panel**

Upon startup of the Editor, the Quick Start panel is displayed.



The *Quick Start* panel provides easy access to the basic authoring functions, including recording and editing. You can enable or disable the display of the *Quick Start* panel.

### **Using the Quick Start Options**

The following options are available from the *Quick Start* panel:

Option	Description
New	Starts the Editor to create new content. For more information, refer to Creating Content.
Open local	Opens existing content from the local computer. For more information, refer to Opening Content.
Batch Publish	Publishes one or more files locally on your computer. For more information, refer to Previewing and Publishing Content (on page 301).
Launch Editor	Launches the editing application to provide access to all author functionality.

### Disabling the Quick Start Panel

From the *Quick Start* panel, select the **DON'T SHOW THIS WINDOW AGAIN** checkbox to disable display of the panel. You can also disable the *Quick Start* panel from the **FILE > PREFERENCES** menu.

- **1.** Open the Editor.
- 2. Select FILE > PREFERENCES.
- **3.** Click **General** on the left pane.
- **4.** Select the **Don't show this window again** checkbox.
- 5. Click OK.

### Enabling the Quick Start Panel

- **1.** Open the Editor.
- 2. Select FILE > PREFERENCES.
- **3.** Click **General** on the left pane.
- **4.** Deselect the **Don't show this window again** checkbox.
- 5. Click OK.

## **Managing Your Editor Configuration Settings**

The following basic configuration settings can be specified in the Editor from the **FILE** > **PREFERENCES** menu. Prior to using the Editor to create content, you should review these settings and determine the best options for your needs:

- Appearance: Enable or disable the *Quick Start* panel and specify the language of the application interface. The following languages are supported: Bulgarian, Catalan, Chinese (Traditional), Chinese (Simplified), Croatian, Czech, Danish, Dutch (Belgium), Dutch (Netherlands), English (US), English (UK), Finnish, French (Canada), French (France), German, Greek, Hungarian, Indonesian, Italian, Japanese, Korean, Norwegian, Polish, Portuguese (Brazil), Portuguese (Portugal), Romanian, Russian, Spanish, Swedish, Thai, and Turkish.
- Logging: Specify the level of logging you want to record. The higher the log level, the more information the application will log. For details on setting log levels, refer to Specifying Logs (on page 23).
- File Types: Make the current application the default application for the listed file types or choose the file types that you want to open by default.
- Auto Save: Select to have the Editor automatically save documents as you work.
- Audio: Specify recording device and quality for audio files created with the Editor. For details, refer to Specifying Course and Simulation Audio Options (on page 39).
- Document Editor: Set the maximum screen size. For details on configuring the Document Editor, refer to Specifying Document Editor Options (on page 39).
- Simulation Editor: Set options to control the display of Simulation Editor features. For details on configuring the Simulation Editor, refer to Specifying Simulation Editor Options (on page 40).
- Filters: Highlight steps in the task pane as a warning icon. For details on setting step filters, refer to Specifying Filter Options (on page 41).
- Course Editor: Set options to control the display of Course Editor features. For details on using the Course Editor, refer to Editing and Formatting: Courses (on page 171).

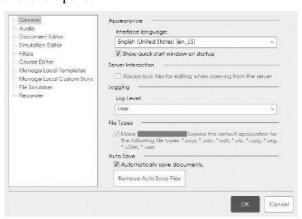
- Manage Local Templates: Import, export, and remove local templates. For details on managing local templates, refer to Managing Local Templates (on page 320).
- Manage Local Custom Skins: Import, export, remove, check-in, or preview custom skins. For details on managing local custom skins, refer to Managing Custom Skins (on page 296).
- File Scrubber: Allows you to scrub documents of translation data. For details on using the file scrubber, refer to Executing the File Scrubber (on page 25).
- Recorder: Elect to capture only the target application during recording (ignoring applications other than the selected application), or elect to capture only the window for the active application(s).

### Selecting the Interface



After specifying the interface language, you must restart the Editor for the changes to take effect.

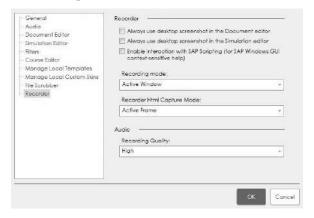
- 1. Open the Editor.
- 2. Select FILE > PREFERENCES.
- **3.** Click **General** on the left pane.



- **4.** Select your desired language from the **Interface language** drop-down list.
- 5. Click OK.

### Specifying Recording and HTML Capture Modes

- **1.** Open the Editor.
- 2. Select FILE > PREFERENCES.
- **3.** Click **Recorder** on the left pane.



**4.** Choose from the following options:

If You Want To	Then
Display the entire desktop screen shot in the document	Select Always use desktop screen shot in the Document editor.
Display the entire desktop screen shot in the simulation	Select Always use desktop screen shot in the Simulation editor.
Capture screen information for context- sensitive help	Select Enable interaction with SAP Scripting (for SAP Windows GUI context-sensitive help).

**5.** In the **Recording mode** drop-down list, choose from the following options:

If You Want To	Then
Capture only the window for the active application(s)	Select Active Window from the Recording mode drop-down list
Capture only the target application during recording	Select <b>Application</b> from the <b>Recording mode</b> drop-down list

**6.** In the **Recorder Html Capture Mode** drop-down list, choose from the following options:

If You Want To	Then
Capture only the active frame when recording in an Internet browser	Select Active Frame.

If You Want To	Then
Capture only the top-most frame when recording in an Internet browser	Select Top-most Frame.
Capture the entire browser window when recording in an Internet browser	Select Entire Browser Window.

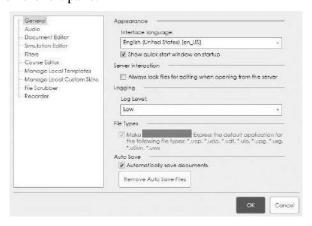
- 7. Select the audio quality from the **Recording Quality** drop-down list.
- 8. Click OK.

### Specifying Editor Options

For more information on specifying Document and Simulation Editor options, refer to Specify Document and Simulation Editor Options (on page 39).

### Specifying Logs

- 1. Open the Editor.
- 2. Select FILE > PREFERENCES.
- **3.** Click **General** on the left pane.



4. Click OK.

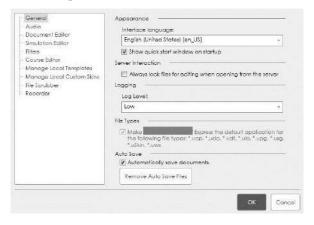


These logs are stored in

### Specifying File Type Associations

If you have two or more versions of the application installed on your computer, you can specify which application is the default for the associated file types (.ucp, .udc, .udt, .ulc, .upg, .usg, .uskin, .utask, and .uws).

- **1.** Open the Editor you want to be the default application.
- 2. Select FILE > PREFERENCES.
- **3.** Click **General** on the left pane.



**4.** Under *File Types*, choose from the following options:

If You	Then
Are using Windows 8	Click Set associations.
	Select the file extensions you want the Editor to open by default.
	Click Save.
Are NOT using Windows 8	Check the Make the default application for the following file types check box.

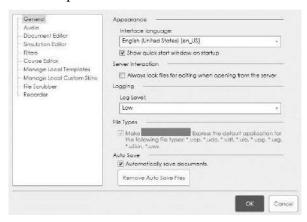
5. Click OK.

## Specifying Auto Save Settings

You can specify the Editor to automatically and frequently save a document you are working on.

1. Select FILE > PREFERENCES.

#### **2.** Click **General** on the left pane.



- **3.** Under *Auto Save*, select the **Automatically save documents** checkbox.
  - The auto save functionality occurs every two minutes. This setting is not adjustable.
- 4. Click OK.



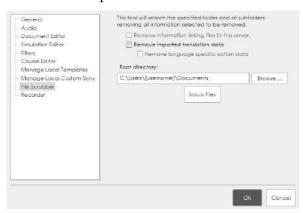
If you want to delete the auto saved files from the directory where they are stored, click **Remove Auto Save Files** and click **OK**. Auto saved files are removed automatically and periodically after a successful recovery of an auto saved file. Manually removing the auto saved files by clicking the **Remove Auto Save Files** button should not need to be performed often.

#### Executing the File Scrubber

The File Scrubber allows you to scrub documents of translated data so the documents are no longer associated with previous translated data.

1. Select FILE > PREFERENCES.

2. Click File Scrubber on the left pane.



- **3.** Select the **Remove imported translation data** checkbox. Optionally, select the **Remove language specific action data** checkbox.
- **4.** Click **Browse...** to specify the root directory containing the content.
- 5. Click Scrub Files.



A progress bar displays the status of the processing. When the process is complete, the scrubbed content can be checked into an alternate project on the Server.

# **Getting Help on the Editor**

The **Help** menu provides access to online help and the Product Support Center.

From the **Help** menu, you can also quickly identify your product version.

## Accessing Help Files for the Editor

Select **HELP > CONTENTS...** from the Editor.

### Accessing the Product Support Center

Select **HELP > ONLINE SUPPORT** from the Editor to access the Product Support Center.

# Viewing the Editor Version

1. Select **HELP > ABOUT...** from the Editor.

## **Chapter 2: Getting Started**

# Exiting

If you attempt to exit the Editor without saving your content, you will receive a prompt confirming you want to exit prior to saving.

# **Exiting the Editor**

Select **FILE > EXIT** from the Editor.

# Uninstalling

The Editor application can be uninstalled from your computer using standard Microsoft Windows Installer uninstall functionality.

## Uninstalling the Editor Software

- 1. Select START > SETTINGS > CONTROL PANEL > ADD OR REMOVE PROGRAMS.
- 2. Select Client from the Currently installed programs list.
- 3. Click Remove.
- **4.** Click **Yes** at the prompt to confirm.
- **5.** Close the *Add or Remove Programs* window.



Application information for individual users is stored in the *Documents and Settings* or *Users* folders on the computer. The uninstall does not remove this content.

# **Upgrading from a Previous Version**

The Editor upgrade is designed to allow you to install a new version on top of your current version. Refer to the *Release Notes* and *Technical Specifications* prior to upgrading.

## **Upgrading Content and Templates**

Your content and custom templates are automatically upgraded during the following activities:

- Content is upgraded when it is opened for editing.
- Content and templates are temporarily upgraded during publishing. The temporary upgrades are deleted upon completion of publishing.
- Existing templates are upgraded and placed in the current version's *Documents* and *Settings* or *Users* folder the first time the Editor is launched.



To take advantage of template features in the latest version, you must create new content with the most current standard author template; new template features are not available in upgraded documents. For more information, refer to Creating a New Author Template.

# <u>Chapter 3</u>: Exploring the Editor Workspace

The Editor workspace uses standard features such as a menu bar and toolbars. The interface provides two main working areas: the content area and the task pane. These areas provide access to your content and the ability to edit your content.

# **Introduction to the Editor Workspace**

The Editor workspace provides access to all authoring functions and the tools to help you maintain consistency and manage your content. Specifically, the Editor workspace includes the following functionality:

- Create and edit documents, simulations, and courses
- Insert steps, actions, notes, links, and tooltips into documents and simulations
- Insert hotspots and web links into courses
- Specify formatting options, such as font and paragraph style
- Use spellcheck, glossary, and annotation functionality
- Create and update your website

#### Overview of the Content Area and Task Pane

In addition to standard application features such as menus and toolbars, the Editor includes the following main areas:

- The procedural content area contains the document, simulation, and screenflow views. The course content area contains the course, audio, and preview views. The content area also displays the functions to manage glossary terms and definitions and create a website.
- The task pane view is customizable and can include such information as an outline view of the content, and a list of annotation sets for the current content.



## Using the Menu

The menu provides access to all author functionality.

The options available on a menu are dependent upon the content you are displaying. Based on what type of content you are viewing, the available options within a menu will differ.



## Using the Toolbars

The toolbar options displayed below the menu bar are customizable and are dependent upon your toolbar display selections and the content you are displaying. Based on what type of content you are viewing, the available toolbar options will differ.



**1.** Select the different tabs across the top (File, Home, Insert, Translations, and View) to change the available toolbar buttons and options.

## Customizing the Toolbar

1. Right-click on the toolbar to display the three toolbar menu options.



The **Add to Quick Access Toolbar** option will display only if you right-click while having your mouse cursor on a button.



**2.** Perform one of the following options:

If You Want To	Then
Add a button to the Quick Access	Verify your mouse is on the proper button, and
Toolbar	Click Add to Quick Access Toolbar.
	Go to Step 3.
Display the Quick Access Toolbar	Click Show Quick Access Toolbar below
below the Ribbon instead of above it,	Ribbon.
which is the default location	Go to Step 4.
Minimize the Ribbon bar	Click Minimize the Ribbon.

#### **Chapter 3: Exploring the Editor Workspace**



**3.** The **Bold** button has been added to the Quick Access Toolbar.



**4.** The Quick Access Toolbar has been placed below the Ribbon



**5.** The Quick Access Toolbar has been minimized.

## **Using Right-Click Menus**

Right-click menus are available throughout the Editor workspace to provide shortcut methods of performing a variety of tasks. The menu options differ depending upon the type of field or object that is selected when the right-click action is performed.

Some of the right-click menu options available include:

- Cut
- Copy
- Paste
- Delete
- Undo/Redo
- Edit steps, actions, notes, and callouts
- Edit tooltips, screens, and images
- Various character and paragraph format options
- Various insertion and editing options

### **Using the Content Area**

The content area displays a WYSIWYG (what you see is what you get) view of the underlying extensible markup language (XML) structure of the document and simulation.

### **Changing Content Views**

Tabs in the lower left allow you to select the desired view of procedural content: document, simulation, or screenflow. Additionally, you can right click on an item in the task pane and select "Edit in document view" or "Edit in simulation view". If you are in course mode, you can select the desired view of course content: course, audio, or preview. If you are in website mode, you can select the page or content view.

To display a particular view in the content area, select the desired tab.





You may encounter a slight time delay when switching between views. This is due to the processing necessary to reformat the data for display.



It is good practice to save your file before switching the views.

## Viewing the Status Bar

The status bar at the bottom of the Editor window provides information on processing status and the glossary terms or page links remaining within the system limit.



#### Using the Task Pane

The following task panes are available in the Editor. Selection availability is dependent on the file type that is open, and the view displayed.

- Annotations: Displays the annotation sets available for the displayed document.
- Course: Displays the lessons and pages in the course.
- Layout: Displays an outline view of the sections and the steps in the document.

## **Chapter 3: Exploring the Editor Workspace**

- Steps: Displays the steps in the simulation.
- Pages: Displays page hierarchy information for the website.
- Glossary: Displays the list of terms.

When you click on an element in the task pane, the content area refreshes to display the corresponding information in the content area. To change the displayed task pane, select the desired pane from the **VIEW** menu, or click the down arrow in the upper right of the task pane.



# <u>Chapter 4</u>: Creating and Opening Content

In addition to recording a target application to produce a document and simulation, the Editor can be used to create and open content independent of the recorder.

# **Introduction to Creating and Opening Content**

In addition to recording a task to create procedural content, you can use the Editor to:

- Create a file into which recorded steps and amplifying information can be added. When you create content, the document, simulation, and screenflow views are generated.
- Rapidly create eLearning courses. When you create course content, the course, audio, and preview views are generated.
- Combine concepts, procedures, and exercises related to a series of tasks or a process into a student guide.
- Combine multiple eLearning courses and documents into a single SCORM package for use with an LMS.

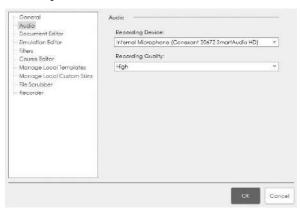
Lastly, the Editor is used to create a project-wide glossary of terms and definitions and a website to provide end users with access to content.

# **Specify Document and Simulation Editor Options**

You have several options to control the display of features within the Document and Simulation Editor.

## Specifying Course and Simulation Audio Options

- 1. Select FILE > PREFERENCES.
- **2.** Click **Audio** on the left pane.



**3.** Complete the following fields:

Field	Description		
Recording Device	Specify the input machine specific.	-	This selection is
Recording Quality	Specify the audio quality setting.		
	Setting	MP3	WAV
	High	320kbps	16-bit
	Medium	128kbps	8-bit
	Low	64kbps	8-bit

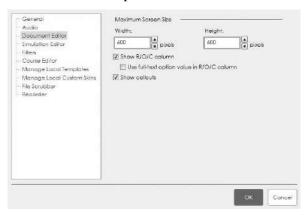
4. Click OK.

## Specifying Document Editor Options

1. Select FILE > PREFERENCES.

## **Chapter 4: Creating and Opening Content**

**2.** Click **Document Editor** on the left pane.



**3.** Complete the following fields:

Field	Description
Width	Specify the maximum pixel width for the displayed document.
Height	Specify the maximum pixel height for the displayed document.

- **4.** Select **Show R/O/C column** to display the Required, Optional, Conditional columns in the Document Editor.
- **5.** Optionally, select **Use full-text option value in R/O/C column**.
- **6.** Select the **Show callouts** checkbox to enable the display of callouts in the Document Editor.



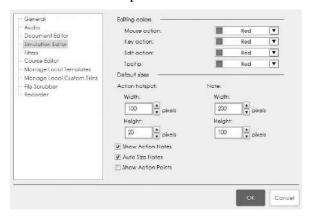
Enabling this option does not affect published output.

7. Click OK.

## Specifying Simulation Editor Options

1. Select FILE > PREFERENCES.

## **2.** Click **Simulation Editor** on the left pane.



### **3.** Complete the following fields:

Field	Description
Mouse action	Specify the color of the mouse action displayed in the Editor.
Key action	Specify the color of the key action displayed in the Editor.
Edit action	Specify the color of the text action displayed in the Editor.
Tooltip	Specify the color of the tooltip displayed in the Editor.
Action hotspot: Width	Specify the initial width of the hotspot.
Action hotspot: Height	Specify the initial height of the hotspot.
Note: Width	Specify the initial width of the note.
Note: Height	Specify the initial height of the note.

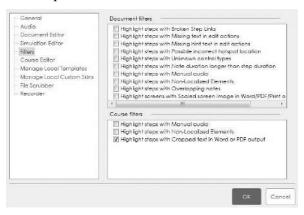
- **4.** Optionally, choose custom colors by clicking **More Colors** on the color drop-down list.
- **5.** Select **Show Action Notes** to display action notes in the Simulation Editor.
- **6.** Select **Auto Size Notes** to automatically resize the note to fit its contents.
- 7. Select **Show Action Points** to display action points in the Simulation Editor.
- 8. Click OK.

## Specifying Filter Options

1. Select FILE > PREFERENCES.

# **Chapter 4: Creating and Opening Content**

## **2.** Click **Filters** on the left pane.



## **3.** Choose from the following options:

Field	Description
Highlight steps with Broken Step Links	This option will highlight steps in the task pane that contain broken step links.
Highlight steps with Missing text in edit actions	This option will highlight edit steps in the task pane that are missing text in an edit action.
Highlight steps with Missing hint text in edit actions	This option will highlight edit steps in the task pane that are missing hint text.
Highlight steps with Possible incorrect hotspot location	This option will highlight steps in the task pane that might contain incorrect hotspot locations.
Highlight steps with Unknown control types	This option will highlight steps in the task pane that contain unknown control types. For more information on control types, refer to Editing an Action: Advanced (on page 135).
Highlight steps with Note duration longer than step duration	This option will highlight steps in the task pane that contain a longer note duration than step duration.
Highlight steps with Manual audio	This option will highlight steps in the task pane that do not contain text to speech (TTS). For more information on TTS, refer to Using Text to Speech (on page 233).
Highlight steps with Non- Localized Elements	This option will highlight steps in the task pane that are not localized.
Highlight steps with Overlapping Notes	This option will highlight steps in the task pane that may contain overlapping notes.
Highlight screens with Scaled screen image in Word/PDF/Print output	This option will highlight screens where the image will be scaled for Word, PDF, and Print outputs. This option helps reduce the occurrence of screen image scaling, which degrades image quality.
Highlight steps with Manual audio (under Course Filters)	This option will highlight steps in the task pane for courses that do not contain text to speech (TTS). For more information on TTS, refer to Using Text to Speech (on page 233).

Field	Description
Highlight steps with Non- Localized Elements (under Course Filters)	This option will highlight steps in the task pane for courses that are not localized
Highlight steps with Cropped text in Word or PDF output (under Course Filters)	This option will highlight steps where too much text is entered on course content pane. This filter alerts you that if the course is published to Word and/or PDF outputs, it would not publish in its entirety. It would publish "cropped." (This does not occur for HTML output, since content panes can be scrolled in dynamic output.)

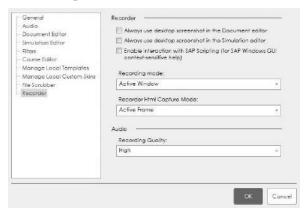


Highlighting displays in the task pane as a warning icon. When you hover the mouse over the step, a tooltip will display containing more details regarding the missing information.

4. Click OK.

## Specifying Screenshot and Scripting Options for the Recorder

- 1. Select FILE > PREFERENCES.
- **2.** Click **Recorder** on the left pane.



- **3.** Select **Always use desktop screen shot in the Document editor** to display the entire desktop screenshot in your document.
- **4.** Select **Always use desktop screen shot in the Simulation editor** to display the entire desktop screenshot in your simulation.
- 5. Select Enable interaction with SAP Scripting (for SAP Windows GUI context-sensitive help) to capture screen information for context-sensitive help.
- **6.** Select a Recording mode from the drop-down list.

# **Chapter 4: Creating and Opening Content**

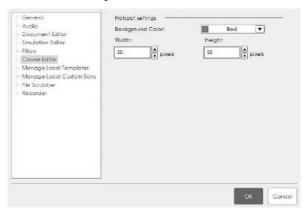
- **7.** Select a Recorder Html Capture Mode from the drop-down list.
- **8.** Select the audio quality from the *Recording Quality* drop-down list.
- 9. Click OK.

# **Specify Course Editor Options**

You have several options to control the display of hotspots within the Course Editor. For more information, refer to Inserting a Hotspot on an Image (on page 217).

## Specifying Course Editor Options

- 1. Select FILE > PREFERENCES.
- **2.** Click **Course Editor** on the left pane.



**3.** Complete the following fields:

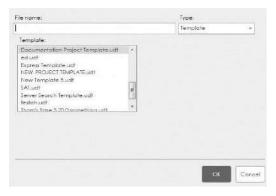
Field	Description
Background color	Specify the color of the hotspot background.
Width	Specify the initial width of the hotspot.
Height	Specify the initial height of the hotspot.

- **4.** Optionally, choose custom colors by clicking **More Colors** on the color drop-down list.
- 5. Click OK.

# **Creating Content**

# **Creating Content**

**1.** From the Editor, select FILE > NEW.



**2.** Enter a name in the **Name** field.



While there is no limit to the amount of characters in the name, the Server will display only the first 60 characters.

**3.** In the **Type** drop-down list, select one of the following options:

If You Want To	Then
Create and record a new document	Select <b>Recording</b> .
Create a blank document	Select <b>Document</b> .
Create a course	Select Course.
Create a student guide	Select Student Guide.
Create a course package	Select Course Package.
Create a template	For more information, refer to Using Author Templates (on page 317).
Create a glossary	Refer to Creating a Glossary (on page 269).
Create a website	Refer to Creating a Website (on page 398).

- **4.** Select a template from the **Template** listbox.
- **5.** Select a language from the **Language** drop-down list.



This option is not available for course packages.

**6.** Click **Browse** ... to select a location in which to store your content.



The default location is C:\Users\[username]\Documents.

## 7. Click OK.



Selecting **Recording** displays the *Recorder* window. Selecting **Document** creates a blank document. Selecting **Course** displays the root course page in the Editor window.

**8.** If you selected **Course**, choose one of the following stencils:

Field	Description
Flash	This stencil creates a standard content page containing a single Flash file.
Full	This stencil creates a standard content page with text.
Half - Bottom	This stencil creates a standard content page with text on the bottom of the page. An optional image can be placed on top.
Half - Left	This stencil creates a standard content page with text on the left of the page. An optional image can be placed to the right.
Half - Right	This stencil creates a standard content page with text on the right of the page. An optional image can be placed to the left.
Half - Two Image - Bottom	This stencil creates a standard content page with text on the bottom of the page. Two optional images can be placed on top.
Half - Two Image - Left	This stencil creates a standard content page with text on the left of the page. Two optional images can be placed to the right.
Half - Two Image - Right	This stencil creates a standard content page with text on the right of the page. Two optional images can be placed to the left.
Image	This stencil creates a standard content page containing an image.
Image - Diagonal - Left	This stencil creates a standard content page with text on the top left and bottom right of the page. Two optional images can be placed diagonally within the stencil.
Image - Diagonal - Right	This stencil creates a standard content page with text on the top right and bottom left of the page. Two optional images can be placed diagonally within the stencil.
Video	This stencil creates a standard content page containing a video.

## **Chapter 4: Creating and Opening Content**

Field	Description
Video - Half - Left	This stencil creates a standard content page. An optional video can be placed to the right.
Video - Half - Right	This stencil creates a standard content page. An optional video can be placed to the left.
Simulation	This stencil creates a content page for embedding a Simulation.
Simulation - Half - Right	This stencil creates a page for embedding a Simulation. An optional image can be placed to the left.

#### 9. Click OK.

For more information on editing and formatting procedural content, refer to Editing and Formatting: Procedural Content (see "Specifying Simulation Editor Options" on page 40).

For more information on editing and formatting course content, refer to Editing and Formatting: Courses (on page 171).

For more information on editing and formatting student guides, refer to Editing and Formatting: Student Guides and Course Packages (on page 251).

# **Open Content**

Only one content item can be open in the Editor at a time (for example, one course).

## **Opening Content**

- **1.** From the Editor, select **FILE > OPEN > OPEN LOCAL...**.
- **2.** In the *Open* window, browse to the location of your document, simulation, course, glossary, or website, and click **Open** to display the content in the Editor.

# **Chapter 4: Creating and Opening Content**



Document and simulation files have a .udc extension. Courses have a .ulc extension. Student guide files have a .usg extension. Glossary files have a .upg extension. Website files have a .uws extension. You can also use Windows Explorer to browse to the file, and double-click to open the file in the Editor.

# <u>Chapter 5</u>: Recording Procedural Content

The application records your actions in Microsoft Windows, webbased, Java, and enterprise applications, and outputs a professionally formatted document and simulation. You can capture screens, buttons, edit fields, and more in the target application.

The recording process captures information to simultaneously produce both a simulation view and a document view of procedural content.

# **Introduction to Recording Procedural Content**

The recording functionality reduces procedural content development time and cost by automatically capturing each screen, step, field entry, and button in the target application. As you record, the application watches your actions in the application, captures each step in the task, and converts the result to professionally formatted documents and simulations. You simply start the recorder, perform the actions that you would like to document, turn the recorder off, and then make edits to the resulting content.

For detailed information on enterprise applications supported by the recorder, refer to the *Technical Specifications*.

In addition, control recognition recording is available for non-accessible applications. Control recognition recording uses image processing to capture screens and entered information. For more information, refer to Specifying Recorder Tuning Options (on page 59).

# **Preparing to Record**

Before you begin recording the target application, prepare your computer and the data you will need to complete a task. In addition, you should perform several test recordings using your target application. You may find it helpful to prepare a quick reference that outlines for authors the standards you are using for recording and provides any helpful tips to use during the recording and editing processes.

If you are planning to use the guided Re-Record functionality, refer to Managing Content Languages (on page 69) before you begin the recording process.

## **Preparing Your Computer**

To create a consistent recording environment, the following are several suggestions for ensuring standardization among all authors:

- Ensure all authors are using the same windows and buttons scheme or theme.
- Ensure all authors are using the same Microsoft Windows color scheme.
- Ensure all authors are using the same Microsoft Windows color palette settings (for example, Highest [32 bit]).
- Standardize the Desktop area setting for all authors to maintain consistency for screen captures.
- Ensure all authors are using the same Microsoft Windows font size (for example, "Normal").
- If you are recording the HP GUI, ensure all authors are using the same version of the GUI and have specified consistent font and color settings in the GUI.
- If you are recording the SAP GUI, ensure all authors are using the same version of the GUI and have specified consistent font and color settings in the GUI.
- If you are recording the Oracle application, ensure all authors are using the same Oracle color settings. Maximize the Oracle window before recording.
- If you are recording Adobe forms in Adobe Reader, ensure all authors turn off the Adobe Reader "protected mode" setting.

# **Starting the Recorder**



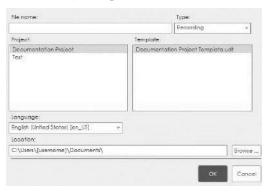
The application does not support recording on secondary monitors. If you use dual monitors, ensure that the application you want to record is displayed on the primary monitor.

## Start Recording

- 1. Select START > PROGRAMS > [APPLICATIONDIRECTORY].
- **2.** Use one of the following two methods to start the recorder:

If	Then
You are starting the recorder from the <i>Quick Start</i> panel	Select the <b>New</b> option.
You are starting the recorder from the Editor application	Select FILE > NEW.

**3.** Select **Recording** from the **Type** drop-down list.



**4.** Complete the following fields:

Field	Description
File name	Enter the filename.
	Do not use special characters in the filename.
Template	Select the template from the listbox.
Language	Select the language for the document from the drop-down list.

Location	Enter, or browse to, the location where the file will be saved.
	The default save location is C:\Users\Documents.

#### 5. Click OK.



If the template's simulation maximum screen height and width do not match the screen height and width of your primary screen, you will receive a warning message. To capture the best image quality, your primary screen's settings should match those used in the template. If you ignore the warning and continue recording without changing the screen settings, image quality will be impacted. For more information on setting the template's simulation maximum screen height and width, refer to Default Publication Settings: Simulation: User Interface Settings (on page 345) in the *Managing Content* manual.

**6.** Select one of the following options:

If You Want To	Then
Record across a series of applications.	Go to Step 9.
Record a single target application If you have specified to record a single target application, you must specify the application after entering the project and template information. For information on specifying a recording mode, refer to Specifying Recording and HTML Capture Modes.	Go to Step 7.
Record the active window for the application(s).	Go to Step 9.

- **7.** From the *Select Application* window, select the target application.
- **8.** Click **OK** to display the *Recorder* window.



**9.** Click oto start recording.

For detailed information on capturing various controls, refer to Capturing Controls (on page 57).

## **Displaying the Recorder Preview Pane**

During recording, a real-time preview of the recorded actions is displayed in a preview pane in the *Recorder* window. The preview pane allows you to view data as it is being captured. The preview pane and window are not captured during recording.



You can hide or display the recorder preview pane.

Click to toggle the display of the preview pane during recording.

## **Preparing Your Data**

Before recording a task, you should identify data that will allow you to navigate through the task and will also serve as example data in the procedure. This will ensure you can proceed through the task easily and without errors.

You may find it helpful to sketch a screen flow to capture usable data and provide you with a map to use while recording the task. A rough sketch can be helpful while recording and can serve as a reference later during editing to verify the recorded data.

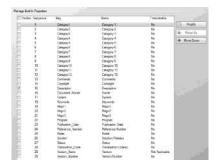
# **Capturing Controls**

The recording process captures a variety of interface objects, including screens, buttons, tabs, checkboxes, drag-and-drop actions, menu paths, edit fields, grids, trees, radio buttons, match codes, list items, and combo boxes.



The application does not support recording on secondary monitors. If you use dual monitors, ensure that the application you want to record is displayed on the primary monitor.

The following table provides an overview of recorder capabilities, limitations, and the steps you must take to capture specific objects.



Object	Description	Required Steps
Edit Fields	The recorder captures field labels and data. The field name, a generic placeholder description, and the data that was entered will be captured.	1. Click or tab in the field. 2. Type in the field. 3. Exit the field. To capture default data, click or tab into the field containing the default data and exit the field. The default data and field name will be captured. In the document view, data is inserted into a Field/Description table. If a value exists in the field on exit, the recorder will capture this value. If the field is empty, the recorder captures a step without a value in the field. If you want to capture only the characters typed, instead of all characters in the field, change the Capture Typing Text Mode value to Typed Characters. For more information, refer to Specifying Recorder Tuning Options (on page 59).

# **Chapter 5: Recording Procedural Content**

Object	Description	Required Steps
Menu Paths	Menu paths are automatically recorded. The recorder captures menu text when you click on the text.	Simply execute the menu path, and the recorder will capture the first initial click as a step and then display the full menu path as a single step.
Grids	When entering data into a table, the field labels are typically located at the top of the column. The recorder will capture both the row and the column label.	<ol> <li>Click in the grid cell.</li> <li>Enter data.</li> <li>Click out of the cell.</li> </ol>
Screens	New screens are captured automatically as you progress through a task.	A screen image is captured for every step. The following types of actions will trigger a new screen shot to be displayed in the document view (In a simulation view each step is displayed with its corresponding screen image.). The order that the criteria are applied is as follows:  1. When you take an action on a screen, the recorder checks if the screen title is different than the previous steps screen title. If yes, a new screen image is displayed.  2. If the screen title did not change, the recorder checks if the dimensions of the active region are different than the screen captured for the previous step. If yes, a new screen image is displayed.  3. If the previous action was performed on a tab or a menu item control, a new
		screen image is displayed.  The recorder also captures the last screen upon stopping the recording process.
Match Codes, Buttons, Checkboxes, Combo Boxes, Tree Items, Tab Controls, Labels, Links, Radio Buttons,	The recorder captures match codes, the button image, the checkbox or radio button and the associated label, and any other images on which you click.	Click on the button, checkbox, radio button, or image.  If you are planning to Re-Record and are selecting a combo box, be sure to click a selection in a combo box, even if the default value in the combo box is not the one desired.
and Images  Combination  Keystrokes	Keystrokes are captured and recorded as new steps.	Type combinations keystrokes Ctrl+N and Alt+F are supported. Command combination keystrokes ALT+TAB, CTRL+ALT+DEL, and ALT+ESC are not supported.
Function Keys	Function keys are captured and recorded as new steps.	Type the function keys F1-F9, F11, and F12.

# **Specifying Recorder Tuning Options**

The recorder tuning option allows you to specify how you want the recorder to handle certain actions during the recording process. These options are useful for when you want to record supported target applications, as well as record unknown and inaccessible controls.

# Selecting the Recorder Tuning Options

**1.** Click on the *Recorder* window. Click the drop-down arrow to the far right to access the Recorder Tuning options.



**2.** Choose from the following options:

Field	Description
Enable target recognition	Select <b>Enable target recognition</b> to enable the recorder to capture screen regions, titles, and context-sensitive help data that is specific to the target application.
	Go to Step 3.
Use only image processing for control recognition	Select Use only image processing for control recognition to capture control information when it is known that the target is not captured well by a plug-in. For a list of available plug-ins, refer to the <i>Technical Specifications</i> .  Go to Step 4.

**3.** Choose one of the following options:

Field	Description
Entire Value	Captures characters in a text box after the user exits the text box.
Typed characters	Monitors the captured characters as they are typed based on keyboard or IME output.

**4.** Select the amount of delay for the screen shot capture.

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5. Click OK.

# **Using the Screen Percent Differential Feature**

The screen differential allows you to choose the percent of pixels that must change on a screen before a new screen shot is displayed. This is helpful if you are recording several actions on the same screen as you might not want a new screen shot for each action unless a significant portion of the screen has changed.

A higher screen differential will yield fewer screen shots; a lower screen differential will yield more screen shots.

## Adjusting the Screen Percent Differential

**1.** Click the drop-down arrow next to the 100 (the default setting) to access the screen percent differential.



**2.** Select, or enter, the percent of pixels in the  100  field on the *Recorder* window.

# **Using Image Mode**

The image mode option allows you to capture a specific area of the screen that does not have clearly defined edges or boundaries. The resulting image is inserted into your content as a new step.

## **Using Image Mode During Recording**

- 1. Open a document and record at least one step in the desired application window.
- **2.** Click on the *Recorder* window to activate image mode.
  - The cursor displays as a crosshair.
- **3.** Click in the window where you want to capture an image.
- **4.** Click and hold the left mouse button as you drag a rectangle around the image you want to capture.
- **5.** Release the mouse button to turn off image mode and capture the selected area.



The image will be inserted as a new step.

# **Using Undo and Redo**

The undo and redo options allow you to remove and restore data captured during recording.

## **Using Undo During Recording**

Click on the *Recorder* window to remove the last item recorded.



You can click more than once to remove additional items that have been recorded. The undo functionality caches up to nineteen steps.

## **Using Redo During Recording**

Click on the *Recorder* window to restore the last item that was removed with the undo function.



You can click more than once to restore additional items that were removed.

## **Minimizing the Recorder Window**

You can minimize the *Recorder* window to the Microsoft Windows task tray.

Click on the *Recorder* window to toggle between minimizing and displaying the window during recording.



To restore the window display, right-click on the icon in the task tray and select **Show Toolbar**.

## **Recording Audio**

The audio option allows you to capture audio while recording an application.

#### **Testing Audio**

The first time you click so on the *Recorder* window, the *Audio Testing* window displays.



- 1. Select a recording device from the drop down list.
- 2. Click and record audio.
- **3.** Click once you have finished recording audio.
- **4.** Click to playback the file. This button is disabled until there is an audio file available for playback.
- **5.** Click **OK** when finished.

#### **Using Audio During Recording**

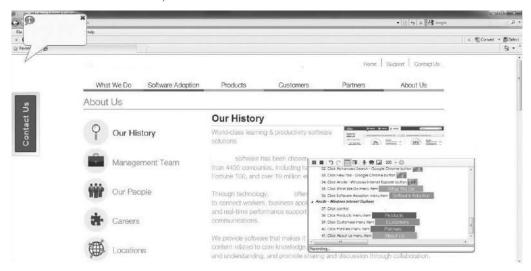
- **1.** Click won the *Recorder* window to start capturing audio.
  - Audio is captured only when the recorder is recording.
- **2.** Record audio and then capture the associated step. Audio is associated to the next recorded step.
- **3.** When finished capturing audio, click **Turn off Audio recording** or click **Stop**. Stopping the recording will also turn off audio capture.

## **Using Notes in the Recorder**

You can insert notes into the recording to help explain an action or to provide details regarding the next recorded step.

#### **Inserting Notes**

- 1. Click on the *Recorder* window to create a new note.
- 2. Insert text into the note, as needed.



**3.** Select the note and resize or move it, as needed.



Inserted notes are associated to the next recorded step. Notes disappear from the screen and cannot be edited or deleted after you start or continue the recording.

**4.** Insert another note, as needed, or record your next step.

#### **Deleting Notes**

Notes can only be deleted before recording the associated step. To delete a note, click  $\mathbf{X}$  in the upper right corner of the note.

## **Pausing and Stopping the Recorder**

You can pause the recorder during the data capture process. While the recorder is paused, you can open other applications and perform other tasks without recording those actions.

When you have finished recording, you must stop the recorder to complete processing and save your content.

#### Pausing the Recorder

Click on the Recorder window to pause the recorder.



Remember to resume recording when you are ready.

#### Stopping the Recorder

Click on the *Recorder* window to stop the recorder.



After stopping the recorder you will receive a prompt asking if you would like to check in the task.

Chapter 5: Recording Procedural Content		

You can also expedite the creation of content in other languages. In particular, the guided Re-Record functionality allows you to easily repeat steps from an original document in a new document.

## **Introduction to Managing Content Languages**

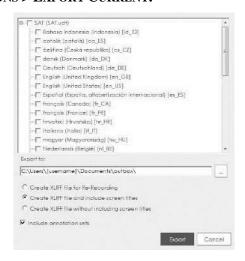
There are several options to manage the language of your content so you can easily produce translated versions of your ART content. Three options are available for managing content languages:

- Create translated documents: Creates a new ART document with text in the new target language(s). This functionality is useful in cases where you have customized your ART documents and phrases and want to export content in XLIFF format for translation in order to create a new version with translated text. For more information, refer to Creating Translated Documents (on page 71).
- Use Guided Re-Record to capture graphics in another language: Creates a new ART document with text and graphics (screens, buttons, and images) in the new target language(s.) This functionality is useful if you have customized your documents and phrases and plan to include translated graphics in your new documents. This is the most robust translation option. For more information, refer to Using Guided Re-Record Functionality (on page 79).
- Create translations of standard ART-provided boilerplate text: Creates a new ART document by morphing ART-provided boilerplate text into another language. This functionality is useful if you have not customized your ART documents and phrases. For more information, refer to Change the Language of Default Text (on page 167) for instructions on changing the document language property.

## **Creating Translated Documents**

#### **Exporting Content for Translation**

- **1.** Open the content.
- 2. Select Translations > Export Current.



- **3.** Select the language(s) corresponding to the translated content to be created.
- **4.** Choose from the following options:

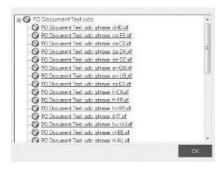
Field	Description
Create XLIFF file for Re- Recording	This option is not recommended for use with exporting content for translation because it does not include step text or screen titles.
	For more information on Re-Recording, refer to Using Guided Re-Record Functionality (on page 79).
Create XLIFF file and include screen titles	Select Create XLIFF files and include screen titles to create an XLIFF file for translation that includes step text and screen titles.
Create XLIFF file without including screen titles	Select Create XLIFF files without including screen titles to create an XLIFF file for translation that includes step text but does not include screen titles.
Include annotation sets	Select this option if you want to include your annotations in the XLIFF file.

**5.** Click to browse to an export location.



Note the export location for later use.

- 6. Click OK.
- 7. Click Export.



**8.** Perform one of the following options:

If You Want To	Then
Edit the files to translate	Refer to Editing Exported Files (on page 72).
Close the export summary window	Click <b>OK</b> .

#### **Editing Exported Files**

For each exported language, one XML Localization Interchange File Format (XLIFF) file is created. The exported XLIFF file(s) contain all phrases and author-entered text in the content. Both the phrases and the author-entered text must be translated. Boilerplate text provided with the template (for example, "Use this procedure to") is automatically translated via the phrases provided in the template.

The file is formatted to facilitate translation by displaying the source (original) text co-located next to the target translated text.

**1.** Open the exported XLIFF file in the desired editor.



The XLIFF file can be edited in Notepad, in an HTML editor, or via a specialized XLIFF editor such as Xliff Editor or Heartsome.

- **2.** Edit the text or data values as necessary.
- **3.** Save the file(s).

### Importing Translated Content



You must perform an export before you can import the files. For more information, refer to Exporting Content for Translation (on page 71).

- **1.** Open the content that has been exported and edited.
- 2. Select Translations> Import Current.



3. Click to select the import location.



This location must match the **Export to** location specified in Exporting Content for Translation (on page 71).

- **4.** Select the exported language(s) for import.
- 5. Click OK.

6. Click Import.



7. Click OK.

#### Create Translations for a Single Document

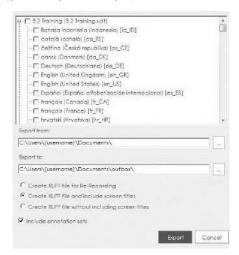
- **1.** Open the content for which you want to create translated file(s).
- 2. Select Translations> Translate Current.



- **3.** Expand the template used for the content.
- **4.** Select the language(s) corresponding to the translated content files to be created.
- **5.** Click next to **Outbox** to select an Outbox location.
- 6. Click Translate.
- 7. Click OK.
- **8.** On the **Translation Summary** window, click the name of the translated file to view in the Editor.

#### Batch Exporting Content for Translation

1. Select Translations > Export Batch.



- **2.** Expand the template(s) used for the content.
- **3.** Select the language(s) corresponding to the new translation content to be created.
- 4. Click next to **Export from** to select the folder containing the content to export.



Note the export location for later use.

All application content in this location that is associated with the selected template(s) will be processed.

- 5. Click OK.
- **6.** Click next to **Export to** to select an export location.



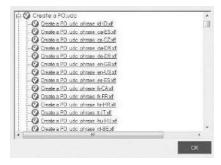
Note the export location for later use.

- 7. Click OK.
- **8.** Choose from the following options:

Field	Description
Create XLIFF file for Re- Recording	This option is not recommended for use with exporting content for translation because this option does not include step text.
	For more information on Re-Recording, refer to Using Guided Re-Record Functionality (on page 79).

Field	Description
Create XLIFF file and include screen titles	Select Create XLIFF files and include screen titles to create an XLIFF file for translation that includes screen titles.
Create XLIFF file without including screen titles	Select Create XLIFF files without including screen titles to create an XLIFF file for translation that does not includes screen titles.
Include annotation sets	Select this option if you want to include your annotations in the XLIFF file.

#### 9. Click Export.



#### **10.** Perform one of the following options:

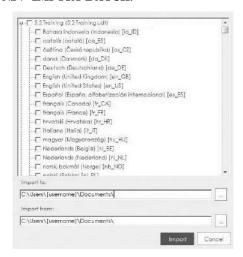
If You Want To	Then
Edit the files to translate text and values	Refer to Editing Exported Files (on page 72) for information on editing exported files.
Close the batch export summary window	Click <b>OK</b> .

## **Batch Importing Translated Content**



You must perform an export before you can import files. For more information, refer to Batch Exporting Content for Translation (on page 75).

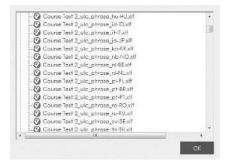
1. Select Translations > Import Batch.



- **2.** Expand the template(s) used for the content.
- **3.** Select the exported language(s) for the content.
- **4.** Click next to **Import to** to select the folder containing the content to import.
  - 1

This location must match the **Export from** location specified in Batch Exporting Content for Translation (on page 75).

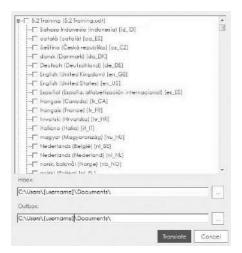
- 5. Click OK.
- **6.** Click next to **Import from** to select the folder containing the content to import.
  - This location must match the **Export to** location specified in Batch Exporting Content for Translation (on page 75).
- 7. Click OK.
- 8. Click Import.



9. Click OK.

#### Creating Translated Files in Batch Mode

1. Select Translations > Translate Batch.



- **2.** Expand the template(s) used for the content.
- **3.** Select the language(s) corresponding to the translated content files to be created.
- 4. Click next to **Inbox** to select an Inbox location.
- 5. Click next to **Outbox** to select an Outbox location.
- 6. Click Translate.
- 7. Click OK.
- **8.** On the **Translation Summary** window, click the name of a translated file to view in the Editor.

## **Using Guided Re-Record Functionality**

Guided Re-Record functionality allows you to recreate steps from an original document into a new document, as well as capture translated screen images and graphics.

When you open an existing document and select to Re-Record, a guide pane opens in the recorder preview pane to display the guide steps. Use the guide steps to help you recreate the required actions in the target language.



## Re-Record Prerequisites: Before You Get Started

Before you initially record a document that will eventually be re-recorded, you must:

- Review Capturing Controls in the Target Application for an overview of recorder capabilities, limitations, and the steps you must take to capture specific objects.
- Review recording preparation guidelines and recorder options as specified in Specify Document and Simulation Editor Options.
- Select the desired language(s) for Re-Record within the template as specified in Specifying General Settings: Languages.
- Use the following guidelines to help ensure a smooth re-recording session:
- Ensure the desired target languages are installed in the application to be recorded.
- Use the pause feature if you must take a break. Stopping the re-recording will end the session.
- Do not move action notes; simply perform the action as guided. If you think you will need to adjust the position before re-recording, perform the adjustment in the original source document before you start the re-recording session.
- Ensure you are re-recording with the same screen resolution as the original content.
- Add any additional information to the resulting document via the Insert > Steps functionality in the Editor; however, if you need to pause the recorder to record additional steps into a document based on a language-related change in process, ensure you resume the guided re-record functionality before continuing.
- Do not resize or move windows during a session.
- Perform only the actions necessary to perform the tasks being documented.

#### **Re-Record Scenarios**

Guided Re-Record allows you to recreate steps in a new language document, as well as apply translations to documents after Re-Recording has been completed.

#### Scenario 1: Translating Before Re-Record

Pre-translation guided Re-Record is used with an exported, translated, and imported original document. Scenario 1 is the "all at once" option. The re-recorded document contains all translations, with no additional action required beyond basic editing and quality assurance. For more information on applying translations, refer to Importing Content for Guided Re-Record Using Scenario 1 (on page 88):

- 1. Export phrases.
- **2.** Translate phrases.
- **3.** Import phrases.
- **4.** Re-record the document.

#### Scenario 2: Translating After Re-Record

Post-translation guided Re-Record can be used before translation is complete. This allows you to re-record your documents and create your XLIFF translation files from the re-recorded document. This is useful if you plan to add additional information to your re-recorded documents and want to ensure that information is translated. For more information on applying translations, refer to Applying XLIFF Translations for Guided Re-Record Using Scenarios 2 and 3 (on page 89):

- **1.** Re-record the document.
- **2.** Export from the re-recorded document.
- **3.** Translate phrases.
- **4.** Apply the XLIFF translations to the re-recorded document.

#### Scenario 3: Using Translation and Guided Re-Record in Parallel

A parallel translation for guided Re-Record can be used before translation is complete. Since the export is from the original document, translations applied to the re-recorded document will overwrite what was captured by the Recorder during the re-record process. This allows you to retain and translate custom step text you added to the original document.

It is recommended that screen titles, button names, menu and list item values, etc. not be translated as these may appear differently in the new language. For example, if your step text reads, "Press Collect," where "Press" is the custom text and "Collect" is the button name, you will be able to retain and translate "Press." For more information on applying translations, refer to Applying XLIFF Translations for Guided Re-Record Using Scenarios 2 and 3 (on page 89).

- **1.** Export from the original document.
- **2.** Translate phrases.
- **3.** Re-record the document.
- **4.** When both translation and re-recording are complete, apply the XLIFF translations to the rerecorded document.

## **What Happens During Guided Re-Record?**

Guided Re-Record is a simple, flexible way to create translated content for a wide range of applications. Guided Re-Record can be used on any .udc file.

During the guided Re-Record process, the application displays an on-screen script that you can follow while recording a new document in a different language. Guided Re-Recording displays a list of screens and steps from a previously recorded document, and prompts you with the steps to take to record the same steps again in the target application.

Guided Re-Record screen prompts display as:

- A new pane in the recorder toolbar that displays the list of steps in the original file
- An action hotspot directly on the application screen that indicates where the next action should occur
- An action note that displays the action text for the step

#### **Using Guided Re-Record**

- **1.** Open the document to be Re -Recorded.
- 2. Select Translations > RE-RECORD.



**3.** If presented with the prompt, choose from the following options:

If You Want To	Then
Save the changes	Click OK.

If You Want To	Then
Continue Re-Recording	Click Cancel.

- **4.** Select one of the available language(s) from the **Languages** drop-down list.
- **5.** Click to select an Outbox location.
- 6. Click OK.
- 7. Click Re-Record.



- **8.** Click to begin the Re-Record process.
- **9.** Use the guide pane as a prompt to assist in recreating the steps in the target application.
- **10.** Optionally, perform one of the following during the Re-Record process. If the toolbar is hidden, right-click on the recorder icon in the system tray to access these functions.

If You Want To	Then
Pause the Re-Record guide script	Click .  Use the guide script pause feature if you need to record an additional language-based step that is not part of the original document.  Ensure you click when you are ready to resume the Re-Record guide script.

If You Want To	Then
Pause the recorder	Click .
	Use the record pause feature if you need to take a break from recording and Re-Recording.
	Ensure you click when you are ready to resume recording. If you have also paused the
	Re-Record guide script, ensure you click to resume.
Stop the Re-Record process	Click .
	Use the stop feature only when you are finished Re-Recording. The stop feature ends Re-Recording for the document.
Hide the Re-Record pane	Click .
Hide or show the guide pane	Click .
Hide or show notes	Click .
Hide or show hotspots	Click .
View step details	Click to open an additional step detail pane to help ensure you re-record the correct information.

**11.** Click to stop the guided Re-Record process.



The re-recorded document will open in the Editor.

## **Exporting, Importing, and Applying XLIFF Translations**

## Exporting Content for Guided Re-Record

**1.** Open the content.

2. Select Translations > Export Current.



- **3.** Select the language(s) corresponding to the translated content to be created.
- **4.** Choose from the following options:

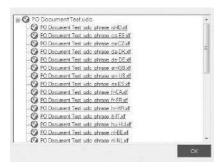
If You Want To	Then
Create XLIFF file for Re- Recording	Select this option to generate the XLIFF file required for Re-Recording. This option does not include screen titles or step text.
	This model is recommended for use with Scenario 1 and Scenario 2. For more information, refer to Scenario 1: Translating Before Re-Record (on page 81) and Scenario 2: Translating After Re-Record (on page 81).
Create XLIFF file and include screen titles and step text	This option is not recommended for use with Guided Re-Record because Guided Re-Record replaces screen titles based on the user interface you are Re-Recording.
	If you want the ability to translate screen titles, refer to Creating Translated Documents (on page 71).
Create XLIFF file without including screen titles	Select Create XLIFF files without including screen titles to create an XLIFF file for Re-Recording. This option includes step text but does not include screen titles.
	This model is recommended for use with Scenario 3. For more information, refer to Scenario 3: Using Translation and Guided Re-Record in Parallel (on page 82).
Include annotation sets	Select this option if you want to include your annotations in the XLIFF file.

**5.** Click to browse to an export location.



Note the export location for later use.

- 6. Click OK.
- 7. Click Export.



**8.** Perform one of the following options:

If You Want To	Then
Edit the files to translate text or values	Refer to Editing Exported Files (on page 72).
Close the export summary window	Click <b>OK</b> .

#### Editing Exported Content for Guided Re-Record

For each exported language, one XML Localization Interchange File Format (XLIFF) file is created. The exported XLIFF file(s) contain all phrases and author-entered text in the content. Both the phrases and the author-entered text must be translated. Boilerplate text provided with the template (for example, "Use this procedure to") is automatically translated via the phrases provided in the template.

The file is formatted to facilitate translation by displaying the source (original) text co-located next to the target translated text.

**1.** Open the exported XLIFF file in the desired editor.



The XLIFF file can be edited via a specialized XLIFF editor such as Xliff Editor or Heartsome.



- **2.** Edit the text or data values as necessary.
- **3.** Save the file(s).

#### Importing Content for Guided Re-Record Using Scenario 1



For more information on Scenario One, refer to Scenario 1: Translating Before Re-Record (on page 81).

You must perform an export before you can import the files. For more information, refer to Exporting Content for Guided Re-Record (on page 85).

- **1.** Open the application file that has been exported.
- **2.** Select Translations > Import Current.



- 3. Click in the Import From field.
- **4.** Navigate to the **Export to** location specified in Exporting Content for Guided Re-Record (on page 85).
- **5.** Select the folder containing languages you want to import.
- 6. Click OK.
- **7.** Select the exported language(s) for import.

#### 8. Click Import.



9. Click OK.

#### Applying XLIFF Translations for Guided Re-Record Using Scenarios 2 and 3



For more information on Scenarios 2 and 3, refer to Scenario 2: Translating After Re-Record (on page 81) and Scenario 3: Using Translation and Guided Re-Record in Parallel (on page 82).

You must perform an export and Guided Re-Record before you can apply XLIFF translations. For more information, refer to Exporting Content for Guided Re-Record (on page 85) and Using Guided Re-Record Functionality (on page 79).

- **1.** Open the Re-Recorded file.
- 2. Select Translations > Apply.
- **3.** Navigate to the location of the exported and translated XLIFF file.
- **4.** Select the **[filename]**_**[language].xlf** file for which you want to apply translations. For example: NewDocument_ru-RU.xlf
- 5. Click Open.
- **6.** Click **OK** to close the message indicating that the translations were applied successfully.

Chapter 6: Managing Content Languages				

# <u>Chapter 7</u>: Editing and Formatting: Basics

Basic editing and formatting refers to standard editing features available within the Editor. These features apply to all application files.

## **Introduction to Editing and Formatting: Basics**

You can enhance your content using basic editing and formatting functionality.

Some of the editing and formatting functions available to you include:

- Modify content properties such as title
- Cut, copy, and paste text
- Spellcheck
- Change the language of default text for content

## **Specify Content Properties**

All application content can be tagged with both built-in and custom properties. Properties are useful in specifying metadata about content. For example, the Transaction Code property is needed in the SAP environment to enable the context-sensitive help link from SAP to ART content.

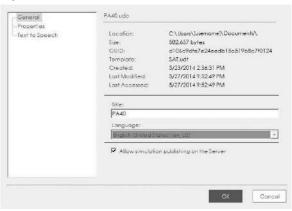
Several built-in property fields are delivered with the default template. You can enable and customize display of these properties to your authors by creating a new author template. Custom properties may include such items as business owner or a documentation reference number. For detailed information on creating a new template, refer to Using Author Templates.

#### Specifying General Properties

- **1.** Create or open content.
- 2. Select FILE > DOCUMENT PROPERTIES....
- **3.** Click **General** on the left pane.



Information such as the size, creation date, and last modified date are displayed as view-only information.



**4.** Review the following fields:

Field	Description	
Title	Edit the name for the content.	

**Chapter 7: Editing and Formatting: Basics** 

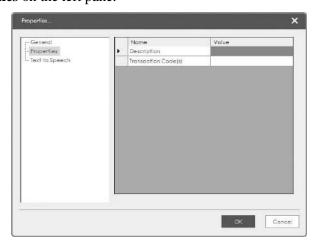
Field	Description
Language	For information on changing the language of existing content text, refer to Change the Language of Default Text (on page 167).
	If the content is translated, select the desired language for the content from the drop-down list to enable globalization of definitions in the content.
	For information on translated content, refer to Using Save As.
Allow simulation publishing on the Server	To enable Server publishing of the document to simulation output, select the <b>Allow Simulation publishing on the Server</b> checkbox.  This option is not available in course mode.

Click OK.

#### Specifying Built-In or Custom Properties

By default, the display of all built-in properties, with the exception of **Description**, is disabled in the template. You can enable display of those properties necessary for your authors by creating a custom template.

- **1.** For information on enabling built-in properties or adding custom properties to your template, refer to Managing Built In Properties (on page 328).
- **2.** Create or open content.
- 3. Select FILE > DOCUMENT PROPERTIES....
- **4.** Click **Properties** on the left pane.



- **5.** Enter values for the properties in the **Value** column, or select available properties from the drop-down lists.
- 6. Click OK.

## **Using Undo and Redo During Editing**

You can undo and redo one or more editing actions in the Editor workspace.

#### **Using Undo During Editing**

Click the **Undo** button on the **Home** toolbar to remove the last edit.



You can select the **Undo** option more than once to remove additional edits. The undo functionality caches up to twenty steps.

#### **Using Redo During Editing**

Click the **Redo** button on the **Home** toolbar to re-apply the last edit.



You can select the **Redo** option more than once to restore additional edits.

## **Using Spellcheck**

During the spellcheck process, action text, step text, notes, narrative, tooltip text, and course content are reviewed. The spellcheck process does not include audio transcript text.



The proofing language for the spellcheck is based on the current file's language.

#### Starting a Spellcheck

- **1.** Create or open a file.
- 2. Select HOME > SPELLCHECK.



To apply changes to the entire file, allow spellcheck to complete the entire spellcheck task.

#### Specifying Spellcheck Options

- **1.** Create or open a file.
- 2. Select FILE > SPELLCHECK OPTIONS.



**3.** Choose one of the following options:

#### **Chapter 7: Editing and Formatting: Basics**

If You Want To	Then	
Allow the spellchecker to suggest corrections	Select Always suggest corrections.	
Enable the spellchecker to suggest from main dictionaries only	Select Suggest from main dictionaries only.	
Ignore words in uppercase	Select Ignore words in UPPERCASE.	
Ignore words with numbers	Select Ignore words with numbers.	
Ignore Internet and file addresses	Select Ignore internet and file addresses.	

#### 4. Optionally, under Main Dictionaries, click Add to select a dictionary.



When working with multiple languages, you can add a main dictionary in another language so you will have the ability to spellcheck in multiple languages. When you click the Add button, you will need to browse to where the application's dictionaries are located. The default location is: C:\Program Files  $(x86)\[applicationdirectory]\Client\data\spellcheck$ . You will have to add your additional language dictionaries in this location in order to select them from the Spellcheck options.

#### **5.** Optionally, under **Custom Dictionaries**, perform one of the following:



When you use the spellcheck, it compares the words in your document with those in the main dictionary. The main dictionary contains most common words, but it might not include proper names, technical terms, or acronyms that you use. In addition, some words might be capitalized differently in the main dictionary than what you want in your document. Adding such words or capitalization to a custom dictionary prevents the spellcheck from flagging them as misspelled words.

If You Want To	Then	
Change the default	Click on the dictionary you want to specify as the default. You have to select a custom dictionary that is not the default or else the <b>Change Default</b> button will not activate.	
	Click Change Default.	
Create a new custom dictionary	Click New	
	Browse to the location of the existing dictionary.	
	Name the file.	
	Click Save.	
	To add words to a dictionary during spellcheck, you must create a custom dictionary from the default dictionary. You cannot add words to the default dictionary.	
Add an existing dictionary	Click <b>Add</b> to specify a dictionary.	
Edit an existing dictionary	Click on the dictionary in the list box.	
	Click <b>Edit</b> to edit the dictionary.	

## **Chapter 7: Editing and Formatting: Basics**

Remove a custom dictionary	Click on the dictionary in the list box.
	Click <b>Remove</b> to remove the dictionary.

#### 6. Click OK.

# **Using Save**

When you save your work, the content is saved on your local hard drive. The save location is specified when you first record or create the content. The Editor notifies you of progress, success, and failure in the status bar.

The Editor automatically saves your work every 2 minutes. If the Editor is closed without saving, the last auto-saved copy of your work can be recovered.

# Saving Your Work

- **1.** Create or open content.
- 2. Select FILE > SAVE.



It is good practice to save your file before switching between views.

# **Using Save As**

The Save As functionality in the Editor is specifically designed to enable you to create a copy of the file.

#### Using Save As to Create a Duplicate of Content

- **1.** Create or open content.
- 2. Select FILE > SAVE AS....
- **3.** Click **No** to create a copy.
- **4.** Enter a name in the **File name** field.



Avoid the use of special characters when naming your content.

5. Click Save.

The duplicate will display in the Editor.

### Using Save As to Assign a New ID to Content

- **1.** Create or open content.
- 2. Select File > Save As....
- **3.** Click **Yes** to assign a new ID.
- **4.** Enter a name in the **File name** field.



Avoid the use of special characters when naming your content.

5. Click Save.

The file with the new ID is displayed in the Editor.

# **Printing**

You can send the document view of your procedural content directly to the printer. Header and footer information is not included in the print output. You can also print a student guide and a storyboard of course content.

# **Printing Content**

- **1.** Create or open content.
- **2.** Perform one of the following options:

If You Want To	Then
Print a document, simulation, student guide, or course storyboard	Select FILE > PRINT.
Print a course storyboard with	Open the course.
annotations	Select VIEW > ANNOTATIONS.
	Select the annotation set you want to print.
	Select FILE > PRINT.
	Printing a course storyboard with annotations can provide helpful hints to end users and additional information for course instructors.

# Closing

Only one file can be open at a time. Close the existing open file before opening a new file.

# Closing the Current File

Click **FILE > CLOSE** to close the current file.

If you attempt to exit the Editor prior to saving your content, you will receive a prompt confirming you want to exit prior to saving.

Chapter 7: Editing and Formatting: Basics	

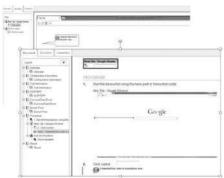
After recording is complete, you have many options for adding and formatting content in both the document and simulation views.

In addition to inserting standard objects such as steps, actions, tooltips, and notes, you can also specify note and step properties.

# **Introduction to Editing and Formatting: Procedural Content**

After you have captured actions in the target application, you can enhance your content using basic editing and formatting functionality. For basic formatting functionality, refer to Editing and Formatting: Basics (on page 91). In addition, you can edit procedural content to insert steps, notes, tooltips, and branches.

Edits performed in one view affect the other view. In other words, when you insert a note in the simulation view, this note is also inserted in the corresponding location in the document view. Edits should be performed on content stored on your local computer.



As you edit content, icons will appear in the different views to help the author identify the content type or action. Here is a list of the icons an author may see:

- Audio attached to left-click action
- Document view/simulation view with a screen, but no action
- Edit action/multiple key action
- Free text area
- Left-click action
- Notes
- Right-click action
- Screenshot that contains a step
- Section
- Single press/Key action
- Table

# **Inserting Standard Simulation Objects**

You can insert several standard simulation objects including:

- Step: You can insert one or more steps from a new recording session or from an existing ART document. In addition, you can insert default steps or substeps during editing.
- Note: Two types of notes are available: default notes, which can be inserted from the template and are intended to provide standardization across content, and action notes, which are automatically created and include the action text for an action. You can enable or disable the display of action notes.
- Action: An action hotspot is indicated as a border around the relevant item.
   For example, an action hotspot may be displayed around a button to indicate that clicking the button is the desired user action.
- Tooltip: Tooltips are displayed as notes that pop up when a user hovers over a specific area of the screen.
- Branch: Branches allow you to create a primary simulation path and include secondary path(s) that produce the same end result but offer alternative methods of reaching the result.

#### **Inserting Steps**

You can use the recorder to capture your actions and create one or more new steps, or you can insert steps from an existing ART document.



For information on editing steps properties, refer to Editing Steps (on page 115).

#### Inserting a Newly-Recorded Step

- **1.** In the Editor workspace, click the **Simulation** tab.
- **2.** Select the position to insert the new step(s) in the *Steps* task pane.

**3.** Select **INSERT > STEPS > FROM RECORDING...** to display the recorder preview pane.



- **4.** Click **O** to begin recording.
- **5.** Perform the desired steps in the target application.
- **6.** Click to stop the recording process.

#### Inserting Steps from an Existing Simulation

- **1.** In the Editor workspace, click the **Simulation** tab.
- **2.** Select the position to insert the steps in the *Steps* task pane.
- **3.** Select Insert > Steps from Document.
- **4.** Browse to the location of the existing document, select the .udc file, and click **Open**.



**5.** In the **Steps** area, expand the tree view to locate the steps you want to import.



A preview of the step is displayed to the right of the tree view. You can import more than one step at a time. Each step will be inserted as a new step within the simulation.

- **6.** Select the checkbox next to the steps(s) to import.
- 7. Click OK.

### Inserting Steps and Substeps

- 1. In the Editor workspace, click the **Simulation** tab.
- **2.** Select the position to insert the new step(s) or substep(s) in the *Steps* task pane.
- **3.** Perform one of the following options:

If You Want To	Then
Insert a step	Select INSERT > QUICK BLOCK > STEP.
Insert a substep	Select INSERT > QUICK BLOCK > SUBSTEP.
Create an information-only step from a	Delete the action(s) from the step.
step containing an action.	Information-only steps are steps that contain notes and references but no action.

**4.** Edit the step as desired.

# **Inserting Notes**

Notes can be added to simulation steps to help explain an action, provide details regarding the step, or to provide tips to the user in playback mode. The notes display as callout boxes on top of the target application.

Two types of notes are available:

- Default Notes: A standard, information- and icon-only note that provides additional details for a step and provides the option to optionally highlight and draw attention to a specific area within a step.
- Highlighted Notes: An information note that automatically highlights and draws attention to a specific area within a step.

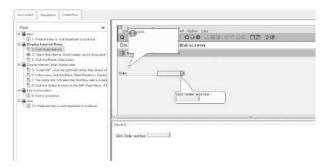


For information on note formatting options, refer to Editing Notes (on page 122). For information on customizing notes, refer to Specifying New Template Settings: Styles (on page 375).

#### Inserting a Default Note

- **1.** In the Editor workspace, click the **Simulation** tab.
- **2.** Select the desired step in the *Steps* task pane.

**3.** Select INSERT > NOTE > NOTE.



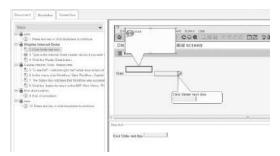
**4.** Double-click on the new note, and enter text.



In addition to text, you can create a hyperlink within the note by highlighting the desired link text, right-clicking, and selecting **INSERT > WEB LINK** from the right-click menu.

# **Inserting a Highlighted Note**

- 1. In the Editor workspace, click the **Simulation** tab.
- **2.** Select the desired step in the *Steps* task pane.
- **3.** Select Insert > Note > Highlighted Note.

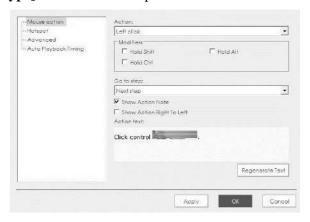


**4.** Double-click on the new note, and enter text.

### Displaying and Hiding Action Notes in the Simulation Editor

- **1.** In the Editor workspace, select the Simulation tab.
- **2.** Right-click on the action note rubber band.
- **3.** Select Edit Action... to display the Action Properties window.

#### 4. Click [Action Type] Action in the left pane.



- **5.** Select the **Show Action Note** checkbox.
- 6. Click OK.



For information on enabling display of action notes in published output, refer to Default Publication Settings: Simulation: General Settings (on page 341). For information on editing action notes, refer to Editing Actions (on page 129).

#### Inserting Actions, Tooltips, and Branches

Action hotspots indicate an action that must be taken to proceed to the next lesson step or branch. Hotspots display as colored rectangles that highlight the area of action:

- Mouse the area to perform a mouse action (for example, click, right-click, double-click).
- Edit/Text the area in which text must be entered to complete the action.
- Key the key required to execute the action (for example, F1, F2, Tab, 1, 2, a, b, c).
- Drag & Drop the areas to perform a drag-and-drop mouse action (for example, left down, drag, left up).

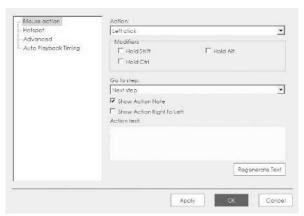
Tooltips can be added to simulation steps to provide amplifying information about a button or area of the screen when the user hovers over the tooltip area.

A branch allows you to create a primary simulation and include secondary simulations, which allow the same end result but offer alternative paths.

Although the steps to insert a branch are essentially the same as inserting steps, some pre-planning is usually required to ensure the simulation logic flows properly. As with the insertion of steps, new branches can originate as steps from an existing simulation or be captured during a new recording session. Secondary branches can be directed to any step in the simulation.

#### Inserting an Action

- **1.** In the Editor workspace, click the **Simulation** tab.
- **2.** Select the desired step in the *Steps* task pane.
- **3.** Select **INSERT** and click **MOUSE**, **EDIT**, **KEY PRESS**, or **DRAG & DROP** to display the *Action Properties* window.





For information on editing action properties, refer to Editing Actions (on page 129).

# Inserting a Tooltip

- **1.** In the Editor workspace, click the **Simulation** tab.
- **2.** Select the desired step in the *Steps* task pane.

**3.** Select **INSERT > TOOLTIP...** to display the *Tooltip Properties* window.



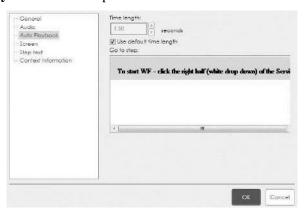


For information on editing tooltip properties, refer to Editing a Tooltip (on page 137).

#### Inserting a Branch for Display During Auto Playback

- **1.** In the Editor workspace, click the **Simulation** tab.
- **2.** Select the position to insert the branch steps in the *Steps* task pane.
- **3.** As necessary, record or insert the new branch steps.
- **4.** Insert the branching action that will lead to the new step via **INSERT > [ACTION TYPE]** (**MOUSE, KEY PRESS, DRAG & DROP**).
- **5.** In the *Action Properties* window, click [Action Type] in the left pane.
- **6.** Set the **Go to step** option for this action to be the first step in the new branch.
- 7. Click OK.
- **8.** Right-click on the branch step from which the branch will initiate.
- **9.** Select **Edit Step** to display the *Step Properties* window.

10. Click Auto Playback in the left pane.



**11.** In the **Go to step** listbox, select the action that should be simulated in the output for Auto Playback mode.

#### 12. Click OK.

The branch will display under the appropriate step in the *Task Pane*.



# **Editing Standard Simulation Objects**

The standard simulation objects - steps, notes, actions, and tooltips - can be edited to modify their display and functionality. The *Steps* task pane displays the text-only information about the step. You can use the step text editor to edit the step information.

In addition to editing simulation objects using the toolbar and right-click menu, you can double-click on steps within the task pane to open the *Step Properties* window.

#### **Editing Steps**

You can edit the general, audio, auto playback, screen, and step text properties of a simulation step by right-clicking or double-clicking on a step in the task pane.

You can view context information for enterprise systems recorded using the application. This will assist in setting up context-sensitive help with the Server, as an author will be able to easily identify screen information within a ART document. For more information on context-sensitive help, refer to Setting Up Online Help.

#### Editing a Simulation Step: Reordering Steps

- **1.** In the *Steps* task pane, click on the step you want to move.
- **2.** Drag the step to above or below the step where you want it to display.



This action will automatically renumber the steps.

#### Editing a Simulation Step: Step Text Editor

1. Select **VIEW > SHOW STEP TEXT EDITOR** to display the step text editor.



**2.** In the *Steps* task pane, select the step to be edited.

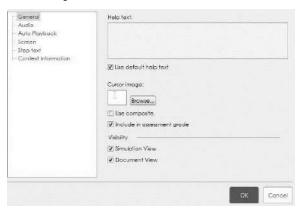


Action text is highlighted with the background color of the action note styles. Action text displays in the same color as the text within the note. This will allow you to confirm that the text you are editing is for an action.

- **3.** Edit the step text in the editor.
- **4.** Optionally, click **Regenerate Text** to revert to the last saved text.

#### Editing a Simulation Step: General Properties

- **1.** Double-click on the step in the *Steps* task pane.
- **2.** Select **General** in the left pane.



Field	Description
Help text	To display the default help text when the user makes an incorrect response during the Self-Test or Assessment mode, enable the <b>Use default help text</b> checkbox.
	To display custom help text, disable the <b>Use default help text</b> checkbox, and enter your text in the <b>Help text</b> field.
Cursor image	Browse to select the cursor graphic displayed during the particular step.
Use composite	Brings extra attention to the hotspot by slowly blacking out the screen (except for the hotspot area) and then returning to the screen display.
Include in assessment grade	To include this step in the grade calculated for Assessment mode, select the <b>Include in assessment grade</b> checkbox.
Visibility	To display this step in the simulation view, select the <b>Simulation View</b> checkbox.
	To display this step in the document view, select the <b>Document View</b> checkbox.

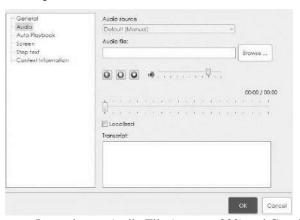
#### 4. Click OK.

# Editing a Simulation Step: Audio Properties



To enable MP3 recording, refer to Installing LAME (on page 228).

- **1.** Double-click on the step in the *Steps* task pane.
- 2. Click Audio in the left pane.





For more information, see Importing an Audio File (on page 230) and Creating an Audio File (on page 229).

**3.** From the Audio source drop-down list, select one of the following options:

If You Want To	Then
Disable text to speech and include	Select Manual.
manual audio file.	Click <b>Browse</b> to select the audio file.
Enable text to speech for step text.	Select Step text [TTS]).
Enable text to speech for transcript.	From the <i>Audio source</i> drop-down list, select <b>Transcript</b> [ <b>TTS</b> ]).
Enable text to speech for step text followed by transcript.	Select Step text followed by transcript [TTS]).
Enable text to speech for transcript followed by step text. This is the default setting.	Select Transcript followed by step text [TTS]).



For more information on using text to speech options, refer to Using Text to Speech (on page 233).

- **4.** Select **(a)** to launch the **Recording Options** dialog.
- **5.** Complete the following fields:

Field	Descripti	on	
Recording Device	Specify the computer sp	input recording devi pecific.	ce. This selection is
Recording Quality	Specify the	audio quality setting	; <b>.</b>
	Setting	MP3	WAV
	High	320kbps	16-bit sampling
	Medium	128kbps	8-bit sampling
	Low	64kbps	8-bit sampling
Transcript	Enter text in	the <i>Transcript</i> text	box.

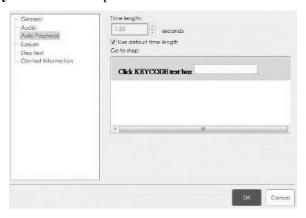
**6.** Once you have set your options, the following controls are activated:

Control	Description
Ш	Click <b>Pause</b> to pause the current recording
O	Click <b>Stop</b> to stop the current recording.
	Click <b>Play</b> to review the current recording.

- 7. Click **OK** to save your changes and close the Recording Options dialog.
- **8.** Select **Localized** to mark the content for localization.
- 9. Click OK.

# Editing a Simulation Step: Auto Playback Properties

- **1.** Double-click on the step in the *Steps* task pane.
- 2. Click Auto Playback in the left pane.



**3.** Edit the following fields:

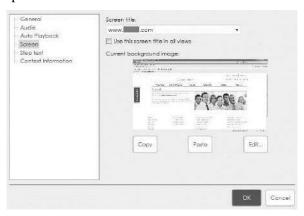
Field	Description
Time length	Specify the delay between each simulation step during Auto Playback mode.
	To use the default wait time specified in the template, select <b>Use default time length</b> .
	To specify a custom wait time, enter the value in the <b>Time length</b> field.
Go to step	Edit the next step or action to be displayed during Auto Playback mode.
	Use this option to set which branch should be displayed in Auto Playback mode.

4. Click OK.

# Editing a Simulation Step: Screen Properties

- **1.** Double-click on the step in the *Steps* task pane.
- **2.** Click **Screen** in the left pane.

**3.** Optionally, you can edit the screen title of the main window of the target application during this particular step.



**4.** As desired, select one of the following options:

If You Want To	Then
Paste a new image from the clipboard	Copy the new background image to be used to your Microsoft Windows clipboard.  Click <b>Paste</b> .
Copy the current image to the clipboard for editing in an external application	Click <b>Copy</b> , and edit the image in the external application.
	Copy the edited image to your Microsoft Windows clipboard, and click <b>Paste</b> (as described above) to replace the background image.
Change the display of the image to reflect either the entire desktop or only	Click <b>Edit</b> , and select Regions on the resulting screen.
the application window	Select the area you want to display.
	Click OK.
	Click OK.



If the clipboard image you are pasting is larger than the current image, a prompt is displayed. Select Yes to resize the clipboard image before pasting, or select No to insert the image without resizing.

5. Click OK.

# Editing a Simulation Step: Step Text Properties

**1.** Double-click on the step in the *Steps* task pane.

#### **2.** Click **Step text** in the left pane.



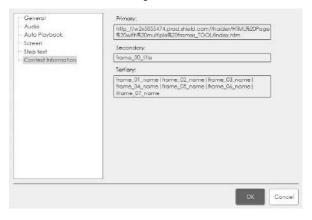
#### **3.** Edit the following fields:

Field	Description
Step text	Displays the current step text.
Actions	You can select any action text in the <b>Actions</b> list box and click <b>Insert</b> to include the text in the step text.
	You can also insert additional text before or after the action text by entering the text in the <b>Step text</b> field. For example, you can insert "and" or "or" to join two actions in a sentence.

4. Click OK.

# Editing a Simulation Step: Viewing and Editing Context Information

- **1.** Double-click on the step in the *Steps* task pane.
- **2.** Click **Context Information** in the left pane.



**3.** Review/edit the following fields:



When an author records applications for which context information is captured by the recorder, that data is placed into the PrimaryContextID, SecondaryContextID, and TertiaryContextID fields at the step-level.

Depending on the application or enterprise system recorder, some of these fields will may not be populated. If a step has an action, then these fields will be editable. When a step has multiple actions then three fields will show Context Information of default action.



Depending on the application or enterprise system recorder, some fields will not be populated.

Field	Description
Primary	Displays the transaction code(s) or screen ID(s) associated with the step.
Secondary	Displays the ID for the screen.
Tertiary	Displays the location of the application recorded into the step.

### **Editing Notes**

You can edit and format note text, modify the note display characteristics, and edit the note pointer location and icon.

Notes and action notes have different characteristics. For more information on editing action notes, refer to Editing an Action: Edit (on page 130).

#### Editing a Note: Note Text

- **1.** Double-click on the note.
- **2.** Highlight the text to be edited or place the cursor at the insertion point.
- **3.** Right-click and select from among the following edit and format options:

Option	Description
Edit	Several editing options are available, including: undo and redo; cut, copy, paste; find and replace; select all; and delete.

Option	Description
Format	Select <b>Font Dialog</b> to specify the font style and size. Select <b>Font Color</b> to specify the font color.
	Modify the character format using the <b>Bold</b> , <b>Italic</b> , <b>Underline</b> , <b>Superscript</b> , <b>Subscript</b> , and <b>Strikeout</b> options.
	To return the character format to the default, select <b>Normal</b> .
	Modify the paragraph format using the indent and list functionality.
Justify	Select <b>Left</b> , <b>Center</b> , or <b>Right</b> to specify the text justification.
Icon	Select an icon for the note.
Insert: Heading	Select INSERT > INSERT HEADING.
Insert: Example	Select INSERT > INSERT EXAMPLE.
Insert: Menu Item	Select INSERT > INSERT MENU ITEM.
Insert: Standard Code	Select INSERT > STANDARD CODE.
	Search for a standard code or select from the <i>Code</i> list.
Insert: Line	Select INSERT > INSERT LINE.
	The line will be placed before the text if the cursor is at the beginning of the text; or the line will be placed after the text if the cursor is at the end of the text.
Insert: Image	Right-click on the text for which you want to insert an image, and select <b>INSERT &gt; INSERT IMAGE</b> .
	Specify the image location, caption, and alignment.
	Check the <b>Localized</b> checkbox to indicate that the image is specific to the current language.
Insert: Captured Image	Highlight the text for which you want to insert a captured image, and select <b>INSERT &gt; CAPTURED IMAGE</b> .
	Specify the application to capture.
	Click and drag the crosshair to select the image to capture.
Insert: Table	Right-click on the text for which you want to insert a table, and select <b>INSERT &gt; INSERT TABLE</b> .
	Specify the properties.

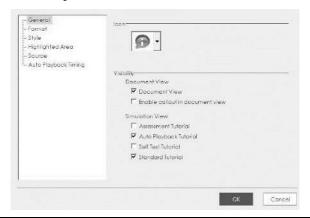
Option	Description
Insert: Link	Highlight the text for the link, and select <b>INSERT &gt; INSERT LINK</b> .
	Specify the type of link, the target window, and location.
	Check the <b>Localized</b> checkbox to indicate that the link is specific to the current language.
	You must publish the document in order to activate the link.
Insert: Field Entry	Select Insert > Insert Field Entry.
Insert: Page Break	Select INSERT > INSERT PAGE BREAK.
Free text	Select <b>INSERT &gt; FREE TEXT</b> and select from the available free text options.
Note	Select INSERT > NOTE and select Note or Highlighted Note to insert a new note.
Steps	Select <b>INSERT &gt; STEPS</b> and select from the available options to insert a new step after the note.



Many of the text format options are also available via the toolbars.

# Editing a Note: General

- **1.** Right-click on the note in the Editor workspace.
- **2.** Select **Edit Note...** to display the *Note Properties* window.
- **3.** Click **General** in the left pane.



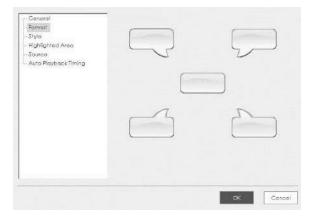
# **4.** Edit the following fields:

Field	Description
Icon	Select a note icon from the drop-down list.
Document View	To display this note in the document view, select the <b>Document View</b> checkbox.
Enable callout in document view	To display a callout for this note, select the <b>Enable</b> callout in document view checkbox.
	Callouts must be enabled in the Template Editor and in the options menu in order for them to display in published output.
	For more information, refer to Default Publication Settings: Document (on page 338) and Specify Document and Simulation Editor Options (on page 39).
Simulation View	Select the checkbox next to <b>Assessment Tutorial</b> , <b>Auto Playback Tutorial</b> , <b>Self Test Tutorial</b> , and/or <b>Standard Tutorial</b> to display this note in the simulation views.

#### 5. Click OK.

# Editing a Note: Format

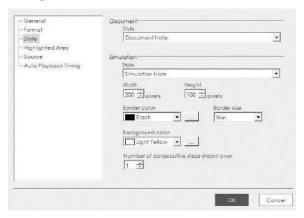
- **1.** Right-click on the note in the Editor workspace.
- **2.** Select **Edit Note...** to display the *Note Properties* window.
- **3.** Click **Format** in the left pane.



- **4.** Click the picture of the desired note format.
- 5. Click OK.

# **Editing a Note: Style**

- **1.** Right-click on the note in the Editor workspace.
- **2.** Select **Edit Note...** to display the *Note Properties* window.
- 3. Click **Style** in the left pane.



**4.** Edit the following fields:

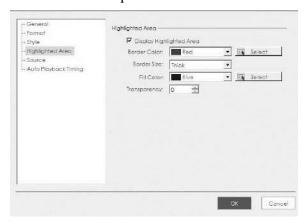
Field	Description
Style (Document)	Select a note icon from the drop-down list.
Style (Simulation)	To display this note in the document view, select the <b>Document View</b> checkbox.
Width	To display this note in the simulation view, select the <b>Simulation View</b> checkbox.
Height	To display a callout for this note, select the <b>Enable</b> callout in document view checkbox.
Border Color	Click to select a color for the border.
Border size	Select a border size from the drop-down list.
Background color	Click to select a background color.
Number of consecutive steps shown over	Click the up or down arrow to select a number of consecutives steps to which the note style should be applied.

#### 5. Click OK.

# Editing a Note: Highlight Area

- **1.** Right-click on the note in the Editor workspace.
- **2.** Select **Edit Note...** to display the *Note Properties* window.

# 3. Click **Highlighted Area** in the left pane.



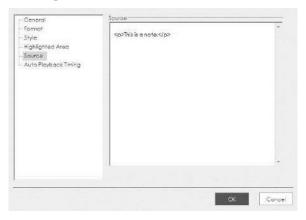
#### **4.** Edit the following fields:

Option	Description
Display Highlighted Area	Select the <b>Display Highlighted Area</b> checkbox to display the highlighted area for the note.
Border Color	Select a border color from the drop-down or click Select to choose a custom color.
Border Size	Select a border size for the highlighted area.
Fill Color	Select a fill color from the drop-down or click <b>Select</b> to choose a custom color.
Transparency	Select a transparency for the highlighted area.

# Editing a Note: Source

- **1.** Right-click on the note in the Editor workspace.
- **2.** Select **Edit Note...** to display the *Note Properties* window.

**3.** Click **Source** in the left pane.



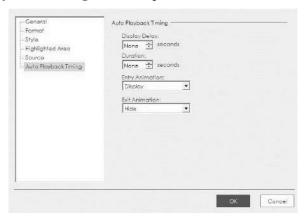
**4.** Edit the source code.



Knowledge of HTML is required.

#### Editing a Note: Auto Playback Timing

- **1.** Right-click on the note in the Editor workspace.
- **2.** Select **Edit Note...** to display the *Note Properties* window.
- 3. Click Auto Playback Timing in the left pane.



Option	Description
Display Delay	Select the wait time before the note is displayed.
Duration	Select the amount of time the note is displayed before it is removed from the screen.

Option	Description
Entry Animation	Select an animation method used to make the note visible on screen.
Exit Animation	Select an animation method used when the note is removed from the screen.

#### 5. Click OK.

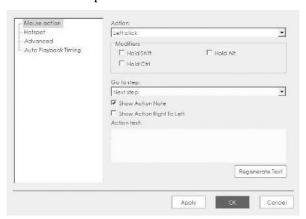
#### **Editing Actions**

You can edit and format the general and display properties of mouse, edit, key, and drag & drop actions.

You can also switch an action type, which allows you to utilize existing content without having to recreate a step.

### Editing an Action: Mouse

- **1.** Right-click on the mouse action rubber band in the Editor workspace.
- **2.** Select **Edit Action...** to display the *Action Properties* window.
- **3.** Click **Mouse action** in the left pane.



Field	Description
Action	Select the mouse action required for the user to move to the next step.
Modifiers	If necessary, specify the Shift, Control, and/or Alt key modifiers to accompany the mouse action.

Field	Description
Go to step	Edit the next step to be displayed after performing the action.
	Use this option to create a new branch in the simulation.
Show Action Note	Select this option to display the action note in the Simulation Editor.
Show Action Right To Left	Select this option to display the action from right to left.
Action text	Enter the specific instructional text to display to the user.
	This text is also displayed in action notes and step text. Right-click in this field to format the text.
	To reflect a change in the action type or a change in the language, click <b>Reset to Default Text</b> to reset the action text. (You must click <b>Apply</b> to save any changes in the current session before you can reflect the changes via <b>Reset to Default Text</b> .)

- **5.** To edit hotspot properties, refer to Editing an Action: Hotspot (on page 134).
- **6.** To edit advanced properties, refer to Editing an Action: Advanced (on page 135).
- 7. Click OK.

# Editing an Action: Edit

- 1. Right-click on the edit action rubber band in the Editor workspace.
- **2.** Select **Edit Action...** to display the *Action Properties* window.
- **3.** Select **Edit action** in the left pane.



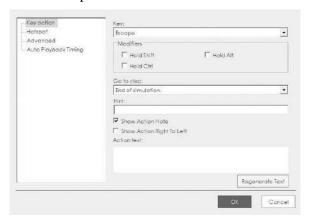
Field	Description
Entry type	Select the type of text entry required for the user to move to the next step.
	<b>Free text</b> playback means the user can enter anything in this field to proceed to the next step.
	<b>Exact text</b> playback means the user must enter text that matches your designated entry.
	Regular Expression playback allows the user to enter any data matching the specified regular expression pattern to proceed to the next step. When using regular expression, the user must press a specific key to exit the field: the Enter key is supported in Flash output.
	Enter the expression in the <b>Text</b> field.
	Example: Email address
	Example: ^([a-z\.]+)@([a-z\.]+)\$
	In this example, abc@xxx.org would be permitted, while ABC@xxx.org would not be permitted.
	Example: ^([a-zA-Z0-9]+)@acme.com\$
	In this example, any email address (in upper- or lowercase) from acme.com would be permitted.
Example Text	Type the specific text or regular expression pattern the user must enter.
Go to step	Edit the next step to be displayed after performing the action.
	Use this option to create a new branch in the simulation.
Hint	Enter the hint to be displayed during Self-Test or Assessment modes.
Show Action Note	Select this option to toggle the display of the action note in the Simulation Editor.
Show Action Right To Left	Select this option to display the action from right to left.
Action text	Enter the specific instructional text to display to the user.
	To reflect a change in the action type or a change in the language, click <b>Reset to Default Text</b> to reset the action text. (You must click <b>Apply</b> to save any changes in the current session before you can reflect the changes via <b>Reset to Default Text</b> .)

**5.** To edit hotspot properties, refer to Editing an Action: Hotspot (on page 134).

- **6.** To edit advanced properties, refer to Editing an Action: Advanced (on page 135).
- 7. Click OK.

# Editing an Action: Key

- 1. Right-click on the key action rubber band in the Editor workspace.
- **2.** Select **Edit Action...** to display the *Action Properties* window.
- **3.** Click **Key action** in the left pane.



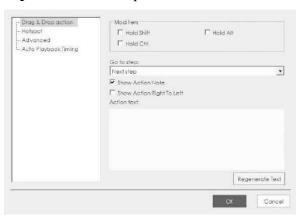
Field	Description
Key	Select the key action required for the user to move to the next step.
Modifiers	If necessary, specify the Shift, Control, and/or Alt key modifiers to accompany the key action.
Go to step	Edit the next step to be displayed after performing the action.
	Use this option to create a new branch in the simulation.
Hint	Enter the hint to be displayed during Self-Test or Assessment modes.
Show Action Note	Select this option to toggle the display of the action note in the Simulation Editor.
Show Action Right To Left	Select this option to display the action from right to left.

Field	Description
Action text	Enter the specific instructional text to display to the user.
	To reflect a change in the action type or a change in the language, click <b>Reset to Default Text</b> to reset the action text. (You must click <b>Apply</b> to save any changes in the current session before you can reflect the changes via <b>Reset to Default Text</b> .)

- **5.** To edit hotspot properties, refer to Editing an Action: Hotspot (on page 134).
- **6.** To edit advanced properties, refer to Editing an Action: Advanced (on page 135).
- 7. Click OK.

# Editing an Action: Drag & Drop

- 1. Right-click on the drag & drop action rubber band in the Editor workspace.
- **2.** Select **Edit Action...** to display the *Action Properties* window.
- 3. Click **Drag & Drop action** in the left pane.



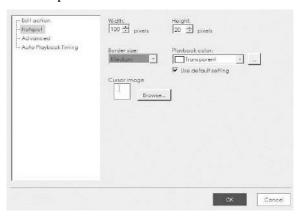
Field	Description
Modifiers	If necessary, specify the Shift, Control, and/or Alt key modifiers to accompany the key action.
Go to step	Edit the next step to be displayed after performing the action.
	Use this option to create a new branch in the simulation.

Field	Description
Show Action Note	Select this option to toggle the display of the action note in the Simulation Editor.
Show Action Right To Left	Select this option to display the action from right to left.
Action text	Enter the specific instructional text to display to the user.
	To reflect a change in the action type or a change in the language, click <b>Reset to Default Text</b> to reset the action text. (You must click <b>Apply</b> to save any changes in the current session before you can reflect the changes via <b>Reset to Default Text</b> .)

- **5.** To edit hotspot properties, refer to Editing an Action: Hotspot (on page 134).
- 6. Click OK.

#### Editing an Action: Hotspot

- **1.** Right-click on the [Action Type] rubber band.
- **2.** Select **Edit Action...** to display the *Action Properties* window.
- **3.** Click **Hotspot** in the left pane.



**4.** Edit the following fields:



Options display based on the action type selected.

Field	Description
Width	Specify the width of the hotspot in pixels.
Height	Specify the height of the hotspot in pixels.

Border size	Select the width of the hotspot border from the drop-down list.
Playback color	Select the playback color of the hotspot from the drop-down list.
	Select the <b>Use default setting</b> checkbox to specify the template default.
Cursor image	Browse to select the cursor graphic displayed inside the action hotspot.

5. Click OK.

#### Editing an Action: Advanced

- **1.** Right-click on the [Action Type] rubber band.
- **2.** Select **Edit Action...** to display the *Action Properties* window.
- **3.** Click **Advanced** in the left pane.



**4.** Select a control type for the action rubber band from the **Control Type** drop-down list.

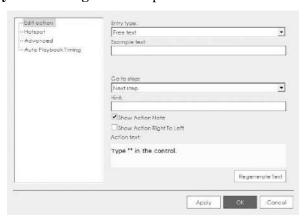


This is useful if you want to change the control type for the action on a step. For example, if you want to change "Main Menu" to "Menu item," or if you have inserted a step manually and want to define a control type for the action. For example, changing the manually-inserted action from the default "Unknown" to "List Box."

- **5.** Select an action type from the **Action Type** drop-down list.
- 6. Click OK.

## Editing an Action: Auto Playback Timing

- **1.** Right-click on the [Action Type] rubberband.
- **2.** Select **Edit Action...** to display the *Action Properties* window.
- **3.** Click **Auto Playback Timing** in the left pane.



- **4.** If you want to manually select the auto playback timing options for the rubber band, deselect the **Use default timing** checkbox and edit the fields in Step5.
- **5.** Edit the following fields:

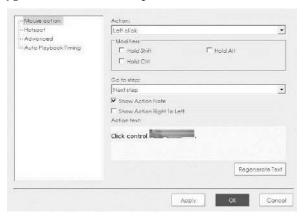
Option	Description
Display Delay	Select the wait time before the action is displayed.
Action Animation Delay	Select the wait time before the animation begins.
Action Animation Duration	This field is not editable. The default value must be used.
Entry Animation	Select an animation method used to make the action visible on screen.
Exit Animation	Select an animation method used when the action is removed from the screen.

6. Click OK.

# Displaying and Hiding Action Notes in the Simulation Editor

- **1.** In the Editor workspace, select the Simulation tab.
- **2.** Right-click on the action note rubber band.
- **3.** Select Edit Action... to display the Action Properties window.

**4.** Click [Action Type] Action in the left pane.



- **5.** Select the **Show Action Note** checkbox.
- 6. Click OK.



For information on enabling display of action notes in published output, refer to Default Publication Settings: Simulation: General Settings (on page 341). For information on editing action notes, refer to Editing Actions (on page 129).

## Moving and Adjusting a Rubber Band

- **1.** Click on the rubber band.
- **2.** Drag the rubber band to the desired location on the image, or click and drag on a sizing handle to resize.



Optionally, you can use the cursor keys to move the rubber band around on the image. The action note tail will snap to the location closest to the center point of the action note associated with the hotspot.

# Editing a Tooltip

**1.** Right-click on the tooltip in the Editor workspace.

**2.** Select **Edit Tooltip...** to display the *Tooltip Properties* window.



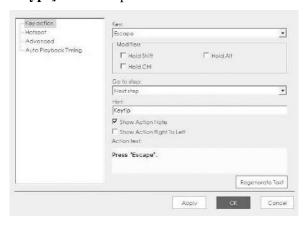
**3.** Click **General** in the left pane, and edit the following fields:

Field	Description
Text	Enter the specific text to display to the user.
Width	Specify the width of the hotspot in pixels.
Height	Specify the height of the hotspot in pixels.

4. Click OK.

## Editing a Branch for Display in Auto Playback

- **1.** Click on the branch step in the *Steps* task pane.
- **2.** In the *Content Pane*, right-click on the branch action rubber band.
- **3.** Select **Edit Action...** to display the *Action Properties* window.
- **4.** Click the [Action Type] in the left pane.



- **5.** Select the desired step number or action in the **Go to step** field.
- **6.** To edit hotspot properties, refer to Editing an Action: Hotspot (on page 134).
- **7.** To edit Advanced properties, refer to Editing an Action: Advanced (on page 135).

8. Click OK.

# **Using Document Sections**

The document view in the Editor is divided into several sections. Sections are used to provide 'containers' for specialized information that you may wish to use in your published content. The inclusion and order of sections is dictated by your template.

Sections are displayed in the *Layout* task pane. When you expand a section displayed in the task pane, you can click on a sub-section to navigate to that location in the content area.



Several standard document sections are delivered with the application:

- Purpose (Overview) contains front matter information.
- Configuration Information: Lists information such as configuration menu path, key field changes, and date of configuration change.
- Test Information: Documents the test conditions, expected results, and actual results that ensure that the related transaction has been correctly configured and documented and is functioning correctly in the system.
- ASAP BPP: Mimics the business process procedure (BPP) documents delivered with an Accelerated SAP (ASAP) implementation.
- Exercise/Data Sheet: Provides a user training document that includes data for a
  given procedure, and tasks and questions for students to complete. For
  additional information on the exercise section, refer to Generating the Exercise
  Section (on page 165).

- Screenflow: Provides a graphical overview of the entire task or process. For additional information on the screenflow section, refer to Working with the Screenflow (on page 168).
- Procedure end user procedures with steps, field description tables, and screen shots.
- Result provides a location to enter any final comments or notes.

Sections can be included or excluded from your documents via the template. In addition, the administrator can create custom sections within the author template. For more information on author templates, refer to Create and Open a New Author Template (on page 319).

## **Editing Document Sections**

The document view in the Editor contains overview information consisting of:

- Purpose: intention of the document
- Trigger: activities that may trigger use of the documented procedure
- Prerequisites: requirements for using the documented procedure
- Menu Path: menu path for initiating the application or transaction addressed in the document
- Transaction Code: references the transaction code to which the document refers
- Helpful Hints: information that the end user may find beneficial

In addition, each application document contains a Result section at the conclusion of the procedure steps. These sections, and the Configuration, Test, and ASAP BPP sections, can be edited to include supplemental text, tables, and images.

The majority of editing and formatting options are available from both the toolbars and the rightclick menu.

# **Inserting Objects in Document Sections**

# Inserting Text

- **1.** Create or open a document.
- **2.** Click the **Document** tab.
- **3.** Place the cursor at the desired insertion point.
- **4.** Enter text.

# Inserting a Manual Page Break

- **1.** Place the cursor where you want to insert the page break.
- 2. Select INSERT > PAGE BREAK.
- **3.** To remove, right-click on the page break or the step after the page break and select **Remove Page Break**.

# Inserting a Web, File, or Intra Link

- **1.** Highlight the free text or text within a note.
- 2. Select INSERT > LINK to enter a link to a URL or file. Select INSERT > INTRA-LINK to add a link to a location within the document.
- **3.** Enter text and, as desired, complete the following fields:

Field	Description
Туре	Select <b>Web Link</b> to add a link to a URL or to a file.
	Select <b>Intra-Link</b> to add a link to a location within the document.
Text	Displays the text selected for link. This field is not editable.
Target	For a web link, select the action for the link:
	<b>Default</b> : Opens the link based on your browser settings.
	<b>New Window</b> : Opens the link in a new browser window.
	<b>Same Window</b> : Opens the link in an existing browser window.
Link Location	Enter a URL address.

Field	Description
Intra-Link Location	Select a location within the document.

- **4.** Check the **Localized** checkbox to mark the content for localization.
- **5.** Click **Insert**.

# Inserting Headings, Examples, and Menu Items

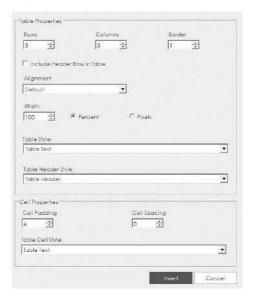
- **1.** Create or open a document.
- **2.** Click the **Document** tab.
- **3.** Place the cursor at the desired insertion point.
- **4.** As desired, select one of the following options:

If You Want To	Then
Insert a heading and sub-bullets	Select INSERT > HEADER.
Insert an example	Select INSERT > EXAMPLE.
Insert a menu item	Select INSERT > MENU ITEM.
Insert a standard code	Select INSERT > QUICK BLOCK > DOCUMENT CODE.

# Inserting a Table

1. Position the cursor where the table is to be inserted in the Document Editor.

#### 2. Select INSERT > TABLE.



# **3.** Complete the following fields:

Field	Description
Rows	Enter the number of table rows.
Columns	Enter the number of table columns.
Border	Enter a value for the table border width.
Include Header Row in Table	Specify if the table should include a header row.
Alignment	Specify a Left, Center, or Right alignment for the position of the table. If Default is selected the template settings are used.
Width	Specify Percent or Pixels, and enter the width of the table.
Table Style	Specify a style for the table.
Table Header Style	Specify a style for the table header.
Cell Padding	Specify the amount of space between the border of the cell and the content of the cell.
Cell Spacing	Specify the amount of space between the cells within a table.
Table Cell Style	Specify a style for the table cells.



For more information on setting table styles in the template, refer to Specifying Styles (on page 375).

**4.** Click **Insert** to insert the table.

## Inserting and Deleting Rows and Columns

- **1.** Right-click on the table and select **Table**.
- **2.** Choose from the following options:

Field	Description
Properties	Allows you to edit the properties specified in Inserting a Table (on page 143).
Insert Row	Inserts a row below the selected row.
Delete Row	Deletes the selected row.
Insert Column	Inserts a column to the left of the selected column.
Delete Column	Deletes the selected column.

# Inserting and Editing a Field/Description or an If/Then Table

A Field/Description table is used to capture the name of the field; whether the field is required, optional, or conditional; and a description of the field. An editable area below the table allows you to enter additional information about what the table contains.

An If/Then table provides the user with more than one performance option before continuing to the next step.

- 1. Position the cursor where the table is to be inserted.
- 2. Select INSERT > QUICK BLOCK > STEP.
- **3.** Position the cursor in the step you just inserted.
- 4. Select INSERT > QUICK BLOCK.
- **5.** Choose from the following options:

If You Want To	Then
Insert a Field/Description Table	Select Field.
Insert an If/Then Table	Select If.

**6.** Optionally, right-click within the table, and select **INSERT > QUICK BLOCK > FIELD ENTRY** to insert a new field into the table.

**7.** Optionally, click on the **Example** text and press the **Delete** key to remove the **Example** field from the table.



Manually inserted Field/Description tables are not globalized. For more information on globalizing, refer to Using Globalize.

## Inserting an If/Then/Go To Table

An If/Then/Go To table provides a user with more than one performance option to complete before branching to another step.

- 1. Click the **Simulation** tab
- **2.** Select the step in which you want to insert an If/Then/Go To table.
- **3.** Select Insert > [ACTION TYPE].
- **4.** Edit the action properties.
- 5. Click OK.
- **6.** Right-click on the step and select **Edit in document view** to edit the If/Then/Go To table.
- **7.** Optionally, right-click in a row and select **Move Up** or **Move Down** to reorder the rows in the table.

#### Inserting a Free Text Block

- **1.** Position the cursor where the free text block is to be inserted.
- 2. Select Insert > Quick Block> Free Text.

## Inserting a Note

- **1.** Position the cursor where the note is to be inserted.
- 2. Select Insert > Note > Note or Highlighted Note.



Notes can be added to Field/Description tables by dragging the note into the Field Description item on the task pane. Dropping a note in a Field/ Description table with a horizontal bar at the bottom of the task pane item will drop the note into that row of the Field/Description table, beneath the example, while dropping a note with the horizontal bar above the row will split the Field/Description table rows. Dropping the note with the horizontal bar above the top field description example will cause the note to be placed above the Field/Description table.

## Inserting an Icon

- **1.** Position the cursor in the free text block, note, or Field/Description into which you want to insert an icon.
- 2. Right-click and select ICON > [ICON]. You can also click INSERT > ICON from the toolbar.

## Inserting a Step

- **1.** Position the cursor where the step is to be inserted.
- 2. Select Insert > Quick Block > [Step].
- **3.** As desired, select one of the following options:

If You Want To	Then
Insert a new Field_Description table for a step	Select <b>Field</b> .
Insert a new If_Then table for a step	Select If.
Insert a new step with the text "Start the transaction using the menu path or transaction code:"	Select Start the task using the menu path.
Insert a new step	Select Step.
Insert a new substep	Select SUBSTEP.



If you are inserting a step from the first step, you will be prompted as to where you want to insert the step.

# **Editing Objects in Document Sections**

## Editing Button Image Layout

- **1.** Create or open a document.
- **2.** Click the **Document** tab.
- **3.** Navigate to the step containing the button image you want to edit.

- **4.** Right-click on the image.
- 5. Select Edit Image.



**6.** Choose from the following options:

Field	Description
Location	Location of the button or image.
Caption	Enter a caption for the button or image.
Layout	Select <b>Left</b> or <b>Right</b> from the drop-down menu for the location of your button or image. For example, selecting <b>Right</b> positions the button or image to the right of the step text.
Use template zoom options	Check <b>Use template zoom options</b> to default to the template options for zooming images.
Enable zoom	Check <b>Enable zoom</b> to enable the image to be zoomed within the published layout.

7. Click Insert.

# Copying Steps, Notes, and Free Text Blocks

- 1. In the *Task Pane*, right-click on the step, note, or free text block to be copied.
- **2.** Select **EDIT** > **COPY**.
- **3.** Click below the object where you would like to insert the step, note, or free text.
- **4.** Right-click, and select **EDIT > PASTE** to paste the step, note, or free text.

## Deleting Steps, Notes, and Free text Blocks

- **1.** In the *Task Pane*, right-click on the step, note, or free text block to be deleted.
- **2.** Select **EDIT** > **DELETE** to delete the object.

## Deleting a Web Link

- **1.** Right-click on the web link you want to delete.
- 2. Click Remove Link.

## **Editing Text**

- 1. Create or open a document.
- **2.** Highlight the text to be edited.
- **3.** Right-click and select the desired option from the **Edit** submenu.

## Editing the Format of Blocks Within a Section

- **1.** Create or open a document.
- **2.** Click the **Document** tab.
- **3.** Double-click the desired block in the *Layout* pane (for example, Configuration Information).
- **4.** Click **Format** in the left pane.
- **5.** Select a style from the **Style** drop-down list.
- **6.** Optionally, select or deselect the **Visible** checkbox.
- **7.** Click **Source** in the left pane.
- **8.** Edit the source code.



Basic knowledge of HTML is required.

For detailed information on editing blocks, refer to Specifying New Template Settings: Blocks (on page 382).

9. Click OK.

# **Editing Notes and Free Text**

- **1.** Create or open a document.
- **2.** Click the **Document** tab.
- **3.** In the *Content Area*, right-click on the note or free text you want to edit.
- **4.** Choose from the following options:

If You Want To	Then
Insert an object	Select <b>Insert</b> , and select an object from the list.
Delete the note or free text	Select <b>EDIT &gt; DELETE</b> .
Modify the note or free text	Select <b>EDIT</b> > [ <b>Freetext or Note</b> ], and go to Step 5.

**5.** In the *Format* pane choose from the following options:



Depending on the item selected, some of the following options may not display.

Field	Description
Document	Select a style from the <b>Style</b> drop-down list. Click in the checkbox next to <b>Visible</b> to enable display in published output.
Simulation	Select a style from the <b>Style</b> drop-down list. Click in the checkbox next to <b>Visible</b> to enable display in published output.
Note	Select an icon from the <b>Icon</b> drop-down list. Click the checkbox next to <b>Pointer</b> to enable a pointer in published output.

- **6.** In the *Source* pane, edit the note or free text.
- **7.** Click **OK** to apply changes.

# **Editing Steps**

- **1.** Create or open a document.
- **2.** Click the **Document** tab.
- **3.** Perform one of the following options:

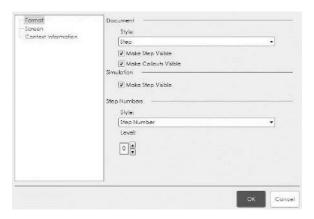
If You Want To	Then
Edit a single step	In the <i>Task Pane</i> , right-click on the step you want to edit.
	Select <b>Insert</b> , and select an object from the list.
	Go to Step 5.
Edit multiple steps	In the <i>Task Pane</i> , Shift+left-click, or Ctrl+left-click, to select multiple steps.
	Right-click on any selected step.
	Go to Step 4.

# **4.** Choose from the following options:

If You Want To	Then
Insert an object	Select <b>Insert</b> , and select an object from the list.
Delete the step	Select <b>Delete</b> .
Modify the step	Select Edit Step and go to Step 5.
Copy the step	Select Copy.
Paste content in the selected step	Select Paste.
Cut the step to paste in another location within the document	Select Cut.
Edit the step in simulation view	Select <b>Edit in Simulation View</b> to open the step in simulation view and edit.

- **5.** Right-click on any step and select **Edit Step...**.
- **6.** In the *Format* pane choose from the following options:

Field	Description
Document	Select a style from the <b>Style</b> drop-down list.
	Select the <b>Make Step Visible</b> checkbox to enable display in the published output.
	Select the <b>Make Callouts Visible</b> checkbox to enable display in the published output.
Simulation	Select the <b>Make Step Visible</b> checkbox to enable display in the published output.
Step Numbers	Select a style from the <b>Style</b> drop-down list to select the style of the step-action type.
	Select a level from the <b>Level</b> drop-down list to enable the step as a sub-step.



**7.** In the *Source* pane, edit the source code.



Depending on what action the step contains, this pane may not be available. Basic knowledge of HTML is required.

**8.** In the *Screen* pane, choose from the following options:

Field	Description
Screen title	Select a screen title from the <b>Screen title</b> drop-down list or manually specify a caption.  Optionally, select <b>Use this screen title in all views</b> .
Use this screen title in all views	Select the <b>Use this screen title in all views</b> option to use the selected screen title for all matching screens in the document.
Current background image	Click <b>Edit</b> or use the <b>Copy</b> and <b>Paste</b> commands to specify a screen to use for the step or to choose an appropriate thumbnail on the <i>Available Backgrounds</i> window.
Show the screen for this step in the document	Only if it is the first time this screen is used: Displays a new screen only if the screen is different from the previous step. This is the default action.  Never: Does not display a screen for this step.  Always: Displays a new screen for the step.

**9.** In the *Step* pane, choose from the following options:



This pane is only available if the object is a field entry in a Field/Description table.

If You Want To	Then
Enable a field	Click the <b>Enabled</b> checkbox to display the label during publication.
Add a new label	Click Add.
	Enter a caption in the <b>Caption</b> field.
	Select a location from the <b>Location</b> drop-down list.
	Click <b>OK</b> .
Modify a field	Select a label from the <i>Label</i> window.
	Click Modify.
	Edit the caption in the <b>Caption</b> field.
	Edit the location in the <b>Location</b> drop-down list.
	Click <b>OK</b> .
Delete a field	Select a label from the <i>Label</i> window.
	Click <b>Delete</b> .
Specify a field requirement	Select Required, Optional, or Conditional from the <b>Required</b> drop-down list to determine the requirement for the step.
	Optionally, you can edit the requirement by clicking on the requirement in the R/O/C column in the Field/Description table in the <i>Editor Pane</i> , and then selecting a requirement from the drop-down list.
	selecting a requirement from the drop-down list.
Show example section	Select <b>Show Example Section</b> to display the example section.
Enter example text	Enter text to display in the example section.

## **10.** Click **Context Information** in the left pane.

#### **11.** Review the context information.



For more information, refer to Editing a Simulation Step: Viewing Context Information (see "Editing a Simulation Step: Viewing and Editing Context Information" on page 121).

#### **12.** Click **OK**.

# **Modifying Paragraphs**

# Setting the Paragraph Format

1. Right-click within the paragraph you wish to edit and select **Format**.

**2.** Modify the paragraph format using the indent and list functionalities.

## Setting the Paragraph Justification

- 1. Right-click within the paragraph you wish to edit, and select **Justify**.
- **2.** Select **Left**, **Center**, or **Right** to specify the text justification.

# **Modifying Characters**

## Setting the Font Type and Size

- **1.** Highlight the text.
- 2. Right-click and select Format.
- **3.** Select **Font Dialog** to specify the font style and size, or select **Font Color** to specify the font color.

## Setting the Character Format

- **1.** Highlight the text.
- **2.** Right-click and select **Format**.
- **3.** Modify the character format using the **Bold**, **Italic**, **Underline**, **Superscript**, **Subscript**, and **Strikeout** options. To return the character format to the default, select **Normal**.

# **Working With Images, Masks, and Callouts**

Images allow you to provide graphic examples within your documents and simulations. You can control what displays in your images and reduce the amount of time your authors spend editing and formatting after image capture. You don't have to take extra steps to modify a screen shot, alter information, or move action notes to hide non-pertinent information.

Callouts allow you to bring attention to specific controls and regions on screen images within a published document. Two types of callouts are available:

- Numbered callouts, which are automatically created for mouse, edit, and dragand-drop actions; field/description tables; and if/then tables within the procedure section of a document. These callouts display as a number in the left or right margins of the screen image. For a field/description or if/then table, the callout will display in published output as a bracket that highlights a group of fields. For all other actions, the callout displays as a trajectory line.
- Non-step callouts, which you can create manually anywhere within the procedure section of the document. Non-step callouts display and are edited like simulation notes.

Callout display is enabled in the simulation by editing the step properties. Callout display and line color in published content is controlled within the template. For more information, refer to Default Publication Settings: Document (on page 338).

Callout lines are created and adjusted according to the following conditions:

Condition	How the Line is Drawn
The step number is placed within the vertical coordinate range of the hotspot.	The starting point of the callout will display on the side of the action note with the central vertical coordinate matching. For example, center to center. A horizontal line will be drawn to connect the step number with the starting point of the callout.
The step number is placed above/below the vertical coordinate range of the hotspot.	The starting point of the callout will display at the top/bottom center of the hotspot. A vertical line is drawn from that position to the central vertical coordinate of the step number. A horizontal line is drawn to connect the vertical line with the step number.
The step number is placed above/below the vertical coordinate range of the combined hotspot region.	A Z-shaped line will connect the center of the bracket to the step number. The vertical split of the Z-shaped line will start halfway between the step number and the bracket.

Condition	How the Line is Drawn
The step number is placed within the vertical coordinate range of the hotspot.	You can shift the callout horizontally from the margin to the callout hotspot. In the case of range callouts, the limiting hotspot will be the hotspot closest to the margin that the callout step number is drawn on.
Step number is placed above/below the vertical coordinate range of the hotspot.	You can shift the callout horizontally within horizontal range of the callout hotspot. If a hotspot covers a textbox, you can only shift the callout along the bottom or top side of the textbox.

# **Working with Images**

# **Editing Images**

- **1.** Create or open a document.
- **2.** Click the **Document** tab.
- **3.** Navigate to the step containing the image you want to edit.
- **4.** Right-click on the image.
- 5. Select Edit Screen....



**6.** Perform one of the following options:

If You Want To	Then
Resize the image	Click on the up or down arrow in the <b>Image Size</b> field.
Crop the image	Grab a sizing handle and drag to crop the image.

If You Want To	Then
Determine the region that displays	Select an image from the <b>Regions</b> drop-down list.
Mark the content for localization	Check the <b>Localized</b> checkbox on the toolbar.

#### 7. Click OK.

# Resetting Screen Images

You can reset an image to its originally-recorded state as long as the image has not been saved. Resetting an image will remove all masks, callout edits, and additional image edits you have made to the screen.

- 1. Create or open a document.
- **2.** Click the **Document** tab.
- **3.** Navigate to the step containing the image you want to edit.
- **4.** Right-click on the image.
- 5. Select Edit Screen....



6. Click Reset.

# Viewing an Image Mask

- **1.** Create or open a document.
- **2.** Click the **Document** tab.

- **3.** Navigate to the step containing the mask you want to view.
- **4.** Right-click on the image containing the mask.
- 5. Select Edit Screen....



**6.** Select VIEW > MASKS.

# **Creating an Image Mask**

- **1.** Create or open a document.
- **2.** Click the **Document** tab.
- **3.** Navigate to the step containing an image for which you want to create a mask.
- **4.** Right-click on the image and select **Edit Screen...**.



5. Click .



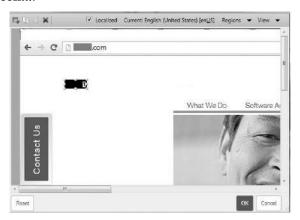
The mask will display as a small, rectangular, black box in the upper left corner of the screen image.

**6.** Select the mask, and drag it to the area you want to mask.

#### 7. Click OK.

# **Editing an Image Mask**

- 1. Create or open a document.
- **2.** Click the **Document** tab.
- **3.** Navigate to the step containing the mask you want to edit.
- **4.** Right-click on the image containing the mask.
- 5. Select Edit Screen....



**6.** Select VIEW > MASK PROPERTIES.



**7.** Choose from the following options:

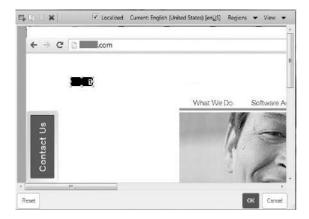
Field	Description
Left, Top, Width, Height	Enter values in the <b>Left</b> , <b>Right</b> , <b>Height</b> , and <b>Width</b> fields, or grab a sizing handle on the mask within the image, and drag it to the size you want
	the mask to cover. The <b>Left</b> , <b>Right</b> , <b>Height</b> , and

Field	Description
	Width fields will adjust accordingly.
Background	Click to select a background color.
Border Color	Click to select a background color.
Border Thickness	Chose a border thickness from the drop-down list.
Preview	Allows you to preview the mask.
Steps	Select the steps for which you want to include the mask.

- **8.** Click the **X** to close the Mask Properties window.
- 9. Click OK.

# **Copying and Pasting an Image Mask**

- 1. Create or open a document.
- **2.** Click the **Document** tab.
- **3.** Navigate to the step containing the image you want to copy and paste.
- **4.** Right-click on the image containing the mask.
- 5. Select Edit Screen....



- **6.** Select the mask you want to copy.
- **7.** Click to copy the mask.
- **8.** Click to paste the mask.

# **Deleting an Image Mask**

- **1.** Create or open a document.
- **2.** Click the **Document** tab.
- **3.** Navigate to the step containing the mask you want to delete.
- **4.** Right-click on the image containing the mask.
- 5. Select Edit Screen....



- **6.** Right-click on the mask to be deleted.
- 7. Select Delete.
- 8. Click OK.

## **Working with Callouts**

## Inserting a Numbered Callout

If callout functionality has been enabled in the template and visibility turned on within the document options, numbered callouts are automatically inserted into the document.

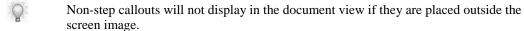
For information on enabling functionality within the template, refer to Default Publication Settings: Document (on page 338). For information on enabling visibility within the document, Specifying Document Editor Options (on page 39).



Simulation View must be enabled in order to activate the display of callouts.

#### Inserting a Non-Step Callout

- **1.** Create or open a document.
- **2.** Click the **Simulation** tab.
- **3.** Navigate to the step for which you want to create a callout.
- **4.** Select INSERT > NOTE > NOTE.
- **5.** Reposition the callout within the screen image.



- **6.** Right-click on the note.
- 7. Select Edit Note....
- **8.** Click **General** on the left pane.
- **9.** Select the **Enable callout in document view** checkbox.



Simulation View must be enabled in order to activate the display of callouts.

10. Click OK.

## **Viewing Callouts**

- **1.** Create or open a document.
- 2. Click the **Document** tab.
- **3.** Navigate to the step containing the callout you want to view.
- **4.** Right-click on the image containing the callout.

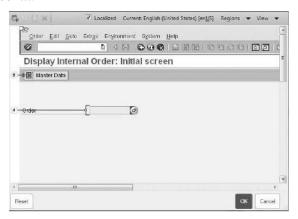
#### 5. Select Edit Screen....



**6.** Select VIEW > CALLOUTS.

# Editing a Numbered Callout

- **1.** Create or open a document.
- **2.** Click the **Document** tab.
- 3. Navigate to the step containing the numbered callout you want to edit.
- **4.** Right-click on the image containing the callout.
- 5. Select Edit Screen....



**6.** Click on a callout.



The displayed number is the step number to which the callout is associated.

**7.** Perform one of the following actions:

If You Want To	Then
Edit the location of the callout number	Drag the callout up, down, left, or right to change the angle of the trajectory line.
	Click on the circular grip and move it left or right to adjust the destination of the trajectory line.

#### 8. Click OK.



Callout line color is defined in the template. For more information, refer to Specifying General Settings: Information (on page 321).

# Editing a Non-Step Callout

- **1.** Create or open a document.
- **2.** Click the **Document** tab.
- 3. Navigate to the step containing the non-step callout you want to edit.
- **4.** Edit the callout as you would a simulation note. For more information, refer to Editing Notes (on page 122).

# **Generating the Exercise Section**

The Exercise section is automatically generated based on the information contained in the Procedure section of the document. To limit rework, you should complete editing of the Procedure section before generating the exercise section.

If you must repopulate the Exercise section after initial creation, refer to Rebuilding the Exercise Section (on page 166).

When generating the Exercise section, data is taken from the field description tables and screen titles to create and populate the Required Data table and the Tasks section.

### **Required Data Table**

A required data table is created from field description tables in the Procedure section. The required data table lists field names and the values listed as examples in the Field/Description tables. If the recorder was used to capture data, these examples are the actual data typed during the task. It does not matter if the examples were automatically inserted during recording or manually inserted later.

#### **Tasks Section**

Specific tasks are created for each screen documented. These tasks are created from the screen titles that exist in the Procedure section. It does not matter if the screens were originally captured during recording or were inserted later in editing.

## Generating the Exercise Section

- **1.** Open the document.
- 2. Select Insert > Quick Block > Exercise/Data Sheet.
- **3.** Scroll to the Exercise section and edit the section as needed.

## Adding User-Specific Data

In certain transactions, the same data cannot be used for every user in the training environment, and user-specific data must be used. This user-specific data will not automatically be created by the template and must be populated by the author.

- **1.** Open the document.
- **2.** Scroll to the User-Specific Data subsection.
- **3.** Double-click to highlight the **xxxx** generic text in the column headings, and type the desired student identifier (for example, "Student 1").
- **4.** Double-click to highlight the **xxxx** generic text in the rows, and type the user-specific data.

## Replacing the Boilerplate Questions

You should enter customized questions and answers in the Tasks subsection.

- **1.** Double-click to highlight the **xxxx** generic text.
- **2.** Type the appropriate question or answer.

# Rebuilding the Exercise Section

The Exercise section is automatically populated based on the information contained in the Procedure section of the document. While it is recommended that you complete the Procedure section before including the Exercise section, you can rebuild your exercise information after initial creation if necessary.



When you rebuild the Exercise section, any text you have entered in the tables, tasks, or question and answer areas will be overwritten.

1. To rebuild the exercise section, select **HOME > UPDATE EXERCISE**.

# **Change the Language of Default Text**

After document creation, you can morph the language of the boilerplate text and simulation action text in your document, simulation, or course. The boilerplate text includes such phrases as "Use this procedure to" and "Helpful Hints." The simulation action text includes such standard introductory step text as "Click," "Type," and "Press."

Only default text can be morphed. Text you type in the document, simulation, or course views is not morphed to another language. In addition, if you have customized simulation action text, these customizations will be lost during morphing.

## **Changing the Language of Default Text**

- **1.** Open the document.
- 2. Select FILE > PROPERTIES....
- **3.** Select the new language from the **Language** drop-down list.
- 4. Click OK.
- **5.** Click **Yes** at the confirmation prompt.

# Working with the Screenflow

The screenflow is an additional view available from the Editor workspace. The screenflow provides a graphical overview of the entire task or process. The screenflow is automatically updated as elements are added or edited in either the document or the simulation view. Branching is not depicted in the screenflow.

When published in HTML output, the screenflow displays at the beginning of the document and is mapped so that each screen in the flow is hyperlinked to the correlating step in the procedure.

# Viewing the Screenflow

1. Select the **Screenflow** tab in the upper left.



# Customizing the Screenflow Display

**1.** Choose one or more of the following options:

If You Want To	Then
Display the screens in a thumbnail view	Select the <b>Thumbnail View</b> radio button in the task pane.
	The view that is selected in the document will be reflected in the published output.
Display only the screen title bars with	Select the <b>Step View</b> radio button in the task
optional additional information	pane.
	When displaying the step view, you can also elect to display a list of the fields and/or the steps on the screen.
	The view that is selected in the document will be reflected in the published output.

If You Want To	Then
Edit the screen title	Double-click in the screen title portion of the screen image, and select a new title from the drop-down menu or enter a new title.
	Changing the screen title in this manner in the screenflow view will also change the screen title for all screens with the same title in the document view. After changing the screen title, a pop-up window will appear asking if you also want to change the screen title in simulation view. Click <b>Yes</b> to change it, or click <b>No</b> to not change the title in simulation view.
Quickly navigate to a particular step in the document or simulation views	Right-click on the screen image and select <b>Edit</b> in document view or <b>Edit in simulation view</b> .

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# <u>Chapter 9</u>: Editing and Formatting: Courses

After you have created a course, you have many options for editing and formatting content in the course.

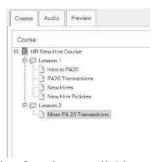
In addition to inserting standard objects such as lessons, pages, and assessment sections, you can also insert text, images, videos, hyperlinks, resources, hotspots, Microsoft PowerPoint content, Adobe Flash content, audio, page transitions and animations.

# **Introduction to Editing and Formatting: Courses**

After you have created a course, you can enhance your course using basic editing and formatting functionality. For basic formatting functionality, refer to Editing and Formatting: Basics (on page 91). In addition, you can edit course content to include such options as inserting text, images, pages, Microsoft PowerPoint content, video, and Flash content. Edits should be performed on content stored on your local computer.

Courses are made up of a course root page, lesson folders, pages (standard or interaction), and optional branching or assessment sections. Standard content pages can contain conceptual information about the course topic, and interaction pages quiz the end user on course materials. Results of the optional branching or assessment sections can be tracked and analyzed using a Learning Management System (LMS).

Lessons are similar to a chapter in a textbook. You can use lessons to introduce content, and then use pages to deliver topic details to the end user. The following is an illustration of a typical course hierarchy within the Course Editor:



Some of the editing and formatting functions available to you include:

- Insert text and images, and apply formatting
- Insert procedural content
- Import Microsoft PowerPoint content
- Import content from another ART course
- Insert hotspots and links
- Manage resources
- Embed Flash content
- Insert MP3 audio files
- Insert videos

- Create self-tests
- Create branching sections
- Create assessments for integration with an LMS

# **Working with Lessons**

Course lessons are folders that contain pages. Pages are inserted into lesson folders to create the course content. You can use standard content pages to provide conceptual information to end users. You can use interaction pages to quiz the user throughout the course, then track and analyze results via an LMS.

For detailed information on creating a course, refer to Creating Content.

### Inserting a Lesson

- **1.** Create or open a course.
- **2.** In the *Course Pane* area, select the course root page or place the cursor where you want to insert a lesson.
- 3. Select Insert > Insert Lesson....



- **4.** Enter a name in the **Name** field.
- **5.** Choose a stencil from the following options:

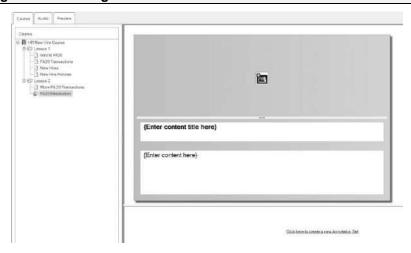
Stencil	Options
Flash	This stencil creates a standard content page containing a single Flash file.
Full	This stencil creates a standard content page with text.
Half - Bottom	This stencil creates a standard content page with text on the bottom of the page. An optional image can be placed on top.
Half - Left	This stencil creates a standard content page with text on the left of the page. An optional image can be placed to the right.

Stencil	Options
Half - Right	This stencil creates a standard content page with text on the right of the page. An optional image can be placed to the left.
Half - Two Image - Bottom	This stencil creates a standard content page with text on the bottom of the page. Two optional images can be placed on top.
Half - Two Image - Left	This stencil creates a standard content page with text on the left of the page. Two optional images can be placed to the right.
Half - Two Image - Right	This stencil creates a standard content page with text on the right of the page. Two optional images can be placed to the left.
Image	This stencil creates a standard content page containing an image.
Image - Diagonal - Left	This stencil creates a standard content page with text on the top left and bottom right of the page. Two optional images can be placed diagonally within the stencil.
Image - Diagonal - Right	This stencil creates a standard content page with text on the top right and bottom left of the page. Two optional images can be placed diagonally within the stencil.
Video	This stencil creates a standard content page containing a video.
Video - Half - Left	This stencil creates a standard content page. An optional video can be placed to the right.
Video - Half - Right	This stencil creates a standard content page. An optional video can be placed to the left.
Simulation	This stencil creates a page for embedding a Simulation.
Simulation - Half - Right	This stencil creates a page for embedding a Simulation. An optional image can be placed to the left.

### 6. Click OK.



A caution icon will display in the outline view on a lesson that does not contain pages or that contains pages that have not been filled out completely.



### **7.** In the course content pane, complete the following fields:



Based on the page selected, some of the following options may not be displayed.

Field	Description
{Enter content title here}	Click to highlight the placeholder and overwrite with the title of the lesson.
{Enter content here}	Click to highlight the placeholder and overwrite with the lesson page content.
Add Picture icon	Click the image to browse to the image location.
Add Video icon	Click the image to browse to the video location.
Edit Simulation Properties	Select an option from the <b>Insert</b> drop-down and browse to the published simulation location, or select a simulation from the <i>Available Simulations</i> list.
	Select the options for <b>Mode visibility</b> .
	Check the <b>Localized</b> checkbox to indicate that the simulation is specific to the current language.
Update Simulations	Browse to the local source file location.
	Select an embedded simulation and click <b>Update</b> .



For more information on changing the course page layout, refer to Working with Flexible Stencils.

# **Working with Pages**

Pages contain the content for the course. The layout of a page is based on the stencil that you choose when you insert a new page into the course. Two types of stencils are available:

- Standard Content: Contains informational content and optional images, simulations or videos.
- Interaction: Contains content consisting of questions and answers and optional images. These stencils use traditional eLearning models such as multiple choice, drag and drop, and fill-in.

Interaction pages can be used with an LMS for tracking purposes, or as a standalone self-test for the user. For more information on working with assessments and self-tests, refer to Working with Assessments and Self-Tests.

### Inserting a Page

- **1.** Create or open a course.
- **2.** In the *Course Pane*, click on a course root folder, lesson, page, or assessment.
- 3. Select INSERT > PAGE....



- **4.** Enter a name in the **Name** field.
- **5.** Choose a stencil from the following options:



Based on where the page is inserted, some of the following options may not be displayed.

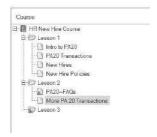
Stencil	Option
Flash	This stencil creates a standard content page containing a single Flash file.
Full	This stencil creates a standard content page with text.
Half - Bottom	This stencil creates a standard content page with text on the bottom of the page. An optional image can be placed on top.
Half - Left	This stencil creates a standard content page with text on the left of the page. An optional image can be placed to the right.
Half - Right	This stencil creates a standard content page with text on the right of the page. An optional image can be placed to the left.
Half - Two Image - Bottom	This stencil creates a standard content page with text on the bottom of the page. Two optional images can be placed on top.
Half - Two Image - Left	This stencil creates a standard content page with text on the left of the page. Two optional images can be placed to the right.
Half - Two Image - Right	This stencil creates a standard content page with text on the right of the page. Two optional images can be placed to the left.
Image	This stencil creates a standard content page containing an image. The image size is configurable.
Image - Diagonal - Left	This stencil creates a standard content page with text on the top left and bottom right of the page. Two optional images can be placed diagonally within the stencil.
Image - Diagonal - Right	This stencil creates a standard content page with text on the top right and bottom left of the page. Two optional images can be placed diagonally within the stencil.
Video	This stencil creates a standard content page containing a video.
Video - Half - Left	This stencil creates a standard content page. A video can be placed to the right.
Video - Half - Right	This stencil creates a standard content page. A video can be placed to the left.
Branching	This stencil creates a branch that allows the user to decide where to go next in the course.
Drag and Drop	This stencil creates an interaction page featuring one matching item per definition.
Drag and Drop - Many-to- One	This stencil creates an interaction page featuring one or more drag-and-drop responses to a single question.

Drag and Drop - Sequencing	This stencil creates an interaction page featuring one or more draggable responses to a single question.
Fill In - Multiple	This stencil creates an interaction page that allows the user to enter responses to multiple questions.
Fill In - Single	This stencil creates an interaction page that allows the user to enter a response to a single question.
Hotspot - Single	This stencil creates a page featuring text and an image. A hotspot area can be defined in the image as the correct response.
Multiple Choice	This stencil creates an interaction page featuring several possible responses to a single question. Only one response is correct.
Multiple Choice - Half	This stencil creates an interaction page featuring several possible responses to a single question. Only one response is correct. An optional image can be placed to the right.
Multiple Correct	This stencil creates an interaction page featuring several possible responses to a single question. One or more responses may be correct.
Multiple Correct - Half	This stencil creates an interaction page featuring several possible responses to a single question. One or more responses may be correct. An optional image can be placed to the right.
Simulation	This stencil creates a page for embedding a Simulation.
Simulation - Half - Right	This stencil creates a page for embedding a Simulation. An optional image can be placed to the left.

### 6. Click OK.



A caution icon will display in the outline view on a lesson that does not contain pages or that contains pages that have not been filled out completely.





For more information on changing the course page layout, refer to Working with Flexible Stencils.

### **Displaying Answers From Another Page**

Answers from a multiple choice knowledge check page can be displayed on another page. This allows answers the user has selected earlier in the course to be displayed on a later page. Answers can only be displayed from multiple choice pages and the answers can only be displayed onto pages with a text area.

### Displaying Another Page's Answer

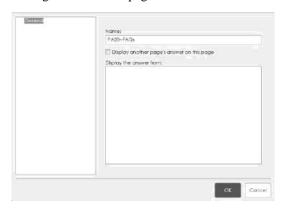


Only pages with a text area can display another page's answer.

1. Right-click on the page in the *Course Pane* and select **EDIT PAGE...**.



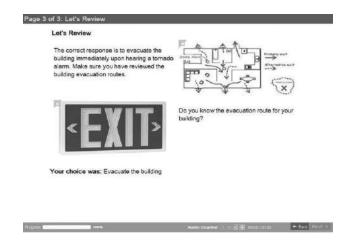
You can also right click on the page in the course content area.



- 2. Select the Display another page's answer on this page checkbox.
- **3.** Select a page from the *Display the answer from* list.
- 4. Click OK.



The answer will only display in the published HTML output. You will not see the answer in the preview or in the Word or PDF published outputs.



## **Working with Flexible Stencils**

Authors can make changes to all of the different course stencil types except for assessments and full page Flash stencils. The content areas within the stencils can be split into smaller content areas, flipped around on the course element (lesson or page), changed to different types of content, and removed.

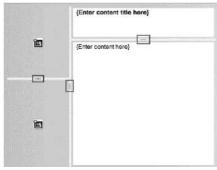
The **Design** tab is only visible in the Editor when working with courses.



The **Design** tab allows authors to:

- Change course element stencil options
- Split a content area vertically or horizontally
- Flip a content area
- Change a content area to content, title, image, or video
- Remove content areas

The dividers, referred to as "slider bars," between content areas within a course element are now adjustable, allowing the author to change the size of each content area. The area percentage is displayed while moving the slider bar. These adjustments will be reflected in the Editor as well as the published output for all course elements except for assessments. Adjusting the slider bars on assessment pages is intended to allow the author to comfortably view all answers on a given page, especially when many answers are added. These assessment adjustments are for the Editor only and are not reflected in the published output.





You can use the undo/redo editing function with flexible stencils.

### Switching a Stencil



This functionality is not available for assessments.

- 1. In the *Course Pane*, click on the lesson or page you want to switch stencils.
- **2.** Click the **Design** tab.
- **3.** Click the **Switch Stencil** button.



**4.** Choose a stencil from the list of options.



When switching between stencils, content will be preserved as long as it is supported by the new stencil. For example, if switching from a stencil layout that supports images to a stencil layout that does not support images, images may be lost.

5. Click OK.



You can use the undo/redo editing function if needed.

## Splitting Content Areas



This functionality is not available for assessments and full page Flash stencils.

- **1.** Select the content area on the course element to split.
- **2.** Click the **Design** tab.
- **3.** Choose from the following options in the *Layout* section:

If You Want To	Then
Divide the content area as if it were cut	Click the <b>Split Vertical</b> button.
in the middle from top to bottom	

If You Want To	Then
Divide the content area as if it were cut	Click the <b>Split Horizontal</b> button.
in the middle from left to right	



While there is no limit to the number of times you can split a content area, if an area is split into too many areas, it may not be visible in the Editor or the published output.



You can use the undo/redo editing function if needed.



Hover over the slider bar and content area to adjust the size of the content areas.

### Flipping Content Areas



This functionality is not available for assessments and full page Flash stencils.

- **1.** Select the content area on the course element to flip.
- 2. Click the **Design** tab.



When you hover over the **Flip** button, the target content area to be flipped will be outlined in green.

**3.** Click the **Flip** button.



If a content area has been split into a group of several smaller areas, then each of the related target areas will be highlighted before flipping. The entire group will not be highlighted as one.



You can use the undo/redo editing function if needed.



Hover over the slider bar and content area to adjust the size of the content areas.

### Changing Content Area Types



This functionality is not available for assessments and full page Flash stencils.

- 1. Select the content area (title, content, image or video) on the course element to change.
- **2.** Click the **Design** tab.
- **3.** Chose from the following options in the *Change Type* section:

If You Want To	Then
Change the selected content area type to content (text)	Click the <b>Change to Content</b> button.
Change the selected content area type to a title	Click the <b>Change to Title</b> button.
Change the selected content area type to an image	Click the <b>Change to Image</b> button.
Change the selected content area type to a video	Click the Change to Video button.



When switching between title and content types, the text will be retained since both are text elements. When switching from a content element to a video or image element, the text will be removed. When switching from a video or image to a content element, the video or image will be removed.



You can use the undo/redo editing function if needed.



Hover over the slider bar and content area to adjust the size of the content areas.

#### Removing Content Areas



This functionality is not available for assessments and full page Flash stencils.



This functionality is only available when there is more than one content area on the course element.

- 1. Select the content area (title, content, image or video) on the course element to remove.
- **2.** Click the **Design** tab.
- 3. Click the **Remove** button.



You will receive a message confirming that you want to delete the selected content area if it contains content (text, image or video).



You can use the undo/redo editing function if needed.

# **Editing Course Content**

The Course Editor allows you to set formatting within a page. You can also reorder lessons and pages. By default, lessons and pages are inserted below the object selected in the *Course Pane*.

## Setting the Character Format

- **1.** Highlight the text you want to format.
- **2.** On the **Home** tab, select one of the following rich-text formatting options:

Field	Description
Font	Select the drop down to change the font style of the text.
Size	Select the drop down to change the size of the text.
Clear all	Select this option to clear all of the formatting from the text.
Bold	Select this option to bold the text.
Italic	Select this option to italicize the text.
Underline	Select this option to underline the text.
Strikethrough	Select this option to strikethrough the text.
Subscript	Select this option to move a character to the bottom of the character line.
Superscript	Select this option to move a character to the top of the character line.
Color	Select the drop down to change the color of the text.
Bullet List	Select this option to format the text in a bulleted list.
Numbered List	Select this option to format the text in a numbered list.
Decrease Indentation	Select this option to decrease the indentation of the text.
Increase Indentation	Select this option to increase the indentation of the text.

Field	Description
Align Left	Select this option to align the text to the left margin.
Center	Select this option to center align the text.
Align Right	Select this option to align the text to the right margin.
Bullet List	Select this option to format the text in a bulleted list.
Numbered List	Select this option to format the text in a numbered list.
Superscript	Select this option to move a character to the top of the character line.



To return the character format to normal, deselect the rich-text formatting from the toolbar.

# Reordering Lessons and Pages

- **1.** Click on the lesson or page you want to move.
- **2.** Choose from the following options:

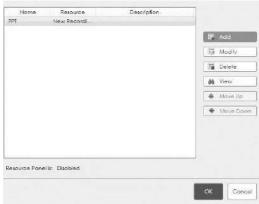
If You Want To	Then
Move the lesson or page above or below another lesson or page	Drag the lesson or page above or below another item in the <i>Course Pane</i> .
Move the lesson or page into another lesson or page	Drag the lesson or page onto the item in the <i>Course Pane</i> .

# Managing Resources, Embedded Simulations, and Images

Resources, embedded simulations, and images can be managed from the Course Editor menu. Resources are links or documents that can be added to a course for additional information. Managing resources, embedded simulations and images allows authors to re-use information throughout a course, as well as providing simpler and faster updating by allowing the author to update and apply only once.

### Managing Resources

**1.** From the Course Editor, select **VIEW > RESOURCES** from the menu.





The resource panel is enabled in the template settings. For more information on enabling the resource panel, refer to Default Publication Settings: Course: General Settings (on page 357).

**2.** Choose from the following options:

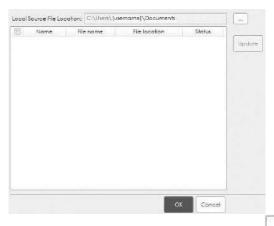
If You Want To	Then
Add a resource	Click Add.
	Enter a name and description.
	Click the <b>URL</b> radio button and enter a <b>URL</b> or click <b>Document</b> and browse to a document on your local computer.
	Click OK.
Modify a resource	Select a resource from the list, and click <b>Modify</b> .
	Edit the resource name, description, or content as needed.
	Click OK.

If You Want To	Then
Delete a resource	Select a resource from the list, and click <b>Delete</b> . Click <b>Yes</b> .
View a resource	Select a resource from the list, and click <b>View</b> . The resource opens in a separate window.
Move a resource	Select a resource from the list, and click <b>Move Up</b> or <b>Move Down</b> to re-arrange the resources.

#### 3. Click OK.

## Managing Embedded Simulations

**1.** From the Course Editor, select **VIEW > EMBEDDED SIMULATIONS** from the menu.





If your embedded simulations are located in another file location, click and navigate to your source file location on your local computer.

**2.** Select a simulation from the list and click **Update**.

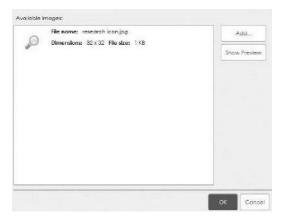


The **Update** button is only available if the selected simulation has a status of **Not Current**, indicating the simulation has been revised.

3. Click OK.

## Managing Images

**1.** From the Course Editor, select **VIEW > IMAGES** from the menu.



**2.** Choose from the following options:

If You Want To	Then	
Add an image	Click Add  Browse and select an image from your local computer.	
	Click Open.	
	If two images are added with the same file name, the application will compare the files to determine if they are identical. If the images are identical, the first image will be used.	
Preview an image	Select an image from the <i>Available Images</i> list and click <b>Show Preview</b> .	
	Close the preview window.	

### 3. Click OK.



Once the course is closed any images no longer being used will be removed from the *Available Images* list.

# **Using Images**

Images can be used to further illustrate a specific point in a lesson and also to enhance conceptual points or questions and answers.

### Inserting Images Into Pages

- **1.** During page creation, select a stencil that allows you to insert an image. For more information, refer to Inserting a Page (on page 177).
- **2.** In the content area, click the **Add Picture...** icon.
- **3.** Choose from the following options:

If You Want To	Then
Insert an available image	Select the image from the Available Images list.
Insert a new image	Click <b>Add</b> .  Navigate to the image you want to insert.  Click <b>Open</b> .
Preview an image	Select an image from the <i>Available Images</i> list and click <b>Show Preview</b> .  Close the image.

- 4. Click OK.
- **5.** Choose one of the following options:

If You Want To	Then
Select a different image	Click the <b>Change Picture</b> icon.
Remove the image	Click the <b>Delete Picture</b> icon.

## **Editing Images**

**1.** Navigate to the image you want to edit.

2. Right-click on the image and select Edit Image....



**3.** Choose from the following options:

Field	Description	
Layout	Select an alignment option for the current image.	
Use template zoom options	If checked, the image will default to the template options for zooming images.	
Enable zoom	If checked, the image will be able to be zoomed within the published layout.	
Width	Select an image width.	
Height	Select an image height.	
Maintain aspect ratio	If checked, the image will adjust width/height when either is changed.	
Caption	Enter a caption for the image.	
	The maximum value is 255 characters.	
	To view the caption, hover over the image in the published output.	
Localized	If checked, the image will be localized.	

### 4. Click OK.



Click the **Change Picture...** icon to select a different image. Click the **Delete Picture...** icon to remove the image.

## **Using Page Transitions**

Authors can insert transitions into courses. A transition can be applied to an entire course element (page, lesson, or assessment). A transition occurs when navigating between course pages (via the course navigation buttons or the course menu). Only one transition type is allowed per course element.

The **Transitions** tab is only visible in the Editor when working with courses.

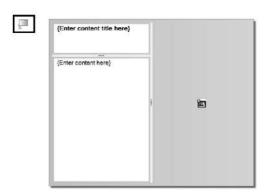


The **Transitions** tab allows authors to:

- Add and remove transitions to courses
- Select directional effect options
- Set durations

The **Transitions** ribbon toolbar displays the transition effects of bounce, fade, slide, zoom, roll, and flip.

Icons to the side of the course element indicate the presence of transitions. Hover over the transition icon to display more information about the transition.





Transitions in an imported PowerPoint may not function as expected.



For more information on which browser versions support transitions, refer to the *Technical Specifications*.



When upgrading from a version earlier than 5.30, if the **Enable Transitions** field was selected a fade transition was applied to all of the course pages.



You can use the undo/redo editing function with transitions.

### Inserting a Transition



Only one transition type is allowed per course element (page, lesson, or assessment).

- **1.** Navigate to the course element to apply the transition.
- **2.** Click the **Transitions** tab.
- **3.** Select one of the following transition effects:

Field	Description
Bounce	The course page will have a bouncing effect as it enters.
Fade	The course page will have a fading effect as it enters.
Slide	The course page will have a sliding effect as it enters.
Zoom	The course page will have a zooming effect as it enters.
Roll	The course page will have a rolling effect as it enters.
Flip	The course page will have a flipping effect as it enters.



After the transition is inserted, an icon reflecting the motion of the transition will appear to the left of the course page. This icon represents the type of transition applied to that page.



You can use the undo/redo editing function with transitions.

### Changing a Transition



Only one transition type is allowed per course element (page, lesson, or assessment).

- **1.** Navigate to the appropriate course page.
- **2.** Click the **Transitions** tab.
- **3.** Choose from the following options:

If You Want To	Then
Change a transition	Click the desired transition from the <i>Transitions</i> group.
Remove a transition	Click the <b>Remove Transition</b> button.



You can use the undo/redo editing function with transitions.

### Applying Effect Options to a Transition

- 1. Navigate to the appropriate course page with the transition.
- **2.** Click the **Transitions** tab.



The **Effect Options** button will become available for the transition if the transition has directional effects.

- **3.** Click the **Effect Options** button.
- **4.** Select one of the following:



The bounce, fade, and roll transitions do not have directional options available as there is only one way to have each of these transitions to appear.

Field	Description	
From Bottom	The transition will occur from the bottom.	
From Left	The transition will occur from the left.	
From Right	The transition will occur from the right.	
From Top	The transition will occur from the top.	
Horizontal	The transition will flip horizontally.	
	Flip transition only	
Vertical	The transition will flip vertically.	
	Flip transition only	



The **Effect Options** button will display the effect for the transition.



You can use the undo/redo editing function with transitions.

### Apply Existing Transition to All Course Pages



When the Apply to All functionality is used, transitions on existing course pages will be deleted and replaced with the transition selected to Apply to All.

- **1.** Navigate to the appropriate course page with the transition.
- **2.** Click the **Transitions** tab.
- **3.** Click the **Apply to All** button to apply the current transition to all of the existing course pages and any newly created course pages.



Every new course page created will have this transition applied even if the original course page containing the transition is deleted or the course is closed and then reopened.



You can use the undo/redo editing function with transitions.



You can delete transitions from all of the existing course pages and any newly created course pages by clicking the **Remove Transition** and **Apply to All** buttons.



To change or remove transitions on an individual course page, refer to Changing a Transition.

### **Setting Transition Durations**

- **1.** Navigate to the appropriate course page with the transition.
- **2.** Click the **Transitions** tab.
- **3.** Complete the following field in the *Timing* section:

Field	Description
Duration	The amount of time in seconds the transition will last. The duration is from 1 - 59 seconds.
	The default value is 1.



Enter the duration in seconds or use the up and down arrows to select the value.



You can use the undo/redo editing function with transitions.

## **Using Animations**

Authors can insert animation effects into courses. Animations can be added to an entire content area containing text, a paragraph of text or an image within a course element (lesson or page). Simulations, assessments, Flash and video do not support animations.

The **Animations** tab is only visible in the Editor when working with courses.



The **Animations** tab allows authors to:

- Add and remove animations to courses by using entrance, emphasis, and exit animation options.
- Apply effect options for animations based on direction or sequence.
- Set animation triggers.
- Set animation durations and delays.
- Reorder animations.

The **Animations** ribbon toolbar displays the entrance animations by default. You can scroll through the animations by clicking the **Move up** and **Move down** buttons on the right side of the list. You can also view all available animations by clicking on the **More** drop-down button at the bottom-right of the list.



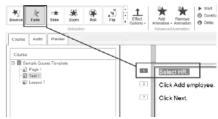


If a content area has multiple animations applied that are not the same, the **Multiple** animation icon is highlighted on the ribbon toolbar.

Numbers in boxes to the side of the course element indicate the presence of animations and the sequence in which the animations will be displayed after publishing. The sequence numbers can appear to the left or right of the course element. The first animation inserted will be designated with the "1," the second, "2," and so on.



You can click the animation sequence number to see the object and animation associated with it.



Multiple animations for an object are grouped together and only one animation sequence number displays. Hover the mouse over the group animation sequence number to view all of the animation sequence numbers in a vertical list.



Animations in an imported PowerPoint may not function as expected.



For more information on which browser versions support animations, refer to the *Technical Specifications*.



You can use the undo/redo editing function with animations.

### Inserting an Animation

**1.** Choose from the following options:

If You Want To	Then
Apply an animation to a paragraph of text	Select the text in the content area on the course element.
	If there are three sentences of text in a content area, you can apply a different animation to each sentence by selecting each sentence separately.
Apply an animation to an image	Select the image in the content area on the course element.
	The image must already be added into the course.

If You Want To	Then
Apply an animation to an entire content area containing text	Select a content area on the course element.  If the content area has multiple animations applied that are not the same, the <b>Multiple</b> animation icon is highlighted on the ribbon toolbar.



Copying text or images that have animations does not copy the animation.

### 2. Click Add Animation.



You can also click the **More** drop down to expand the *Animation* ribbon.

### **3.** Choose from the following options:

If You Want The Animation To Display	Then
When the selected object is first introduced during course playback	Go to Step 4.
While the selected object is displayed during course playback	Go to Step 6.
When the selected object exits during course playback	Go to Step 8.

### **4.** Select one of the following *entrance* animation effects:

Field	Description
Bounce	The selected object will have a bouncing effect as it enters.
Fade	The selected object will have a fading effect as it enters.
Slide	The selected object will have a sliding effect as it enters.
Zoom	The selected object will have a zooming effect as it enters.
Roll	The selected object will have a rolling effect as it enters.
Flip	The selected object will have a flipping effect as it enters.

- **5.** Go to Step 9.
- **6.** Select one of the following *emphasis* animation effects:

Field	Description
Flash	The selected object will flash.
Pulse	The selected object will pulse.
Shake	The selected object will shake.

- **7.** Go to Step 9.
- **8.** Select one of the following *exit* animation effects:

Field	Description
Bounce	The selected object will have a bouncing effect as it exits.
Fade	The selected object will have a fading effect as it exits.
Slide	The selected object will have a sliding effect as it exits.
Zoom	The selected object will have a zooming effect as it exits.
Roll	The selected object will have a rolling effect as it exits.
Flip	The selected object will have a flipping effect as it exits.

**9.** Repeat steps 1 - 8 to add more animations.



After the animation is entered, a number will appear to the left or right of the selected object. This number represents the sequence in which the animations will display.



You can use the undo/redo editing function with animations.

## Changing an Animation



Copying text or images that have animations does not copy the animation.

**1.** Choose from the following options:

If You Want To	Then
Change an animation	Select the animation by clicking the actual object or clicking the associated animation sequence number.
	Click the <b>More</b> button to expand the Animation ribbon.  Select the desired animation.
	Select the desired animation.

Remove an animation	Select the animation by clicking the actual object or clicking the associated animation sequence number.  Click <b>Remove Animation</b> .
	When removing an animation, the sequence number for the animations are renumbered automatically. For example, if there are 5 animations and animation #3 is removed, then the #4 and #5 will become #3 and #4 respectively.
	Deleting text or images that have animations, deletes the animation.



You can use the undo/redo editing function with animations.

## Applying Effect Options to an Animation

- **1.** On the course element, select the animation by clicking the actual object or clicking the associated animation sequence number.
- **2.** Click the **Effect Options** button.
- **3.** Select one of the following:



The roll, flash, pulse, and shake animations do not have directional options available as there is only one way to have each of these animations to appear.

Field	Description
Direction: From Bottom	The animation will come in from the bottom.
Direction: From Left	The animation will come in from the left.
Direction: From Right	The animation will come in from the right.
Direction: From Top	The selected object will come in from the top.
Direction: Horizontal	The animation will flip horizontally.  Flip animation only

Direction: Vertical	The animation will flip vertically.  Flip animation only
Sequence: As One Object	All of the text within the content area will be animated at the same time and with the same animation.  This applies to an entire content area of text only.
Sequence: All At Once	All paragraphs will be animated at the same time, but each paragraph can have different animations.  This applies to an entire content area of text only.
Sequence: By Paragraph	Each paragraph will be animated.  This applies to an entire content area of text only.



When an animation is selected, the **Effect Options** button will display the effect for that animation.



You can use the undo/redo editing function with animations.

## **Setting Animation Triggers**

- **1.** On the course element, select the animation by clicking the actual object or clicking the associated animation sequence number.
- **2.** Select one of the following in the **Start** field:

Field	Description
After Previous	The animation will start after the previous animation is completed.  This is the default value.
With Previous	The animation will start with the previous animation.
Right Arrow Key	The animation will start when the right arrow key is pressed when navigating through a course in html published output.



You can use the undo/redo editing function with animations.

### Setting Animation Durations and Delays

- **1.** On the course element, select the animation by clicking the actual object or clicking the associated animation sequence number.
- **2.** Select one of the following in the *Timing* section:

Field	Description
Duration	The amount of time in seconds the animation is displayed. The duration is from 1 - 59 seconds.
	The longer the duration is set, the slower the animation speed.
	Bounce animations have a default duration of 2 seconds. All other animations have a default duration of 1 second.
Delay	The amount of time in seconds the animation is delayed once it is triggered. The delay value is from 1 - 59 seconds.
	The default value is 0 seconds.



Enter the duration and delay in seconds or use the up and down arrows to select the value.



You can use the undo/redo editing function with animations.

### Reordering an Animation

**1.** In the course content area, select the animation sequence number box.



Hover your cursor over the animation sequence number to view all animation sequence numbers if multiple exist for an item.

2. Click the Move Earlier or Move Later button to reorder the animation.





You can use the undo/redo editing function with animations.

# **Editing Interaction Pages**

Interaction pages apply only to self-tests, branching pages, and pages within an assessment section. After you insert a page and choose an interaction page stencil, you must enter content into the fields and select your interactions in order to validate the page within the course.

Interactions differ based on the stencil. Interactions only apply to stencils with a question and answer format. In some stencils, the question and answer displays as a term and definition.

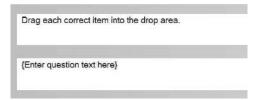
You can also customize the instructional phrases of your interactions. For example, you can modify, "Match the term on the left with the definition on the right" to read, "Select the best term for the definition."

### **Customizing Instructional Phrases**



Customized instructional phrases will no longer translate when the course language is changed. You can customize interaction instructional phrases globally within the author template. For more information regarding author templates, refer to Managing Phrases (on page 331).

**1.** Click to highlight text in the instructional phrase field.

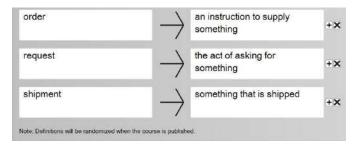


**2.** Enter new text.

### Editing Interactions for Drag and Drop

- **1.** Click on the **{Enter question text here}** field.
- **2.** Enter a question.
- **3.** Click on the **{Enter term here}** field.
- **4.** Enter a term.
- **5.** Click on the corresponding **Enter definition here**} field.

#### **6.** Enter a definition.



### **7.** Choose from the following options:

If You Want To	Then
Add terms and definitions	Click the + icon beside the definition to add the new term and definition below.
	Adding too many terms and definitions will make it difficult to view the content in the course content area.
Remove terms and definitions	Click the <b>X</b> icon beside the definition to delete.
	The <b>X</b> icon will be disabled when only one interaction exists because there must be one interaction on the page.
Adjust the content areas	Hover over the slider bar and content area to adjust the size.
	Changes are only visible in the Editor. Published content will not be affected.

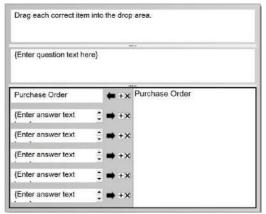


Definitions will be randomized when the course is published.

## Editing Interactions for Drag and Drop - Many-to-One

- 1. Click on the {Enter question text here} field.
- 2. Enter a question.
- **3.** Click on an **{Enter answer text here}** field.
- **4.** Enter an answer.

**5.** Click the arrow next to the correct answer(s) to move the item to the answer pane.





To move an incorrect answer from the answer pane, click the back arrow.

**6.** Choose from the following options:

If You Want To	Then
Add answers	Click the + icon beside the answer to add a new answer below.
	Adding too many answers will make it difficult to view the content in the course content area.
Remove answers	Click the X icon beside the answer to delete.
	The <b>X</b> icon will be disabled when only one interaction exists because there must be one interaction on the page.
Adjust the content areas	Hover over the slider bar and content area to adjust the size.
	Changes are only visible in the Editor. Published content will not be affected.

# Editing Interactions for Drag and Drop - Sequencing

- 1. Click on the {Enter question text here} field.
- **2.** Enter a question.
- **3.** Click on an **{Enter answer text here}** field.
- **4.** Enter an answer.

| Trequest | Trequest

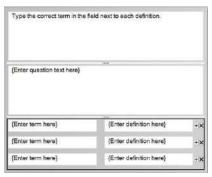
**5.** Click the arrow next to the answer(s) to move the item to the answer pane.

- **6.** Use the up and down arrows to order the answers.
  - To move an incorrect answer from the answer pane, click the back arrow.
- **7.** Choose from the following options:

If You Want To	Then
Add answers	Click the + icon beside the answer to add a new answer below.
	Adding too many answers will make it difficult to view the content in the course content area.
Remove answers	Click the <b>X</b> icon beside the answer to delete.
	The <b>X</b> icon will be disabled when only one interaction exists because there must be one interaction on the page.
Adjust the content areas	Hover over the slider bar and content area to adjust the size
	Changes are only visible in the Editor. Published content will not be affected.

## Editing Interactions for Fill In - Multiple and Single

- 1. Click on the {Enter question text here} field.
- **2.** Enter a question.
- **3.** Click on the **{Enter term here}** field.
- **4.** Enter a term.
- **5.** Click on the corresponding **{Enter definition here}** field.
- **6.** Enter a definition.





If you have multiple correct definitions for a term, separate them with a comma.

#### **7.** Choose from the following options:

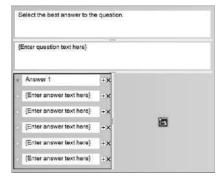
If You Want To	Then
Add terms and definitions	Click the + icon beside the definition to add a new term and definition below.
	Adding too many terms and definitions will make it difficult to view the content in the course content area.
Remove terms and definitions	Click the <b>X</b> icon beside the definition to delete.
	The X icon will be disabled when only one interaction exists because there must be one interaction on the page.
Adjust the content areas	Hover over the slider bar and content area to adjust the size
	Changes are only visible in the Editor. Published content will not be affected.

## Editing Interactions for Multiple Choice - Multiple and Half



If you choose the Multiple Choice - Half stencil, you can insert an optional image to the right. For detailed information, refer to Using Images (on page 191).

- 1. Click on the {Enter question text here} field.
- **2.** Enter a question.
- **3.** Click on the **{Enter answer text here}** field.
- **4.** Enter possible answer text.
- **5.** Click the radio button next to the correct answer.



**6.** Choose from the following options:

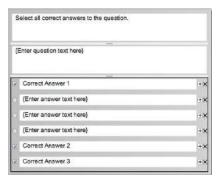
If You Want To	Then
Add answers	Click the + icon beside the answer to add a new answer below.
	Adding too many answers will make it difficult to view the content in the course content area.
Remove answers	Click the <b>X</b> icon beside the answer to delete.
	The X icon will be disabled when only one interaction exists because there must be one interaction on the page.
Adjust the content areas	Hover over the slider bar and content area to adjust the size.
	Changes are only visible in the Editor. Published content will not be affected.

# Editing Interactions for Multiple Correct - Multiple and Half



If you choose the Multiple Correct - Half stencil, you can insert an optional image to the right. For detailed information, refer to Using Images (on page 191).

- 1. Click on the {Enter question text here} field.
- **2.** Enter a question.
- **3.** Click on the **{Enter answer text here}** field.
- **4.** Enter possible answer text.
- **5.** Click the checkboxes next to the correct answers.



**6.** Choose from the following options:

If You Want To	Then
Add answers	Click the + icon beside the answer to add a new answer below.
	Adding too many answers will make it difficult to view the content in the course content area.
Remove answers	Click the <b>X</b> icon beside the answer to delete.
	The <b>X</b> icon will be displayed when only one interaction exists because there must be one interaction on the page.
Adjust the content areas	Hover over the slider bar and content area to adjust the size.
	Changes are only visible in the Editor. Published content will not be affected.

# **Importing Microsoft PowerPoint Content**

Elements from Microsoft PowerPoint can be imported into presentations. For information on supported versions of Microsoft PowerPoint, refer to the *Technical Specifications*. There are three options for importing Microsoft PowerPoint elements:

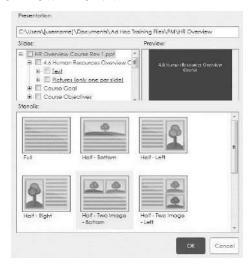
- Import a slide as a single image
- Import graphics from the presentation
- Import text elements from the presentation



Animations in an imported PowerPoint may not function as expected.

#### Importing PowerPoint Slides as Images

1. Select INSERT > FROM POWERPOINT.



**2.** Choose the .ppt or .pptx file from which you want to import slides.



This action will open Microsoft PowerPoint. Do not close the application until you are finished importing slides.

**3.** In the **Slides** area, expand the tree view to locate the slides you want to import.



A preview of the slide is displayed to the right of the tree view. You can import more than one slide at a time. Each slide will be inserted as an image in a new standard content page within the course.

- **4.** Select the checkbox next to the slide(s) titles to import. Do not select the **Text** or Pictures checkboxes under the slide title to import the slides as images; only select the slide title.
- **5.** Choose a stencil from the following options:

Stencil	Options
Full	This stencil creates a standard content page with text.
Half - Bottom	This stencil creates a standard content page with text on the bottom of the page. An optional image can be placed on top.
Half - Left	This stencil creates a standard content page with text on the left of the page. An optional image can be placed to the right.
Half - Right	This stencil creates a standard content page with text on the right of the page. An optional image can be placed to the left.
Half - Two Image - Bottom	This stencil creates a standard content page with text on the bottom of the page. Two optional images can be placed on top.
Half - Two Image - Left	This stencil creates a standard content page with text on the left of the page. Two optional images can be placed to the right.
Half - Two Image - Right	This stencil creates a standard content page with text on the right of the page. Two optional images can be placed to the left.
Image	This stencil creates a standard content page containing an image.
Image - Diagonal - Left	This stencil creates a standard content page with text on the top left and bottom right of the page. Two optional images can be placed diagonally within the stencil.
Image - Diagonal - Right	This stencil creates a standard content page with text on the top right and bottom left of the page. Two optional images can be placed diagonally within the stencil.

- 6. Click OK.
- **7.** Click **Yes** to confirm the import.

## Importing Graphics from PowerPoint Slides

- 1. Select Insert > From PowerPoint.
- **2.** Choose the .ppt or .pptx file from which you want to import graphics.
- 3. Click Open.



This action will open Microsoft PowerPoint. Do not close the application until you are finished importing graphics.

**4.** In the **Slides** area, expand the tree view to locate the pictures you want to import.





A preview of the graphic is displayed to the right of the tree view. You can only import one graphic per slide; however, you can import graphics from other slides during a single import action. Each graphic is inserted as a new standard content page within the course. The image is not editable on the resulting page.

- **5.** Select the **PICTURES** checkbox next to the graphic(s) you want to import.
- **6.** Choose a stencil from the following options:

Stencil	Options
Full	This stencil creates a standard content page with text.
	It is recommended that you do not use the Standard - Full template as it does not support graphics.
Half - Bottom	This stencil creates a standard content page with text on the bottom of the page. An optional image can be placed on top.
Half - Left	This stencil creates a standard content page with text on the left of the page. An optional image can be

Stencil	Options
	placed to the right.
Half - Right	This stencil creates a standard content page with text on the right of the page. An optional image can be placed to the left.
Half - Two Image - Bottom	This stencil creates a standard content page with text on the bottom of the page. Two optional images can be placed on top.
Half - Two Image - Left	This stencil creates a standard content page with text on the left of the page. Two optional images can be placed to the right.
Half - Two Image - Right	This stencil creates a standard content page with text on the right of the page. Two optional images can be placed to the left.
Image	This stencil creates a standard content page containing an image.
Image - Diagonal - Left	This stencil creates a standard content page with text on the top left and bottom right of the page. Two optional images can be placed diagonally within the stencil.
Image - Diagonal - Right	This stencil creates a standard content page with text on the top right and bottom left of the page. Two optional images can be placed diagonally within the stencil.

- 7. Click OK.
- **8.** Click **Yes** to confirm the import.

## Importing Text from PowerPoint Slides

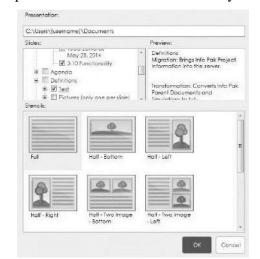


It is recommended that you arrange the slide elements within PowerPoint using the **Move to Back** functionality so that the text box you wish to import as the title is the bottom/back-most element within each slide.

- 1. Select Insert > From PowerPoint.
- **2.** Choose the .ppt or .pptx file from which you want to import text.
- 3. Click Open.



This action will open Microsoft PowerPoint. Do not close the application until you are finished importing text.



**4.** In the **Slides** area, expand the tree view to locate the text you want to import.



A preview of the text is displayed to the right of the tree view. You can import more than one text element at a time. All text elements selected are imported into the content area of one new standard content page. Text elements are imported as plain text without character formatting.

- **5.** Select the **Text** checkbox next to the text item(s) you want to import.
- **6.** Choose a stencil from the following options:

Stencil	Options
Full	This stencil creates a standard content page with text.
Half - Bottom	This stencil creates a standard content page with text on the bottom of the page. An optional image can be placed on top.
Half - Left	This stencil creates a standard content page with text on the left of the page. An optional image can be placed to the right.
Half - Right	This stencil creates a standard content page with text on the right of the page. An optional image can be placed to the left.
Half - Two Image - Bottom	This stencil creates a standard content page with text on the bottom of the page. Two optional images can be placed on top.
Half - Two Image - Left	This stencil creates a standard content page with text on the left of the page. Two optional images can be placed to the right.

Stencil	Options
Half - Two Image - Right	This stencil creates a standard content page with text on the right of the page. Two optional images can be placed to the left.
Image - Diagonal - Left	This stencil creates a standard content page with text on the top left and bottom right of the page. Two optional images can be placed diagonally within the stencil.
Image - Diagonal - Right	This stencil creates a standard content page with text on the top right and bottom left of the page. Two optional images can be placed diagonally within the stencil.

# 7. Click OK.

**8.** Click **Yes** to confirm the import.

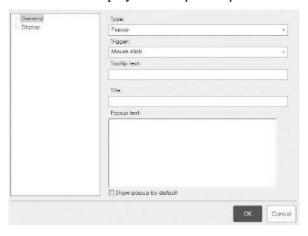
# **Using Hotspots, Popups, and Links**

Hotspots can be inserted on images to provide additional information or hints to end users. In addition, you can insert the following items in text within standard content areas:

- Popups- Displays text with the hotspot. Popups can be shown by default or displayed based on a trigger.
- Web Link- Launches a destination website in a new web browser window.
- Page Link- Opens another page within the course.
- Resource Link- Opens a document in the current window or a new web browser window.

#### Inserting a Hotspot on an Image

- 1. Select a page that contains an image.
- **2.** Click on the image on which you want to insert the hotspot.
- **3.** Select **INSERT > HOTSPOT** to display the *Hotspot Properties* window.



**4.** Click **General** in the left pane and choose from the following options:



Depending on the type selected, some of the following options may not be displayed.

Field	Description
Type	Specify Popup, Web Link, Page Link, or Resource Link.
	Popup: Displays text based on an assigned trigger.
	Web Link: Launches a webpage.
	Page Link: Links to another page within the course.
	<b>Resource Link</b> : Links to a document in a course page.
Trigger	Specify Mouse click or Mouse over.
Tooltip Text	Enter text to display when a user pauses the mouse on the popup.
Title	Enter text to be displayed as the hotspot title.
Link Location	Enter the location of the link.
Show popup by default	Select the <b>Show popup by default</b> checkbox to display the hotspot in published output.
Localized	Check the <b>Localized</b> checkbox to indicate that the link should be localized.

**5.** Click **Display** in the left pane and choose from the following options:

Field	Description
Background Color	Specify a background color for the hotspot. This will display as a gradient box with a matching border in a published course.
Image	Specify an image for the hotspot.
Layout	Specify the position of the hotspot. Choose from Top left corner, Top right corner, Center, Bottom left corner, Bottom right corner.
Visible	Select the <b>Visible</b> checkbox to display the hotspot in published output.

#### 6. Click OK.

# Moving and Adjusting a Hotspot

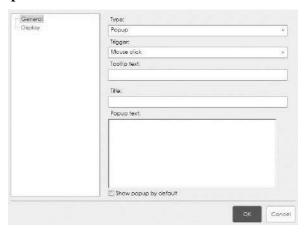
- 1. Click on the hotspot.
- **2.** Drag the hotspot to the desired location on the image, or click and drag on a sizing handle to resize.



Optionally, you can use the cursor keys to move the hotspot around on the image.

# **Editing Hotspot Properties**

- **1.** Right-click on the hotspot.
- 2. Select Edit Hotspot....



**3.** Click **General** in the left pane and complete the following fields:



Based on the type selected, some of the following options may not be displayed.

Field	Description
Туре	Specify Popup, Web Link, Page Link, or Resource Link.
	Popup: Displays text based on an assigned trigger.
	Web Link: Launches a webpage.
	Page Link: Links to another page within the course.
	Resource Link: Links to a document in a course
	page.
Trigger	Specify Mouse click or Mouse over.
Tooltip Text	Enter text to display when a user pauses the mouse on the popup.
Title	Enter text to be displayed as the hotspot title.
Show popup by default	Select the <b>Show popup by default</b> checkbox to display the hotspot in published output.
Localized	Check the <b>Localized</b> checkbox to indicate that the link should be localized.

**4.** Click **Display** in the left pane and choose from the following options:

Field	Description
Background Color	Specify a background color for the hotspot. This will display as a gradient box with a matching border in a published course.
Image	Specify an image for the hotspot.
Layout	Specify the position of the hotspot. Choose from Top left corner, Top right corner, Center, Bottom left corner, Bottom right corner.
Visible	Select the <b>Visible</b> checkbox to display the hotspot in published output.

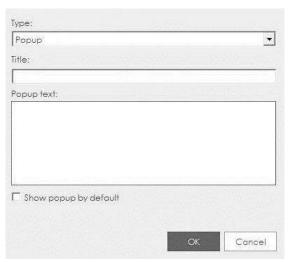
#### 5. Click OK.

## Inserting Popups, Web Links, Page Links, and Resource Links in Text



Popups and links are inserted in the text of standard content pages, and can also be inserted into the directions of any interaction page.

- **1.** Select and highlight text within the content area.
- **2.** Right-click and select **INSERT > INSERT LINK**.



**3.** Complete the following fields:



Depending on the type selected, some of the following options may not be displayed.

Field	Description
Туре	Specify <b>Popup</b> , <b>Web Link</b> , <b>Page Link</b> , or <b>Resource Link</b> .
	Popup: Displays text based on an assigned trigger.
	Web Link: Launches a webpage.

	Page Link: Links to another page within the course.  Resource Link: Links to a document in a course page.
Link Location	Specify a destination website, or a link to published content to launch from the published course.
Page	Expand or collapse the tree view as needed.
	Select a page from the list.
Available Resources	Select a resource from the list.
Open in new window	Select this option to open the link in a new window in the published course.
	Selecting this option will attempt to open the link in a new window; however, some applications' security settings will override this setting.
Localized	Check the <b>Localized</b> checkbox to indicate that the link should be localized.

## 4. Click OK.

#### **Insert Published Simulations and Course Content**

You can insert a published ART simulation via a simulation stencil. These stencils are accessible when creating a new course or when inserting a new page into an existing course.



A course treats an inserted published ART simulation as a single page. A course will appear as a single object to an LMS. The LMS will not recognize the simulation as a standalone object.

You can insert course content via the Insert menu. This option is available when inserting objects into an existing course. You can select only the pages you want to include in your course, decreasing the amount of time spent editing.

#### Inserting Content from Existing Courses



A caution icon will display in the outline view on a page for which content has not been filled out completely and on the Assessment section if there are no pages inserted into the assessment.

- **1.** Create or open a course.
- 2. Select INSERT > FROM COURSE.
- **3.** Browse to the location of the existing course, select the .ulc file, and click **Open**.



**4.** In the **Page** area, expand the tree view to locate the page(s) you want to import.



A preview of the page is displayed to the right of the tree view. You can import more than one page at a time. Each page will be inserted as a new page within the course.

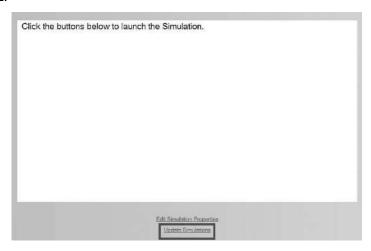
- **5.** Select the page(s) you want to import.
- 6. Click OK.



You can edit the course using the procedures described in Editing and Formatting: Basics (on page 91) and Editing and Formatting: Courses (on page 171).

# **Inserting Published Simulations**

- **1.** Create or open a course.
- 2. Select Insert > Page, Insert > Lesson, or Insert > Assessment.
- **3.** Select a simulation stencil.
- **4.** Enter a name in the **Name** field.
- 5. Click OK.



**6.** Click **Edit Simulation Properties**.



**7.** Perform one of the following options:

If You Want To	Then
Insert a new simulation	Select <b>Simulation</b> from the Insert drop-down list.  Click  Select the root folder containing all of the elements for the published simulation.  Click <b>OK</b> .

If You Want To	Then
Insert a simulation from your local	Select <b>Local</b> from the Insert drop-down list.
computer	Select a simulation from the <b>Source file</b> window.
	The local source directory is by default the same location as the course file. To change the local source file directory, select MANAGE > EMBEDDED SIMULATIONS from the menu.
Use an available simulation	Select a simulation from the <b>Available Simulations</b> window.
	This window lists all simulations that have been inserted into the course.

## **8.** Complete the following:

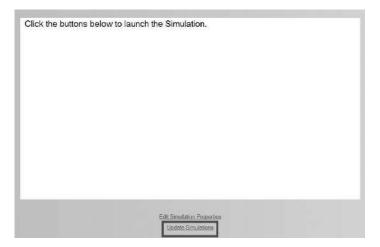
Field	Description
Auto Playback Tutorial	Select the checkbox to enable this playback option in a published course.
Standard Tutorial	Select the checkbox to enable this playback option in a published course.
Self Test Tutorial	Select the checkbox to enable this playback option in a published course.
Assessment Tutorial	Select the checkbox to enable this playback option in a published course.

#### **9.** Click **Insert**.

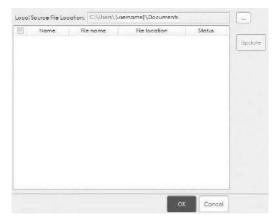
# Inserting Updated Simulations

- **1.** Create or open a course.
- 2. Select Insert > Page, Lesson, or Assessment.
- **3.** Select a simulation stencil.
- **4.** Enter a name in the **Name** field.

#### 5. Click OK.



**6.** Click **Update Simulations**.



**7.** Select the updated simulation from the list. The **Update** button will only be available if the simulation has been revised since it was last inserted or updated.



Simulations that have the source simulation on the Server will not be updated unless connected to the Server.

#### 8. Click OK.



If any errors occur during the process, information will be written to the log file and a message will be displayed at the end of the process.

# **Working with Flash Content**

You can embed a single Flash file (.swf) into a course. The Flash content must contain all of the files necessary for playback.

You can also edit the Flash file via settings in the Adobe Flash Player Settings.



Flexible stencils and the right click menu are not available when working with Flash content.

## Embedding and Editing Flash Content

**1.** Choose one of the following options:

If You Want To	Then
Embed Flash content as a course root	Select FILE > NEW
page	Enter a name in the <b>File name</b> field.
	Select <b>Course</b> from the <b>Type</b> drop-down list.
	Choose a template from the <b>Template</b> listbox.
	Click <b>OK</b> .
Embed Flash content as a lesson	Select the <b>Insert</b> tab.
	Click the <b>Lesson</b> button.
Embed Flash content as a standard	Select the <b>Insert</b> tab.
content page	Click the <b>Page</b> button.

- **2.** Enter a name in the **Name** field.
- **3.** Select the **Flash** stencil.
- 4. Click OK.
- **5.** In the content area, click **Add Flash content...**.
- **6.** Navigate to the .swf file.
- 7. Click Open.
- **8.** Right-click on the flash file in the Editor.
- 9. Select Settings....

- **10.** Edit the settings using the *Adobe Flash Player Settings* window.
- 11. Click Close.

# **Using Audio Files**

Audio files can help guide the end user through the course and provide supplemental information. Each page or step within a course or simulation can have a supported audio file - MP3 or WAV - associated with the content.



Audio files must be in MP3 format to run on an iPad.



Using WAV files will increase the size of a course compared to when using MP3 files.

Audio can be incorporated into two ways:

- Create an audio recording from directly within the application. This capability is excellent for quick, simple recordings that will not require further editing or processing. By default, recording audio within the Editor will create WAV files. To convert WAV files to MP3, refer to Installing LAME (on page 228).
- Import an audio file created with an external audio editor application. Using an
  external audio editor allows you more flexibility to enhance or edit your audio
  recording.

If using WAV files, it is recommended to use the following settings to avoid distortion in the published output:

WAV File Setting	Recommendation
Recorded bit depth	16-bit, mono
Frequency (Hz)	Between 32,000 - 44,1000 Hz
Resulting Bitrate of WAV File	512kbps - 705kbps
	$(i.e. 16 \times 32,000 = 512k)$

#### Installing LAME

To create MP3 files from within the Editor, your computer must have the LAME application installed within the application directory.



To perform this task, you must be an Administrator on your computer. If you are not, contact your IT department for assistance.

- 1. Perform a web search for "lame encoder download".
- **2.** Download the latest version of LAME that is compatible with your computer.

- **3.** On your computer, navigate to your browser's Download folder.
- **4.** Double-click on the LAME zip file to open the file.
- **5.** Select both lame.exe and LAME_ENC.DLL.
- **6.** Right-click the selected files and select **Copy**.
- 7. Navigate to LOCAL DISK (C:)>PROGRAM FILES>[application directory]>CLIENT>BIN or LOCAL DISK (C:)>PROGRAM FILES (X86)>[application directory]>CLIENT>BIN.
- **8.** Paste both files into the bin directory.
- **9.** If the Editor is running, restart the Editor for the changes to take effect.



Once you have installed LAME, all recordings will be encoded as MP3 files.

## Creating an Audio File

- 1. In the Course Pane area, select the page to contain the audio.
- 2. Select **HOME > RECORD** to launch the **Recording Options** dialog window.



**3.** Complete the following fields:

Field	Description	n	
Recording Device	1 "	Specify the input recording device. This selection is machine specific.	
Recording Quality	Specify the au	Specify the audio quality setting.	
	Setting	MP3	WAV
	High	320kbps	16-bit
	Medium	128kbps	8-bit
	Low	64kbps	8-bit
Transcript	Enter text for	the transcript.	

**4.** Click **1** to start the recording. **Length** will display the recording length in seconds.

**5.** Once you have set your options, the following controls are activated:

Control	Description
<b>O</b>	Click <b>Pause</b> to pause the current recording.
0	Click <b>Stop</b> to stop the current recording.
<b>(2)</b>	Click <b>Play</b> to review the current recording.

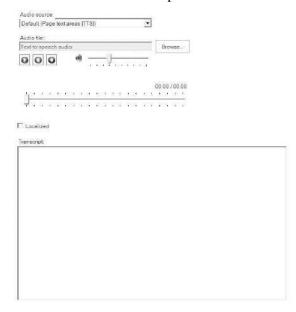
6. Click OK.

## Importing an Audio File



The recommended MP3 encoding quality/bitrate is between 48-64 kbps. Ensure the file is converted to mono to keep the file size as small as possible.

- 1. In the task pane, select the page for which you want to insert audio.
- **2.** Click the **Audio** tab on the top left.



- **3.** Select **Manual** from the *Audio source* drop-down list.
- 4. Click Browse....
- **5.** Choose the MP3 or WAV audio file to import.
- 6. Click Open.

#### Playing an Audio File



Adobe Flash must be installed to enable audio playback.

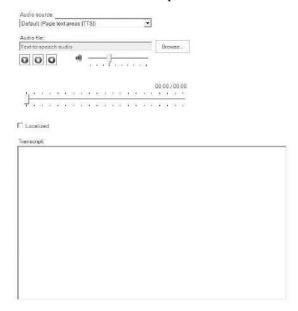
- 1. In the task pane, select the page containing the audio.
- **2.** Click the **Audio** tab on the top left.
- **3.** Click .



You can adjust the volume using the slide bar . To stop the playback, click

## Transcribing an Audio File

- 1. In the task pane, select the page containing the audio.
- **2.** Click the **Audio** tab on the top left.



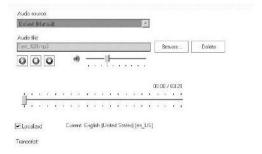
- **3.** Click in the **Transcript** field.
- **4.** Enter the text of the audio file.



The transcript text is plain text.

## Deleting an Audio File

- **1.** In the ask pane, select the page containing the audio.
- **2.** Click the **Audio** tab on the top left.



- **3.** Verify the audio file you want to delete is displayed in the Audio file field. You can use the **Browse** button to navigate to the proper file.
- **4.** Click the **Delete** button to delete the audio file.



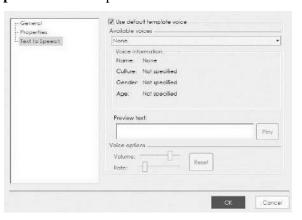
You will not be prompted to confirm the delete action. The file will be instantly deleted.

## **Using Text to Speech**

Course text and simulation step text can be converted into speech. Text to speech provides accessible outputs for visually impaired users. Authors can automatically convert text to audio that is available to the end user when playing the published output. In addition, text to speech allows audio to be translated and used in conjunction with XLIFF files.

### Configuring Available Voices for Text To Speech

- 1. Open the proper application template and ensure that text to speech is enabled for simulations and courses. For more information on enabling text to speech, refer to Default Publication Settings: Simulation: General Settings (on page 341) and Default Publication Settings: Course: General Settings (on page 357).
- **2.** If you have not already done so, configure a voice for text to speech. For more information, refer Specifying General Settings: Text To Speech (on page 326).
- **3.** From the Editor, open the course or simulation for which you want to add text to speech.
- **4.** Select **FILE > DOCUMENT Properties...**.
- **5.** Click **Text To Speech** on the left pane.



**6.** Select one of the following options:

If You Want To	Then
Use the default template voice	Check Use default template voice.
Select a different voice	Select a voice from the <i>Available Voices</i> dropdown list.

If You Want To	Then
Preview the selected voice	Enter text in the <b>Preview Text</b> field and click
	Play.

**7.** Click **OK**. Text to speech audio is published within the course or simulation.

## **Using Video Files**

You can insert and embed video files into a course. Video files can be used to demonstrate a task or to further explain a concept. Well-made videos can reduce training time by quickly demonstrating a concept that would otherwise require much technical text or complicated diagrams. You can add multiple video formats; however, not all video formats are supported by all browsers. Please refer to the *Technical Specifications* for requirements.



For more information on adding and enabling video formats, refer to Default Publication Settings: Course: General Settings (on page 357).

#### Inserting a Video File

**1.** During page creation, select a stencil that allows you to insert a video. For more information, refer to Inserting a Page (on page 177).



There is no limit to how many videos can be added to a course page.

- 2. In the content area, click the Add Video... icon.
- **3.** Choose one of the following options:

If You Want To	Then
Insert a video	Select <b>Local Video</b> in the <i>Type</i> drop-down list.
	Click <b>Browse</b> and locate the video you want to upload.
	Click <b>Open</b> after selecting the video file.
	Optionally, insert a caption for the video in the <b>Caption</b> field.

If You Want To	Then
Embed a video	Select <b>Embedded Video</b> in the <i>Type</i> drop-down list.
	Optionally, insert a caption for the video in the <b>Caption</b> field.
	This is for screen readers only. A caption can be added at the end of the embedded code. This text will display below the video in the published output.
	Enter the embedded video code in the <b>Embed Code</b> field.
	Any text added after the <iframe> could result in the video not displaying correctly.</iframe>

#### 4. Click OK.



For embedded web videos, a placeholder image will be displayed.



Adjusting the size of the content area will not adjust the size of an embedded video. The height and width must be adjusted in the embedded code.

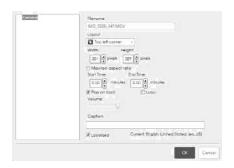
**5.** Choose one of the following options:

If You Want To	Then
Select a different video	Click the Change Video icon.
Remove the video	Click the <b>Delete Video</b> icon.

# Editing a Video File

- **1.** Navigate to the video you want to edit.
- **2.** Right-click on the video and select **Edit Video...**.
- **3.** Choose one of the following:

If You Want To	Then
Edit a local video	Go to Step 4.



# **4.** Edit the following fields:

Field	Description
Layout	Select an alignment option for the current video.
	The default value is top left corner.
Width	Select a video width.
Height	Select a video height.
Maintain aspect ratio	If checked, the video will adjust width/height when either is changed.
Start Time	Select a start time within the video for video playback.
	If your video is 5 minutes long and you want to skip the first 2 minutes, the start time would be 3 minutes.
End Time	Select an end time for video playback.
	The maximum value is the length of the video clip.
Play on load	If checked, the video will start automatically when loaded in the browser.
	The default value is selected.
	If you add multiple videos to a course page, you should modify this option to improve the end-user experience during playback.
Loop	If checked, the video clip will play on a continuous loop.
Volume	Select a volume level for the video.
Caption	Enter a caption for the video.
	The maximum value is 255 characters.
	Hovering over the video in the published output, displays the caption for <i>local</i> videos only.
Localized	If checked, the video will be localized.

## **5.** Go to Step 7.



## **6.** Edit the following fields:

Field	Description	
Layout	Select an alignment option for the current video.	
	The default value is center.	
Caption	Enter a caption for the video.	
	The maximum value is 255 characters.	
	A caption can be entered at the end of the embedded code. This text will display below the video in the published output.	
Embed Code	Enter the embedded code for the video.	
	Any text added after the <iframe> could result in the video not displaying correctly.</iframe>	
	The height and width are specified in the embedded code.	
	You can add code to auto play the embedded video.	
Localized	If checked, the video will be localized.	



Adjusting the size of the content area will not adjust the size of an embedded video. The height and width must be adjusted in the embedded code.

#### 7. Click OK.

# Working with Assessment Sections, Self-Tests, and Branches

Interaction pages are inserted into an assessment section to test user knowledge. Results can be tracked and reported via email, Active Server Pages (ASP), or a Learning Management System (LMS).

Interaction pages can also be used as self-tests to provide ungraded feedback to a user during the course. Insert self-tests within a lesson to allow end users to test themselves on the knowledge in each lesson before moving into an optional graded assessment section.

### Inserting an Assessment Section

- 1. Select INSERT > ASSESSMENT.
- **2.** Enter a name in the **Name** field.
- **3.** Choose a stencil from the following options:

Stencil	Options
Full	This stencil creates a standard content page with text.
Half - Bottom	This stencil creates a standard content page with text on the bottom of the page. An optional image can be placed on top.
Half - Left	This stencil creates a standard content page with text on the left of the page. An optional image can be placed to the right.
Half - Right	This stencil creates a standard content page with text on the right of the page. An optional image can be placed to the left.
Half - Two Image - Bottom	This stencil creates a standard content page with text on the bottom of the page. Two optional images can be placed on top.
Half - Two Image - Left	This stencil creates a standard content page with text on the left of the page. Two optional images can be placed to the right.
Half - Two Image - Right	This stencil creates a standard content page with text on the right of the page. Two optional images can be placed to the left.

Stencil	Options
Image	This stencil creates a standard content page containing an image.
Image - Diagonal - Left	This stencil creates a standard content page with text on the top left and bottom right of the page. Two optional images can be placed diagonally within the stencil.
Image - Diagonal - Right	This stencil creates a standard content page with text on the top right and bottom left of the page. Two optional images can be placed diagonally within the stencil.
Video	This stencil creates a standard content page containing a video.
Video - Half - Left	This stencil creates a standard content page. An optional video can be placed to the right.
Video - Half - Right	This stencil creates a standard content page. An optional video can be placed to the left.

#### 4. Click OK.

# Inserting Interaction Pages Into an Assessment Section

- **1.** In the *Course Pane*, right-click on the assessment root page.
- 2. Select Insert > Page....
- **3.** Enter a name in the **Name** field.
- **4.** Choose a stencil from one of the following options:

Stencil	Options
Drag and Drop	This stencil creates an interaction page featuring one matching item per definition.
Drag and Drop - Many-to- One	This stencil creates an interaction page featuring one or more drag-and-drop responses to a single question.
Drag and Drop - Sequencing	This stencil creates an interaction page featuring one or more draggable responses to a single question.
Fill In - Multiple	This stencil creates an interaction page that allows the user to enter responses to multiple questions.
Fill In - Single	This stencil creates an interaction page that allows the user to enter a response to a single question.

Stencil	Options
Hotspot Single	This stencil creates a page featuring text and an image. A hotspot area can be defined in the image as the correct response.
Multiple Choice	This stencil creates an interaction page featuring several possible responses to a single question. Only one response is correct.
Multiple Choice - Half	This stencil creates an interaction page featuring several possible responses to a single question. Only one response is correct. An optional image can be placed to the right.
Multiple Correct	This stencil creates an interaction page featuring several possible responses to a single question. One or more responses may be correct.
Multiple Correct - Half	This stencil creates an interaction page featuring several possible responses to a single question. One or more responses may be correct. An optional image can be placed to the right.
Simulation	This stencil creates a standard content page that allows you to import a published simulation.
Simulation - Half - Right	This stencil creates a standard content page that allows you to import a published simulation. An optional image can be placed on the left.

#### 5. Click OK.



For more information on interaction pages, refer to Editing Interaction Pages.

# **Editing Assessment Section Properties**

- **1.** In the *Course Pane*, right-click on the assessment root page.
- 2. Select EDIT ASSESSMENT....
- **3.** Edit the following options:

Field	Description
Name	Edit the assessment name.

Field	Description
Select questions from a question pool	This option indicates to display a pre-determined number of interaction pages during the course.
Number of questions to use	Use the up and down arrows to specify the number of questions to display during the course.

#### 4. Click OK.

# **Creating Custom Assessment Feedback for a Page**

- **1.** In the *Course Pane*, right-click on an interaction page.
- 2. Select Edit Assessment....
- 3. Select Custom Feedback.



- **4.** Select the **Use custom feedback text** checkbox.
- **5.** Complete the following fields:



Depending on the type of page selected, some options may not display.

Field	Description
Correct	Enter the text to display in response to a correct answer.
	For example: That is correct.
Incorrect	Enter the text to display in response to an incorrect answer.
	For example: That is incorrect. Would you like to try again?

#### 6. Click OK.

## Editing Custom Assessment Feedback for a Page

- **1.** In the *Course Pane*, right-click on the interaction page for which you want to edit custom assessment feedback.
- 2. Select Edit Assessment....



- 3. Click Custom Feedback on the left pane.
- **4.** Select the **Use custom feedback text** checkbox.
- **5.** Edit/review the following fields:



Depending on the type of page selected, some options may not display.

Field	Description
Correct	Enter a value to display for a correct answer. For example: Correct.
Incorrect	Enter a value to display for an incorrect answer. For example: Incorrect. Would you like to try again.

6. Click OK.

# Creating a Self-Test

**1.** Click on any page within a lesson.

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2. Select INSERT > PAGE.



- **3.** Enter a name in the **Name** field.
- **4.** Choose from one of the following options:



Stencils for standard content pages also display in this window. To create a self-test, choose only one of the stencils listed below.

Stencil	Options
Branching	This stencil creates an interaction page featuring several possible choices to a question. Making a choice results in going to an independent section of content.
Drag and Drop	This stencil creates an interaction page featuring one matching item per definition.
Drag and Drop - Many-to- One	This stencil creates an interaction page featuring one or more drag-and-drop responses to a single question.
Drag and Drop - Sequencing	This stencil creates an interaction page featuring one or more draggable responses to a single question.
Fill In - Multiple	This stencil creates an interaction page that allows the user to enter responses to multiple questions.
Fill In - Single	This stencil creates an interaction page that allows the user to enter a response to a single question.
Hotspot - Single	This stencil creates a standard content page for writing, editing, and formatting text that includes a hotspot. An image can be placed on the right.
Multiple Choice	This stencil creates an interaction page featuring several possible responses to a single question. Only one response is correct.
Multiple Choice - Half	This stencil creates an interaction page featuring several possible responses to a single question. Only one response is correct. An optional image can be placed to the right.
Multiple Correct	This stencil creates an interaction page featuring several possible responses to a single question. One or more responses may be correct.

Multiple Correct - Half	This stencil creates an interaction page featuring several possible responses to a single question. One
	or more responses may be correct. An optional image can be placed to the right.

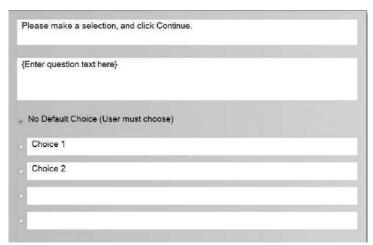
5. Click OK.

#### **Working with Branches**

You can use interaction and standard pages to create branches within your course. Branches allow users to choose where in the course they want to go and these choices are specified when you create the branch. The choice will cause the user to take a side road in the content. Based on input provided by the user, and the nature of the branch, the user can then return to the main flow of the course after all pages in the branch have been visited. Branches allow you to give a variety of options to your end users, which allows them to partake in the eLearning course based on their personal needs.

#### Creating a Branch

- 1. Select INSERT > PAGE.
- **2.** Enter a name in the **Name** field.
- **3.** Select the **Branching** stencil.
- 4. Click OK.
- **5.** Click on the **{Enter question text here}** field.
- **6.** Enter a question.



#### **Chapter 9: Editing and Formatting: Courses**

**7.** Click the radio button next to the preferred choice:

If You Want To	Description
Allow the user to choose which page to visit	Select the <b>No Default Choice (User must choose)</b> radio button.
Determine which page the user will visit next	Select a one of the custom choice radio buttons.

- **8.** Click on the **Choice 1** field.
- **9.** Enter text for the choice.
- **10.** Click on the **Choice 2** field.
- **11.** Enter text for the choice.
- **12.** Choose from the following options:

If You Want To	Then
Add more choices	Enter text for the choice in the blank field.
Adjust the content areas	Hover over the slider bar and content area to adjust the size.
	Changes are only visible in the Editor. Published content will not be affected.

- **13.** On the *Course Pane*, right-click on a choice within the branching page.
- **14.** Select **Insert Page...**.



- **15.** Enter a name in the **Name** field.
- **16.** Choose a stencil from the following options:

Stencil	Option
Flash	This stencil creates a standard content page containing a single Flash file.
Full	This stencil creates a standard content page with text.

Stencil	Option
Half - Bottom	This stencil creates a standard content page with text on the bottom of the page. An optional image can be placed on top.
Half - Left	This stencil creates a standard content page with text on the left of the page. An image can be placed to the right.
Half - Right	This stencil creates a standard content page with text on the right of the page. An image can be placed to the left.
Half - Two Image - Bottom	This stencil creates a standard content page with text on the bottom of the page. Two optional images can be placed on top.
Half - Two Image - Left	This stencil creates a standard content page with text on the left of the page. Two optional images can be placed to the right.
Half - Two Image - Right	This stencil creates a standard content page with text on the right of the page. Two optional images can be placed to the right.
Image	This stencil creates a standard content page containing an image.
Image - Diagonal - Left	This stencil creates a standard content page with text on the top left and bottom right of the page. Two optional images can be placed diagonally within the stencil.
Image - Diagonal - Right	This stencil creates a standard content page with text on the top right and bottom left of the page. Two images can be placed diagonally within the stencil.
Video	This stencil creates a standard content page containing a video.
Video - Half - Left	This stencil creates a standard content page. An optional video can be placed to the right.
Video - Half - Right	This stencil creates a standard content page. An optional video can be placed to the right.
Branching	This stencil creates a branch that allows the user to decide where to go next in the course.
Drag and Drop	This stencil creates an interaction page featuring one matching item per definition.
Drag and Drop - Many-to- One	This stencil creates an interaction page featuring one or more drag-and-drop responses to a single question.
Drag and Drop - Sequencing	This stencil creates an interaction page featuring one or more draggable responses to a single question.

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Stencil	Option
Fill In - Multiple	This stencil creates an interaction page that allows the user to enter responses to multiple questions.
Fill In - Single	This stencil creates an interaction page that allows the user to enter a response to a single question.
Hotspot Single	This stencil creates a page featuring text and an image. A hotspot area can be defined in the image as the correct response.
Multiple Choice	This stencil creates an interaction page featuring several possible responses to a single question. Only one response is correct.
Multiple Choice - Half	This stencil creates an interaction page featuring several possible responses to a single question. Only one response is correct. An optional image can be placed to the right.
Multiple Correct	This stencil creates an interaction page featuring several possible responses to a single question. One or more responses may be correct.
Multiple Correct - Half	This stencil creates an interaction page featuring several possible responses to a single question. One or more responses may be correct. An optional image can be placed to the right.
Simulation	This stencil creates a page for embedding a Simulation.
Simulation - Half - Right	This stencil creates a page for embedding a Simulation. An optional image can be placed to the left.

#### 17. Click OK.

- **18.** Edit the stencil using one of the procedures in Editing and Formatting: Courses (on page 171).
- **19.** Repeat steps 13 18 to create additional pages within the branch choice.

# **Editing Branching Page Properties**

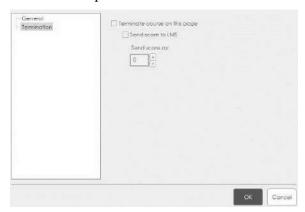
**1.** Right-click on a choice within a branch.



To edit branching properties, a choice must contain one or more pages.

2. Select Edit Page....

# **3.** Select **Termination** in the left pane.





The General tab is read only. The page name is not editable through the properties window.

#### **4.** Choose from the following options:

Field	Description
Terminate course on this page	Select the <b>Terminate course on this page</b> checkbox to end the course once the user has completed this page.
Send score to LMS	Select the <b>Send score to LMS</b> checkbox to send the page score to a registered LMS.
Send score as	Select a score to be sent to the LMS.

#### 5. Click OK.

Chapter 9: Editing and Formatting: Courses	

# Chapter 10: Editing and Formatting: Student Guides and Course Packages

You can edit and format a student guide to combine concepts, procedures, and exercises related to a series of tasks or a process. In addition, you can publish multiple application document and course files into a single master SCORM package.

# Introduction to Editing and Formatting Student Guides and Course Packages

Student guides allow you to combine concepts, procedures, and exercises related to a series of tasks or a process. Student guides can include application documents and courses, as well as Microsoft Word documents. By combining related information into one booklet, you can provide your end users with an easily printable collection of relevant content.

Student guides can be published to Word format and have the file extension .usg. Published student guides can be checked into the Server as a managed document, or they can be printed out as a single file for distribution to end users.

Creating a course package allows a mobile player within a learning management system (LMS), such as ANCILE uLearn, to recognize the course structure without the course structure being created manually. Course packages can be published locally and checked into the Server for content management.

A course package allows you to publish multiple application content files into a single master SCORM package. You can combine documents and courses that are based on the same template, and specify the order in which content will be presented to the end user. When adding application source files, you have the option of selecting files that reside locally as well as on a Server. Course packages have the file extension .upc.

# Working With a Student Guide

#### Inserting Content Into a Student Guide

- 1. Create a student guide using the procedure found in Creating Content.
- **2.** Perform one of the following options:

If You Want To	Then
Insert source content	Select Insert > Insert > Source File.
	Go to Step 3.
Insert a Microsoft Word document	Select Insert > Insert Word Document.
	Navigate to the .doc or .docx file you want to insert.
	Click OK.
	Go to Step 5.

- **3.** From the **Insert** menu, chose **Local**.
- **4.** Perform one of the following options:

If You Want To	Then
Insert an eLearning course	In the <i>Source file</i> window, click on the .ulc file you want to insert.
Insert a published document	In the <i>Source file</i> window, click on the .udc file you want to insert.
	In the <i>Publication</i> window, click on the publication type. Only those publication types that produce Word output are listed.

5. Click Insert.

# Replacing Content within a Student Guide

- **1.** Open a student guide.
- **2.** Select the content you want to edit or replace in the *Task Pane*.
- **3.** Click **Replace** to the far right.
- **4.** In the *Source file* window, click on the .udc or .ulc file you want to insert.

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**5.** In the *Publication* window, click on the publication type.



Publication types will display for .udc files only if they can be published to Word format. For more information, refer to Previewing and Publishing Content (on page 301).

6. Click Insert.

#### Replacing or Editing Microsoft Word Content Within a Student Guide

- **1.** Open a student guide.
- **2.** Select the Word file in the *Task Pane* that you would like to edit or replace.
- **3.** Perform one of the following options:

If You Want To	Then
Replace the Word file	Click <b>Replace</b> to the far right.
	Navigate to the replacement file.
	Click Open.
Edit the existing Word file	Click <b>Edit</b> and then click <b>Yes</b> on the pop-up window to open the file in Microsoft Word.
	Edit the <b>Word</b> file.
	In Word, select <b>FILE &gt; SAVE</b> .
	In the Editor, click <b>Yes</b> when prompted to update the student guide.

#### Reordering Content within a Student Guide

- 1. Click on the content you want to move.
- **2.** Choose one of the following options:

If You Want To	Then
Move the content above or below another item	Drag the content above or below another item in the task pane.
Move the content under another item to create a chapter	Drag the content onto the item in the task pane.

#### Previewing the Table of Contents

- **1.** Open a student guide.
- **2.** Select **Table of Contents** in the *Task Pane*.
- 3. Click Preview.



The table of contents preview will open in Microsoft Word. Any edits made to the table of contents in Word will not be saved in the .usg file.

The display is controlled by options available in the Template Editor. For more information, refer to Default Publication Settings: Student Guide (on page 350).

**4.** Optionally, review the following fields:

Field	Description
File name	Displays the file name for the Student Guide.
Source directory	Displays the location where the student guide is saved on the author's local computer.



After publishing a student guide, you must open the guide in Microsoft Word and update the table of contents as per Word's table of contents update functionality.

#### Viewing and Editing Properties for Student Guide Content

- 1. Open a student guide.
- **2.** Select a file type from the *Task Pane*.
- **3.** Optionally, edit the name of the document in the **Name** field.



This changes the display of the document name in the table of contents.

**4.** Review the following information for source files:

Field	Description
File name	Displays the file name for the content
Publication	Displays the publication type. This option is available only for content created in the Editor.

# Chapter 10: Editing and Formatting: Student Guides and Course Packages

GUID	Displays the unique identifier for the content. This option is available only for content created in the Editor.
Version Number	Displays the current version number for the content. This option is available only for content created in the Editor.
Language	Displays the language of the content. This option is available only for content created in the Editor.
Created	Displays the creation date of the content to ensure content is up to date.
Last Modified	Display date and time the document was last modified.
Last Accessed	Displays the date and time the content was last accessed.

# **Working with Course Packages**

#### Inserting a Lesson Into a Course Package

- 1. Create or open a course package.
- **2.** In the *Course Package* area, select the package root page or place the cursor where you want to insert a lesson.
- 3. Select INSERT > LESSON.
- **4.** Enter a name for the lesson in the **Name** field.

#### Inserting a Source File into a Course Package

- **1.** Create or open a course package.
- **2.** In the *Course Package* area, click on a root folder, lesson, or source file.
- 3. Select INSERT > SOURCE.



**4.** From the **Insert** drop-down list, choose one of the following options:

If You Want To	Then
Insert content saved to your local source directory	Select Local.

- **5.** In the *Source file* window, click on the file you want to insert.
- **6.** In the *Publication* window, click on the publication type. Only those publication types that produce Flash output are listed.
- 7. Click Insert.

#### Updating or Replacing a Source File

- **1.** Create or open a course package.
- **2.** In the *Course Package* area, click on the source file you want to replace.
- **3.** Click **Replace** to the far right.
- **4.** From the **Insert** drop-down list, choose one of the following options:

If You Want To	Then
Update content saved to your local	Select Local.
source directory	

- **5.** In the *Source file* window, click on the file you want to insert.
- **6.** In the Publication window, click on the publication type. Only those publication types that produce Flash output are listed.
- 7. Click Insert.
- **8.** If you are updating a document from the Server, click **Update** to ensure you are inserting the most recent version from the Server.

#### Reordering Content within a Course Package

- **1.** Click on the lesson or source file you want to move.
- **2.** Choose from the following options:

If You Want To	Then
Move the lesson or source file above or below another lesson or source file	Drag the lesson or page above or below another item in the <i>Course Package</i> pane.
Move the lesson or page into another lesson	Drag the lesson or page onto the item in the <i>Course Package</i> task pane.

#### Viewing and Editing Properties for Course Packages

- **1.** Open a course package.
- **2.** Select a file type from the *Course Package* pane.

# Chapter 10: Editing and Formatting: Student Guides and Course Packages

- **3.** Optionally, edit the name of the document in the **Name** field.
- **4.** Review the following information for source files:

Field	Description
File name	Displays the file name for the content.
Publication	Displays the publication type.
GUID	Displays the unique identifier for the content.
Version Number	Displays the current version number for the content.
Language	Displays the language of the content.
Created	Displays the creation date of the content to ensure content is up to date.
Last Modified	Display date and time the document was last modified.
Last Accessed	Displays the date and time the content was last accessed.

Chapter 10: Editing and Formatting: Student Guides an	nd Course Packages
	-

# **Chapter 11:** Searching Content

Search functionality in the editor allows you to search within content.

# **Chapter 11: Searching Content**

# **Introduction to Searching**

In addition to basic search functionality, there is a find and replace feature to allow you to easily locate and change text within your content.

# **Searching Within Content**

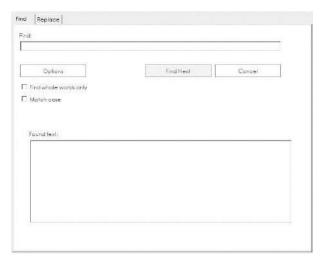
Two search functions are available within a document or course:

- Find one or more instances of particular text
- Find and replace one or more instances of particular text

You can search within notes, actions, steps, the document narrative, course text and annotations.

#### Executing a Search

- **1.** Create or open content.
- 2. Click **HOME > FIND**.
- 3. Select the **Find** tab.
- **4.** Enter the search text in the **Find** field.



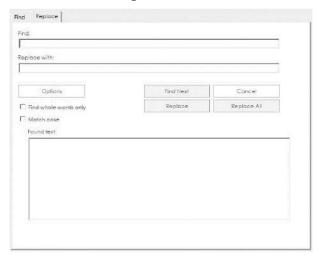
- **5.** Optionally, click **Options** to expand and collapse additional search criteria.
- **6.** Optionally, click **Find whole words only** to search for an exact word, or click **Match case** to search for words using case sensitivity.
- 7. Click Find Next.
- **8.** To find additional instances of the search text, click **Find Next**.

#### **Chapter 11: Searching Content**

**9.** Click **Cancel** to close the window.

#### Using Find and Replace

- **1.** Create or open content.
- 2. Select HOME > FIND.
- **3.** Select the **Replace** tab.
- **4.** Enter the search text in the **Find** field.
- **5.** Enter the replacement text in the **Replace with** field.

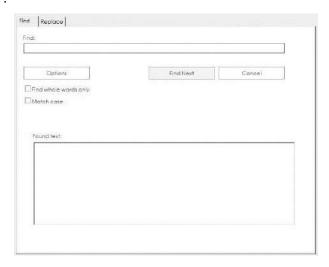


- **6.** Optionally, click **More Options** to expand and collapse additional search criteria.
- **7.** Optionally, click **Find whole words only** to search for an exact word, or click **Match case** to search for words using case sensitivity.
- **8.** Click **Replace** to find and replace the next instance of the search text, or click **Replace All** to find and replace all instances of the search text.
- **9.** To find additional instances of the text, click **Find Next**.
- **10.** Click **Cancel** to close the window.

#### Performing a Quick Search

**1.** Create or open content in the Document view.

#### 2. Enter Ctrl+F.



- **3.** Enter the search term in the **Find** field.
- **4.** Optionally, click **Find whole words only** to search for an exact word, or click **Match case** to search for words using case sensitivity.
- 5. Click Next.
- **6.** Repeat Step 5 to find the next instance of the term.
- **7.** Click the red  $\mathbf{X}$  to close the window.

Chapter 11: Searching Content		

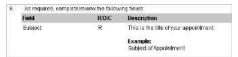
# **Chapter 12: Using the Glossary**

The application allows you to maintain a central file of terms and definitions used in procedural content. The glossary functionality ensures authors are using consistent and approved definitions.

#### Introduction to the Glossary

Glossary functionality is provided to allow you to maintain a collection of terms and definitions used in procedural content. The glossary allows you to specify consistent, business-specific definitions for your terms and then automatically push these definitions into your documents.

Terms and definitions are displayed in recorded Field/Description tables within the document view of content. Field description tables that are inserted during editing as a step will not support glossary functionality. The following is an illustration of a recorded Field/Description table.



Maintaining terms and definitions in one file allows documents to be updated quickly and accurately. New terms can be added, and changes can be made to definitions for existing terms within the glossary. The glossary functionality supports one definition per term.

Once you have standardized the valid terms and definitions, the administrator executes the globalization process to update definitions (descriptions) of terms (fields) within the documents prior to making the documents available to your end users.

Only those documents created with the same template as that used by the current glossary template can be globalized.

To ensure a manageable glossary file size and ensure optimum performance, there is a system limitation of 2500 terms that can be stored and managed in a Glossary. If an action within the glossary editor would cause this limit to be exceeded, a message is displayed. The number of available terms remaining is always displayed in the lower left.



You can choose not to use a central glossary but, rather, have authors enter definitions directly into the Description column of tables.

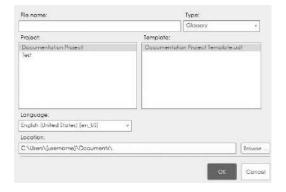
# **Create the Glossary**

There are two methods for initially creating your glossary:

- Create the glossary file from within the Editor and proceed to populate the file manually or via the globalization process.
- Create the glossary file by importing an existing, tab-delimited text file containing terms and definitions or terms only.

# Creating a Glossary

- 1. Select **FILE > NEW** from the Editor.
- **2.** Select **Glossary** from the **Type** drop-down list.



- **3.** Select **Glossary** from the **Type** drop-down list.
- **4.** Complete/review the following information:

Field	Description
File name	Enter the name of the glossary.
Template	Select the template associated with this glossary.
	The template controls the glossary layout and the term and definition styles used.
	Only documents created with this template can be globalized using this glossary.
Language	This field is not applicable to the glossary file type.
Location	As desired, edit the default location of the glossary.

#### **Chapter 12: Using the Glossary**

#### 5. Click OK.

For information on adding terms and definitions to your glossary, refer to Adding a Term and Definition (on page 272).

#### Creating a Glossary by Importing a Text File



Prior to importing the text file, save the file using UTF-8 or Unicode encoding to ensure special characters are imported correctly. When saving a text file in Notepad, select **FILE > SAVE AS...** and specify UTF-8 or Unicode from the Encoding dropdown list.

- 1. Create the glossary file as described in Creating a Glossary (on page 269).
- 2. Select TOOLS > IMPORT A GLOSSARY.
- **3.** Click **Browse...** to navigate to the tab-delimited text file.
- 4. Click OK.
- **5.** At the confirmation prompt, click **Yes** to confirm replacement of any existing terms and definitions.



If a line within the file includes a tab, a term and definition pair is imported. If a line within the file does not include a tab but does include text, a term is imported.

**6.** Review the Application log for any errors. The log is stored in the C:\Users\[username]\AppData\Roaming\[applicationdirectory]\version X.xx\Logs directory.

# **Open and Save the Glossary**

# Opening a Glossary

- 1. Select FILE > OPEN > OPEN LOCAL....
- **2.** Select the .upg file.
- 3. Click Open.

# Saving a Glossary

Perform one of the following actions:

If You Want To	Then
Save an existing glossary	Select <b>FILE &gt; SAVE</b> .
	If this is the first time you are saving the file and the display of the <i>Properties</i> window is enabled, the <i>Properties</i> window is displayed.
Save the open glossary as a new file	Select FILE > SAVE AS
	Enter a new filename, and click Save.

# **Adding Terms and Definitions**

When you add a new term and definition pair, the pair is available to all application documents when a globalization process is executed.

#### Adding a Term and Definition

1. Select Insert > Insert Term.



- **2.** Enter the new term in the **Term** field.
- 3. Click OK.
- **4.** Perform one or more of the following actions:

If You Want To	Then
	Click Use definition from another term.
term (a synonym)	Select the synonym from the drop-down list.
Add a definition	Click Use own definition.
	Enter the definition.



The term and definition pair are added.

#### Adding a Definition to an Existing Term

- **1.** Select the term from the *Glossary* task pane.
- **2.** Enter a definition or specify a synonym.

# **Updating Terms and Definitions**

#### Editing a Term or Definition

- **1.** Select the term from the *Glossary* task pane.
- **2.** Edit the term or definition.

#### Deleting a Term

- **1.** Select the term from the *Glossary* task pane.
- 2. Select **HOME > DELETE**.



**3.** Click **Yes** to delete the term.



Deleting a term removes the term and its definition from the glossary. If you attempt to delete a term used as a synonym, a warning message is displayed. Any terms using the deleted term as a synonym will be updated to reflect a blank definition.

# **Browsing the Glossary**

You can search for one or more specific terms and view all undefined terms in the glossary.

#### Viewing Term Information

- **1.** Select a term in the *Glossary* task pane.
- **2.** View the definition or synonym in the content area.

# Searching for a Term

1. In the Glossary task pane, enter the term in the [Search for Term] field.



The list refreshes to highlight the first term matching the search criteria. In addition, terms not matching the search criteria are filtered out of the list.

**2.** View the associated definition or synonym in the content area.

#### **Viewing Undefined Terms**

In the Glossary task pane, click the View undefined terms only checkbox.

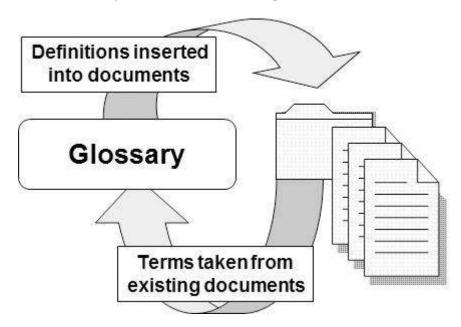


The list refreshes to display terms with a synonym and terms without a definition.

# **Using Globalize**

Definitions for terms in application-created content can be updated using a process called globalization. During globalization, definitions are inserted into documents and new terms in documents are gathered for inclusion in the glossary. The globalization process affects only text within recorded Field/Description tables. Text within Field/Description tables inserted during editing is ignored.

If a term exists in the document, but not in the glossary, the term is added to the glossary with a blank definition. The glossary will then need to be updated with a customized definition of the new term. You can then globalize to distribute the update to the documents containing the term.



Only those documents created with the same template as that used by the current glossary file can be globalized.



Definitions are never retrieved from documents during globalization. If an author has entered a definition for a term in a document, this definition will be overwritten by the globalization process.

The glossary functionality is not case-sensitive, meaning that a term in a document will be considered the same as a term in the glossary regardless of whether the same capitalization rules are applied. Purchase order and Purchase Order in documents are considered the same term. The Glossary is character-string dependent, however; Purchase order (one space) is different than Purchase order (two spaces).

#### **Chapter 12: Using the Glossary**

#### Globalizing Documents

You can globalize a batch of documents directly from the Editor workspace. This task is typically performed by your project administrator. During globalization, definitions are pushed to documents. Optionally, new terms (with a blank definition) are added to the glossary.

The documents to be globalized must be stored in a location accessible by the computer executing the globalization. Prior to globalization, request that your authoring team upload their content to a designated file server.

#### Globalizing a Batch of Documents

1. Select INSERT > APPLY DEFINITIONS.



**2.** Select one of the following options:

If You Want To	Then
Apply definitions to a set of documents	Click Specify the location of the content. Click <b>OK</b> .
Apply definitions to a set of documents and retrieve new terms from these documents	Click Specify the location of the content. Select Retrieve New Terms from Documents. Click <b>OK</b> .



All application content in the specified folder and any subfolders is globalized.

**3.** Optionally, review the Application log for details and information on any errors. The log is stored in the C:\Users\[username]\AppData\Roaming\[applicationdirectory]\version X.xx\Logs directory.

# **Publish the Glossary**

The following subsection describes the steps to publish your glossary.

For detailed information on publishing documents, simulations, and courses, refer to Publishing Content. For information on batch publishing content, the glossary, and your website, refer to Batch Publishing (on page 416).

#### Publishing the Active Glossary

1. Select FILE > PUBLISH > PUBLISH CURRENT.



- **2.** Select the template corresponding to the glossary to be published.
- **3.** Optionally, browse to specify an outbox other than the default.



The additional options below the outbox are applicable only if you are batch publishing content and the glossary. For information on batch publishing content, the glossary, and your website, refer to Batch Publishing (on page 416).

**4.** Click **Publish** to publish the active glossary.



When you publish the glossary, any existing, previously published glossary at the same location is deleted.

When publishing is complete, a summary message is displayed with a hyperlink to the successfully published glossary. The name of the published glossary is determined by the entry in the glossary publication settings in your template. For detailed information on glossary publication settings, refer to Manage All Publications (on page 333).

#### **Chapter 12: Using the Glossary**

Optionally, review the Application and Transformation logs for detailed information on events. In Windows 7 and Windows 8, the logs are stored in the \User\App Data\Roaming\[applictiondatapath]\Version X.X\Logs directory.



To print the glossary, open and print the published index.xml file located in the specified outbox at \[glossary\xml.\]

#### **Integrating a Published Glossary into the Website**

After publishing the glossary and website, the link to the glossary in the upper right of the website will automatically point to the glossary file. Ensure you move all published files to a central file or web server as described in Making Your Website Available to End Users (on page 420).

# **Export a Glossary File**

You can export a glossary file for import into the Server. This is useful if you have an glossary database and are planning to upgrade to the Server-based version of this application.

#### Exporting a Glossary File

- **1.** Open a glossary file.
- 2. Select INSERT > EXPORT.



- **3.** Click **Browse...** to navigate to the export location.
- **4.** Enter a file name in the **File Name** field.
- 5. Click OK.



6. Click OK.



7. Click OK.

ter 12: Using the	Glossary			
_	-			

## **Chapter 13: Using Annotations**

Annotation functionality within the Editor allows authors and reviewers to add notes and comments into content created in the Editor.

#### **Introduction to Annotations**

Annotations allow authors and reviewers to insert comments in the form of notes directly within a document, simulation, or course. Annotations are created within a set; each author or reviewer can have a unique, customized annotation set to contain his notes to the author.

Annotations display in the procedural view and in the course view. Annotations made in one procedural view will affect the other view. Annotations do not display on the published content available to end users. Course annotations can be displayed on a printed course storyboard. For more information, refer to Printing Content (on page 102). Printing course annotations can provide additional information for students and course instructors.

You can display or hide annotations within content. You can toggle the display of annotation sets in the content area.



Course annotations are displayed on the bottom of the content area. Document and simulation annotations are displayed in the task pane in the Document view.





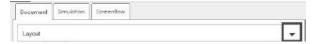
## **Viewing Annotations**

#### Viewing an Annotation Set

- **1.** Open a document, simulation, or course.
- **2.** Perform one of the following actions:

If You Want To	Then
View an annotation set for a document	Select the <b>Document</b> tab.
	Go to Step 3.
View an annotation set for a simulation	Select the <b>Simulation</b> or <b>Course</b> tab.
or course	Select <b>VIEW &gt; ANNOTATIONS</b> to display the <i>Annotation</i> task pane if the annotations do not display at the bottom of the content pane.  Go to Step 5.

**3.** Click the drop-down arrow to the right of the **Layout** field on the **Document** tab.



- **4.** Click **Annotations** from the drop-down list.
- **5.** Perform one of the following:

If You Want To	Then
View annotations for a document	Right-click on the annotation set in the task pane and select <b>View</b> .
	You can also double-click on the annotation set.
	The view will update and you will see the annotation column to the right of the document. Scroll through the document to view the annotation notes. This is why it is helpful to color-code the different annotation sets so it is easier to see the annotations.
View annotations for a simulation or course	In the content area, click on the tab name corresponding to the annotation set. Review the annotation notes.

#### **Chapter 13: Using Annotations**

#### **Hiding All Annotation Sets**

**1.** Perform one of the following actions:

If You Want To	Then
Hide annotations in a document	Select the <b>Document</b> tab. Right-click on an annotation set name in the task pane.
Hide annotations in a simulation or course	Select the <b>Simulation</b> or <b>Course</b> tab. Right-click on an annotation tab in the content area.

2. Click **Hide** to hide all notes within the content area.



If you want to switch back to document layout view, click the drop-down arrow to the right of **Annotations** and toggle back to **Layout**.



If you want to turn off the annotations on the simulation and course views, go to **VIEW > ANNOTATIONS** and de-select the checkbox.

## Creating, Viewing, and Hiding Annotation Sets

An annotation set contains all the individual annotations made by one author or reviewer for a simulation, document, or course. A document or course can have more than one annotation set, but only one annotation set is viewable at a time.

Creating an annotation set automatically creates all annotations within the set. Each annotation within an annotation set is associated with only one element in the document or one page in a course. Annotations are stored as part of the application content; they are not stored separately on the local computer.

Annotations can also be hidden from view.

#### Creating an Annotation Set

- **1.** Create or open a document, simulation, or course.
- **2.** Perform one of the following actions:

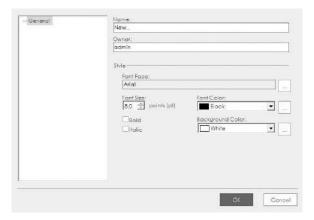
If You Want To	Then
	Select the <b>Document</b> or <b>Simulation</b> tab, and go to Step 3.
Create an annotation set for a course or a simulation	Go to Step 3.

- **3.** Select **VIEW > VIEW ANNOTATIONS** to display the *Annotation* task pane.
- **4.** Perform one of the following actions:

If You Want To	Then
Create an annotation set for a document	Right-click in the task pane, and go to Step 5.
	Click on the <b>Click here to create a new Annotation Set</b> hyperlink, and go to Step 6.

#### **Chapter 13: Using Annotations**

#### 5. Click New....



#### **6.** Complete the following fields:

Field	Description
Name	Enter the name of the annotation set.
Owner	Enter the name of the annotation author.
Style: Font Face	Specify a font for the annotation text from the drop-down list or optionally browse to locate a font.
Style: Font Size	Specify a font size for the annotation text from the drop-down list.
Style: Color	Specify a font color for the annotation text or optionally browse to choose a custom font color.
Style: Bold	Click the checkbox to activate bold formatting.
Style: Italic	Click the checkbox to active italic formatting.
Style: Background Color	Specify a background color for the annotation note or optionally browse to choose a custom background color.

#### 7. Click OK.

#### **Entering Annotation Text**

- **1.** Create or open a document, simulation, or course.
- **2.** Perform one of the following actions:

If You Want To		Then
Enter anno simulation	Annotation text for documents can only be entered on the Simulation tab.	Select the <b>Simulation</b> tab.  Select <b>VIEW &gt; ANNOTATIONS</b> to display the <i>Annotation</i> task pane.  Go to Step 2.
Enter annotation text in a course		Select the Course tab.  Select VIEW > ANNOTATIONS to display the  Annotation task pane.  Go to Step 2.



**3.** In the content area, perform one of the following actions:

If You Want To	Then
Enter annotation text in a document	In the content area, double-click in the annotation note corresponding to the element you wish to annotate, and go to Step 4.
Enter annotation text in a course or a simulation	Navigate to the page you want to annotate.  Click on the appropriate tab.  Click in the annotation content area, and go to Step 4.

**4.** Enter your annotation text.

## **Managing Annotation Sets**

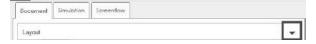
You can create copies of existing annotation sets, modify an annotation set, and delete annotation sets

#### **Duplicating an Annotation Set**

- **1.** Open a document, simulation, or course.
- **2.** Perform one of the following actions:

If You Want To	Then
Duplicate an annotation set in a	Select the <b>Document</b> tab.
document	Go to Step 3.
Duplicate an annotation set in	Select the Simulation or Course tab.
simulation or course	Select <b>VIEW &gt; ANNOTATIONS</b> to display the <i>Annotation</i> task pane if the annotations do not display at the bottom of the content pane.  Go to Step 5.

3. Click the drop-down arrow to the right of the **Layout** field on the **Document** tab.



- **4.** Click **Annotations** from the drop-down list.
- **5.** Perform one of the following actions:

If You Want To	Then
Duplicate an annotation set in a document	Right-click on the annotation set name in the task pane. Select <b>Duplicate</b> .
Duplicate an annotation set in a course or a simulation	Right-click on the tab of the annotation set you want to duplicate, and select <b>Duplicate</b> .

- **6.** Right-click on the duplicated annotation set, and select **Modify**.
- **7.** Specify the annotation set properties. For information on entering properties, refer to Creating an Annotation Set.

#### 8. Click OK.

#### **Updating an Annotation Set**

- **1.** Create or open a document, simulation, or course.
- **2.** Perform one of the following actions:

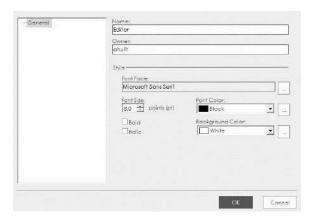
If You Want To	Then
Update an annotation set in a document	Select the <b>Document</b> tab.
	Go to Step 3.
Update an annotation set in simulation	Select the Simulation or Course tab.
or course	Select <b>VIEW &gt; ANNOTATIONS</b> to display the <i>Annotation</i> task pane if the annotations do not display at the bottom of the content pane.  Go to Step 5.

**3.** Click the drop-down arrow to the right of the **Layout** field on the **Document** tab.



- **4.** Click **Annotations** from the drop-down list.
- **5.** Perform one of the following actions:

If You Want To	Then	
Update an annotation set in a document	Right-click on the annotation set name in the task pane.	
	Select Modify	
Update an annotation set in a course	Right-click on the tab of the annotation set you want to duplicate, and select <b>MODIFY</b> .	



#### **Chapter 13: Using Annotations**

- **6.** Edit the annotation set properties. For information on maintaining properties, refer to Creating an Annotation Set.
- 7. Click OK.

#### **Deleting an Annotation Set**

- **1.** Create or open a document, simulation, or course.
- **2.** Perform one of the following actions:

If You Want To	Then
Update an annotation set in a document	Select the <b>Document</b> tab.
	Go to Step 3.
Update an annotation set in simulation	Select the <b>Simulation</b> or <b>Course</b> tab.
or course	Select <b>VIEW</b> > <b>ANNOTATIONS</b> to display the <i>Annotation</i> task pane if the annotations do not display at the bottom of the content pane.  Go to Step 5.

3. Click the drop-down arrow to the right of the **Layout** field on the **Document** tab.



- **4.** Click **Annotations** from the drop-down list.
- **5.** Perform one of the following actions:

If You Want To	Then	
Delete an annotation set in a document	Right-click on the annotation set name in the tasl pane.	
	Select <b>Delete</b> .	
Delete an annotation set in a course	Right-click on the tab of the annotation set you want to duplicate, and select <b>DELETE</b> .	



**6.** Click **Yes** at the confirmation prompt.

## **Managing Annotation Notes**

After you have created your annotation set and individual annotation notes, you can update the text within a note and modify the note format.

#### **Editing an Annotation Note**

**1.** Perform one of the following actions:

If You Want To	Then
Edit an annotation note for a document	Double-click on the annotation set name to edit, and go to Step 2.
Edit an annotation note for a course or a simulation	Go to Step 2.

- **2.** Click in the note in the content area.
- **3.** Edit text as desired.

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# <u>Chapter 14</u>: Using Custom Skins and Modifying CSS Files

The application allows you to manage custom skins for courses, simulations, and guided help publications. You can deploy custom skins with the Editor to provide multiple authors the ability to share and use the custom skins. You can modify CSS files to incorporate your corporate standards and preferences.

## **Creating and Customizing Skins**

The application allows you to create and update custom skins for courses, simulations, and guided help publications. You can deploy the custom skin with the Editor to provide multiple authors the ability to share and use the custom skins.

## **Creating Skins**

#### **Creating Skins**

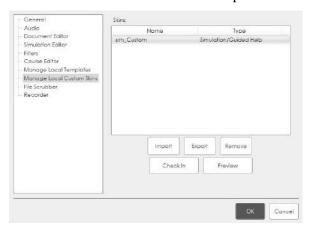
If you do not want to leverage a standard skin delivered with the application, you can create a custom skin.

- **1.** Copy an existing skin from the C:\Users\[username]\AppData\Roaming\[applicationdirectory]\version X.xx\skins\[Course or Sim]\ ART folder.
- **2.** Paste the skin to the C:\Users\[username]\AppData\Roaming\[applicationdirectory]\version X.xx\skins\[Course or Sim]\custom folder.
- **3.** Rename the skin (the folder name). For example: Custom Skin 001
- **4.** Modify the skin.css located in the C:\Users\[username]\AppData\Roaming\[applicationdirectory]\version X.xx\skins\[Course or Sim]\custom\[renamed skin]\skin folder.

## **Managing Custom Skins**

#### Manage Local Custom Skins

- 1. Select FILE > PREFERENCES.
- **2.** Click MANAGE LOCAL CUSTOM SKINS from the left pane.



**3.** Perform one of the following options:

If You Want To	Then	
Import a custom skin	Click Import	
	Navigate to the .uskin file on your local computer and click <b>Open</b> .	
	Click OK.	
Deploy a custom skin	Select a skin from the list.	
	Click Export	
	Deployed custom skins have a .uskin file extension.	
Delete a custom skin	Select a skin from the list.	
	Click Remove	
	Click Yes.	

4. Click Close.

## **Guidance on Modifying Cascading Style Sheets**

#### Guidance on Modifying Cascading Style Sheets

You can modify the .css files to incorporate your corporate standards (for example, font and color scheme).



A complete tutorial on modifying cascading style sheets is beyond the scope of this manual. Several books and websites discuss this topic in detail. In particular, the World Wide Web Consortium (W3C) provides helpful information at http://www.w3.org http://www.w3.org.

The following table provides general guidance on performing common customization tasks in the style sheets.

If You Want To	Go To	Modify
Customize the placement of the Continue button on	The <b>assessment</b> section of the content.css file.	div#assessmentButtons to set the text alignment and background.
assessment stencils		div#assessmentButtons input[type=button] to set the borders and background of all the assessment buttons.
		input#btnContinue, input#btnRetry, input#btnReset, input#btnShowMe and input#btnSkipSim to set border, color and text alignment of each respective button individually.

**Chapter 14: Using Custom Skins and Modifying CSS Files** 

If You Want To	Go To	Modify
Override or replace images displayed in the course menu	The <b>menu</b> section of the skin.css file.	<b>div#courseImage</b> to set the image URL for the course icon.
		div#menuHereImage to set the image URL for the menu here icon.
		div#menuVisitedImage to set the image URL for the menu visited icon.
		<b>div#menuMinusImage</b> to set the image URL for the menu minus icon.
		div#menuPlusImage to set the image URL for the menu plus icon.
		<b>div#menuAssessmentImage</b> to set the image URL for the menu assessment icon.
		<b>div#assessmentPassedImage</b> to set the image URL for the assessment passed icon.
		div#postAssessmentPassedImage to set the image URL for the post assessment passed icon.
		div#postAssessmentImage to set the image URL for the post assessment icon.
		div#menuBranchImage to set the image URL for the menu branch icon.
		div#menuBranchChoiceImage to set the image URL for the menu branch choice icon.
		<b>div#branchConnectorImage</b> to set the image URL for the branch connector icon.
		div#singleBranchImage to set the image URL for the single branch icon.
		div#extendBranchImage to set the image URL for the extend branch icon.
Modify the username prompt in courses and simulations	The user name prompt page section of the skin.css file.	body.uiPromptPageBackground to set the background of the prompt page.
		td.uiPromptBackground to set the image URL or background of the prompt box.
		div#titleTextDiv to set the text color, text alignment and font of the title.
		<b>div.uiPromptText</b> to set the text color, text alignment and font of the prompt text.
Customize the loading page in courses, simulations, and	The <b>loading</b> section of the skin.css file.	div#LoadingMessage to set the background color of the loading page.
guided help		div#LoadingMessage div#loadingText to set the color and text alignment.

## Chapter 14: Using Custom Skins and Modifying CSS Files

If You Want To	Go To	Modify
		div#loadingImage to set the logo dimensions and URL.

<b>Chapter 14: Using Custom Skins and Modifying CSS F</b>	iles
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## <u>Chapter 15</u>: Previewing and Publishing Content

The application offers flexibility in the content types and formats that you can publish. Published content can be incorporated into your end user website.

## **Introduction to Previewing and Publishing Content**

Publishing has many functions, and allows you to:

- Convert certain sections of a single document into complete, stand-alone publications intended for end user consumption.
- Convert your course or simulation into web-ready content.
- Create a printable booklet containing concepts, procedures, and exercises.
- Combine multiple content files into a single master SCORM package for use with an LMS.
- Produce guided help output to use during task execution.

You may publish as often as necessary. Content that is locally published to the same location will overwrite existing content of the same format and type.

For detailed information regarding publishing the glossary and website, refer to Publishing the Active Glossary (on page 277) and Publishing the Active Website (on page 414).

#### **Overview of Document Publishing**

Based on the settings specified by the author template you are using, the following document types may be available to publish:

- ASAP BPP (Business Process Procedure) Mimics the BPP documents that come with an Accelerated SAP (ASAP) implementation.
- ASAP BPP Cue Card (HTML and XML formats only) Mimics the ASAP BPP documents and provides a dynamic, multi-layer format designed specifically for context-sensitive help.
- Configuration Information Lists information such as configuration menu path, key field changes, and date of configuration change.
- Cue Card (HTML and XML formats only) Provides a dynamic, multi-layer document designed specifically for context-sensitive help, includes screenflows.
- Exercise Includes data for a given procedure, and tasks and questions for end users to complete.

- Quick Reference (Flow) Includes overview information and a screenflow.
- Quick Reference (Step) Includes overview information and end user steps without screen images or field definitions.
- Test Document Includes scenarios and results used in system testing.
- Work Instruction Includes overview information, end user procedures with steps, field description tables, screen shots, and screenflows.
- Test Script Publishes an XML file and creates an "Images" folder containing images that correspond to each step in a document created with the application. A Microsoft Excel add-in allows you to upload this publication type to HP Quality Center version 9.2 or higher as a manual test script.

Your available document publishing settings and output types is mandated by your template. For detailed information on creating and maintaining templates, refer to Using Author Templates - Express (see "Using Author Templates" on page 317).

#### **Overview of Simulation Publishing**

Simulations are published as interactive tutorials. Based on the settings specified by the template you are using, the following simulation playback modes may be available to publish:

- Auto Playback: Replays the task; no user intervention is required.
- Standard: Guides the user through the task with step-by-step instructions.
- Self Test: Allows the user to attempt the task and provides guidance when an error is made.
- Assessment: Allows results to be captured and integrated into custom or thirdparty tracking applications.

Interactive tutorials are output as HTML files. HTML output is viewable through standard web browsers.

The tutorials are accessible through a main lesson homepage. The homepage display can be modified via your template. For detailed information on creating and maintaining templates to define your simulation publishing options, refer to Using Author Templates (on page 317).

#### **Chapter 15: Previewing and Publishing Content**

#### **Overview of Course Publishing**

Courses are published as self-paced content in HTML format, which provides optimal output performance by streaming audio after the content is buffered. Courses are interactive and can be played back using a supported web browser.

In addition, you can publish courses to PDF, print, and Word for distribution to your end users.

#### **Overview of Student Guide Publishing**

Student guides are published to Microsoft Word format. You must ensure that all application source files exist in the same directory as the student guide. In addition, your source files must use the same template as the student guide to which they are inserted.



After publishing a student guide, you must open the guide in Microsoft Word and update the table of contents as per Word's table of contents update functionality.

#### **Overview of Course Package Publishing**

A course package can automatically publish your course or simulation as an AICC- or SCORM-conformant package ready for upload to your AICC or SCORM LMS. A course package (.ucp) can be published to a .zip file to allow you to combine multiple content files into a single master SCORM Package.

#### **Overview of Guided Help Publishing**

Guided Help is published HTML content designed to be used during task execution. Users can start guided help playback for on-the-job support.

## **Previewing a Simulation**

You can preview simulations prior to publishing output locally or by checking the content into the Server.

1. Select **FILE > PREVIEW SIMULATION...** to display the *Preview Simulation* window.



**2.** Click on one of the listed tutorial modes to launch the simulation.



Hyperlinks and hotspots inserted into the simulation will not be active until the simulation is published.

For detailed instructions on interacting with a simulation during playback, refer to Viewing Simulations (on page 311).

## **Previewing a Course**

You can preview individual course pages prior to publishing. Only one page can be viewed at a time.

**1.** In the *Course* pane, click on the desired page to preview.



Hyperlinks, hotspots, and simulations inserted into the course will not be active until the course is published.

**2.** Select the **Preview** tab.



### **Publishing Content**

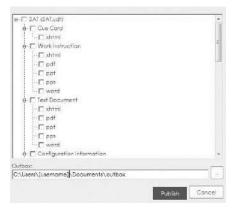
You can publish the current open content, or specify an inbox of content to publish in batch mode.



You must have Microsoft Office (specifically, Microsoft PowerPoint and Word) installed on your computer to locally publish .ppt, .pptx, .doc, .docx and .pps output.

#### **Publishing Active Content**

1. Select FILE > PUBLISH CURRENT....



**2.** Perform one of the following actions:

If You Want To	Then
Publish documents and simulations	Select the appropriate checkboxes to the left of the desired simulation and document types and formats.
Publish a course	Select the HTML, PDF, Print, or Word option.
Publish a student guide	Select the Word option.
Publish a course package	Select the zip option.
Publish guided help	Select the Guided Help option.

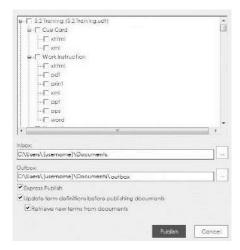
- **3.** Optionally, browse to specify an outbox other than the default.
- **4.** Click **Publish** to publish the selected output types and formats.

#### **Chapter 15: Previewing and Publishing Content**

When publishing is complete, a summary message is displayed with a hyperlink to successfully published content. For detailed information on viewing simulation playback, refer to Viewing Simulations (on page 311). For detailed information on viewing a course, refer to Viewing Courses (on page 313).

#### **Batch Publishing Content**

1. Select FILE > BATCH PUBLISH....



- **2.** Select the appropriate checkboxes to the left of the desired template, content types, glossa\ries, websites, and associated formats.
- **3.** Optionally, browse to specify an inbox and/or outbox other than the default.
- **4.** Optionally, select the **Publish** checkbox to publish only files in the inbox that have changed since the last publish operation.



When this option is enabled, the application scans the inbox folder to determine which documents and courses have been modified since the last publish operation. The application then includes only these changed files in the list of content to be published to the outbox folder.

**5.** Click **Publish** to publish the selected output types and formats.

When publishing is complete, a summary message is displayed with hyperlinks to successfully published content. For detailed information on viewing simulation playback, refer to Viewing Simulations (on page 311). For detailed information on viewing course playback, refer to Viewing Courses (on page 313).

#### Prerequisites for Importing Content into an LMS

Perform the following steps to generate simulations and courses that are ready for import into your SCORM- or AICC-conformant LMS:

- 1. Select the Create package option within the template. Ensure the correct version of SCORM or AICC is selected. For more information, refer to Default Publication Settings: Course: LMS Settings (on page 363) and Default Publication Settings: Simulation: LMS Settings (on page 346).
- **2.** Publish the simulation(s) and/or course(s).



If the content does not contain an assessment, only the completion status will be captured. For more information, refer to Publishing Content for Use in an LMS (on page 309).

**3.** Locate the SCORM- or AICC-conformant .zip file in the published folder.

#### Publishing Content for Use in an LMS

- **1.** Create or open a course or simulation.
- 2. Select File > Publish Current... to publish the content to your local drive.



The course or simulation template must have the Create Package option enabled. For more information, refer to Default Publication Settings: Course: LMS Settings (on page 363) and Default Publication Settings: Simulation: LMS Settings (on page 346).

- **3.** Select the appropriate Course or Simulation output type(s).
- **4.** In the **Outbox** field, select a local folder.
- 5. Click Publish.



The publishing process will create a [your file name].zip file in one of the following locations depending on your document type:

[applicationdirectory] Courses: [your file name]\course\html\ [applicationdirectory] Simulations: [your file name]sim\html\

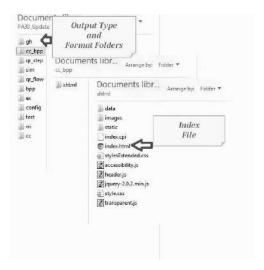
**6.** Provide the .zip file package to your LMS administrator for upload according to the appropriate LMS specifications.

### **Viewing and Working with Published Content**

#### **Viewing Documents**

Published content is stored in the specified outbox folder. Within this folder, content is stored in subfolders based on file name.

Within each folder, output type and format subfolders are displayed. Navigate to the desired subfolder and double-click on the index file to display content.



#### Working with Test Scripts

The test script publication publishes an XML file formatted for use in a Microsoft Excel spreadsheet. If you are using HP Quality Center version 10.0 or higher, the publication will also publish an "Images" folder containing images that correspond to each step in a document created by the application. The XML file contains paths to the images, which are automatically attached to the steps in HP Quality Center version 10.0 or higher.

This document type is available only from the Editor. For more information on installing and configuring the Microsoft Excel Add-In, refer to the "Microsoft Excel Add-In Guide" provided with your supported version of HP Quality Center.

The following provides an overview of how to enable and produce a test script publication:

- **1.** Enable **Test Script** on the *Publications* tab in the template.
- **2.** Publish the test script from the Editor.
- **3.** Open the test script in Microsoft Excel. Only the step text will be published in the Excel Spreadsheet (XML); no images will display.

- **4.** Complete the **Subject** and **Expected Results** columns fields. Documents do not contain a field that represents these values.
- **5.** Upload the test script to HP Quality Center using the Microsoft Excel Add-in.

#### **Viewing Simulations**

If you are viewing a simulation outside of a SCORM- or AICC-conformant LMS, enter a username in the **Please enter a user name for the test results** field, and click ...

All output modes can be started by selecting a hyperlink on the published homepage.



For detailed information on customizing playback modes, refer to Default Publication Settings: Simulation: General Settings (on page 341).

#### Viewing a Standard Simulation

In this playback mode, the end user interacts with the lesson. End users are shown the action hotspots, the steps in the *Steps* window, the step status bar, notes, and any incorporated audio. The end user performs the actions to complete the tutorial.

Standard mode allows the end user to skip around in the lesson by selecting the desired step in the *Steps* window. The *Steps* window display can also be customized.

The following playback options are available:

If You Want To	Then
Enable or disable playback of an associated audio file	Click on the bottom right of the simulation playback page.

#### **Chapter 15: Previewing and Publishing Content**

If You Want To	Then
Remove a bookmark	To remove a bookmark, select the bookmarked step, and click ₹.
Hide the Steps window	To hide the Step Window, click <b>Hide Steps</b> .
Restore the <i>Steps</i> window	To restore the <i>Step Window</i> , click <b>Restore Steps</b> .
Send the simulation output to a printer	To send the step text and screens to the printer, click in the <i>Step Window</i> .
Expand or collapse the <i>Step Window</i> window	Click in the Step Window.
Move to the next or previous step	Click on on the bottom left of the simulation playback page.

#### Viewing an Auto Playback Simulation

This playback mode will automatically run the lesson without user interaction. In this mode, the application performs the actions to complete the simulation with the user as an observer. Although the action hotspots and step status bar are viewable, the user has no input into the actions occurring during playback of the lesson. A Control Toolbar is displayed during the Auto Playback mode so that the user can reverse, pause, forward, stop, or resume the lesson playback. In addition, the user can move forward or backward by selecting a step in the *Steps* window.

For instructions on creating printable output and inserting bookmarks, refer to Viewing a Standard Simulation (on page 311). In Auto Playback mode, the user must first stop the playback before inserting a bookmark.

#### Viewing a Self-Test Simulation

The Self-Test has no *Steps* window instructions, hotspots, notes, audio playback, or step status bar information. In this playback mode, the user is encouraged to remember and perform all necessary steps for testing purposes.

If you have enabled the display of hints for this lesson or for all lessons, the hint for the nonessential data will display in the lower left of the playback window. For example, one step of the simulation assessment might require users to enter a training ID, but in real life they will enter their own user id. When creating the simulation, you can type a note in the hint field like "Type Training ID 0001 for this simulation. On the production site, you will use your own User ID." For more information on enabling hints, refer to Default Publication Settings: Simulation: General Settings (on page 341).

The user must perform all steps within the simulation from memory. If the user makes a mistake on a step, a Help window will display. By selecting **Yes** on the Help window, the system will display only the location of the required action with the appropriate hotspot.

Upon completion of a lesson in Self-Test mode, the user will receive an accuracy score measuring his performance.

#### Viewing an Assessment Simulation

The Assessment mode has no *Steps* window instructions, hotspots, notes, audio playback, or step status bar information. In this playback mode, the user is encouraged to remember and perform all necessary steps for testing purposes.

If you have enabled the display of hints for this lesson or for all lessons, the hint for the nonessential data will display in the lower left of the playback window. For example, one step of the simulation assessment might require users to enter a training ID, but in real life they will enter their own user id. When creating the simulation, you can type a note in the hint field like "Type Training ID 0001 for this simulation. On the production site, you will use your own User ID". For more information, refer to Default Publication Settings: Simulation: General Settings (on page 341).

This mode also provides the ability to send test results. To capture the results of an assessment tutorial if you are working outside of an LMS, you must enter a URL specifying the test result destination in the template. For complete details on specifying assessment options in the template, refer to Default Publication Settings: Simulation: General Settings (on page 341).

The user must perform all steps within the simulation from memory. If the user makes a mistake on a step, a Help window will display. By selecting **Yes** on the Help window, the system will display only the location of the required action with the appropriate hotspot.

Upon completion, the user will receive an accuracy score measuring his performance.

A user can view, filter, and sort all assessment history on the Server, if applicable.

#### **Viewing Courses**

If you are using an LMS or score catcher, enter a username in the **Please enter a user name for the test results** field, and click .

#### **Chapter 15: Previewing and Publishing Content**

View a course by selecting the **Course** hyperlink on the published homepage.



Buttons such as **Back** and **Next** are used to navigate through the course. The **Menu** button allows the user to display an outline view of course content and identify his location within the course. The user can also jump to different pages within the course.

The audio toolbar allows the user to play, pause, stop, and mute the audio that accompanies an individual page.

The **History** option allows the user to display only pages that have been visited. For example, if a user wanted to change a choice, or review page content, selecting this option displays only the pages visited. This is useful if your course incorporates branching so that the user sees only content relevant to the branch selected, or if a user wants to go directly to a specific page that has already been visited.

A user can opt to zoom into an image on a published page by hovering over the image and clicking the plus (+) sign on the image. This will open the image in a new window.

When a user reaches the end of the course, the user will be given the option to continue into the assessment.

A user can exit the course at any time by clicking **Exit**. The user will be prompted to confirm course results.

Upon completion, the user will receive an accuracy score measuring his performance.

#### **Viewing Student Guides and Course Packages**

Published student guide content is stored in the specified saved location. You can view published student guides by opening them in Microsoft Word.

Published course package content is stored as a .zip file in the specified saved location. You can view content within a published course package by opening the index.html file in a web browser.

#### Viewing Simulations on the Apple iPad

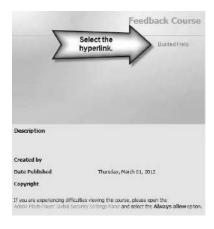
The application supports playback of simulations on Apple iPads. Because the iPad does not natively support Windows-specific keys on its keyboard, the application provides specific key combinations to allow users to complete simulations.

The following options are available:

If You Want To	Then
Display iPad-specific help	Click on the bottom right of the simulation playback page.
Enable a right-click event	Click on the bottom right of the simulation playback page.
Enable the Control (CTRL) key	Click on the bottom right of the simulation playback page.
Enable the Alt key	Click on the bottom right of the simulation playback page.
Enable the Shift key	Click on the bottom right of the simulation playback page.

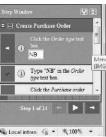
#### **Viewing Guided Help**

Guided help is launched by selecting the hyperlink on the published content home page.



#### **Chapter 15: Previewing and Publishing Content**

Once the user starts playback, guided help will automatically run without user interaction. This mode is quite similar to the auto playback mode in simulations; the application performs the actions to complete the transaction with the user as an observer.



A Control Toolbar is displayed in the guided help to allow users to reverse, pause, forward, stop, or resume the help playback. In addition, the user can move forward or backward by selecting a step in the *Step* window.

If You Want To	Then
Play the playback	Click on the bottom right of the help playback page.
Pause the playback	Click on the bottom right of the help playback page.
Advance one step	Click on the bottom right of the help playback page.
Reverse one step	Click on the bottom right of the help playback page.
Change Options	Click on the top right to open Options.  Refer to Setting Guided Help Options for additional information.
Change to current step mode	Click on the top right of the help playback page to toggle between Current Step mode and Full View mode.
	Current Step mode focuses on the current step only. Full View mode displays the entire transaction and highlights the current step.

Author templates control the formatting and publishing options available to authors. Templates allow you to set standards and maintain consistency within your authoring team. The template also controls the functionality and display of your glossary and website.

# **Introduction to Author Templates**

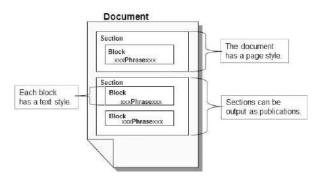
A key capability of ART is the ability to allow administrators to establish and enforce standards through the use of author templates. Author templates contain configuration and style settings to control the appearance and content of your training materials. Templates help you to enforce consistency via these predetermined formatting and configuration settings. Consistent formatting enables your users to quickly and easily find information in all content.

Author templates provide control over the following elements.

- Styles a group of formatting options that relate to paragraphs or character text.
- Publications a designator indicating content output.
- Phrases a group of culture-specific boilerplate text items that are placed into a block by default.
- ART Properties metadata such as document title, owner, and version used to describe content.
- Image, Data, and Language Management allows you to control images, data fields, and languages associated with a template.

You can edit author templates via the Editor.

The following diagram illustrates many of the basic procedural document elements that you can modify within the template:



### **Managing Author Templates**

At the start of your project, you should create a new template and specify your configuration settings.

Each file is linked to a template via the template's unique 32-bit identifier.

During creation and edit, author templates are stored on your computer in the following locations:

C:\Users\[username]\AppData\Roaming\[applicationdirectory]\version X.xx\templates

You can manage local templates directly through the Editor. Author templates have a .udt file extension.

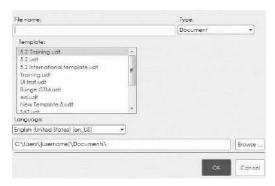
### **Create and Open a New Author Template**

The following best practices apply to your use of author templates:

- Create a new template using the FILE > NEW menu in the Editor. Do not copy and rename a .udt file. The copy process renames the file but does not modify the template's unique identifier. A document is linked to a template via the template identifier, not the template name.
- After creating a .udt file, do not rename the file via Microsoft Windows
   Explorer as this may cause an author to have multiple template files with the
   same identifier.

#### Creating a New Author Template

**1.** From the Editor, select **File > New**.



- **2.** Enter a name for the new template in the **Name** field.
- **3.** Select **Template** from the **Type** drop-down list.
- **4.** Select a template from the **Template** list.
- 5. Click OK.



Refer to any of the following subsections for more information on customizing the template.

#### Opening a Template

- **1.** From the Editor, select **FILE > OPEN > OPEN TEMPLATE**.
- **2.** Select the template you want to open.
- **3.** Optionally, select **Lock template for editing**.
- 4. Click OK.

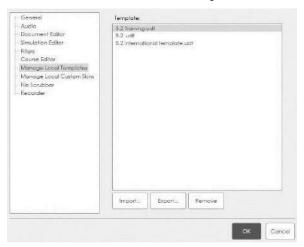


The standard author template delivered with the product cannot be opened in the Editor.

#### Managing Local Templates

1. Select FILE > PREFERENCES.

### **2.** Click MANAGE LOCAL TEMPLATES from the left pane.



**3.** Perform one of the following options:

If You Want To	Then
Import a template	Click Import
	Navigate to the template and click <b>Open</b> .
	Click OK.
Export a template	Select a template from the list.
	Click Export
	Navigate to the template and click <b>Open</b> .
	Enter a name for the template.
Remove a template	Select a template from the list.
	Click Remove.
	Click <b>Yes</b> .

# **Specifying New Template Settings: General**

#### Specifying General Settings: Information

- **1.** From the Editor, open the new template.
- **2.** Click **General** on the status bar.

#### **3.** Click **Information** in the task pane.



### **4.** Review the following information:

Field	Description
Name	Specifies the name of the new template.
GUID	Specifies the unique ID of the template.
Show file properties on first save	Select the <b>Show file properties on first save</b> checkbox to display the <i>Properties</i> window to the author upon the first save during a new recording.
Show "Press Return' step after Field Description Table	If enabled, the 'Press Return' step is displayed after Field/Description tables.
Field Label Separator	Specifies what character should be used to separate multiple labels in a Field/Description table.
Default Screen Display for Steps in the Document Editor	Select from the following display options: Only if it is the first time this screen is used, Always, or Never.
Callout Color	Select the color to be used for displayed callouts. Optionally, click <b>Select</b> to choose a color.
Background Color	Select the background color to be used for displayed masks.
Border Color	Select the border color to be used for displayed masks.

### **5.** Perform one or more of the following options:

If You Want To	Then
Add built-in or custom properties to be used to organize the website hierarchy	Click on the desired property in the <b>Properties</b> box.
Only enabled properties will be displayed in the <b>Properties</b> box. For	Click the right arrow to move the property to the <b>Hierarchy</b> box.
detailed instructions on enabling built- in and custom properties, refer to Specifying Built-In or Custom Properties (on page 94)	If you will be building your website based on properties, it is helpful to ensure the above option - <b>Show file properties on first save</b> - is enabled. This will prompt your authors to specify properties when creating content.

If You Want To	Then
Remove built-in or custom properties to be used to organize the website hierarchy	Click on the desired property in the <b>Hierarchy</b> box. Click the left arrow to move the property to the <b>Properties</b> box.
Specify the hierarchy of selected properties	Use the up and down arrows to order the hierarchy of properties.

**6.** Select FILE > SAVE to save the template.

### Specifying General Settings: Images

- **1.** From the Editor, open the new template.
- 2. Click the General tab.
- **3.** Select **Images** in the *Task Pane*.



**4.** Perform one of the following options:

If You Want To	Then
Add an image to the template	Click Add.
	Navigate to the image and click <b>Open.</b>
Update an image	Select the image to update, and click <b>Update</b> .
	Navigate to the updated image, and click <b>Open</b> .
Delete a custom image	Select the custom image from the list, and click <b>Delete</b> .
	At the prompt, click Yes.
	You cannot delete the standard images delivered with the application.



A preview of the selected image will display to the right.

**5.** Select FILE > SAVE to save the template.

### Specifying General Settings: Data Files

- **1.** From the Editor, open the new template.
- 2. Click the General tab.
- **3.** Select **Data Files** in the *Task Pane*.



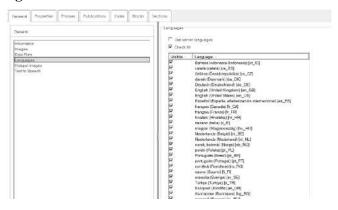
**4.** Perform one of the following options:

If You Want To	Then
Add a data file to the template	Click Add.
	Navigate to the data file and click <b>Open.</b>
Update a data file	Select the data file to update, and click <b>Update</b> .
	Navigate to the updated data file, and click <b>Open</b> .
Modify a data file	Select a data file, and click <b>Modify</b> .
	Edit the file, and select <b>FILE &gt; SAVE</b> .
	Basic knowledge of HTML, CSS, and JavaScript is required.
	Optionally, click <b>Change Editor</b> to specify a different data file editor.
Delete a custom data file	Select the custom data file from the list, and click <b>Delete</b> .
	At the prompt, click Yes.
	You cannot delete the standard data files delivered with the application.

**5.** Select FILE > SAVE to save the template.

### Specifying General Settings: Languages

- **1.** From the Editor, open the new template.
- 2. Click the General tab.
- **3.** Select **Languages** in the *Task Pane*.



**4.** Perform one of the following options:

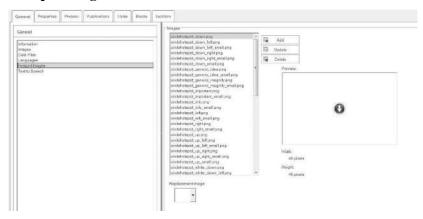
If You Want To	Then
Manually select languages to be	Deselect Use server languages.
enabled in this template	Select or deselect one or more checkboxes in the <b>Visible</b> column.
Select all languages to be used in this template.	Select Check All.

**5.** Select FILE > SAVE to save the template.

# Specifying General Settings: Hotspot Images

- **1.** From the Editor, open the new template.
- 2. Click the General tab.

**3.** Select **Hotspot Images** in the *Task Pane*.



**4.** Perform one of the following options:

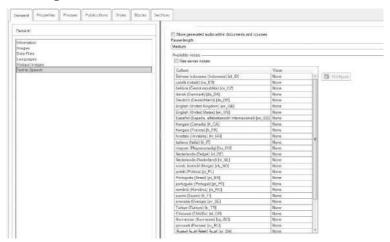
If You Want To	Then
Add an image	Click Add.
	Browse to the image and click <b>Open</b> .
Update an image	Select an image from the <i>Images</i> list and click <b>Update</b> .
	Browse to the updated image and click <b>Open</b> .
Delete an image	Select an image from the <i>Images</i> list and click <b>Delete</b> .
	Click Yes.
Choose a replacement image	Select an image from the <i>Images</i> list.  Click the <i>Replacement Image</i> drop down list and
	select an image.

**5.** Select FILE > SAVE to save the template.

### Specifying General Settings: Text To Speech

- **1.** From the Editor, open the new template.
- 2. Click the General tab.





### **4.** Perform one of the following options:

If You Want To	Then
Store text to speech audio within the source document or course	Check Store generated audio within documents and courses.
	Selecting this option allows authors to play the generated audio from the Editor without having text to speech voices installed on their computer.
	If this setting is disabled, the text to speech audio is saved only when the document or course is published.
	Storing text to speech audio within the source file will increase the size of the document or course.
Change the length of the pause between words for text to speech playback	Select from the following options: None, Extra Small, Small, Medium (default), Large, Extra Large.
Configure a voice for text to speech	Select a language/culture from the <i>Available Voices</i> list and click <b>Configure</b> .
	Choose a voice from the Available Voices list.
	Click <b>OK</b> when finished making a selection or <b>Cancel</b> to select another voice from the previous screen.



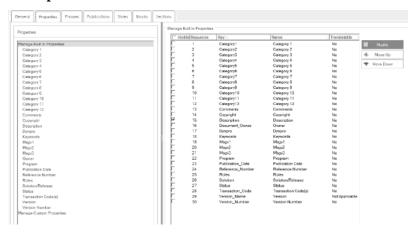
SAPI5 compliant voices must be installed to use text to speech functionality. For more information, refer to the *Technical Specifications*.

Additional voices may be installed on the Server for publishing, but not locally available on your machine. Please contact your local application administrator with any questions.

### **Specifying New Template Settings: Properties**

### Managing Built In Properties

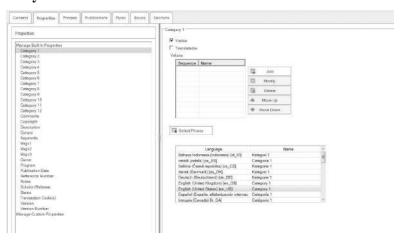
- **1.** From the Editor, open the new template.
- **2.** Click the **Properties** tab.



- **3.** To make the property visible to authors in the *Properties*... window, click the **Visible** checkbox.
- **4.** Perform one of the following options:

If You Want To	Then
Move the value earlier in the list	Click <b>Move Up</b> one or more times as needed.
Move the value later in the list	Click <b>Move Down</b> one or more times as needed.

5. Click Modify.



**6.** Perform one of the following options:

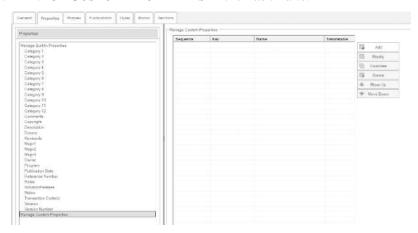
If You Want To	Then
Make the value visible.	Check the Visible checkbox.
Make the value translatable.	Check the <b>Translatable</b> checkbox. This option is only available if the <b>Visible</b> checkbox is checked.
Add a value	Click Add.
	Enter a value.
	Click <b>OK</b> .
Modify a value	Select a value.
	Click Modify.
	Edit the text.
	Click OK.
Delete a value	Select a value.
	Click <b>Delete</b> .
	Click Yes.
Add a custom phrase	Click Select Phrase.
	Click Add.
	Select a language from the left.
	Enter the text in the content area.
	Click <b>OK</b> .
Select a phrase	Click Select Phrase.
	Select a language from the <b>Language</b> drop-down list.
	Select a phrase from the <b>Phrase</b> listbox. Optionally, enter text into the <b>Phrases</b> field to search for text.
	Click <b>OK</b> .

**7.** Select **FILE > SAVE** to save the template.

# Creating and Managing Custom Properties

- **1.** From the Editor, open the new template.
- **2.** Click the **Properties** tab.

**3.** Select MANAGE CUSTOM PROPERTIES in the *Task Pane*.



**4.** Select one of the following options:

If You Want To	Then
Add a new custom property	Click Add.
	Select a language from the drop-down list.
	Enter a name.
	Click OK.
	Go to Step 5.
Modify an existing custom property	Go to Step 5.
Duplicate an existing custom property	Select a custom property from the <i>Task pane</i> and click <b>Duplicate</b> .
	Select a language from the drop-down list.
	Enter a name.
	Click OK.
	Go to Step 5.
Delete the selected property	Select a custom property from the <i>Task Pane</i> and click <b>Delete</b> .
	Click Yes.
	Go to Step 5.
Move the property earlier or later in the list.	Select a custom property from the <i>Task Pane</i> and click <b>Move Up</b> or <b>Move Down</b> one or more times as needed.

- **5.** Select the custom property from the *Task Pane* and click **Modify**.
- **6.** Perform one of the following options:



Based on the item selected, some options may not display.

If You Want To	Then
Make the property visible to authors	Check the <b>Visible</b> checkbox.
Make the property translatable	Check the <b>Translatable</b> checkbox. This option is only available if the <b>Visible</b> checkbox is checked

	and there are no values assigned to the property.
Add values to the property	Click Add.
	Enter a value.
	Click OK.
Modify values to the property	Select a value.
	Click Modify.
	Edit the text.
	Click OK.
Delete values to the property	Select a value.
	Click <b>Delete</b> .
	Click Yes.
Move the value	Select a value.
	Click <b>Move Up</b> or <b>Move Down</b> one or more times as needed.

#### 7. Click Select Phrase.

**8.** Perform one of the following options:

If You Want To	Then
Add a custom phrase	Click Add.
	Select a language from the left.
	Enter the text in the content area.
	Click OK.
Select a phrase	Select a language from the <b>Language</b> drop-down list.
	Select a phrase from the <b>Phrase</b> listbox. Optionally, enter text into the <b>Phrases</b> field to search for text.
	Click OK.

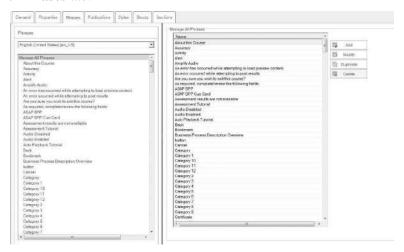
**9.** Select FILE > SAVE to save the template.

# **Specifying New Template Settings: Phrases**

# Managing Phrases

**1.** From the Editor, open the new template.

2. Click the Phrases tab.



- **3.** Select a language from the **Language** drop-down list in the *Task Pane*.
- **4.** Choose a phrase name.



The following table lists the phrases for actions during recording and the common phrases for keyboard keys.

Field	Description
Click %s %t %u	%s = label
	% t= control type
	%u = image
Double-click %s %t %u	%s = label
	% t= control type
	%u = image
Right-click %s %t %u	%s = label
	% t= control type
	%u = image
Right double-click %s %t	%s = label
%u	% t= control type
	%u = image
Type %s in the %t %u	%s = typed text
Drag %s to %t	%s = first image
	%t = second image
Up, Down, Left, Right	Press "Up"
	Press "Down"
	Press "Left"
	Press "Right"

Page Up, Page Down	Press "Page Up"
	Press "Page Down"
Tab	Press "Tab"
Return	Press "Return"
Home, End	Press "Home" Press "End"
Insert, Delete	Press "Insert" Press "Delete"

### **5.** Perform one of the following options:

If You Want To	Then
Add a phrase	In the Content Pane, click Add.
	Select a language from the left navigation pane.
	Enter the phrase in the Content Pane.
	Click OK.
Modify a phrase	Select a phrase in the Content Pane.
	Click Modify.
	Optionally, select a new language from the left navigation pane.
	Edit the phrase in the Content Pane.
Duplicate a phrase	Select the phrase you want to duplicate from the <i>Content Pane</i> .
	Click <b>Duplicate</b> .
Delete a phrase	Select the phrase you want to delete.
	Click <b>Delete</b> .
	At the prompt, click Yes.

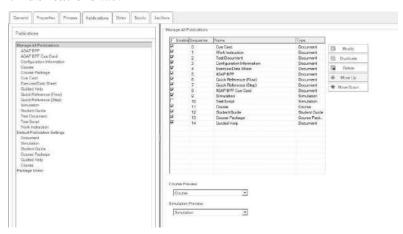
**6.** Select FILE > SAVE to save the template.

# **Specifying New Template Settings: Publications**

# Manage All Publications

**1.** From the Editor, open the new template.

**2.** Click the **Publications** tab.



- 3. Click the checkbox in the **Enabled** column next to the publication types you want to activate.
- **4.** Choose from the following options:

Field	Description	
Course Preview	Select an option from the drop-down list to display which style course you want to preview.	
	You can create an option by duplicating and modifying the <b>Course</b> publication type as described in Duplicating, Deleting, and Moving Publication Types (on page 336).	
Simulation Preview	Select an option from the drop-down list to display which style simulation you want to preview.	
	You can create an option by duplicating and modifying the <b>Simulation</b> publication type as described in Duplicating, Deleting, and Moving Publication Types (on page 336).	

- **5.** Select a publication type from the *Manage All Publications* list in the task pane.
- 6. Click Select Phrase.
- **7.** Perform one of the following options:

If You Want To	Then
Add a custom phrase	Click Add.
	Select a language from the left.
	Enter the text in the <b>Content</b> area.
	Click OK.

If You Want To	Then
Select a phrase	Select a language from the <b>Language</b> drop-down list.
	Select a phrase from the <b>Phrase</b> listbox. Optionally, enter text into the <b>Phrases</b> field to search for text. Click <b>OK</b> .

### **8.** Perform one of the following options:

If You Want To	Then
Add a section	Click Add.
	Select a section from the list.
	Click OK.
Remove a section	Click Remove.
	At the prompt, click <b>Yes</b> .
Move the section earlier in the list	Click <b>Move Up</b> one or more times as needed.
Move the section later in the list	Click <b>Move Down</b> one or more times as needed.



Section functionality is not applicable to the glossary or website publication types.

**9.** Review the publication type in the **Type** field.



The **Type** field is not configurable.

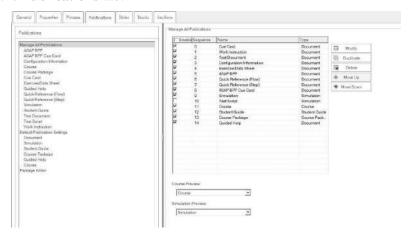
- **10.** Enter a format name in the **Name** field.
- **11.** Perform one of the following options:

If You Want To	Then
Use default publication settings	Select the checkbox next to Use Default Publication Settings.
Create custom publication settings	Deselect the checkbox next to Use Default Publication Settings.
	Click a publication setting under the selected publication type.
	Refer to Setting Default Publication Settings for more information.

**12.** Select **FILE > SAVE** to save the template.

### Duplicating, Deleting, and Moving Publication Types

- **1.** From the Editor, open the new template.
- 2. Click the **Publications** tab.



**3.** Choose from the following options:

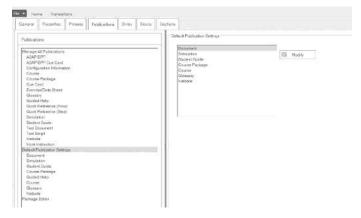
If You Want To	Then
Copy a publication type	Select the publication type you want to copy, and click <b>Duplicate</b> .
Delete a publication type	Select the publication type you want to delete, and click <b>Delete</b> .
Move the publication type earlier in the list	Click <b>Move Up</b> one or more times as needed to determine where the publication type will display in the application website drop-down list.
Move the publication type later in the list	Click <b>Move Down</b> one or more times as needed to determine where the publication type will display in the application website drop-down list.

**4.** Select FILE > SAVE to save the template.

### **Setting Default Publication Settings**

- **1.** From the Editor, open the new template.
- 2. Click the Publications tab.

# 3. Click **Default Publication Settings** in the task pane.



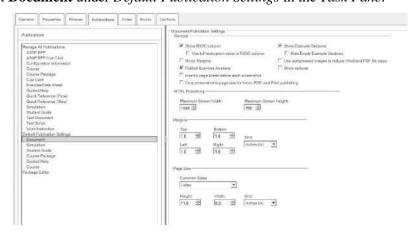
# **4.** Select one of the following options:

If You Want To	Then
Modify document publication settings	Select <b>Document</b> under <i>Default Publication Settings</i> in the task pane.
	Refer to Default Publication Settings: Document (on page 338) for more information.
Modify simulation publication settings	Select <b>Simulation</b> under <i>Default Publication Settings</i> in the task pane.
	Refer to Default Publication Settings: Simulation: General Settings (on page 341), Default Publication Settings: Simulation: User Interface Settings (on page 345), Default Publication Settings: Simulation: LMS Settings (on page 346), and Default Publication Settings: Simulation: Caption Settings (on page 348) for more information.
Modify student guide publication settings	Select <b>Student Guide</b> under <i>Default Publication Settings</i> in the task pane.
	Refer to Default Publication Settings: Student Guide (on page 350) for more information.
Modify course package settings	Select <b>Course Package</b> under <i>Default Publication Settings</i> in the task pane.
	Refer to Default Publication Settings: Course Package (on page 351) for more information.

If You Want To	Then
Modify course publication settings	Select <b>Course</b> under <i>Default Publication Settings</i> in the task pane.
	Refer to Default Publication Settings: Course: General Settings (on page 357), Default Publication Settings: Course: User Interface Settings (on page 360), Default Publication Settings: Course: LMS Settings (on page 363), Default Publication Settings: Course: Caption Settings (on page 365), and Default Publication Settings: Course: Page Settings (on page 366) for more information.
Modify guided help settings	Select <b>Guided Help</b> under <i>Default Publication Settings</i> in the task pane.
	Refer to Default Publication Settings: Guided Help: General Settings (on page 352), Default Publication Settings: Guided Help: User Interface Settings (on page 353), Default Publication Settings: Guided Help: Captions (see "Default Publication Settings: Guided Help: Guided Help Captions" on page 355), and Default Publication Settings: Guided Help: Mobile Device Publication Settings (on page 356) for more information.

### **Default Publication Settings: Document**

- **1.** From the Editor, open the new template.
- 2. Click the **Publications** tab.
- **3.** Select **Document** under *Default Publication Settings* in the *Task Pane*.





The Editor has the capability to automatically crop screen images in Word, PDF, and Print published outputs. You can activate this feature by selecting the **Crop screen shot to page size for Word, PDF, and Print publishing** checkbox in the table below. Most monitors are wider than the standard letter layout page width. If full-size screenshot images are included in the .udc file by default, then they will be scaled to fit into the page for these published outputs. This can result in a degradation of image readability, especially with "wide screen" monitors. This option provides an automated way to avoid the scaling of screenshots in Word, PDF, and Print outputs.

#### **4.** Complete/review the following fields:

Field	Description
Show R/O/C column	Select <b>Show R/O/C column</b> to display the R/O/C column in published output.
Use full-text option value in R/O/C column	Select <b>Use full-text option value in R/O/C column</b> to display Required, Optional, or Conditional in the published content. <b>Show R/O/C column</b> must be selected in order to enable this option.
Show Example Sections	Select <b>Show Example Sections</b> to display the example sections.
Hide Empty Example Sections	Select <b>Hide Empty Example Sections</b> to hide empty example sections. <b>Show Example Sections</b> must be selected in order to enable this option.
Mirror Margins	Select <b>Mirror Margins</b> to create booklet-style, double-sided pages for PDF and Word outputs.
Use compressed images to reduce Word and PDF file sizes	Select this option to use compressed images in the Word and PDF outputs. Compressing images will reduce the overall file size for both Word and PDF files.
Publish Exercise Answers	Select <b>Publish Exercise Answers</b> to publish exercise answers.
Show callouts	Select <b>Show callouts</b> to display callouts in published outputs.
	Callouts will only display in publications containing screenshots.  The font, font size, and line thickness of the callout is not configurable.
	This setting only applies to publications and is independent of the separate "Show callouts" setting in the Document Editor FILE > PREFERENCES that controls whether Editor callouts are visible in the Editor.
Insert a page break before each screen shot	Select Insert a page break before each screen shot to insert a break before screen shots.
Screen	Select minimum and maximum screen heights and widths.

Field	Description	
Crop screen shot to page size for Word, PDF, and Print publishing	Select to automatically crop screen images in Word, PDF, and Print published output. A red-dotted rectangle displays on the screenshot images that will be cropped in Word, PDF, and Print published outputs. This rectangle is drawn only in the Document Editor. If the size of a given screenshot image is less than the page size defined in the template, then the entire screen will be included in Word, PDF, and print published outputs even if the Crop screen shot to page size for Word, PDF, and Print publishing is turned on.	
	Suggestions for using the auto-crop functionality:	
	The location of the red rectangle is determined automatically with the intent of including as many of the steps associated with the current screenshot as possible. Therefore different areas of subsequent screens may be included in the cropped areas. Additional screens may be displayed in Document view automatically when auto-crop is turned on. For example: you have a document with 10 steps and only 1 screenshot is displayed in Document view. When you turn on auto-crop, only the first 7 steps fit within the crop rectangle size for the screen shot. The screenshot associated with step 8 will display and steps 8-10 will display under that screen shot. So now you will see two screen shots in Document view.  The cropped screen size takes the callout into account, if applicable, and will be adjusted accordingly.	
Maximum Screen Width	Select maximum width for screenshots included in HTML publications.	
	If the actual screenshot width is larger than this value, the screenshot will be scaled down to this width in the published output.	
Maximum Screen Height	Select maximum height for screenshots included in HTML publications.	
	If the actual screenshot height is larger than this value, the screenshot will be scaled down to this height in the published output.	

Field	Description
Margins	Select the unit of measurement and specify the margins for the top, bottom, left, and right pages.
Page Size	Select common size, unit of measurement and specify the height and width.

- **5.** Click the **Publications** tab.
- **6.** Select FILE > SAVE to save the template.

### Default Publication Settings: Simulation: General Settings

- **1.** From the Editor, open the new template.
- **2.** Click the **Publications** tab.
- **3.** Select **Simulation** under *Default Publication Settings* in the *Task Pane*.
- **4.** Select **Simulation General Settings** from the drop-down list.
- **5.** Complete the following fields:

Field	Description
Case-Sensitive	Select the <b>Case-Sensitive</b> checkbox to require the user to enter all text in the same case specified in the action properties (provided an Edit action of type 'Exact String' is used).
Require enter press	Select the <b>Require enter press</b> checkbox to require the user to press enter after an action.
Right click	Select the mouse and key combination to be used to represent a right-click action in the simulation.
Image Quality	Select a percentage from the drop-down list.
	The <b>Image Quality</b> option allows you to specify the compression quality of the image. The default of 85% is recommended.
Bookmark	Select <b>Enabled</b> , <b>Disabled</b> , or <b>Mode Specific</b> from the drop-down list to select a display setting for bookmarks in the published output.
Mode Order	Use the <b>Move Up</b> and <b>Move Down</b> buttons to arrange the sequence of modes.

**6.** Select one of the following Audio Source options:



The *Audio Source* options are only available after you have configured a voice in the template settings. For more information on configuring a voice, refer to Specifying General Settings: Text To Speech (on page 326).

Field	Description
Manual	Select <b>Manual</b> to disable text to speech. This is the default setting.
Step Text (TTS)	Select <b>Step Text (TTS)</b> to enable text to speech for step text only.
Transcript (TTS)	Select <b>Transcript</b> ( <b>TTS</b> ) to enable text to speech for transcript only.
Step Text Followed by Transcript (TTS)	Select <b>Step Text Followed by Transcript (TTS)</b> to enable text to speech for step text and transcript, respectively.
Transcript Followed by Step Text (TTS)	Select <b>Transcript Followed by Step Text (TTS)</b> to enable text to speech for transcript and step text, respectively.

#### **7.** For Assessment mode, complete the following fields:

Field	Description
Enabled	Select to confirm that this mode is available for publishing.
Help Mode	Select from Auto playback mode, Standard mode, or Self-Test mode.
Note Display Delay	Select the wait time before notes are displayed.
Note Entry Animation	Select Fade In or Display.

#### **8.** For Auto playback mode, complete the following fields

Field	Description
Enabled	Select to confirm that this mode is available for publishing.
Playback Timer	Specify the default wait time between steps during auto playback.
Display mouse path	Select the <b>Display mouse path</b> checkbox to display mouse movements associated with each step of the simulation during auto playback.
Loop auto playback mode	Select this option to loop a simulation when viewed in auto-playback mode.
Display action notes	Select to display action notes.
Display action note tail	Select to display action note tail.
Display hotspots	Select to display hotspots.

Field	Description
Enable simulation typing sounds	Select the <b>Enable simulation typing sounds</b> checkbox, and select a sound from the drop-down list to enable typing sounds during simulation playback.
	For information on adding sound files to the template, refer to Specifying General Settings: Data Files (on page <b>Error! Bookmark not defined.</b> ).
Default Action Display Delay	Specify the default wait time for action display.
Default Action Animation Delay	Select the default wait time for action animation.
Default Action Entry Animation	Select Fade In or Display.
Default Action Exit Animation	Select Fade Out or Hide.

#### **9.** For Self-Test mode, complete the following fields:

Field	Description
Enabled	Select to confirm that this mode is available for publishing.
Help Mode	Select from <b>Auto playback mode</b> or <b>Standard mode</b> .
Note Display Delay	Select the wait time for notes to display.
Note Entry Animation	Select Fade In or Display.

### **10.** For Standard mode, complete the following fields:

Field	Description
Enabled	Select to confirm that this mode is available for publishing.
Display action notes	Select the <b>Display action notes</b> checkbox to enable the display and publishing of the auto-generated action notes in simulations.
Display action note tail	Select to display action note tail.
Display hotspots	Select to display hotspots.
Note Display Delay	Select the wait time for notes to display.
Note Entry Animation	Select Fade In or Display.

#### **11.** For Home Page, complete the following fields:



These options are set in the document properties and are customizable. For more information on customizing properties, refer to Specifying New Template Settings: Properties (on page 328).

Field	Description
Title	Select <b>Title</b> to display the title on the home page.
Author	Select <b>Author</b> to display the author on the home page.
Description	Select <b>Description</b> to display the description on the home page.
Copyright	Select <b>Copyright</b> to display the copyright on the home page.
Publish date	Select <b>Publish Date</b> to display the publish date on the home page.

### **12.** For Step Window, complete the following fields:

Field	Description
Show step window	Select the <b>Show Step Window</b> checkbox to display the <i>Steps</i> window to users during simulation playback.
Height	Select the height of the published step window.
Width	Select the width of the published step window.
Dock on startup	Select <b>Dock on startup</b> checkbox to set the dock position on startup.
Dock Position	Select a dock position. The dock position determines how the step window will display. Select from the following options: <b>Default (LTR: Right - RTL: Left)</b> , <b>Mirrored (LTR: Left - RTL: Right)</b> , <b>Right</b> , or <b>Left</b> .

### **13.** For Action Defaults, complete the following fields:

Field	Description
Border color	Select the color of the hotspot border.
	Optionally, specify custom colors by clicking <b>Select</b> to the right of the color drop-down list.
Border size	Select the size of the hotspot border.
Flashing	Select the checkbox next to <b>Flashing</b> to enable flashing hotspots.

### **14.** Select FILE > SAVE to save the template.

### Default Publication Settings: Simulation: User Interface Settings

- **1.** From the Editor, open the new template.
- **2.** Click the **Publications** tab on the status bar.
- **3.** Select **Simulation** under *Default Publication Settings* in the *Task Pane*.
- **4.** Select **Simulation User Interface Settings** from the drop-down list.



**5.** Select a skin from the **Skins** drop-down list.



A preview of the skin selection will display in the **Preview** window.

**6.** Complete the following fields:

Field	Description
Player Colors	Select a background color, and primary and secondary colors for the banner background from the drop-down list.
Text Colors	Select a primary color for the banner text from the drop-down list.



Optionally, specify custom colors by clicking **Select** to the right of the color drop-down list.

**7.** Choose from the following options:

Field	Description
	Enables a smooth, animated transmission from step to step. This field defaults to selected.

Field	Description
Reuse existing window	Determines whether the existing window is used, or another new window is opened when the user launches another option from the simulation launch page.
Hide audio bar when audio is not present	Hides the audio bar when audio is not present.
Do not resize	Opens the simulation in the current window size.
Resize and center window	Opens the simulation at the size specified by the screen width and height, and centers the simulation window.
Start in full screen mode	Opens the simulation in full screen mode.

**8.** Under **Screen**, select a minimum and maximum screen height and width.

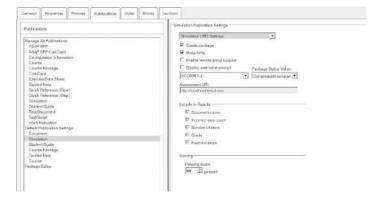


This option is available only if **Resize and center window** is selected.

- 9. Under Maximum Screen Size, select a minimum or maximum screen size.
- **10.** Select **FILE > SAVE** to save the template.

### Default Publication Settings: Simulation: LMS Settings

- **1.** From the Editor, open the new template.
- 2. Click the **Publications** tab.
- **3.** Select **Simulation** under *Default Publication Settings* in the *Task Pane*.
- **4.** Select **Simulation LMS Settings** from the drop-down-list.



**5.** Complete/review the following fields:

Field	Description
Create package	Click the <b>Create Package</b> checkbox to create LMS-conformant output for integration with a Learning Management System (LMS).
Show hints	Select the <b>Show hints</b> checkbox to display hints during the simulation self test or assessment test.  Hints are nonessential data (for example, a user name) required to complete the simulation.
Enable remote proxy support	Only select the <b>Enable remote proxy support</b> checkbox if you are instructed to do so by Product Support.
Display username prompt	Select this option to display the username prompt on the home page.
Package Type	Select SCORM 2004, SCORM 1.2, or AICC from the drop-down list to select the output.
	You can edit the SCORM and AICC imsmanifest.xml file via the package editor. For more information, refer to Default Publication Settings: Package Editor (on page 370).
Package Status Value	Select a completion-type value from the drop-down list.  This option is available only for SCORM 1.2 and AICC.
Assessment URI	Enter a destination URI (Uniform Resource Identifier) to send test results for capture by a custom-built utility instead of an LMS. You can create an Active Server Page (ASP) or Java Server Page (JSP) on a web server to receive the output for subsequent storage and reporting in a learning management system. Any technology that accepts the form Post method using HTTP can be used to handle the output.  Example: http://www.yourcompany.com/results.asp Note that if the student's web browser security settings are set to High, warning messages will be displayed.  The Create Package option must be disabled in order to enter a URI.

# **6.** Complete/review the following fields:

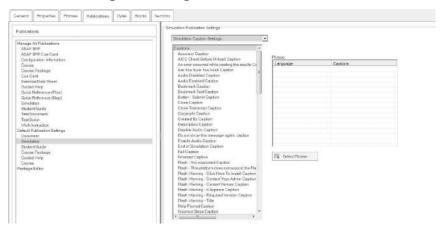
Field	Description
	Select the desired checkboxes to indicate the information to be captured when the simulation self test or assessment is completed.

Field	Description
Passing score	Specify the required passing score.

**7.** Select FILE > SAVE to save the template.

### Default Publication Settings: Simulation: Caption Settings

- **1.** From the Editor, open the new template.
- 2. Click the Publications tab.
- **3.** Select **Simulation** under *Default Publication Settings* in the *Task Pane*.
- 4. Select Simulation Caption Settings.



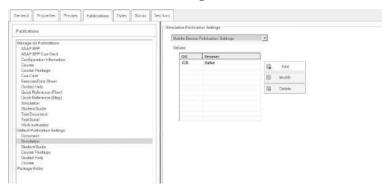
- **5.** Highlight a phrase in the phrase list.
- 6. Click Select Phrase.
- **7.** Perform one of the following options:

If You Want To	Then
Add a custom phrase	Click Add.
	Select a language from the left.
	Enter the text in the content area.
	Click OK.
Select a phrase	Select a language from the <b>Language</b> drop-down list.
	Select a phrase from the <b>Phrase</b> listbox. Optionally, enter text into the <b>Phrases</b> field to search for text.
	Click OK.

**8.** Select FILE > SAVE to save the template.

### Default Publication Settings: Simulation: Mobile Device

- **1.** From the Editor, open the new template.
- 2. Click the **Publications** tab.
- **3.** Select **Simulation** under *Default Publication Settings* in the *Task Pane*.
- 4. Select Mobile Device Publication Settings.



- **5.** Highlight an item in the Values list.
- **6.** Perform one of the following options:

If You Want To	Then
Add a mobile device publication setting	Click Add.
	Enter Operating System.
	Enter Browser.
	Click <b>OK</b> .
Modify a mobile device publication	Click Modify.
setting	Enter Operating System.
	Enter Browser.
	Click OK.
Delete a mobile device publication	Click <b>Delete</b> .
setting	Click Yes.

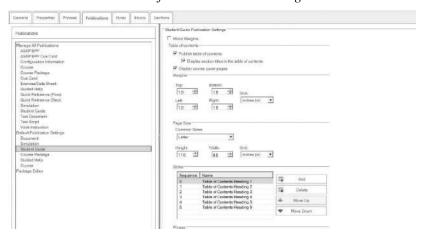


The Operating System and Browser settings are detected during launch. At this time, there are no custom settings for each mobile device.

**7.** Select **FILE > SAVE** to save the template.

### Default Publication Settings: Student Guide

- **1.** From the Editor, open the new template.
- **2.** Click the **Publications** tab.
- **3.** Select **Student Guide** under *Default Publication Settings* in the *Task Pane*.



**4.** Complete/review the following fields:

Field	Description
Mirror Margins	Select <b>Mirror Margins</b> to create booklet-style, double-sided pages for output.
Table of Contents	Select <b>Publish Table of Contents</b> to create a table of contents for output.
	Select <b>Display section titles in the table of contents</b> to display the section titles in inserted content in the published output.
	Select <b>Display course cover pages</b> to display the course cover page in published output.
Margins	Select the unit of measurement and specify the margins for the top, bottom, left, and right pages.

Field	Description
Page Size	Select size and unit of measurement.

**5.** Choose from the following options:

If You Want To	Then
Add a style	Select the style you want to copy, and click <b>Add</b> .
Delete a style	Select the style you want to delete, and click <b>Delete</b> .
Move the style earlier in the list	Click <b>Move Up</b> one or more times as needed to determine where the style will display in the table of contents.
Move the style later in the list	Click <b>Move Down</b> one or more times as needed to determine where the style will display in the table of contents.

- **6.** Click **Select Phrase** to select a phrase for the player.
- **7.** Perform one of the following options:

If You Want To	Then
Add a custom phrase	Click Add.
	Select a language from the left.
	Enter the text in the content area.
	Click <b>OK</b> .
Select a phrase	Select a language from the <b>Language</b> drop-down list.
	Select a phrase from the <b>Phrase</b> listbox. Optionally, enter text into the <b>Phrases</b> field to search for text. Click <b>OK</b> .

**8.** Select **FILE > SAVE** to save the template.

# Default Publication Settings: Course Package

- **1.** From the Editor, open the new template.
- **2.** Click the **Publications** tab.

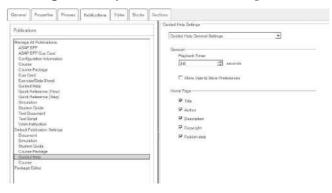
**3.** Select **Course Package** under *Default Publication Settings* in the *Task Pane*.



- **4.** Select **SCORM 2004** or **SCORM 1.2** from the drop-down list to select the output.
- **5.** If you are using SCORM 1.2, select a completion-type value from the drop-down list.
- **6.** Select **FILE > SAVE** to save the template.

## Default Publication Settings: Guided Help: General Settings

- **1.** From the Editor, open the new template.
- 2. Click the Publications tab.
- **3.** Selected **Guided Help** under *Default Publication Settings* in the *Task Pane*.



- **4.** Select **Guided Help General Settings** from the drop-down list.
- **5.** Complete the following fields:

Field	Description
Playback Timer	Select the up-down controls to set the default time in seconds that guided help displays for each page. If the playback timer is set to 0 or a negative number, Guided Help with not automatically progress. The user must manually step through the Guided Help.

Allow User to Store Preferences	Select <b>Allow User to Store Preferences</b> checkbox to allow users to store preference settings for playback time, screen location of Guided Help, window size and window mode (maximize/minimize).
	(maximize/minimize).

#### **6.** Complete the following fields:



These options are set in the document properties and are customizable. For more information on customizing properties, refer to Specifying New Template Settings: Properties. (see "Specifying New Template Settings: Properties" on page 328)

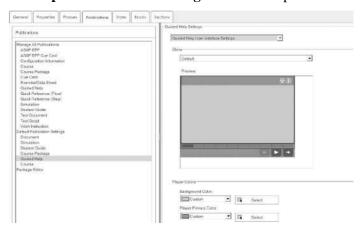
Field	Description
Title	Select <b>Title</b> to display the title on the home page.
Author	Select <b>Author</b> to display the author on the home page.
Description	Select <b>Description</b> to display the description on the home page.
Copyright	Select <b>Copyright</b> to display the copyright on the home page.
Publish date	Select <b>Publish Date</b> to display the publish date on the home page.

**7.** Select FILE > SAVE to save the template.

# Default Publication Settings: Guided Help: User Interface Settings

- **1.** From the Editor, open the new template.
- 2. Click the Publications tab.
- **3.** Select **Guided Help** under *Default Publication Settings* in the *Task Pane*.

**4.** Select **Guided Help User Interface Settings** from the drop-down list.



**5.** Select a skin from the **Skins** drop-down list.



A preview of the skin selection will display in the **Preview** window.

**6.** Complete the following fields:

Field	Description
Player Colors	Select primary and secondary colors from the drop-down list.
Text Colors	Select primary and secondary, and link text colors from the drop-down list.



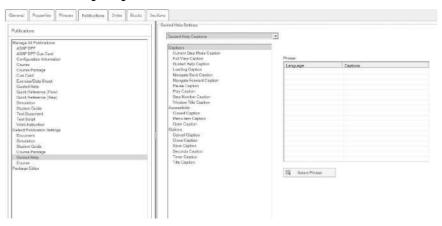
Optionally, specify custom colors by clicking **Select** to the right of list.

**7.** Select from the following options:

Field	Description
Step Window	Under <b>Step Window</b> , select a height and width, maximum image height and width, and screen position and whether to maximize on startup.
General	Enables a smooth, animated transmission from step to step.  Also allows the help to always display on top of all other windows when running in Internet Explorer.

## Default Publication Settings: Guided Help: Guided Help Captions

- **1.** From the Editor, open the new template.
- 2. Click the **Publications** tab.
- **3.** Select **Guided Help** under *Default Publication Settings* in the *Task Pane*.
- 4. Select Guided Help Captions.

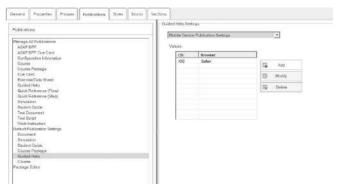


- **5.** Highlight a phrase in the phrase list.
- 6. Click Select Phrase.
- **7.** Perform one of the following options:

If You Want To	Then
Add a custom phrase	Click Add.
	Select a language from the left.
	Enter the text in the content area.
	Click OK.
Select a phrase	Select a language from the <b>Language</b> drop-down list.
	Select a phrase from the <b>Phrase</b> listbox.
	Optionally, enter text into the <b>Phrases</b> field to search for text.
	Click OK.

## Default Publication Settings: Guided Help: Mobile Device Publication Settings

- **1.** From the Editor, open the new template.
- **2.** Click the **Publications** tab.
- **3.** Select **Guided Help** under *Default Publication Settings* in the *Task Pane*.
- 4. Select Mobile Device Publication Settings from the drop-down list.



**5.** Perform one of the following options:

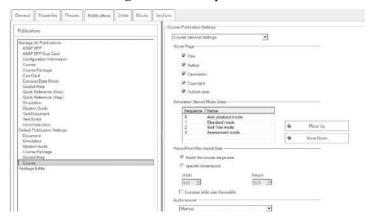
If You Want To	Then
Add a new operating system/browser configuration	Click Add.
	Enter an operating system in the <b>Operating System</b> field.
	Enter the Browser type in the <b>Browser</b> field.
	Click OK.
Modify an existing operating system/browser configuration	Select an operating system/browser combination.
	Select Modify.
	Change operating system/browser setting as desired.
	Click OK.
Delete an existing operating	Select an operating system/browser combination.
system/browser configuration	Select <b>Delete</b> .
	Click Yes.



The Operating System and Browser settings are detected by Guided Help during launch. At this time, there are no custom settings for each mobile device.

## Default Publication Settings: Course: General Settings

- **1.** From the Editor, open the new template.
- **2.** Click the **Publications** tab.
- **3.** Select **Course** under *Default Publication Settings* in the *Task Pane*.
- **4.** Select **Course General Settings** from the drop-down list.



**5.** Complete the following fields:



These options are pulled from the document properties and are customizable. For more information on customizing properties, refer to Specifying New Template Settings: Properties (on page 328).

Field	Description
Title	Select <b>Title</b> to display the title on the home page.
Author	Select <b>Author</b> to display the author on the home page.
Description	Select <b>Description</b> to display the description on the home page.
Copyright	Select <b>Copyright</b> to display the copyright on the home page.
Publish date	Select <b>Publish Date</b> to display the publish date on the home page.
Simulation Stencil Mode Order	Use the <b>Move Up</b> and <b>Move Down</b> buttons to set the simulation stencil mode order.
Match the course stage size	Select <b>Match the course stage size</b> to display the course at the same size as the imported PowerPoint.
Specific dimensions	Select <b>Specific dimensions</b> to display the course in a specified width and height.

Increase slide size if possible	Select Increase slide size if possible to increase the
_	size of the slides.

#### **6.** Select one of the following Audio Source options:



The *Audio Source* options are only available after you have configured a voice in the template settings. For more information on configuring a voice, refer to Specifying General Settings: Text To Speech (on page 326).

Field	Description
Manual	Select <b>Manual</b> to disable text to speech. This is the default setting.
Page Text Areas (TTS)	Select <b>Page Text Areas</b> ( <b>TTS</b> ) to enable text to speech for page text areas only.
Transcript (TTS)	Select <b>Transcript</b> ( <b>TTS</b> ) to enable text to speech for transcript only.
Page Text Area Followed by Transcript (TTS)	Select Page Text Area Followed by Transcript (TTS) to enable text to speech for page text area and transcript, respectively.
Transcript Followed by Page Text Areas (TTS)	Select <b>Transcript Followed by Page Text Areas</b> ( <b>TTS</b> ) to enable text to speech for transcript and page text areas, respectively.

#### **7.** Choose from the following player elements:

Field	Description
Back	Enables the Back button in the published course.
Exit	Enables the Exit button in the published course.
Exit Simulation	Enables the Exit Simulation button in the embedded simulation in the published course.
Glossary	Enables the Glossary button in the published course.
Help	Enables the Help button in the published course.
History	Enables the History button in the published output.
Menu	Enables the Menu button in the published output.
Next	Enables the Next button in the published course.

Field	Description
Resources	Enables the Resources button in the published output.
	The <b>Default Display</b> field is enabled when Resources is selected.
	Select the <b>Page</b> radio button to enter a URL to direct the Resources link to.
	Select the <b>Panel</b> radio button to have the Resources launch in a panel on the left-side of the course playback window

**8.** Enter a URL in the URL field.



Based on the player element selected, this option may not display.

- **9.** Select the **Enable player element in published output** checkbox to enable the use of the selected element. Repeat this step for each player element.
- **10.** Click **Select Phrase** to select a phrase for the player.
- **11.** Perform one of the following:

If You Want To	Then
Add a custom phrase	Click Add.
	Select a language from the left.
	Enter the text in the content area.
	Click OK.
Select a phrase	Select a language from the <b>Language</b> drop-down list.
	Select a phrase from the <b>Phrase</b> listbox. Optionally, enter text into the <b>Phrases</b> field to search for text.
	Click OK.

**12.** Select one of the following feedback phrases:

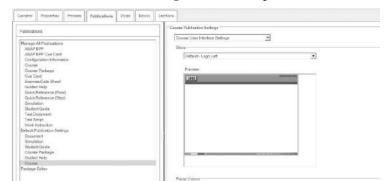
Field	Description
Correct	Displays when the end user enters the correct answer.
First Attempt Incorrect	Displays when the end user enters an incorrect answer the first time.
Second Attempt Incorrect	Displays when the end user enters an incorrect answer the second time.

- **13.** In the **Video Input Formats** area, select the **Enabled** checkbox next to the video format extension to enable the video format in published output.
- **14.** Perform one of the following:

If You Want To	Then
Add a video input type	Click Add.
	Insert the extension of a video input type to add to the available options.
	Click <b>OK</b> .
Modify a video input type	Click Modify.
	Edit the extension information.
	Click <b>OK</b> .
Delete a video input type	Click Delete.
	Click <b>OK</b> to confirm the deletion.
G 1 1	G.I. ( Description of the lateral of
Save changes made	Select FILE > SAVE to save the template.

# Default Publication Settings: Course: User Interface Settings

- **1.** From the Editor, open the new template.
- 2. Click the Publications tab.
- **3.** Select **Course** under *Default Publication Settings* in the *Task Pane*.



## **4.** Select **Course User Interface Settings** from the drop-down list.

- **5.** Select a skin from the **Skins** drop-down list.
  - A preview of the skin selection will display in the **Preview** window.
- **6.** Complete the following fields:

Field	Description
Player Colors	Select a background color, course background user interface color, and player primary and secondary colors from the drop-down list. These colors will display in the published course output.
Text Colors	Select primary and secondary, and link text colors from the drop-down list. These colors will display in the published course output.



Optionally, specify custom colors by clicking Select to the right of list.

#### **7.** Select from the following options:

Field	Description
Reuse existing window	Determines whether the existing window is used, or another new window is opened when the user launches another option from the simulation launch page.
Hide audio bar when audio is not present	Hides the audio bar when audio is not present.
Only display one popup at a time	If selected, only one popup is displayed at any one time.
Allow user to give up and fail assessment simulations	Allows the user to quit and fail an assessment.
Base progress on current location	Shows percent complete based on where the user is in the course.

Field	Description
Base progress on percentage done	Shows percent complete based on how much of the course a user has completed.
Allow Image Zooming	Specifies if image zooming is allowed and if it is the default setting.
Do not resize	Opens the course in the current window size.
Resize and center window	Opens the course at the size specified by the screen width and height, and centers the course window.
Start in full screen mode	Opens the course in full screen mode.
Screen Width/Height	Specifies the size of the course page content within the browser window.
Stage Width/Height	Specifies the size of the course page content within the browser window.
Logo	Select a logo to display in the published course and on the website.
	Logos are managed in the Image area of the Template Editor. For more information on images, refer to Specifying General Settings: Images (on page 323).
Hotspot Interaction	Select a stamp to indicate a hotspot in a course. Select a color for the hotspot.

**8.** Select FILE > SAVE to save the template.

## Default Publication Settings: Course: Mobile Device Settings

- **1.** From the Editor, open the new template.
- 2. Click the Publications tab.
- **3.** Select **Course** under *Default Publication Settings* in the *Task Pane*.
- 4. Select Mobile Device Publication Settings from the drop-down list.



**5.** Perform one of the following options:

If You Want To	Then
Add a new operating system/browser configuration	Click Add.
	Enter an operating system in the <b>Operating System</b> field.
	Enter the Browser type in the <b>Browser</b> field.
	Click OK.
Modify an existing operating system/browser configuration	Select an operating system/browser combination.
	Select Modify.
	Change operating system/browser setting as desired.
	Click OK.
Delete an existing operating system/browser configuration	Select an operating system/browser combination.
	Select <b>Delete</b> .
	Click Yes.

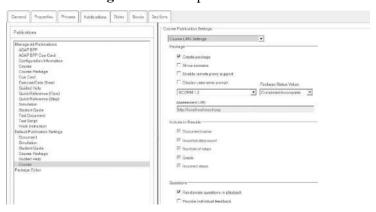


The Operating System and Browser pairs are detected during launch. At this time, there are no custom settings for each mobile device.

**6.** Select FILE > SAVE to save the template.

## Default Publication Settings: Course: LMS Settings

- **1.** From the Editor, open the new template.
- 2. Click the **Publications** tab.
- **3.** Select **Course** under *Default Publication Settings* in the *Task Pane*.
- **4.** Select **Course LMS Settings** from the drop-down list.



**5.** Complete the following fields:

Description
Click the <b>Create Package</b> checkbox to create SCORM-conformant or AICC-conformant output for integration with a Learning Management System (LMS).
Click the <b>Show Answers</b> button to display the answer at the end of the course.
Only select the <b>Enable Remote Proxy Support</b> checkbox if you are instructed to do so by Product Support.
Select this option to display the username prompt on the home page.
Select SCORM 2004, SCORM 1.2, or AICC from the drop-down list to select the output.  For more information on packages, refer to Default Publication Settings: Package Editor (on page 370).
Select a completion-type value from the drop-down list.  This option is available only for SCORM 1.2 and AICC.
Enter a destination URI (Uniform Resource Identifier) to send test results for capture by a custom-built utility instead of an LMS. You can create an Active Server Page (ASP) or Java Server Page (JSP) on a web server to receive the output for subsequent storage and reporting in a learning management system. Any technology that accepts the form Post method using HTTP can be used to handle the output.  Example: http://www.yourcompany.com/results.asp Note that if the student's web browser security settings are set to High, warning messages will be displayed.  The Create Package option must be disabled in order to enter a URI.

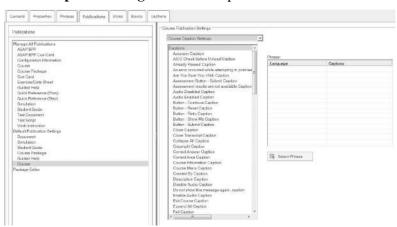
# **6.** Complete the following fields:

Field	Description
Include in results	Select the desired checkboxes to indicate the information to be captured when the course assessment is completed.
	Checkboxes are disabled if the <b>Create Package</b> option is enabled.
Randomize questions in playback	Select this option to randomize the order of assessment pages.
Provide individual feedback	Select this option to provide feedback on individual assessment questions.
Passing score	Specify the required passing score.
Users may retake	No questions: Users may not retake any questions.
	Incorrect questions: Users may retake only those questions that were answered incorrectly.  All questions: Users may retake all questions.

**7.** Select **FILE > SAVE** to save the template.

#### Default Publication Settings: Course: Caption Settings

- **1.** From the Editor, open the new template.
- **2.** Click the **Publications** tab.
- **3.** Select **Course** under *Default Publication Settings* in the *Task Pane*.
- **4.** Select **Course Caption Settings** from the drop-down list.



- **5.** Highlight a phrase in the phrase listbox.
- 6. Click Select Phrase.

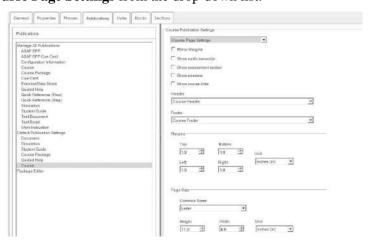
**7.** Perform one of the following options:

If You Want To	Then
Add a custom phrase	Click Add.
	Select a language from the left.
	Enter the text in the content area.
	Click <b>OK</b> .
Select a phrase	Select a language from the <b>Language</b> drop-down list.
	Select a phrase from the <b>Phrase</b> listbox.  Optionally, enter text into the <b>Phrases</b> field to search for text.
	Click OK.

**8.** Select **FILE > SAVE** to save the template.

## Default Publication Settings: Course: Page Settings

- **1.** From the Editor, open the new template.
- 2. Click the **Publications** tab.
- **3.** Select **Course** under *Default Publication Settings* in the *Task Pane*.
- **4.** Select **Course Page Settings** from the drop-down list.



**5.** Complete the following fields:

Field	Description
Mirror Margins	Select <b>Mirror Margins</b> to create booklet-style, double-sided pages for PDF and Word publication.
Show audio transcript	Select <b>Show audio transcript</b> to display the audio transcript in published courses.

Field	Description
Show assessment section	Select <b>Show assessment section</b> to display the assessment section in a published course.
Show answers	Select <b>Show answers</b> to display assessment answers.
Show course links	Select <b>Show course links</b> to display links when you publish a course to Word or PDF format.

#### **6.** Complete the following fields:

Field	Description
Header	Select Course Header, Student Guide Header, Header, Course Footer, Student Guide Footer, or Footer from the drop-down list to select the header.
Footer	Select Course Footer, Student Guide Footer, Footer, Course Header, Student Guide Header, or Header from the drop-down list to select the footer.
Margins	Specify margins for <b>Top</b> , <b>Bottom</b> , <b>Left</b> , and <b>Right</b> . Optionally, select the unit of measurement from the <b>Unit</b> drop-down box.
Page Size	Specify the common sizes, height, width, and unit of measurement.

7. Select FILE > SAVE to save the template.

## Default Publication Settings: Glossary

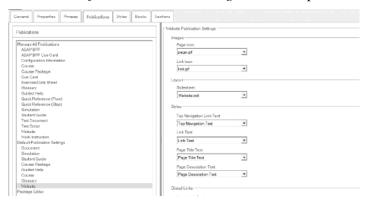
- **1.** From the Editor, open the new template.
- 2. Click the **Publications** tab.
- **3.** Select **Glossary** under *Default Publication Settings* in the task pane.
- **4.** Complete the following fields:

Field	Description
Layout: Stylesheet	Select the stylesheet used to control the layout of the glossary.  Stylesheets are managed in the Data Files area of the Template Editor. For more information on data files, refer to Specifying General Settings: Data Files (on page 324).
Glossary Text Styles: Term Text Style	Select the style to be used for the glossary term text. Styles are managed in the Styles area of the Template Editor. For more information on styles, refer to Specifying Styles (on page 375).
Glossary Text Styles: Definition Text Style	Select the style to be used for the glossary definition text.  Styles are managed in the Styles area of the Template Editor. For more information on styles, refer to Specifying Styles (on page 375).

**5.** Select FILE > SAVE to save the template.

## Default Publication Settings: Website

- **1.** From the Editor, open the new template.
- **2.** Click the **Publications** tab.
- **3.** Select **Website** under *Default Publication Settings* in the task pane.



**4.** Complete the following fields:

Field	Description
Images: Page Icon	Select an image for the page icon from the drop-down list.
	Images are managed in the Images area of the Template Editor. For more information on Images, refer to Specifying General Settings: Images (on page 323).
Images: Link Icon	Select an image for the link icon from the drop-down list.
	Images are managed in the Images area of the Template Editor. For more information on Images, refer to Specifying General Settings: Images (on page 323).
Layout: Stylesheet	Select the stylesheet used to control the layout of the website.
	Stylesheets are managed in the Data Files area of the Template Editor. For more information on data files, refer to Specifying General Settings: Data Files (on page 324).
Styles: Top Navigation Link Text	Select the style to be used for the navigation text displayed at the top of the website window.
	Styles are managed in the Styles area of the Template Editor. For more information on styles, refer to Specifying Styles (on page 375).
Styles: Link Text	Select the style to be used for hyperlinked text on the website.
	Styles are managed in the Styles area of the Template Editor. For more information on styles, refer to Specifying Styles (on page 375).
Styles: Page Title Text	Select the style to be used for page titles on the website.
	Styles are managed in the Styles area of the Template Editor. For more information on styles, refer to Specifying Styles (on page 375).
Styles: Page Description Text	Select the style to be used for page description text on the website.
	Styles are managed in the Styles area of the Template Editor. For more information on styles, refer to Specifying Styles (on page 375).
Global Links: Home Link Caption	Click <b>Select Phrase</b> to specify an alternate phrase for the home link on the website. The default is "Home".
Show glossary link	Select this checkbox to display the hyperlink to the glossary from the website.

Field	Description
Global Links: Glossary Link Caption	Click <b>Select Phrase</b> to specify an alternate phrase for the glossary link on the website. The default is "Glossary".
Show Help Link	Select this option to display the help link.
Help Link Caption	Click <b>Select Phrase</b> to select a phrase for the help link. <b>Show Help Link</b> must be enabled.
Help Link URL	Enter a URL for the help link. <b>Show Help Link</b> must be enabled.

## **5.** Perform one or more of the following options:

If You Want To	Then
Hide links to content not yet published to the website	Select the checkbox to the left of <b>Hide links to unpublished content</b> .
Change the message displayed when a user selects a hyperlink for unpublished content	Enter the message to be displayed.  This option is not available if you have selected to hide links to unpublished content.
Specify a property from which to build quick launch pages for use with SAP and Help Launchpad.	Select the transaction code property to enable context-sensitive help based on the SAP transaction code.
You must have first enabled or created the specified property via the template <b>Properties</b> tab.	For more information on other properties used for applications other than SAP R/3, refer to Transferring Your Website to a Server (on page 422).
Select the separator to be used if an author specifies multiple property values for content	When entering multiple values for the specified property, you must select a separator to define these values. The default value is a comma.

**6.** Select FILE > SAVE to save the template.

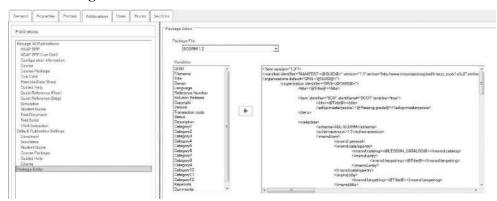
## Default Publication Settings: Package Editor



You can edit the SCORM and AICC imsmanifest.xml file via the package editor.

- **1.** From the Editor, open the new template.
- 2. Click the Publications tab.

**3.** Select **Package Editor** in the *Task Pane*.



- 4. Select the package file type from the Package File drop down list.
- **5.** In the code box, insert the cursor where you want to insert a variable.
- **6.** Select the variable(s) to be included from the **Variables** list.
- **7.** Click the right arrow to add the variable(s) to the package file.
- **8.** Edit the file as desired.
- **9.** Repeat Steps 5 through 8 for each element you want to add.
- **10.** Select **FILE > SAVE** to save the template.



The application supports the following elements from the SCORM/AICC specifications:

specifications.	
Package File	Supported Data Elements
SCORM 1.2	Lesson Status (cmi.core.lesson_status)
	Lesson Location (cmi.core.lesson_location)
	Suspend Data (cmi.suspend_data)
	Raw Score (cmi.core.score.raw)
	Min Score (cmi.core.score.min)
	Max Score (cmi.core.score.max)
	Session Time (cmi.core.session_time)
	Interactions (cmi.interactions)
	Interaction ID (cmi.interactions.n.id)
	Interaction Time (cmi.interactions.n.time)

Chapter	16:	Using	<b>Author</b>	<b>Temp</b>	lates
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. comgramor remplace	
	Interaction Type (cmi.interactions.n.type)
	Interaction Correct Response (cmi.interactions.n.correct_responses.n.pattern)
	Interaction Student Response (cmi.interactions.n.student_response)
	Interaction Result (cmi.interactions.n.result)
	*Interaction Description (rwd.interactions.n.description)
SCORM 2004	Completion Status (cmi.completion_status)
	Success Status (cmi.success_status)
	Lesson Location (cmi.location) Suspend Data
	(cmi.suspend_data) Raw Score (cmi.score.raw)
	Min Score (cmi.score.min)
	Max Score (cmi.score.max)
	Scaled Score (cmi.score.scaled)
	Session Time (cmi.session_time)
	Interactions (cmi.interactions)
	Interaction ID (cmi.interactions.n.id)
	Interaction Type (cmi.interactions.n.type)
	Interaction Correct Response (cmi.interactions.n.correct_responses.n.pattern)
	Interaction Student Response (cmi.interactions.n.student_response)
	Interaction Result (cmi.interactions.n.result)
	Interaction Description (cmi.interactions.n.description)
AICC	Lesson Location (Core.Lesson_Status)
	Lesson Status (Core.Lesson_Location)
	Suspend Data (Core_Lesson)
	Raw Score (Core.Score)
	Session Time (Core.Time)



## The following table explains the Data Elements:

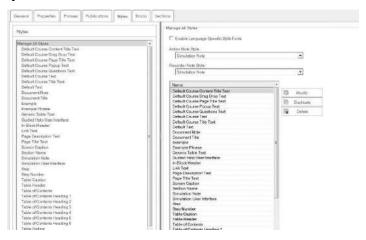
Data Element	Explanation
Lesson Status	Element utilized to specify the completion status of the SCO (completed/incomplete). This element can also be utilized to specify the mastery/success of the SCO (passed/failed).
Completion Status	Element utilized to specify the completion status of the SCO (completed/incomplete).
Success Status	The element utilized to specify the mastery of the SCO (passed/failed).
Lesson Location	The element used to specify the step/page at which the learner terminated the SCO. Also referred to as the SCO bookmark.
Suspend Data	The element utilized to persist content-specific information, such as the pages/steps the learner has viewed within the SCO. This element is primarily utilized by courses.
Raw Score (0-100)	The element utilized for specifying the score achieved by the learner within the SCO. The value is based on the performance within the assessment mode of a simulation, or within either an assessment or terminated branch, with scoring enabled, inserted into a course.
Min Score	The minimum score a learner can achieve within a lesson. This value is currently always set to a value of "0" (zero) within published content.
Max Score	The maximum score a learner can achieve within a lesson. This value is currently always set to a value of "100" within published content.
Percent Complete	The element utilized to specify the completion percentage of a learner within the SCO.

Scaled Score (0-10)	The element utilized to specify the performance of a learner within the SCO that is scaled to fit with the range of $0-1.0$ . The value is based on the performance within the assessment mode of a simulation, or within either an assessment or terminated branch, with scoring enabled, inserted into a course.
Session Time	The time the learner has spent in the lesson during a given session.
Interactions	The data related to the questions/steps within an assessment. The value is based on the performance within the assessment mode of a simulation, or an assessment inserted into a course.  Interaction ID - The unique
	identifier of the interaction.
	Interaction Time - A timestamp at which the interaction was completed.
	<b>Interaction Type</b> - The type of the interaction.
	Interaction Correct Response - The correct answer for the interaction.
	Interaction Student Response - The learner's response to the interaction.
	Interaction Result - The success outcome (correct or incorrect/wrong)
	Interaction Description - The description of the interaction, utilized to persist the question stem. In the case of SCORM 1.2, this is a custom data model element that is utilized by ANCILE uLearn.

# **Specifying New Template Settings: Styles**

# Specifying Styles

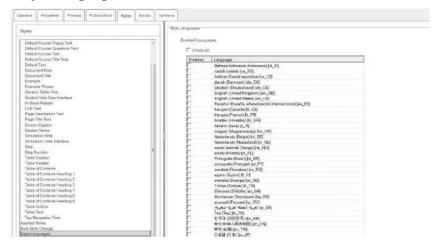
- **1.** From the Editor, open the new template.
- 2. Click the Styles tab.



**3.** Perform one of the following options:

If You Want To	Then
Enable the use of language-specific fonts	Select Enable Language Specific Style Fonts, and go to Step 4.
Disable the use of language-specific fonts	Deselect Enable Language Specific Style Fonts, and go to Step 7.

**4.** Select **Style Languages** from the *Task Pane*.



**5.** Perform one of the following options:

If You Want To	Then
Manually select style languages to be enabled in this template	Select or deselect one or more checkboxes in the <b>Enabled</b> column.
Select all languages to be used in this template.	Select Check All.

- **6.** Select **Manage All Styles** from the *Task Pane*.
- **7.** Perform one of the following options:

If You Want To	Then
Change the Action Note style	Select a style from the Action Note Style drop-down list.
Change the Recorder Note style	Select a style from the Recorder Note Style drop-down list.

**8.** The following styles are available from the *Task Pane*:

Field	Description
Default Course Content Title Text	The style to be used for the text displayed in the content title area of a course.
Default Course Drag Drop Text	The style to be used for the text displayed for drag and drop in a course.
Default Course Page Title Text	The style to be used for the text displayed as the page title in a course.
Default Course Popup Text	The style to be used for the text displayed as a popup in a course.
Default Course Questions Text	The style to be used for the text displayed as assessment questions in a course.
Default Course Text	The style to be used for the course text.
Default Course Title Text	The style to be used for the text displayed as the course title.
Default Text	The style to be used for the page text.
Document Note	The style to be used for the document note.
Document Title	The style to be used for the document title that displays at the top of a document.
Example	The style to be used for the example text.
Example Phrase	The style to be used for the example phrase text.
Generic Table Text	The style to be used for generic table text.
Guided Help User Interface	The style to be used for the text displayed in a guided help user interface.
Link Text	The style to be used for the link text.
Page Description Text	The style to be used for the page description text.

Field	Description
Page Title Text	The style to be used for the page title text.
Screen Caption	The style to be used for the captions displayed above screen captures in a document.
Section Name	The style to be used for sections displayed in your document.
Simulation Note	The style to be used for simulation notes.
Simulation User Interface	The style to be used for simulation user interface.
Step	The style to be used for step text.
Step Number	The style to be used for the step number.
Table Header	The style to be used for the table header.
Table of Contents	The style to be used for table of contents heading.
Table of Contents Heading 1-6	The style to be used for the levels within the table of contents.
Table Text	The style to be used for the table text.
	To remove the table border, including columns and rows, set the <b>Border Color</b> to Transparent. You must also set the <b>Border Size</b> to None under the <b>Table Outline</b> style to remove the entire table border.
Table Outline	The style to be used for the table outline.
	To remove the table border, including columns and rows, set the <b>Border Size</b> to None. You must also set the <b>Border Color</b> to Transparent under the <b>Table Text</b> style to remove the entire table border.
Top Navigation Text	The style to be used for the top navigation text displayed in a course.

- 9. Click Modify.
- 10. Click Select Phrase.
- **11.** Perform one of the following options:

If You Want To	Then
Add a custom phrase	Click Add.
	Select a language from the left.
	Enter the text in the content area.
	Click <b>OK</b> .
Select a phrase	Select a language from the <b>Language</b> drop-down list.
	Select a phrase from the <b>Phrase</b> listbox. Optionally, enter text into the <b>Phrases</b> field to search for text. Click <b>OK</b> .

## **12.** Complete the following fields:

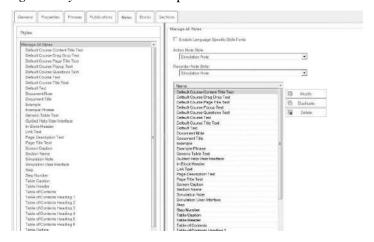


Depending on the style selected, some of the following options may not be displayed.

Field	Description
Font	Click <b>Select</b> to choose a font.
Size	Specify the font size.
Font Color	Select a font color from the drop-down list.
	Optionally, click <b>Select</b> to create a custom color.
Effects	Click the checkbox(es) next to <b>Bold</b> , <b>Underline</b> , <b>Italic</b> , or <b>Strikethrough</b> , to apply rich text formatting.
Use Language Specific Fonts	Click the checkbox next to Use Language Specific Fonts and click Select to choose the language specific font(s).
Justification	Specify a justification setting from the drop-down list. The following justification styles are available: <b>Default (LTR: Left -RTL: Right)</b> , <b>Mirrored (LTR: Right - RTL: Left)</b> , <b>Left, Right, Center</b> , or <b>Full</b> .
Margins	Specify margins for <b>Top</b> , <b>Bottom</b> , <b>Left</b> , and <b>Right</b> .  Optionally, select the unit of measurement from the <b>Unit</b> drop-down box.
First Line	Specify the indent of the first line.
	Optionally, select the unit of measurement from the <b>Unit</b> drop-down box.
Background Color	Specify a background color from the drop-down list.
	Optionally, click <b>Select</b> to create a custom color.
Gradient	Select the <b>Gradient</b> checkbox to apply a gradient to section header backgrounds in HMTL outputs viewable in supported versions of Internet Explorer.
Start Color	Specify a gradient start color from the drop-down list.
	Optionally, click <b>Select</b> to create a custom color.
End Color	Specify a gradient end color from the drop-down list.
	Optionally, click <b>Select</b> to create a custom color.
Orientation	Specify the orientation of the gradient from the drop-down list.
Border Color	Specify a border color from the drop-down list.
	Optionally, click <b>Select</b> to create a custom color.
Border Size	Specify the border width from the drop-down list.
Apply to Bottom Border Only - HTML Only	Specify the style be applied only to the bottom border.

# Modifying, Duplicating, and Deleting Styles

- **1.** From the Editor, open the new template.
- **2.** Click the **Styles** tab.
- **3.** Select *Manage All Styles* from the task pane.



- **4.** Select a style from the *Editor Pane*.
- **5.** Choose from one of the following options:

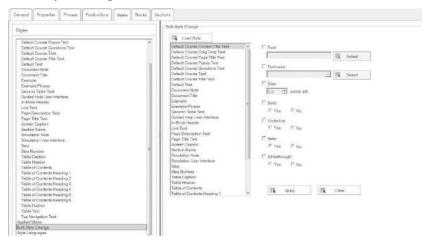
If You Want To	Then
Modify the selected style	Click <b>Modify</b> , and refer to Specifying Styles (on page 375).
Duplicate the style	Click <b>Duplicate</b> .  The duplicated style is added below the original style. Modify the property to specify a new name and characteristics. For more information, refer to Specifying Styles (on page 375).
Delete the selected style	Click <b>Delete</b> . At the prompt, click <b>Yes</b> .

**6.** Click FILE > SAVE to save the template.

## Changing Bulk Styles

- **1.** From the Editor, open the new template.
- **2.** Click the **Styles** tab.

**3.** Select *Bulk Style Change* from the *Task Pane*.



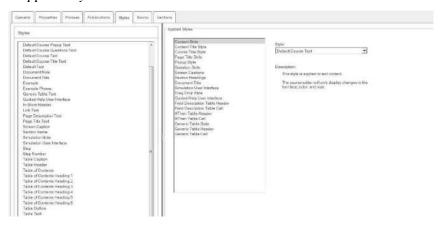
- **4.** Select a style from the list.
- **5.** Click **Load Style** to view the current style settings for the item selected.
- **6.** Using the Ctrl or Shift key, select one or more styles for which you want to apply a bulk change.
- **7.** Complete the following fields:

Field	Description
Font	Select the checkbox next to <b>Font</b> to specify a font.
Font Color	Select the checkbox next to <b>Font Color</b> to specify a font color.
Size	Select the checkbox next to <b>Size</b> to specify a font size.
Bold	Select the checkbox next to <b>Bold</b> , and select <b>Yes</b> or <b>No</b> to specify a bold font.
Underline	Select the checkbox next to <b>Underline</b> , and select <b>Yes</b> or <b>No</b> to specify an underline font.
Italic	Select the checkbox next to <b>Italic</b> , and select <b>Yes</b> or <b>No</b> to specify an italic font.
Strikethrough	Select the checkbox next to <b>Strikethrough</b> , and select <b>Yes</b> or <b>No</b> to specify a strikethrough font.

- 8. Click Apply.
- **9.** Select FILE > SAVE to save the template.

#### Viewing Styles

- **1.** From the Editor, open the new template.
- **2.** Click the **Styles** tab.
- **3.** Select *Applied Styles* from the *Task Pane*.





A list of styles and their descriptions is displayed in the *Editor Pane*.

## **Specifying New Template Settings: Blocks**

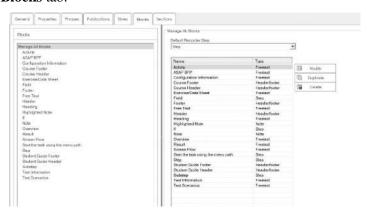


When editing the header/footer, it is recommended that a test publish be performed to see how the header/footer appears on published output. Based on the header/footer and page settings selected, the header/footer may print outside the designated space. If this occurs, it is recommended that you adjust the header/footer settings. For example, the width/height of the page, margins, and font size can cause the header/footer text to print outside the designated area.

## Specifying Blocks

**1.** From the Editor, open the new template.

## 2. Click the Blocks tab.



**3.** Perform one of the following options:

If You Want To	Then
Modify a block	Go to Step 5.
Duplicate a block	Select the block from the content area, and click <b>Duplicate</b> .
Delete a block	Select the block from the content area, and click <b>Delete</b> .
	At the prompt, click <b>Yes</b> .

- **4.** Optionally, select a step type from the **Default Recorder Step** drop-down list.
- **5.** Select one of the following blocks from the *Task Pane*:

Field	Description
Activity	The block that contains the task information.
ASAP BPP	The block that contains the business process description overview, input, output, comments, and tips and tricks.
Configuration Information	The block that contains the configuration information for the document.
Course Footer	The block that contains the course footer information.
Course Header	The block that contains the course header information.
Exercise/Data Sheet	The block that contains information relevant to the end user's task.
Field	The block that contains the Field/Description table.
Footer	The block that contains the footer information.
Free Text	The block that contains the boilerplate freetext.

Field	Description
Header	The block that contains the header information.
Heading	The block that contains the heading boilerplate text.
If	The block that contains the If/Then table.
Note	The block that contains the note boilerplate text.
Purpose	The block that contains the trigger, prerequisites, menu path, transaction code, and helpful hints.
Result	The block that contains the percent complete.
Screen Flow	The block that contains the screen flow image file.
Start the task using the menu path	The block that contains the start transaction text.
Step	The block that contains the step boilerplate text.
Student Guide Footer	The block that contains the student guide footer information.
Student Guide Header	The block that contains the student guide header information.
Substep	The block that contains the substep boilerplate text.
Test Information	The block that contains the test history and scenarios.
Test Scenarios	The block that contains the table specific to test scenarios.

- 6. Click Modify.
- 7. Click Select Phrase.
- **8.** Perform one of the following options:

If You Want To	Then
Add a custom phrase	Click Add.
	Select a language from the left.
	Enter the text in the content area.
	Click <b>OK</b> .
Select a phrase	Select a language from the <b>Language</b> drop-down list.
	Select a phrase from the <b>Phrase</b> listbox. Optionally, enter text into the <b>Phrases</b> field to search for text.
	Click <b>OK</b> .

- **9.** In the content area, modify the text within the curly braces.
- **10.** Perform one or more of the following options:

If You Want To	Then
Modify the format of displayed block text	Highlight the text to be formatted. Click <b>Format</b> , and select from the <b>Edit</b> ,
	Format, or Justify options.
Insert an image, table, weblink, or line at the cursor location in the displayed block text	Click <b>Format</b> , and select from the <b>Table</b> or <b>Insert</b> options.
Modify the format of an image	Click <b>Format</b> , and select <b>Left</b> or <b>Right</b> from the <i>Image Layout</i> options
Insert a phrase or standard document property code at the cursor location in the displayed block text	Click INSERT > PHRASE [or] Standard Code, and select from the displayed list.
View the content area in mirrored justification	Select Mirrored View.

**11.** Optionally, edit the source content of the block in the *Source Pane*.



Basic knowledge of HTML, CSS, and JavaScript is required.

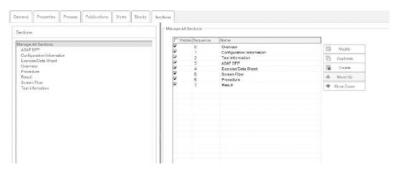
- **12.** Determine where the block is used in the **This item is used by the items below** pane.
- **13.** Under **Format**, select a style from the drop-down list.
- **14.** Click the checkbox next to **Visible** to display the block in published documentation.
- **15.** Select **FILE > SAVE** to save the template.

## **Specifying New Template Settings: Sections**

## **Specifying Sections**

**1.** From the Editor, open the new template.

2. Click the **Sections** tab.



- **3.** Select a section from the *Task Pane*.
- **4.** Click the checkbox next to **Visible** to display the section in published documentation.



New sections will display in all new documents and older documents will be upgraded to add newly added sections when opened.

**5.** Complete the following fields:

Field	Description
Header	Specify the header for the section.
Footer	Specify the footer for the section.

- 6. Click Select Phrase.
- **7.** Perform one of the following options:

If You Want To	Then
Add a custom phrase	Click Add.
	Select a language from the left.
	Enter the text in the content area.
	Click OK.
Select a phrase	Select a language from the <b>Language</b> drop-down list.
	Select a phrase from the <b>Phrase</b> listbox. Optionally, enter text into the <b>Phrases</b> field to search for text.
	Click <b>OK</b> .

**8.** Under **Content**, perform one of the following options:

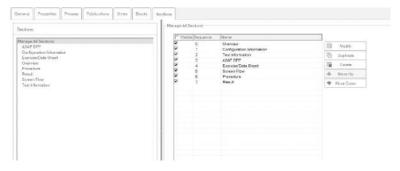
If You Want To	Then
Add content to the section	Click Add.
	Select a block from the list.
	Click OK.

If You Want To	Then
Remove content	Click Remove.
	At the prompt, click <b>Yes</b> .
Move content to earlier in the list	Click <b>Move Up</b> one or more times as needed.
Move content to later in the list	Click <b>Move Down</b> one or more times as needed.

- **9.** Determine where the section is used in the **This item is used by the items below** area.
- **10.** Click **FILE > SAVE** to specify additional sections.

## Modifying, Duplicating, and Deleting Sections

- **1.** From the Editor, open the new template.
- **2.** Click the **Sections** tab.



**3.** Perform one of the following options:

If You Want To	Then
Modify a section	Select the section from the <i>Manage All Sections</i> list in the <i>Content Pane</i> .
	Click Modify.
	For information on modifying a section, refer to Specifying Sections (on page 385).
Duplicate a section	Select the section from the content area, and click <b>Duplicate</b> .
	The duplicated section is added below the original section. Modify the property to specify a new name and characteristics. For information, refer to Specifying Sections (on page 385).
Delete a section	Select the section from the content area, and click <b>Delete</b> .
	At the prompt, click <b>Yes</b> .

## **Chapter 16: Using Author Templates**

If You Want To	Then
Move a section earlier in the list	Select the section.
	Click <b>Move Up</b> one or more times as needed.
Move the section later in the list	Select the section.
	Click <b>Move Down</b> one or more times as needed.

**4.** Click FILE > SAVE to save the template.

## **Export and Import an Author Template**

The application allows users to import and export author template phrases via the XML Localization Interchange File Format (XLIFF) for translating template content in to multiple languages. When a template is exported, one XLIFF file will be created for each language. When a template is imported, it is updated to contain the translated phrases.

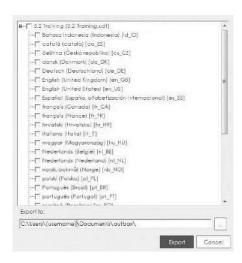
The file is formatted to facilitate translation by displaying the source (original) text co-located next to the target translated text.



The XLIFF file can be edited in Notepad, in an HTML editor, or via a specialized XLIFF editor such as Xliff Editor or Heartsome.

## **Exporting Template Content**

- 1. Start the Editor and open the desired template (.udt) file.
- **2.** Select Translations > Export Current.



**3.** Select the target export language(s).



Multiple languages can be selected. Click the checkbox beside the template name to select all languages.

4. Click Export.

### **Chapter 16: Using Author Templates**

**5.** Optionally, select , to specify a destination folder other than the default.



Only the template will be exported. Any depending application content will not be represented in the output.

6. Click Export.



7. Click OK.

## Importing Template Content

- **1.** Start the Editor and open the desired template (.udt) file.
- 2. Select Translations> Import Current.



**3.** Select the template and language(s) to import.

## 4. Click Import.



### 5. Click OK.



The template is now updated to include the translated phrases, and will be included in content using that template.

## **Delete an Author Template**



Create a backup of the template file prior to deleting the template. Any existing documents created with the deleted template cannot be opened after the template is deleted.

## Deleting an Author Template

- 1. Select FILE > PREFERENCES.
- **2.** Click **MANAGE LOCAL TEMPLATES** on the left pane.
- **3.** Select the template you want to delete.
- 4. Click Remove.
- 5. Click OK.

You can design, build, and maintain a website to deliver content to your end users. In addition to standard application documents, simulations, student guides, and eLearning courses, non-ART content can be included in the website.

### Introduction to the Website

You can present published content to your end users via a website. You can rapidly build your website by assigning properties to application content and then leveraging these properties to automatically organize your website hierarchy. Alternately, you can manually create your website hierarchy and drag-and-drop content into the hierarchy structure.

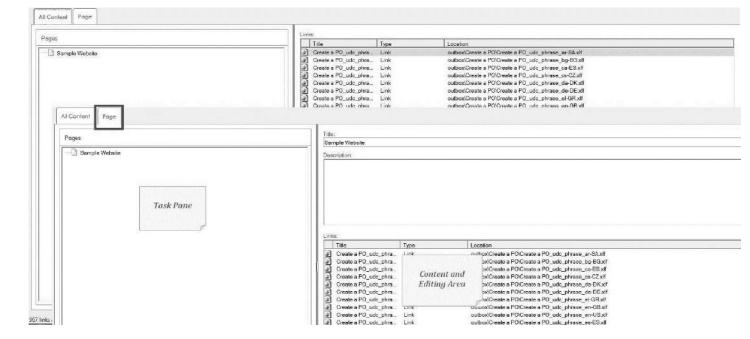
The website is a collection and organization of pages and content links, not a document repository. You must host the generated website, including the published content, on a web server or network file server to make the website available to your end users.

## **Create the Website**

## **Exploring the Website Editor**

The website editor consists of the following areas:

- Content and Editing Area displays the title and description of the selected page; also displays the content available from each page and the content available on the entire website.
- Task Pane displays a tree view of the website structure.



Two tabs in the upper left allow you to customize your view of website content:

- The **Page** tab displays the title, description, and included links for the page currently selected in the task pane.
- The All Content tab displays the list of all links available for inclusion in the website. Only those links which have been added to a page will display on the website.

### **Planning and Designing the Website**

Before creating your website, you should determine the desired navigation structure to present to your end users. Some potential organization methods include:

- Application module (for example, Sales, Human Resources, Finance)
- Employee role (for example, Sales Clerk, Personnel Manager, Accountant)
- Geographic or organizational location (for example, Headquarters, United States, Tokyo)
- Business process or function (Sales Orders, Personnel Development, Budgeting)

When working with the application, it is helpful to think of your navigation structure as being made up of pages, which can contain subpages and/or links. The pages in your website reflect your desired navigation structure. For example, you might have a page named "Sales" with a subpage named "Sales Clerk."

There are two methods for structuring and populating your website:

- Create your website structure manually by creating pages and populate the website by adding content links to these pages.
- Automatically build your website structure and populate the website based on the properties of your content. For example, you can use the built-in Category properties within a template to specify your structure. You might specify Category 1 as business process and Category 2 as role. The template also allows you to specify a hierarchy of these category properties. After authors assign a value to the category properties within content, your published website would reflect a navigation structure based on business process as the primary selection and role as the secondary selection.



If you will be automatically populating your website using properties, you should enable these properties in your project template, specify the valid values, and ensure your authors have access to this template prior to developing content. For detailed information on templates, refer to Using Author Templates (on page 317).

## What Can My Website Include?

The following types of content can be included within a website:

Application-created content, including documents, simulations, and courses.



The website can only contain content that was created with the same template as the website

 Hyperlinks to non-ART content on other websites or to files stored on other servers or websites

Within the website editor, the following icons are used to identify content types:

- 🛍 indicates an application-created document/simulation or student guide.
- indicates an application-created course.
- a indicates a link to another website or file.
- indicates a website page.
- **N** indicates the source file cannot be found.

### **Page and Link Limits**

The application is specifically designed to produce and manage small- and medium-size websites. Consequently, there is a limit of 1000 links or pages within the website to maximize performance and to keep the website to a manageable file size.

Pages are displayed in the task pane. Links are displayed in the **Links** list.

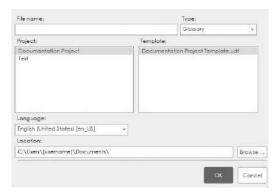
The number of remaining pages and links is displayed to the right of the tabs in the lower left.

Pages and links that are copied and pasted are included in the limit. A shortcut to a page or link does not count against the limit.

If you attempt to add a page or link and this action will exceed the limit, an error message is displayed. You cannot complete an operation that would result in exceeding the limit.

## Creating a Website

**1.** Select **FILE > NEW** from the Editor.



- **2.** Select **Website** from the **Type** drop-down list.
- **3.** Complete/review the following information:

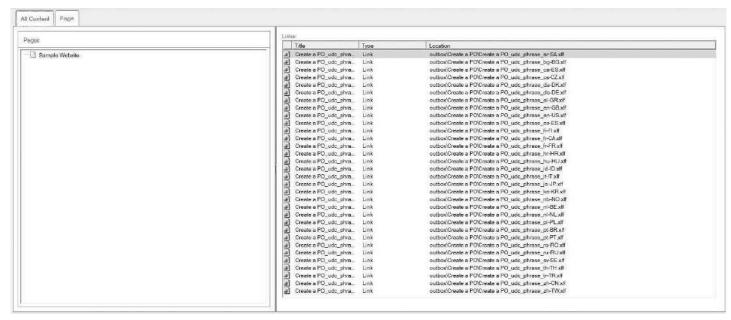
Field	Description
Name	Enter the name of the website.  The name you specify here will also be displayed at the top of published website pages.
Template	Select the template associated with this website.  The template controls the website appearance and, if used, the properties on which the website organization is based.  The website can only contain content that is generated by the selected template.  For detailed information on templates, refer to "Using Templates" in the Managing Content manual.
Language	Select the website language from the drop-down list. This selection determines the language used in the list of available child documents on the published website.
Location	As desired, edit the default location of the website.

### 4. Click OK.

## **Open and Save the Website**

## Opening a Website

- 1. Select FILE > OPEN > OPEN LOCAL....
- **2.** Select the .uws file.
- 3. Click Open.



### Saving the Website

Perform one of the following actions:

If You Want To	Then
Save an existing website	Select FILE > SAVE.
	If this is the first time you are saving the file and the display of the <i>Properties</i> window is enabled, the <i>Properties</i> window is displayed.
Save the open website as a new file	Select FILE > SAVE AS
	Enter a new filename, and click <b>Save</b> .

## **Building the Website Structure Manually**

You can manually build your website structure by creating pages within the website editor.

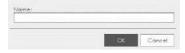
For information on leveraging content properties to automatically generate a website based on the values of the properties, refer to Populating the Website Structure Automatically (on page 408).

### **Create and Edit Pages**

Pages contain links to content or to content stored on other websites. By defining pages and subpages, you create the website navigation structure that will be viewed by your end users.

## Creating a Page

- 1. Select the **Page** tab.
- **2.** Select the parent of the new page in the *Pages* task pane.
- 3. Select INSERT > PAGE.



- **4.** Enter the name of the page. This text will display at the top of this website page.
- 5. Click OK.

## Editing a Page

- **1.** Select the **Page** tab.
- **2.** Select the page in the *Pages* task pane.



**3.** Edit the text in the **Title** or **Description** fields. Your changes are saved when you move to another page or when you exit a field.



Only plain text is supported in these fields.

## Moving or Copying a Page

- **1.** Select the page to move or copy in the *Pages* task pane.
- **2.** Perform one of the following options:

If You Want To	Then
Move the page	Right-click on the page, and select Cut.
	Right-click on the new parent for the page, and select <b>Paste</b> to insert the page under the selected parent.
	OR
	Click and hold the left mouse button on the name of the page, and drag the page to the new location. A black line is displayed to indicate where the page will be inserted.
	Release the mouse button.
Copy the page	Right-click on the page, and select Copy.
	Right-click on the new parent for the page, and select <b>Paste</b> to insert the page under the selected parent.
	OR
	Control-click the left mouse button on the name of the page, and drag the page to the new location. A black line is displayed to indicate where the page will be inserted.
	Release the mouse button.
Create a shortcut to an existing page	Right-click on the page, and select <b>Copy</b> .
	Right-click on the new parent for the page, and select <b>Paste Shortcut</b> .
	The shortcut link is displayed in the <b>Links</b> list to the left.

## Deleting a Page

- **1.** In the *Pages* task pane, right-click on the page to be deleted.
- **2.** Select **Delete** to remove the page from the website.

## **Adding Content to the Website**

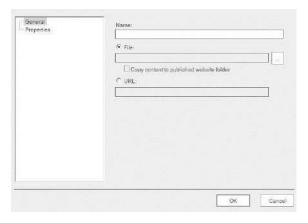
Pages and subpages allow you to provide a structural organization to your website. Links are added to these pages to allow your end users to launch specific content items.

### Add and Edit Content Links

When you add a link to a page, you are inserting a hyperlink to published application content or to non-ART content stored on another file or web server. You can add a single link to your website or import a folder of links. Links are created using relative paths, when possible.

## Adding a Link to a Page

- 1. Select the page to contain the link from the *Pages* task pane.
- 2. Select INSERT > LINK....



**3.** Perform one of the following options:

If You Want To	Then
Create a link to content	Select the File radio button and click to browse to the file.
	The <b>Name</b> field is automatically populated based on the filename.

Create a link to non-ART content	Select the File radio button and click to browse to the file.
	The file must be located on a file or web server accessible by your end users.
	Enter the name of the document in the <b>Name</b> field.
	If desired, select <b>Copy content to published website folder</b> . This option copies content to the website folder during publishing.
Create a link to a website location	Enter a name for the website location in the <b>Name</b> field.
	Example: Acme Corporate Website
	Enter the complete website address in the <b>Url</b> field.
	Example: http://www.acme.com

### 4. Click OK.



The content link is displayed in the **Links** list.

## Adding Links via Drag-and-Drop

- **1.** Select the page to contain the link(s) from the *Pages* task pane.
- **2.** Select the **Page** tab.
- **3.** In Windows Explorer, select one or more files or a folder of files.
- **4.** Drag and drop the file(s) or folder into the **Links** list.

## Adding Multiple Links to a Page

- **1.** Select the page to contain the links from the *Pages* task pane.
- 2. Select INSERT > MULTIPLE LINKS....



- **3.** Select the folder from which links should be imported.
- 4. Click OK.



The application will import links from the specified folder and all subfolders for all supported document types. These links will be added to the selected page.

## Editing a Link

- 1. Select the **Page** or **All Content** tab.
- **2.** Right-click the link name, and select **Properties**.
- **3.** For non-ART content, you can edit the name and location fields and the prop\-entry values. For application-created content, only the location field may be edited.

## Moving and Copying a Link

- 1. Select the Page tab.
- **2.** Perform one of the following options:

If You Want To	Then
Move a link to another page	Right-click on the link in the <b>Links</b> list, and select <b>Cut</b> .
	Right-click on the target page in the <i>Pages</i> task pane, and select <b>Paste</b> to insert the link on the selected page.
	OR
	Click and hold the left mouse button on the link in the <b>Links</b> list, and drag the link to the target page in the <i>Pages</i> task pane.
	Release the mouse button.

If You Want To	Then
Copy a link to another page	Right-click on the link in the <b>Links</b> list, and select <b>Copy</b> .
	Right-click on the target page in the task pane, and select <b>Paste</b> to insert the link on the selected page.  OR
	Control-click the left mouse button on the link in the <b>Links</b> list, and drag the link to the target page in the task pane.  Release the mouse button.

### Reordering Links on a Page

- 1. Select the **Page** tab.
- **2.** From the *Pages* task pane, select the page containing the links to be reordered.
- **3.** From the **Links** list, select the link to be reordered, and drag the link up or down within the list.



A black line is displayed to indicate where the page will be inserted when you release the mouse button. Note that pages are always displayed above links in the list.

**4.** Release the mouse button to move the link to the new position.

### Removing a Link from a Page

- 1. Select the **Page** tab.
- **2.** From the *Pages* task pane, select the page containing the link to be removed.
- 3. Right-click on the desired link in the Links list, and select Delete.

## Deleting a Link from the Website

Deleting a link removes all instances of the link in the website. If you want to remove the link only from a specific page, remove the link via the **Page** tab.

- 1. Select the All Content tab.
- **2.** Right-click on the desired link, and select **Delete**.

**3.** Click **Yes** to remove the link from the website.

## **Populating the Website Structure Automatically**

You can automatically populate your website structure by leveraging the properties and associated property values specified within your template and stored within the content. To enable use of this functionality, you perform the following steps:

- **1.** Enable built-in properties or create custom properties in your template. For example, you might designate Category 1 as Business Process. Refer to Specifying New Template Settings: Properties (on page 328) for detailed information on properties.
- **2.** Specify possible values for these properties in your template. For example, possible values for Business Process might include Sales Orders, Personnel Management, and Accounts Payable.
- **3.** Specify the hierarchy of the properties in your template. For example, Category 2 Role might be subordinate to the Business Process property. Refer to Specifying General Settings: Information (on page 321) for detailed information on specifying property hierarchy.
- **4.** Ensure the template is accessible from a location for your users to download.
- **5.** Instruct your authors to specify values for all applicable categories in each file.

You are then ready to import content and automatically structure the website based on the content properties.

### Importing Content Links

1. Select INSERT > INSERT MULTIPLE LINKS... to import one or more folders containing your content.



- **2.** Navigate to the folder location.
- 3. Click OK.



Refer to "Automatically Organizing the Website" below for detailed instructions on automatically organizing the imported content based on the content property values.

## Automatically Organizing the Website

1. Select TOOLS > ORGANIZE WEBSITE.



A warning message displays indicating that the current website structure will be overwritten.

#### 2. Click OK.



The *Pages* task pane is updated to reflect the properties and hierarchy specified in the template. Links to imported content are added to pages based on the property values specified in the content.

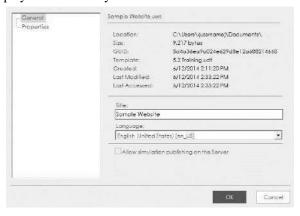
## **Viewing Website Properties**

## **Viewing Website Properties**

- 1. Select FILE > DOCUMENT PROPERTIES....
- **2.** Click **General** on the left pane.



Information such as the size, associated template, creation date, and last modified date are displayed as view-only information.



**3.** As desired, edit the **Title** or **Language** fields.



The data entered into the **Title** field will display as the header on the published website.

4. Click OK.

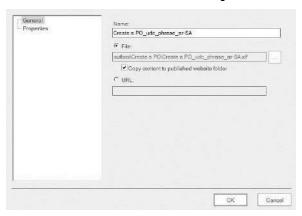
### **View Content Properties**

From the website editor, you can view properties of the included links.

You can modify the properties of non-ART content only. To modify ART content properties, you must open and edit the file.

## Viewing Link Properties

1. Right-click on a link in the **Links** list, and select **Properties**.



**2.** Perform one of the following options:

If You Want To	Then
View general properties	Select the <b>General</b> tab.
View content properties	Select the <b>Properties</b> tab.
Edit the properties of non-ART content	Select the <b>Properties</b> tab.  Select or enter a value for the desired property.
	You cannot edit the properties of documents from the website editor. You must open and edit the document to modify the properties.

#### 3. Click OK.

### **Set Link List Details**

Within the **Links** list you can specify up to four built-in or custom properties to display for the content items in the list. Examples of these properties include transaction code and content location. The Title and Type are always displayed.

Note that you must have first enabled the desired properties in the template associated with the website.

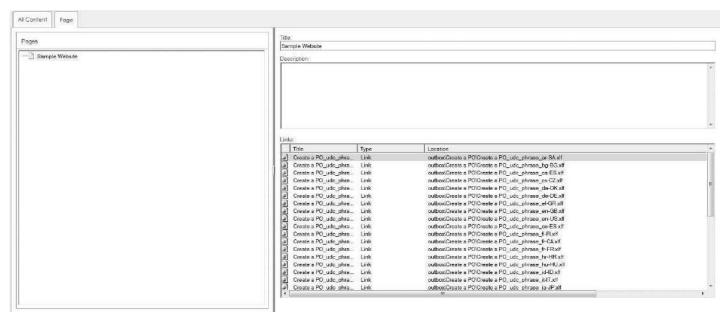
For detailed information on templates, refer to Using Author Templates (on page 317).

### Setting Link List Details

1. Select VIEW > CONFIGURE.



- **2.** Select up to four enabled built-in or custom properties available from the template to dis\-play as a column header in the **Links** list. You can also specify that the Location property be displayed.
- 3. Click OK.





The list is refreshed and the selected column headings are displayed.

## **Refreshing the Website**

You should periodically refresh your website if authors are continuing to make changes to materials and may be moving or deleting content. By executing a refresh, you can easily check and verify links without rebrowsing to find content items.

The refresh process checks all links in the website and updates the titles or properties within content if these have changed. In addition, the refresh process will verify that content items are still available at the originally-specified locations. If content has been moved, the links are noted as 'source not found' in the **Links** list. Provided this content has already been published, it will still be available on the website, however. If source content is replaced, a subsequent refresh will repair these links.

To execute a refresh, select **VIEW > REFRESH**.

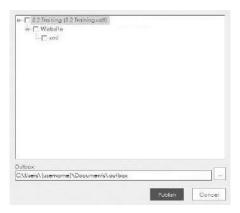
## **Publishing the Website**

The following subsection describes the steps to publish your website.

For detailed information on publishing documents, simulations, and courses, refer to Publishing Content (on page 307). For information on batch publishing content, the glossary, and your website, refer to Batch Publishing (on page 416).

### Publishing the Active Website

1. Select FILE > PUBLISH > PUBLISH CURRENT....



- **2.** Select the template corresponding to the website to be published.
- **3.** Optionally, browse to specify an outbox other than the default.
- **4.** Click **Publish** to publish the selected website.



When you publish the website, any existing, previously published website at the same location is deleted.

When publishing is complete, a summary message is displayed with a hyperlink to the successfully published website. On the published website, active links are only provided to documents and courses that have at least one published output in the outbox directory. If a document or course has no published content in the outbox directory, the publication settings in the template determine whether an inactive link or no link is shown.

Optionally, review the Application and Transformation logs for detailed information on events. In Windows 7 and Windows 8, the logs are stored in the C:\Users\[username]\App Data\Roaming\[applicationdirectory]\Version X.X\Logs directory.

Refer to Making Your Website Available to End Users (on page 420) for information on making the website available to end users.

## **Publishing Quick Launch Pages**

Quick launch pages are created during website publishing and are used in conjunction with Help Launchpad to provide context-sensitive help directly from SAP. The quick launch pages are summarized in a text file (fp_upload.txt), which is uploaded into your SAP system.

Quick launch pages are intermediate web pages listing content files with a common property, typically the transaction code. If only one content file contains a unique property, then the quick launch page is an HTML redirect to the content. If multiple content files contain a common property, such as the transaction code VA01, the application builds an intermediate web page listing all content with this property.

Refer to Default Publication Settings: Website (on page 368) for information on specifying the property from which to build the quick launch pages.

After publishing, the quick launch text file is placed in the specified outbox in the \[website name]\flash\qlaunch folder.

For complete details on setting up online help using quick launch pages, refer to Creating Online Help (on page 423).

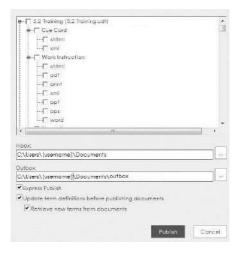
### **Batch Publish Process**

When publishing content, one or more glossaries, and one or more websites in a batch operation, the following processing order is followed:

- 1. All files in the specified inbox are read.
- **2.** If the inbox contains a glossary, definitions are updated in content and new terms are retrieved (provided these options are enabled in the *Batch Publish*... window). This step is repeated for each glossary selected to be published.
- **3.** Documents and courses are published. Only updated content is published if **Express Publish** is selected.
- **4.** If the inbox contains a website, the website is updated and published. This step is repeated for each website selected to be published.

### **Batch Publishing**

1. Select FILE > PUBLISH > BATCH PUBLISH....



- **2.** Select the appropriate checkboxes to the left of the desired template, content types and for\mats, website, and glossary.
- **3.** Optionally, browse to specify an inbox other than the default.
- **4.** Optionally, browse to specify an outbox other than the default.
- **5.** Perform one or more of the following options:

If You Want To	Then
Publish only files that have changed	Select the Express Publish checkbox.
since the last publish operation	When this option is enabled, the application scans the inbox folder to determine which documents and courses have been modified since the last publish operation. The application then includes only these changed files in the list of content to be published to the outbox folder.
Update the definitions in documents prior to publishing documents	Select the <b>Update terms definitions before publishing documents</b> checkbox.
	If you are publishing many documents, updating terms may substantially increase the time necessary to complete the publish process.
Automatically add new terms found in documents to the current glossary while updating the document definitions	Select the <b>Retrieve new terms from documents</b> checkbox.
	This option is only enabled if the option to update term definitions is enabled.
	If you are publishing many documents, updating terms may substantially increase the time necessary to complete the publish process.

## **6.** Click **Publish** to publish the selected content.

When publishing is complete, a summary message is displayed with hyperlinks to successfully published content.

## **Navigate the Website**

### **Overview of Navigation Pages**

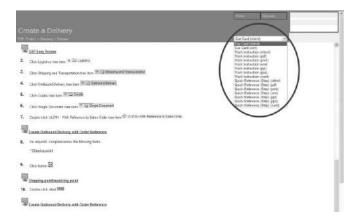
The end user can navigate within the website by selecting one of the following links:

- Home Click to return to the home page.
- Glossary Click to display the list of terms and definitions.
- Page or content link Click on the page name or link to navigate within the website or display content.



## **Overview of Content Pages**

After selecting a content link, the end user selects one of the available published types and formats from the drop-down list.



To return to a preceding page in the website, the end user clicks on a breadcrumb link in the upper left below the page title.



## Making Your Website Available to End Users

## **Overview of the Website Directory Structure**

The following list depicts the directory structure of the website after publishing.

```
[Outbox Directory]
       website name
               website folder
                      xml folder
                             index.htm
                             site_index.htm
                             assets folder
                             content folder
                                     [page id code] folder
                                            index.xml
                                            [link id code] folder
                                                    index.xml
                                            [link id code] folder
                                                    index.xml
                                            [link id code] folder
                                                    index.xml
                                     [page id code] folder
                             qlaunch folder
                                     fp_upload.txt
                                     [property value] folder
                                            index.xml
                                            [link id code] folder
                                                    index.xml
                                            [link id code] folder
                                                    index.xml
```

[property value] folder

## [property value] folder

## **Directory Structure Details**

The index.htm file located in the \[outbox]\[website name]\[website folder]\xml directory is the launching page for the website.

For each page in the website, the application creates a subdirectory within the \xml directory. The name of the subdirectory is determined using a unique alphanumeric id code. To aid in navigating to content folders with an alphanumeric id code, open the site_index.htm file in the \xml directory.

Within each page subdirectory, the application writes a single "index.xml" file. The index.xml file contains the page information and XSLT stylesheet-linking information.

For each document or course in the website, the application creates a subdirectory and writes a single "index.xml" file within the subdirectory. The index.xml file contains the list of available publication types and formats for the content, along with XSLT stylesheet-linking information. The publication information in the template determines the link priority of the publish types and formats.

A "qlaunch" subdirectory is created within the root \xml directory. Within the "qlaunch" subdirectory, the application creates quick launch subdirectories, each with an "index.xml" file listing links that share a common value for the property specified in the template's publication settings.

If only one link contains a particular value for the property, then the quick launch page will be a redirect to the link. If multiple content files contain the same value for the property, the quick launch page will list all links with that property.

Within the "qlaunch" subdirectory is an "fp_upload.txt" text file containing an index of quick launch pages. Your administrator must upload this file into Help Launchpad to provide context-sensitive help for SAP R/3. Refer to Enabling Help in the SAP R/3 and APO Environments (on page 433) for detailed instructions.



The standard Windows folder structure supports folder names up to 100 characters. If you are using SAP SRM, folder names can be up to 200 characters based on the transaction code associated with the folder. In this instance, the website will take the first 100 characters, append a unique code, and use this for the folder name in the directory structure.

## **Transferring Your Website to a Server**

To make your content available to end users, you must copy the entire contents of the outbox folder specified during publishing.

# **Chapter 18: Creating Online Help**

You can present published content to your end users via online, context-sensitive help integrated with SAP and other applications.

Context-sensitive help can open directly from the user's location in the application to the relevant topic or work instruction. After a context-sensitive help search is conducted and the resulting document is opened, the content will automatically scroll to the first location in the document where the context matches the one from which help was called. If multiple documents match the search results, then the user will have to select to the appropriate document from the list of search results.

The auto-scroll functionality only applies to steps where the context data is captured by the recorder. To take advantage of the auto-scroll functionality, new or existing documents need to be published with version 5.20 or later.

The application can automatically scroll to content for only HTML-based published documents including:

- Any document type published to HTML that contains steps
- Simulation auto and standard playback modes
- Guided help

Using the auto-scroll functionality requires an addition to the exslt file used to generate the website. Refer to the section Enabling the Auto Scroll Functionality (on page 424).

# **Introduction to Creating Online Help**

You can present published content to your end users via a website and online, context-sensitive help. Via the website publishing process you can produce 'quick launch' pages which, in conjunction with the Help Launchpad product, are used to provide context-sensitive help directly from your SAP R/3 system. Online help via the SAP Enterprise Portal, Oracle, Siebel, and Microsoft Windows-based applications is also available.



For information on publishing quick-launch pages, refer to Publishing Quick Launch Pages (on page 415).

### Types of Help Available

The following subsections provide general information regarding establishing online, context-sensitive help in the SAP, SAP Enterprise Portal, Oracle, Siebel and Microsoft Windows environments. Refer to the following user manuals and white papers for detailed instructions on establishing and maintaining online help:

- Help Launchpad for ANCILE Info Pak
- Context-Sensitive Help Solutions for Enterprise Systems (white paper)
- Creating Content user manual

### Enabling the Auto Scroll Functionality

To take advantage of the auto scroll functionality, new or existing websites and documents will have to be published with version 5.20 or later. The auto scroll functionality is only available with versions 5.2 and later.

Before enabling the auto scroll functionality, please note that your content and custom templates automatically upgrade when opened for editing. If they are published prior to being opened in the Editor, then your content and templates are temporarily upgraded during publishing. The temporary upgrades are deleted upon completion of publishing.

Existing templates are upgraded and placed in the current version's Documents and Settings or Users folder the first time the Editor is launched after an upgrade.



If you have customized the website.xslt file located at "...\website\xml\assets" folder, we recommend making a copy of the .xslt file prior to republishing. Refer to Publishing the Website (on page 414).

1. From the Editor, open the template you want to modify.

- 2. Click the General tab.
- **3.** Select **Data Files** from the left pane.
- **4.** Click the .xlst template file to modify.
- 5. Click Modify.

```
File Edit Format View Help
<?xml version="1.0" encoding="UTF-8"?>
</
           <xs! variable name="rootElement" select="name(|")"/>
<xs! variable name="systemHelpLocation" select="WPaths/ToHelp"/>
           <xsl variable name="systemHelpTitle" select="//Phrases/Help"/>
           <xsl:variable name="ToOutbox" select="//Paths/ToOutbox"/>
           <xsl variable name="ToAssets" select="//Paths/ToAssets"/>
            <xsl variable name="ToGlossary" select="//Paths/ToGlossary"/>
           <xsl variable name="ToPages" select="//Paths/ToPages"/>
           <xsl variable name="Home" select="//Phrases/Home"/>
           <xsl variable name="Glossary" select="//Phrases/Glossary"/>
<xsl variable name="Linkloon" select="//SitePublicationInfo/Linkloon"/>
           <xsl:variable name="PageTitleStyle" select="//SitePublicationInfo/PageTitleStyle"/><xsl:variable name="LinkTextStyle" select="//SitePublicationInfo/LinkTextStyle"/>
           <xslrvariable name="PageDescStyle" select="//SitePublication info/PageDescStyle">
<xslrvariable name="Folderloon" select="//SitePublicationInfo/Folderloon"/>
            <xsl:variable name="TopNavStyle" select="//SitePublicationInfo/TopNavStyle"/>
           <xsl variable name="TermStyle" select="l/Glossan/PublicationInfo/TermStyle"/>
           <xsl variable name="DefnStyle" select="//GlossaryPublicationInfo/DefnStyle"/>
           <xsl variable name="Logo" select="//CourseUiSettings/Logo"/>
           <xsl:variable name="Breadcrumb" select="//Breadcrumbs/Breadcrumb"/>
           <!-- This variable sets the background color of the website. --
  <xsl:variable name="backgroundColor">rgb(255, 255, 255)
           <xsl:variable name="UlColor1">rgb(101, 133, 184)
          <!-- This variable sets the logo background color of the website. --> 
<xsl variable name="UlColor/2">rgb(142, 131, 125)<lxsl variable>
           <!-- This variable sets the header font color of the website. -->
           <xsl·variable name="TextColor1">rgb(190, 210, 249)</xsl·vanable>
           <xs/:template match="/">
                      <a href="http://www.netribute.name="dir"><xsl:value-of-select="\Direction"\></xsl:attribute>
```

**6.** Navigate to the function: "changeDoc(selectControl, index)".



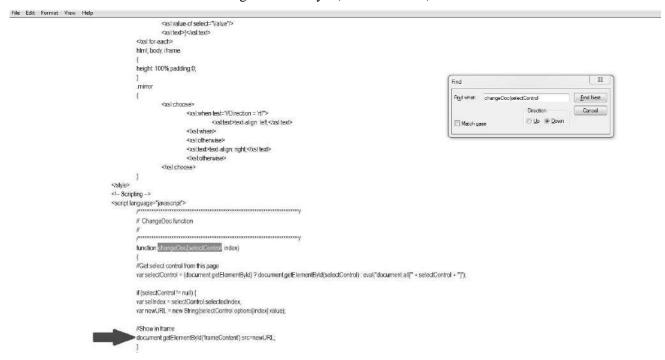
To locate this function, try searching for it using your text editor's search feature.

File Edit Format View Help <xsl:value-of select="Value"/> <xsl:text>}</xsl:text> </xsl:for-each> html, body, iframe height: 100%;padding:0; } .mirror Find wh <xsl:choose> <xsl:when test="//Direction = 'rtl"> <xsl:text>text-align: left;</xsl:text> </xsl:when> <xsl:otherwise> <xsl:text>text-align: right;</xsl:text> </xsl:otherwise> </xsl:choose> </style> <!-- Scripting --> <script language="javascript"> // ChangeDoc function 11 function changeDoc(selectControl, index) //Get select control from this page var selectControl = (document.getElementByld) ? document.getElementByld(selectControl) : eval("document.all[" + selectControl + "]"); if (selectControl != null) { var sellndex = selectControl.selectedIndex; var newURL = new String(selectControl.options[index].value);

//Show in frame

document.getElementByld('frameContent').src=newURL;

7. Locate the line "document.getElementById('frameContent').src=newURL".

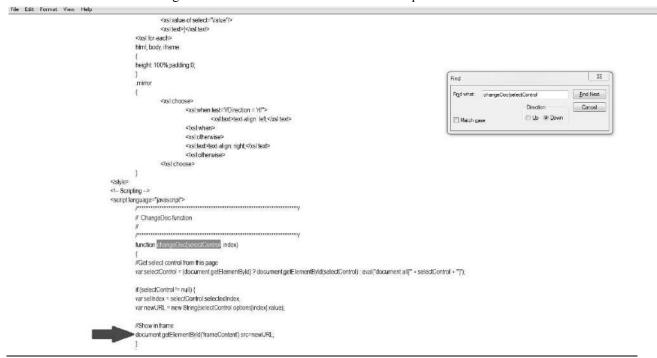


**8.** Replace with: document.getElementById('frameContent').src = newURL + window.location.search;



Add exactly this phrase: document.getElementById('frameContent').src = newURL + window.location.search; including the semicolon (;).

The image below shows an "after" view of what this part of the .xslt file should look like.



**9.** Navigate to the second "}" under the line you just added.

```
File Edit Format View
                                                            <xsl:value-of select="Value"/>
                                                            <xsl:text>}<lxsl:text>
                                                   </xsl:for-each>
                                                   html, body, iframe
                                                   height 100%;padding:0;
                                                            <xsl:choose
                                                                      <xs! when test="//Direction = 'rti">
                                                                                <xs/>xs/text>text-align: left </xs/text>
                                                                      </xsi when>
                                                                      <xsl otherwise>
                                                                      <xsl text>text-align_right,</xsl text>
                                                                      </ri>
                                        </style>
                                        <!- Scripting ->
                                         <script language="javascript">
                                                   // ChangeDoc function
                                                   function changeDoc(selectControl, index)
                                                   var selectControl = (document.getElementByld) ? document.getElementByld(selectControl) eval("document.all(" + selectControl + "T"),
                                                   var sellndex = selectControl selectedIndex
                                                  var newURL = new String(selectControl.options[index] value);
                                                  document.getElementByld(TrameContent').src = newURL + window location.search.
```

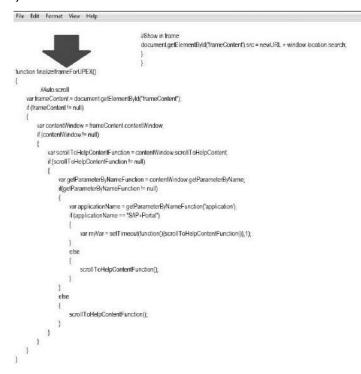
**10.** Copy the below code and paste it directly after the second "}".



This will insert a new function to enable the content to scroll to the relevant location in the file after the user calls help.

```
{
      var applicationName = getParameterByNameFunction('application');
      if (applicationName == "SAP+Portal")
      {
            var myVar =
      setTimeout(function(){scrollToHelpContentFunction()},1);
      }
      else
      {
                scrollToHelpContentFunction();
      }
    }
    else
      {
            scrollToHelpContentFunction();
      }
    }
}
```

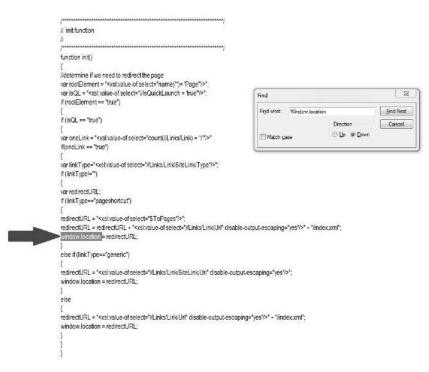
}



**11.** Navigate to the "init" function.



To locate this function, try searching for "function init()" using your text editor's search feature.



**12.** Locate the line "Window.location = redirect.URL".

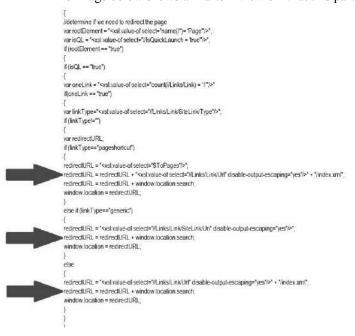


Note there are three instances of this line in the "init" function. Perform the following step for all three instances.

**13.** Above the line "Window.location = redirect.URL," insert a line with the following text including the semicolon: redirectURL = redirectURL + window.location.search;



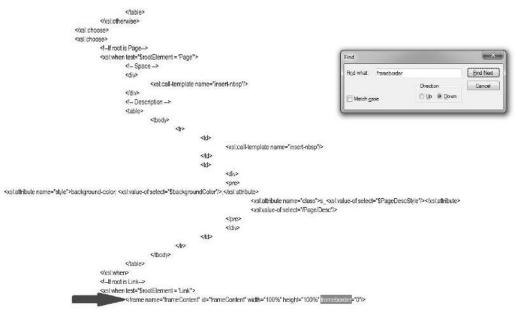
Add exactly this phrase: redirectURL = redirectURL + window.location.search; including the semicolon (;). The image below shows an "after" view of what this part of the .xslt file should look like.



**14.** Navigate to the iframe element with an id equal to:"frameContent".



To locate this function, try searching for id="frameContent" using your editor's search feature.

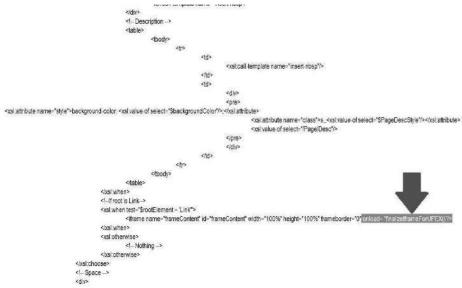


**15.** Immediately before the closing > tag, insert onload="finalizeIframeForUPEX()".



Add exactly this phrase: onload="finalizeIframeForUPEX()".

The image below shows an "after" view of what this part of the .xslt file should look like.



- **16.** Click **FILE > SAVE** from the text editor.
- **17.** Close the file.
- **18.** Click **Yes** to update the template when prompted.

# **Enabling Online Help**

### **Enabling Help in the SAP R/3 and APO Environments**

The Help Launchpad component allows SAP to display the correct content for each transaction in a browser window that displays on top of the SAP application.

### Enabling Help for SAP R/3 and APO

- 1. Install the Help Launchpad Executable and ABAP Transport per the instructions provided in the Help Launchpad user manual. This task is typically performed by the SAP R/3 administrator.
- **2.** Ensure you have enabled the transaction code property in your template and have made this template available to authors.
- 3. Create content.
- **4.** To specify the transaction code for the content, select **FILE > PROPERTIES...** to open the *Properties* window.
- **5.** Select the **Properties** tab on the left.
- **6.** Enter the transaction code in the **Transaction Code(s)** field. For multiple transaction codes, separate these codes with the value specified in the associated template (for example, comma ",", colon ":", or semi-colon ";").
- 7. Click OK.
- **8.** Publish the content and the website.
- **9.** Copy the published content and website to a shared network location.
- **10.** In SAP, create a Help Launchpad server via transaction code /RWD/ZF0 per the instruc\-tions provided in the Help Launchpad user manual.
- **11.** Enter the quick launch folder location (within the published website) in the **Server Location** field.
- **12.** Specify the location of the "fp_upload.txt" file (within the published website) in the **Upload Location** field.

**13.** In SAP, upload the transactions from the "fp_upload.txt" via transaction code /RWD/ZF0 per the instructions provided in the *Help Launchpad* user manual. Ensure the **pre 5.0 format** checkbox is deselected.

To access custom help within SAP, an end user performs the following steps:

- **14.** Start the transaction using the menu path or transaction code.
- **15.** Select **HELP > CUSTOM HELP** to display the context-sensitive help in a browser window on top of the SAP application.

# Limitations When Providing Help in the SAP SRM and Enterprise Portal Environments

- For security reasons, the context-sensitive help solution for SAP SRM and SAP Enterprise Portal does not verify that the help content exists, nor does it direct users to an alternate location in the event that no context-sensitive help is available for a given context.
- In SAP SRM and SAP Enterprise Portal, the Help menu essentially links to a page using a link that matches its ID. When there is no help content available at that location, an HTTP 404 (Page Not Found) error displays in the new browser window.
- Due to limitations in cross-domain web document access, the required HTML code for activating the stay-on-top ActiveX control is not included in the code supplement for the SAP Enterprise Portal or SAP SRM context-sensitive help code supplements.

### **Enabling Help in the SAP SRM Environment**

End-users interact with SAP Supplier Relationship Management (SRM) applications via a web-based user interface.

The ANCILE Help Launchpad Code Supplement allows SAP SRM to display the correct content for each screen in a browser window that displays on top of the SAP SRM application.

### Enabling Help for SAP SRM

**1.** Install the ANCILE Help Launchpad Code Supplement per the instructions provided in the *Context-Sensitive Help Solutions for Enterprise Systems* white paper. This task is typically performed by the SAP SRM administrator.

- **2.** Enter the quick launch folder (within the published website) in the **Help_Server_Location** field
- **3.** Ensure you have enabled the transaction code property in your template and have made this template available to authors.
- 4. Create content.
- **5.** To specify the SRM screen ID for the content, select **FILE > PROPERTIES...** to open the *Properties* window.
- **6.** Select the **Properties** tab on the left.
- **7.** Enter the screen ID code in the **Transaction Code(s)** field. For multiple transaction codes, separate these codes with the value specified in the associated template (for example, comma ",", colon ":", or semi-colon ";").
- 8. Click OK.
- **9.** Publish the content and the website.
- **10.** Copy the published content and website to a shared network location.

To access custom help within SAP SRM, an end user performs the following steps:

- **11.** Start the procedure by navigating to the desired screen.
- **12.** Select the **Help** link to display the context-sensitive help in a browser window on top of the SAP SRM application.

# **Configuring SAP Portal for Use with Context-Sensitive Help**

SAP EP is a web-based platform for delivering information from various sources to end users. Using the URL to Help Topic setting, the SAP EP can display the correct content for each iView/Portal Page in a browser window that displays on top of the SAP EP application.

Context-sensitive help allows you to provide end users with quick and convenient access to help via an online performance support system. End users request help from the Server via a direct link in the SAP EP application.

When creating custom Help links in an application that will be hosted in an iView, consider using an approach similar to that used in the context-sensitive solution for the iView itself.

- Assign a unique identifier to each Help link. Recall that each iView in an SAP EP system has a unique alphanumeric identifier (for example, "com.sap.portal.createNewUser") that can be used as a reliable link between an iView and its related help content. Each custom Help link should also have a unique identifier that can be included in the properties of applicable documents.
- Include the unique Help link identifier in documents. The application allows the author to specify the iView ID(s) to which the document applies. The Help link unique identifier should also be specified in the document.

# Creating a Template for Use with SAP Portal

Context-sensitive help for SAP Portal is driven by context identifiers. Each screen in SAP Portal has a unique context identifier and these are gathered collectively for a procedure and automatically inserted into the transaction code property of a document. Context identifiers are used to call context-specific help on the screen in which the end user is working.

Transaction code is a term and property used to identify a process. It is used in two separate instances:

- Transaction code property: The Server matches this document property to the associated SAP CRM 2007 screen when a call for help is made from SAP Portal.
- **Transaction code block**: In a document, this block displays the transaction code pertaining to the document created.

**1.** Create a template.



A project administrator typically creates and customizes templates. For more information, refer to Using Author Templates (on page 317).

- 2. Select the **Blocks** tab.
- 3. Select Purpose.
- **4.** Turn off the display of the **Transaction Code** block in a document.
- **5.** Select the **Properties** tab.
- **6.** Enable the **Transaction Code** property.
- 7. Select FILE > SAVE.
- **8.** Click the **Publications** tab.
- 9. Select Website.
- **10.** Select **Transaction Code(s)** from the **Build from Property** field.
- 11. Select Comma(,) from the Multiple Values Separated By field.
- **12.** Select FILE > SAVE.

#### Publishing the Website

As part of website publishing, you will also generate quick launch pages to enable communication between the website and SAP Portal. For information on publishing the website, refer to Publishing the Website (on page 414).

### Configuring SAP Portal to Send a Help Request to the Website



The SAP system administrator must configure SAP Portal to send help requests to the Server. This configuration is specified by adding links to the web dynpro page for which you want to provide context-sensitive help.

- **1.** Log into SAP Portal.
- **2.** Locate the SAP Portal Business Package iView for which you want to create context-sensitive help.

- **3.** Right-click on the iView.
- **4.** Select **OPEN > OBJECT**.
- **5.** Locate the **Show Help Menu** item.
- **6.** Select the **Yes** radio button.
- **7.** Open a new browser instance, and run the iView as a Portal end user.
- **8.** Copy the Object ID from the pop-up Details screen, omitting the pcd portion of the ID.
- **9.** Build the help call URL as [web server]/[website name]/website/website/xml/assets/redirect.html?iViewID=[iView ID].
- **10.** Paste the URL into the URL to Help Topic property of the iView.
- 11. Click Save.

# Recording an SAP Portal Document

- **1.** Log into SAP Portal.
- **2.** Perform one of the following options:

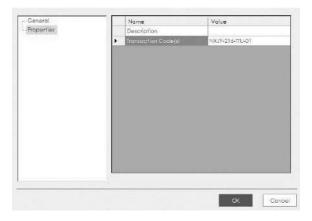
If You Want To	Then
Record and edit the entire document	Use the template created in Creating a Template for Use with SAP CRM 2007 (see "Creating a Template for Use with SAP CRM" on page 449),to record and edit the document using the Editor and the procedures described in Creating Online Help (on page 423).  Go to Step 3.
Insert steps into a previously recorded document	Update the template associated with the document.  Open the document.
	Select the <b>Simulation</b> tab.
	Select INSERT > STEPS > FROM NEW RECORDING.
	Record the steps in SAP Portal using the Editor and the procedures described in Recording Procedural Content (on page 51).
	Go to Step 3.



The recorder does not automatically gather transaction codes for screens containing an embedded SAP HTML GUI; however, you can obtain the transaction codes in this environment if you have integrated Help Launchpad with the SAP system you are displaying within the embedded HTML GUI.

In the above scenario, select **HELP > [CUSTOM] HELP** within the transaction displayed in the HTML GUI. Review the web address field displayed in the new browser window, and identify the transaction code for this transaction. Copy the code and paste it into the Transaction Code property of the document you are currently recording.

- **3.** In the application, select **FILE > PROPERTIES**.
- 4. Select Properties.



- **5.** Ensure the context identifier(s) have been inserted into the **Transaction Code** value field.
- 6. Click OK.
- **7.** Save the document.
- **8.** Add the document to the website using the procedures described in Building a Website (on page 393).
- **9.** Publish the document using the procedures described in Previewing and Publishing Content (on page 301).
- **10.** Republish the website using the procedures described in the Building a Website (on page 393).



When the website is republished, the document will be available for the end user via the help icon in SAP Portal.

### Enabling the Required iView/Portal Page Options

To enable end users to access context-sensitive help for an iView/portal page, the Help option must be enabled. Each iView/portal page Help option is disabled by default; however, an SAP EP user with the appropriate permission to edit an iView/portal page can enable the Help option via the Property Editor.

Each iView and portal page in a portal system can be contained in a tray. The tray includes the name of the iView/portal page and a drop-down menu of options such as Refresh, Open in New Window, Personalize, Details, and Help.

To enable the iView/portal page required options:

- 1. Log into SAP Enterprise Portal with Content Administrator permission.
- 2. In the Portal Catalog, right-click on the desired iView/portal page and select OPEN > OBJECT.



An iView or portal page may display in several different contexts based on your role within the SAP EP. For example, the "Create User" iView may be configured differently for Super Administrators than it is for Content Administrators. In addition, note the specific role(s) in which an iView/portal page is to be modified. If more than one role applies, the iView/portal page must be edited for all roles.

- **3.** In the editing area, select the Property Editor panel located to the right of the editing area.
- **4.** In the Property Category list, select **Show All**.
- **5.** For the *Show 'Details'* option property, click **Yes**.
- **6.** For the *Show 'Help'* option property, click **Yes**.
- **7.** For the *Show Tray* option property, click **Yes**.
- 8. Click Save.

# Locating the iView/Portal Page ID

Each iView and portal page in SAP EP has a unique alphanumeric identifier, which is registered in the portal content directory (PCD). The identifier is assigned when a new iView/portal page is created in the Portal Content Studio. Because identifiers are unique, they can be used as reliable links between an iView/portal page and its related help content.

To link an iView or portal page to help content, the iView/portal page ID must be included in the properties of the applicable document(s). To allow authors to easily locate an iView/portal page's ID, the Details option must be enabled. An author can determine the iView/portal page ID via its details window by selecting the Details option within SAP EP. This will display a new browser window containing the Portal Component and Object ID.

The Object ID is a string of alphanumeric characters. You may choose to use the entire Object ID as the iView/portal page ID, or simply use the segment of the Object ID that follows the last "/" divider.

### Including the iView/Portal Page ID in Documents

The application allows the author to populate properties within the document. These properties are leveraged when building website navigation and quick launch pages.

The application provide a Properties window for populating the Transaction Code(s) property within the document.

To map a document to an iView/portal page via the Properties tab:

- **1.** Ensure that the Transaction Code(s) built-in property is marked as visible in the template. By default, the display of all built-in properties is disabled in the template.
- **2.** Open the desired document associated with the template.
- 3. Select FILE>PROPERTIES....
- **4.** Click **Properties** on the left pane.
- **5.** Select the *Transaction Code(s)* field.
- **6.** Enter the iView/portal page ID in the Transaction Code(s) field. For multiple IDs, separate each with a comma.
- 7. Click OK.
- **8.** Select **FILE > SAVE** to save your document.

### Setting the Help URL for an iView/Portal Page

The URL to Help Topic property was introduced in EP6 SP17 and EP7 SP10 as a simple way to direct end users to the correct help URL; however, if you wish to configure the help URL for iViews or portal pages for which the URL to Help Topic property is not available, you may do so by using the PCD Inspector. The procedure for determining which procedure to use for setting the help URL depends on the following criteria.

- The version and service pack (SP) of your SAP EP system
- Whether you wish to enable the Help option on an iView or portal page

SAP EP Version	Service Pack (SP) Version	Set Help URL for iViews via	Set Help URL for Portal Pages via
6	Prior to SP17	PCD Inspector	PCD Inspector
	SP 17-20	Portal Content Administrator	PCD Inspector
7	Prior to SP 10	PCD Inspector	PCD Inspector
	SP 10-12	Portal Content Administrator	PCD Inspector
	SP 13	Portal Content Administrator	Portal Content Administrator
7.30	0	PCD Inspector	PCD Inspector

### Setting the Help URL Using Portal Content Administration

If you are setting the URL to Help Topic property for an iView/portal page, you may do so using Portal Content Administration.

To set an iView/portal page URL to Help Topic property using Portal Content Administration:

- 1. Log into SAP Enterprise Portal with Content Administrator permission.
- 2. In the Portal Catalog, right-click on the desired iView/portal page and select OPEN > OBJECT.



An iView or portal page may display in several different contexts based on role within the SAP EP. For example, the "Create User" iView may be configured differently for Super Administrators and Content Administrators. Therefore, it is important to note the specific role(s) in which an iView/portal page is to be modified. If more than one role applies, then the iView/portal page must be edited for all roles.

- **3.** Locate the Property Editor panel to the right of the editing area.
- **4.** In the Property Category list, select **Show All**.
- **5.** In the list of properties, scroll to the URL to Help Topic property, and enter the help topic location. Refer to Setting Up Stay-On-Top and Browser Controlled with ActiveX Mode in the *Help Launchpad* user manual.
- **6.** Enter the complete address of the **website/xml/qlaunch** folder in the published website, followed by the iView/portal page ID and "/index.xml". For example: http://[server]/website/sml/qlaunch/[iView/portalpage ID]/index.xm.



Only http addresses will produce the desired help results. For example, an iView with an ID of "com.sap.portal.usersInLast3Hours", the following address would be used: http://[server]/website/xml/qlaunch/com.sap.portal.usersInLast3Hours/index.xml.



Use a forward slash (/) to indicate path separator.

7. Click Save.

# **Setting the Help URL Using the PCD Inspector**

- 1. Log into SAP Enterprise Portal with Content Administrator permission.
- **2.** From the Portal's top menu, click **System Administration**.
- **3.** From the *System Administration* page, click **Support**.
- **4.** From the Support page Top Level Areas list, click **Portal Content Directory**.
- **5.** In the Test and Configuration Tools list, click **PCD Inspector**. You may see warnings at this point; confirm these warnings and continue.
- **6.** From the PCD Inspector browser, check the box next to **portal_content**.
- 7. Click Browse Into.
- **8.** Repeat Step 6-7 as necessary until you reach the desired portal page.
- **9.** Select the checkbox next to the desired portal page, and click **PropEditor**. This will open a new browser window for the PCD Generic Layer Property Editor.
- 10. Click Switch to PCM.
- **11.** From the *List of All Properties* list, choose **com.sap.portal.iview.HelpURL**.
- 12. Click Edit.
- **13.** In the Property Value field, enter the complete address of the website/xml/qlaunch folder in the published website, followed by the iView/portal page ID and "/index.xml": http://[server]/website/xml/qlaunch/[iView/portal page ID]/index.xml.



Only http addresses will produce the desired help results. For example, an iView with an ID of "com.sap.portal.usersInLast3Hours", the following address would be used: http://[server]/website/xml/qlaunch/com.sap.portal.usersInLast3Hours/index.xml.



Use a forward slash (/) to indicate path separator.

14. Click Save.

### Modifying the Help Link in the Portal Masthead

By default, the Help link in the SAP EP masthead launches the SAP Help Portal; however, the Portal Content Administrator can change the URL that is displayed by this Help link. For

example, you may wish to have this Help link display the home page of your custom or application-generated website or display a specific page on your corporate intranet.

To select the URL that is displayed by the Help link in the Portal masthead, perform the following steps:

- 1. In the Portal Catalog, go to **Portal Users > Standard Portal Users.**
- **2.** Right-click on the *Default Framework* page and select **OPEN > OBJECT**.
- **3.** Check the *Masthead iView* checkbox and click **Properties**.
- **4.** In the Property Editor, from the *Property Category* drop-down list, select **Navigation**.
- **5.** In the Property Editor, locate the **URL of Help Link** property.
- **6.** In the URL of Help Link property, enter the URL of the site you want to display.
- 7. Click Save.

### Requesting Help from SAP Portal

- **1.** Log into SAP Portal as an end user.
- **2.** Navigate to the desired screen.
- **3.** Click the help icon (?) for the screen.



The website searches for available help for the screen based on the context identifier specified in the document.

- **4.** SAP Portal will open a new browser window displaying the following potential help options:
  - If a single help document has been created, the document displays in the new browser window.
  - If more than one help document has been created, a list of documents displays in the browser window.
  - If no help document has been created, an HTTP 404 (Page Not Found) error displays in the new browser window.

# Configuring SAP SRM 4-6 for Use with Context-Sensitive Help

SAP SRM captures context IDs and allows the SRM system to display the correct help content for each screen in a separate browser window. The context-sensitive help solution for SAP SRM provides custom help for only SRM Enterprise Buyers Professional (EBP) screens via the Help link in each screen.

One of the things that can be contained within an SAP EP iView is the SAP SRM user interface. In other words, a user can perform an SAP SRM transaction from within an iView. If a customer wants context-sensitive help for an SAP EP iView (regardless of what the iView contains), then the context-sensitive help solution for SAP EP is required.

### Obtaining the Help Launchpad Code Supplement

Download the Help Launchpad Code Supplement for SAP SRM from the Product Support Center. This code supplement was authored by ANCILE for use only by customers and partners. The code supplement file contains JavaScript code that redirects the SAP SRM's existing Help link to a help page created with the application.

### Modifying the Workplace Integration API

SAP Internet Transaction Server (ITS) embeds the wpintegration.js client-side script into every SRM screen at runtime. This script provides programmatic access to several SRM screen functions, including the Help link. By modifying the wpintegration.js script via the ABAP Workbench, we are able to intercept and redirect help calls made from this Help link.



Refer to the appropriate instructions and SAP Note(s) for changing JavaScript files via the ABAP Workbench.

To modify the Workplace Integration API:

- 1. Log into the appropriate SAP System using SAP GUI.
- 2. Open the ABAP Workbench Object Navigator using transaction SE80.
- **3.** In the Object Navigator, select the Internet Service **BBPGLOBAL**. The Web Application Builder is started.
- **4.** Select **WPINTEGRATION.JS** from the Mime Objects located under the BBPGLOBAL item in the Object list.

- 5. Right-click WPINTEGRATION.JS and select Change.
- **6.** If prompted, click the green check.
- 7. If prompted, click Maint. in logon lang.
- 8. Click Save As Local File.
- **9.** Create a backup copy of the wpintegration.js file (e.g., wpintegration.js.bak) on your local computer.
- **10.** In the Web Application Builder, scroll to the bottom of the wpintegration.js file.
- **11.** Append the Help Launchpad code supplement to the end of the wpintegration.js file.
- **12.** In the code supplement, locate and edit the following fields:

Field Name	Description
HELP_SERVER_LOCATION	Complete address of the qlaunch folder in the published website.
	The application's websites consist of a folder structure that stores the navigational pages, quick launch pages, and content for the web pages. This folder structure includes a qlaunch folder.
HELP_FALLBACK_LOCATION	Location of the fallback help, in case a scripting error occurs during context-sensitive help.
	The fallback help does not automatically redirect the user to a given website when there is a help page that cannot be found. The context-sensitive help solution for SRM cannot determine whether or not a specific help page exists on a given website.
SCREEN_ID_TEXT	Message text used to indicate the screen ID
SHOW_ID	Determines whether the screen ID is displayed in the new window launched from the screen Help link:
	true = show screen ID
	false = show help content
HELP_WINDOW_LEFT	Help window left position in pixels
HELP_WINDOW_TOP	Help window top position in pixels
HELP_WINDOW_WIDTH	Help window width in pixels
HELP_WINDOW_HEIGHT	Help window height in pixels

- 1. Save the **wpintegration.js** file.
- 2. Select the **BBPGLOBAL Internet Service** from the Object Navigator list.
- 3. Click Publish.



You should receive a message at the bottom of the screen stating the object published successfully.

**4.** Refresh the SRM screen displayed in the web browser.



You may need to clear your browser's cache or Temporary Internet Files.



This modification affects all screens in the SRM system. Be sure to verify that each screen has online help available.

### Determining the Screen ID

Each screen in an SRM system has a unique alphanumeric identifier (ID). This ID can be used as a reliable link between an SRM screen and its related help content. To link an SRM screen to help content, the ID must first be included in the applicable document(s).

If the **SHOW_ID** property is set to true, any user with access to an SRM screen can determine its ID using the Help link:

- 1. In the wpintegration.js file, ensure that the SHOW_ID property is set to **true**.
- **2.** Save the wpintegration is file.
- 3. Click Publish.
- **4.** Refresh the SRM screen displayed in the web browser.



You may need to clear your browser's cache or Temporary Internet Files.

**5.** In the desired BSP application screen, select the **Help** link to open a new window that displays the ID for the screen.

#### Including the SRM Screen ID in Documents

The application allows the author to populate properties within the document, then it leverages these properties when building website navigation and quick launch pages.

The application provides a Properties window for populating the Transaction Code(s) property within the document. To map a document to a SRM screen via the Properties tab:

- **1.** Ensure that the Transaction Code(s) built-in property is marked as visible in the template. By default, the display of all built-in properties is disabled in the template.
- **2.** Open the desired document associated with the template.
- 3. Select FILE > PROPERTIES....
- **4.** Click **PROPERTIES** on the left pane.
- **5.** Select the **Transaction Code(s)** field.
- **6.** Enter the iView/portal page ID or the screen ID in the Transaction Code(s) field. For multiple pages or IDs, separate each with a comma.
- 7. Click OK.
- **8.** Select **FILE > SAVE** to save your document.

### Viewing Help Content for an SRM Screen

If the SHOW_ID property is set to false, any user with access to an SRM screen can view help content for the screen using the Help link:



This modification affects the Help link for every SRM screen. Be sure to verify that help content is ready for each available SRM screen before performing the following steps. The Help link links blindly to a page that matches its ID.

- 1. In the wpintegration.js file, ensure that the SHOW_ID property is set to **false**.
- **2.** Save the **wpintegration.js** file.
- 3. Click Publish.
- **4.** Refresh the SRM screen displayed in the web browser.



You may need to clear your browser's cache or Temporary Internet Files.

**5.** In the desired Business Server Pages (BSP) application screen, select the Help link to open a new browser window that displays help content for the screen.

### **Enabling Help for SAP CRM**

To implement and use context-sensitive help for SAP CRM with the application, you will perform four procedures:

• Create a template.

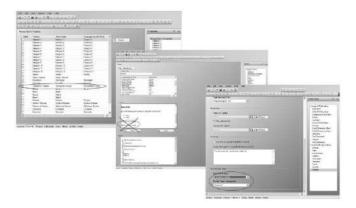
- Configure SAP CRM to send help requests to the application's website.
- Record an SAP CRM document with the application and republish the website to make the document available for context-sensitive help.
- Request context-sensitive help from SAP CRM.

### Creating a Template for Use with SAP CRM

Context-sensitive help for SAP CRM is driven by context identifiers. Each screen in SAP CRM has a unique context identifier and these are gathered collectively for a procedure and automatically inserted into the transaction code property of a document. Context identifiers are used to call context-specific help on the screen in which the end user is working.

Transaction code is a term and property used to identify a process, and it is used in two separate instances:

- **Transaction code property**: The Server matches this document property to the associated SAP CRM screen when a call for help is made from SAP CRM.
- **Transaction code block**: In a document, this block displays the transaction code pertaining to the document created.



**1.** Create a template.



A project administrator typically creates and customizes templates. For more information, refer to Using Author Templates (on page 317).

- 2. Select the **Blocks** tab.
- 3. Select Purpose.
- **4.** Turn off the display of the **Transaction Code** block in a document.

- **5.** Select the **Properties** tab.
- **6.** Enable the **Transaction Code** property.
- 7. Select FILE > SAVE.
- **8.** Click the **Publications** tab.
- 9. Select Website.
- 10. Select Transaction Code(s) from the Build from Property field.
- 11. Select Comma(,) from the Multiple Values Separated By field.
- 12. Select FILE > SAVE.

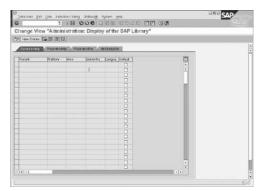
### **Publishing the Website**

As part of website publishing, you will also generate quick launch pages to enable communication between the application website and SAP CRM. For information on publishing the website, refer to Publishing the Website (on page 414).

### Configuring SAP CRM to Send a Help Request to the Website

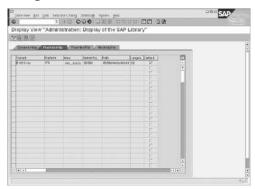
The SAP system administrator must configure SAP CRM to send help requests to the website. This configuration is specified by adding variants to the Plain HtmlHttp tab of the SR13 transaction code.

- 1. Log into SAP CRM via the SAP GUI.
- 2. Enter the transaction code SR13.



- **3.** On the **Dynamic Help** tab, delete any existing entries.
- 4. Click .

# **5.** Select the **PlainHtmlHttp** tab.



# **6.** Complete the following fields:

Field	Description
Variant	Enter a variant name.
	Example: YourCompanyHelp
Platform	Enter a platform.
	Example: ITS.
Area	Enter an area.
	Example: <b>XML_DocU</b>
Server Name	Enter the webserver name.
	Example: MySite
Path	On the web server, locate the <b>redirect.html</b> . This
	file is found in http://[webservername]/[website name]/website/xml/assets/redirect.html.
	Copy the URL beginning with [website name], and paste into the <b>Path</b> field.
	Example: [website name]/website/xml/assets/redirect.html
	Append ?csh= to the end of the path name
	Example: [website name]/website/xml/assets/redirect.html?c sh=
	This path name cannot exceed 64 characters.
Language	Enter the language key.
	Example: For German, enter <b>DE</b> .
Default	Select this checkbox if the language specified is the default help language.

# 1. Click .

### Recording an SAP CRM Document

- **1.** Log into SAP CRM.
- **2.** Perform one of the following options:

If You Want To	Then
Record and edit the entire document	Use the template created in Creating a Template for Use with SAP CRM 2007 (see "Creating a Template for Use with SAP CRM" on page 449), to record and edit the document using the Editor and the procedures described in Creating Online Help (on page 423).  Go to Step 3.
Insert steps into a previously recorded document	Update the template associated with the document.
	Open the document.
	Select the Simulation tab.
	Select Insert > Steps > From New Recording.
	Record the steps in SAP CRM using the Editor and the procedures described in Recording Procedural Content (on page 51).
	Go to Step 3.

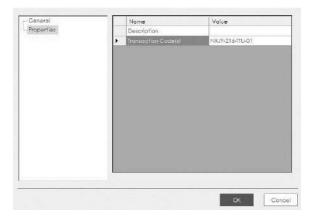


The recorder does not automatically gather transaction codes for screens containing an embedded SAP HTML GUI; however, you can obtain the transaction codes in this environment if you have integrated ANCILE Help Launchpad with the SAP system you are displaying within the embedded HTML GUI.

In the above scenario, select Help > [Custom] Help within the transaction displayed in the HTML GUI. Review the web address field displayed in the new browser window, and identify the transaction code for this transaction. Copy the code and paste it into the Transaction Code property of the document you are currently recording.

**3.** In the application, select **FILE > PROPERTIES**.

4. Select Properties.



- **5.** Ensure the context identifier(s) have been inserted into the Transaction Code value field.
- 6. Click OK.
- **7.** Save the document.
- **8.** Add the document to the website using the procedures described in Building a Website (on page 393).
- **9.** Publish the document using the procedures described in Publishing Content.
- **10.** Republish the website using the procedures described in the Building a Website (on page 393).



When the website is republished, the document will be available for the end user via the help icon in SAP CRM 2007.

### Requesting Help from SAP CRM 2007

**1.** Log into SAP CRM as an end user.

**2.** Navigate to the desired screen.



**3.** Click the help icon (?) for the screen.



The website searches for available help for the screen based on the context identifier specified in the document.

- **4.** SAP CRM 2007 will open a new browser window displaying the following potential help options:
  - If a single help document has been created, the document displays in the new browser window.
  - If more than one help document has been created, a list of documents displays in the browser window.
  - If no help document has been created, an HTTP 404 (Page Not Found) error displays in the new browser window.

### **Enabling Help for Oracle E-Business**

To implement and use context-sensitive help for Oracle E-Business with the application, you will perform six procedures:

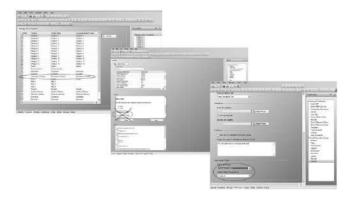
- Create a template for use with Oracle E-Business.
- Publish the website.
- Specify a designated author account for Oracle E-Business.
- Record an Oracle E-Business document with the application and republish the website to make the document available for context-sensitive help.
- Modify an Oracle E-Business end user account for use with context-sensitive help.
- Request context-sensitive help from Oracle E-Business.

### Creating a Template for Use with Oracle E-Business

Context-sensitive help for Oracle E-Business is driven by context identifiers. Each screen in Oracle has a unique context identifier. Context identifiers are gathered collectively for a procedure and when inserted into the transaction code property of a document, will call context-specific help on the screen in which the end user is working.

Transaction code is a term and property used to identify a process, and it is used in two separate instances:

- **Transaction code property**: The website matches this document property to the associated Oracle screen when a call for help is made from Oracle.
- **Transaction code block**: In a document, this block displays the transaction code pertaining to the document created. For Oracle documents, it is recommended that the display of this block be disabled within the template.



**1.** In the application, create a template.



A project administrator typically creates and customizes templates. For more information, refer to Creating Online Help (on page 423).

- 2. Select the **Blocks** tab.
- 3. Select Purpose.
- **4.** Turn off the display of the **Transaction Code** block in a document.
- **5.** Select the **Properties** tab.
- **6.** Ensure the transaction code property is selected.
- 7. Select FILE > SAVE.
- **8.** Click the **Publications** tab.
- 9. Select Website.

- 10. Select Transaction Code(s) from the Build from Property field.
- 11. Select Comma(,) from the Multiple Values Separated By field.
- 12. Select FILE > SAVE.

### **Publishing the Website**

The website must be published to a web server that is accessible by Oracle E-Business before authors can record documents. As part of website publishing, you will also generate quick launch pages to enable communication between the website and Oracle E-Business.

For information on publishing the website, Publishing the Website (on page 414).

### Specifying an Author Account for Oracle E-Business

The Oracle system administrator must create a designated author account in Oracle E-Business. This account communicates with the website to generate the screen data necessary to request help from Oracle E-Business.

You must log into Oracle E-Business using the designated author account in order to record help-ready documents. Context-sensitive help is not available when logged via the author account.

For more information on creating user accounts, refer to the Oracle E-Business documentation.

- 1. On the website server, locate the **csh_capture_context.html** file. For example: http://[webservername]/[website name]/website/xml/assets/csh_capture_context.html.
- **2.** Copy the URL, including the filename.



**3.** Paste the URL, including the filename, into the Applications Web Help Agent profile setting User column for the author in Oracle E-Business.



For more information on setting system profile values, refer to the Oracle E-Business documentation.

**4.** Save the author settings.

# Recording an Oracle E-Business Document

- **1.** Log into Oracle E-Business using the author account created in Specifying an Author Account for Oracle E-Business (on page 456).
- **2.** Create a new document using the template created in Creating a Template for Use with Oracle E-Business (on page 455).
- **3.** Perform one of the following options:

If You Want To	Then
Record and edit the document and gather context identifiers later	Record and edit the document using the Editor and the procedures described in the <i>Creating Content</i> user manual.
	Go to Step 4.
Record the document and gather context identifiers as you complete the document	Record the document, pausing the recorder after each screen recorded. For more information on recording, editing, and using the recorder toolbar, refer to Recording Procedural Content (on page 51), Editing and Formatting: Basics (on page 91), Editing and Formatting: Procedural Content (see "Specifying Simulation Editor Options" on page 40).  Click the help icon for each screen.  This will open a new browser window containing the context identifier for the screen.
	Repeat until context identifiers for all screens within the procedure have been collected.
	Go to Step 6.

**4.** After you are finished recording, revisit the Oracle screens and click on the help icon on each screen captured in the recorded document.

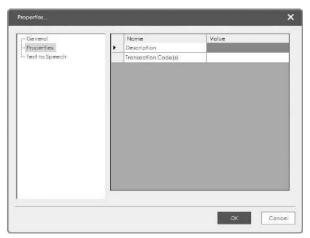


This will open a new browser window containing the context identifier for the screen.

**5.** Repeat Step 4 until context identifiers for all screens within the procedure have been collected.



- **6.** Highlight and copy the context identifier string from the browser window.
- **7.** Open the document created in Step 2.
- **8.** Select FILE > PROPERTIES.
- 9. Select Properties.



- **10.** Paste the context identifier string into the **Transaction Code** property of the document.
- 11. Click OK.
- **12.** Save the document.
- **13.** Add the document to the website using the procedures described in Building a Website (on page 393).
- **14.** Publish the document using the procedures described in Publishing Content.
- **15.** Republish the website using the procedures described in the Building a Website (on page 393).



When the website is republished, the document will be available for the end user via the help icon in Oracle.

Perform the following optional configuration steps to create a link to Oracle Help from the website:

- **16.** Navigate to the website. For example: http://[webservername]/[web\-site name]/website/xml/assets.
- **17.** Locate the **.Website.xslt** file.
- **18.** Create a backup of the file.
- **19.** Open the original file in Notepad or an XML Editor.
- **20.** Edit the following variables:

Field	Description
<xsl:variable <br="" name="sys\-&lt;br&gt;temHelpLocation">select="""/&gt;</xsl:variable>	The URL for the default help in Oracle.  Example: <xsl:variable "="" name="systemHelpLo\cation" select="http://acmeoraclehelp.com/index.htm"></xsl:variable>
<xsl:variable "="" name="sys\-temHelpTitle" select=""></xsl:variable>	The Help title that displays to an end user.  Example: <pre><pre>cxsl:variable name="systemHelpTi\-tle"</pre> select="'Oracle Help""/&gt;</pre>

**21.** Select FILE > SAVE.

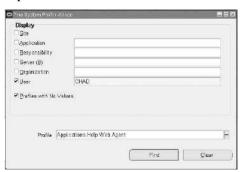
### Modifying Oracle E-Business End User Accounts for Context-Sensitive Help

You must modify all existing user accounts to enable context-sensitive help. An Oracle administrator creates end user accounts based on the needs of the company. While there are several options for defining system profile values for existing users, this procedure demonstrates defining a system profile value for an individual user.

**1.** Log into Oracle as a system administrator.

# **Chapter 18: Creating Online Help**

**2.** Navigate to the system profile values.



**3.** Define system profile values for the user.



Refer to the Oracle documentation for information about the System Profile Values Site, Application, Responsibility, and User, and to choose the system profile value that is most appropriate for your end user community. If you are using multiple locales on the website, you must specify the account by User.

- **4.** On the website server, locate the redirect.html file. For example: http://[webserver name]/[website name]/website/xml/assets/redirect.html.
- **5.** Copy the URL, including the filename.



**6.** Perform one of the following options:

If You Want To	Then
Create an end user account for Oracle E-Business 12	Paste the URL into the Applications Web Help Agent profile setting User column for the end user in Oracle.
Create an end user account for Oracle E-Business 11.5	Paste the URL into the Applications Web Help Agent profile setting User column for the end user in Oracle.
	Append ?rwd=true to the end of the URL string.
	Example: http://[webserver name]/[website name]/website/xml/assets/redi\rect.html?rwd=true.

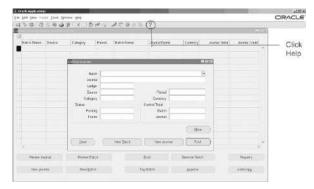


For more information on setting system profile values, refer to the Oracle documentation.

**7.** Save the end user settings.

# Requesting Help from Oracle E-Business

- **1.** Log into Oracle E-Business as an end user.
- **2.** Navigate to the desired screen.



**3.** Click the help icon for a screen.



The website searches for available help for the screen based on the publication settings specified in the template and the context identifier specified in the document.

- **4.** Oracle E-Business will open a new browser window displaying the following potential help options:
  - If a single help document has been created, the document displays in the new browser window.
  - If more than one help document has been created, a list of documents displays in the browser window.
  - If no help document has been created, an HTTP 404 (Page Not Found) error displays in the new browser window.

# **Context-Sensitive Help for Siebel**

Context-sensitive help allows you to provide end users with quick and convenient access to help via an online performance support system. End users request help from the Server via a direct link in Siebel.

To implement and use context-sensitive help for Siebel you will perform three procedures:

- Create a custom help menu in Siebel.
- Record a Siebel document with the application and make this document available for context-sensitive help.
- Request help from Siebel.

For information on supported versions of Siebel, refer to the *Technical Specifications*.

# Creating a Siebel Custom Menu and Publishing the Website

# Obtaining the Siebel Custom Menu eScripts

Download the Siebel Custom Menu eScripts from the Product Support Center. The following scripts were authored by ANCILE for use only by customers and partners. These scripts contain JavaScript code that redirects Siebel's existing Help link to a help page created with the application.

- Service_PreCanInvokeMethod_Server.txt
- ServicePreInvokeMethod Browser.txt

# Creating a Custom Menu In Siebel



We recommend creating a custom menu in the test environment and migrating the changes to the production environment after the changes have been complied and tested.



All actions within this procedure are performed in Siebel using Siebel Tools. For information on supported versions of Siebel, refer to the *Technical Specifications*.

1. Create a new project to house changes needed to add a context-sensitive help link from Siebel to the website. Be sure to include a name and description for the project.

- **2.** Check out the context-sensitive help project.
- **3.** Check out the menu used in the target application.
- **4.** Create a new symbolic string for the menu item using the following values:



A symbolic string must be created for each locale.

Field	Description
Name	Enter a name for the symbolic string.
Current String Value	Enter the string value.
Project	Enter the project name created in Step 1.
Definition	Enter a definition.
Comment	Enter any amplifying information about the string.

- **5.** Save the string.
- **6.** Create a new business service using the following values:

Field	Description	
Name	Enter a name for the service.	
Project	Enter the project name created in Step 1.	
Class	Enter the class.	
Comment	Enter any amplifying information about the service.	

- **7.** Save the service.
- **8.** Create a new Business Service Method called **HP ART**.
- **9.** Right-click on the business service you created in Step 6.
- 10. Select Edit Server Scripts.
- 11. Select eScript.
- **12.** Paste the provided script into the **Service_PreCanInvokeMethod** method.
- **13.** Save the server script.
- **14.** Right-click on the business service you created in Step 6.
- **15.** Select **Edit Browser Scripts**.
- **16.** Select **eScript**.

#### **Chapter 18: Creating Online Help**

- **17.** Paste the provided script into the **Server_PreInvoke** method.
- **18.** Replace [Server Name] with the URL of the redirect.html page on the website.
- **19.** Save the browser script.
- **20.** Using Siebel Tools, create a new command using the following values:

Field	Description
Name	Enter a name for the command.
Project	Enter the project name you created in Step 1.
Business Service	Enter the business service you created in Step 6.
Display Name	Enter a display name for the command.
Show Pop-up	Ensure the <b>Show Pop-up</b> box is selected.

- **21.** Save the command.
- **22.** Create a new menu item for the menu project using the following values:

Field	Description
Name	Enter a name for the menu item.
Caption	Enter the string reference created in Step 4.
Command	Enter the command created in Step 20.
Position	Select the appropriate position.

- **23.** Save the menu project.
- **24.** Compile, test, and migrate the changes to the production environment.

# **Publishing the Website**

The website must be published to a web server that is accessible by Siebel before authors can record documents. As part of website publishing, you will also generate quick launch pages to enable communication between the website and Siebel.

For information on publishing the website, refer to Publishing the Website (on page 414).

For information on supported versions of Siebel, refer to the *Technical Specifications*.

# **Creating Content and Requesting Help**

# Recording and Publishing a Siebel Document

**1.** Record a Siebel document using the procedures described in Recording Procedural Content (on page 51).

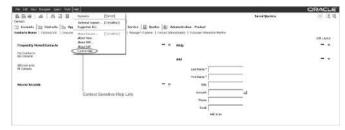


The recorder will automatically gather the view names for each screen as the author records the document and hard code the names into the document meta data.

- **2.** Edit the document using the procedures described in Editing and Formatting: Basics (on page 91) and Editing and Formatting: Procedural Content (on page 105).
- **3.** Publish the document to the website using the procedures described in Building a Website (on page 393).
- **4.** Republish the website using the procedures described in Publishing the Website (on page 414).

# Requesting Help From Siebel

- 1. Log into Siebel as an end user.
- **2.** Navigate to the desired screen.



3. Select HELP > [HELP NAME].



The help name is specified when you create the help menu option. For more information, refer to Creating a Custom Menu In Siebel 8 (see "Creating a Custom Menu In Siebel" on page 462).

- **4.** Siebel will open a new browser window displaying the following potential help options:
  - If a single help document has been created, the document displays in the new browser window.
  - If more than one help document has been created, a list of documents displays in the browser window.

# **Chapter 18: Creating Online Help**

- If no help document has been created, an HTTP 404 (Page Not Found) error displays in the new browser window.
- **1.** Choose from the following options:

If You Want To	Then
Select a help document	Click on the hyperlink for the document you wish to view.
Access the Siebel Help Center	Click <b>Siebel Help</b> in the upper left.
Return to Siebel	Close the browser window.

# **Configuring PeopleSoft for Use with Context-Sensitive Help**

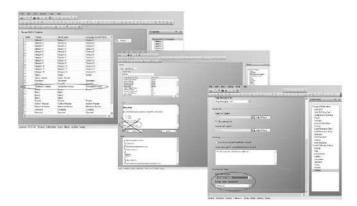
Context-sensitive help allows you to provide end users with quick and convenient access to help via an online performance support system. End users request help from the server via a direct link in the PeopleSoft application. For information on supported versions of PeopleSoft, refer to the *Technical Specifications*.

# Creating a Template for Use with PeopleSoft

Context-sensitive help for PeopleSoft is driven by context identifiers. Each screen in PeopleSoft has a unique context identifier and these are gathered collectively for a procedure and automatically inserted into the transaction code property of a document. Context identifiers are used to call context-specific help on the screen in which the end user is working.

Transaction code is a term and property used to identify a process, and it is used in two separate instances:

- **Transaction code property**: The server matches this document property to the associated PeopleSoft screen when a call for help is made from PeopleSoft
- **Transaction code block**: In a document, this block displays the transaction code pertaining to the document created.



**1.** In the application, create a template.



A project administrator typically creates and customizes templates. For more information, refer to Using Author Templates (on page 317).

2. Select the **Blocks** tab.

#### **Chapter 18: Creating Online Help**

- 3. Select Purpose.
- **4.** Turn off the display of the **Transaction Code** block in a document.
- **5.** Select the **Properties** tab.
- **6.** Enable the **Transaction Code** property.
- 7. Select FILE > SAVE.
- **8.** Click the **Publications** tab.
- 9. Select Website.
- **10.** Select **Transaction Code(s)** from the **Build from Property** field.
- 11. Select Comma(,) from the Multiple Values Separated By field.
- **12.** Select FILE > SAVE.

# Publishing the Website

As part of website publishing, you will also generate quick launch pages to enable communication between the website and PeopleSoft. For information on publishing the website, refer to Publishing the Website (on page 414).

### Recording a PeopleSoft Document

**1.** Record a document using the procedures described in Recording Procedural Content (on page 51).



The recorder will automatically gather the view names for each screen as the author records the document and will insert the names into the document metadata.

**2.** Edit the document using the procedures described in Editing and Formatting: Basics (on page 91) and Editing and Formatting: Procedural Content (see "Specifying Simulation Editor Options" on page 40).

# Requesting Help from PeopleSoft

- 1. Log into PeopleSoft as an end user.
- **2.** Navigate to the desired screen.
- 3. Click HELP.

- **4.** PeopleSoft will open a new browser window displaying the following potential help options:
  - If a single help document has been created, the document displays in the new browser window.
  - If more than one help document has been created, a list of documents displays in the browser window.
  - If no help document has been created, a zero search result window displays.



If stay-on-top is enabled, the help document remains on top of the Peoplesoft screen. Stay-on-top help uses an Active X control to support this functionality. If a user does not have Active X installed on the computer, a prompt to install the control is displayed.

**1.** Choose from the following options:

If You Want To	Then
Select a help document	Click on the hyperlink for the document you wish to view.
Return to PeopleSoft	Click Peoplesoft Help.

ter 18: Creating Onlin	e Help		

# Appendix A: Configuring Java Access Bridge for Recording

When you first record a Java application, the Recorder will detect if Java Access Bridge (JAB) has been configured appropriately for the Java application being recorded. If the application detects that JAB has not configured properly, a message appears advising that JAB needs to be configured for the Java Runtime Environment (JRE). The message may be similar to: "For best results recording this application, configure Java Access Bridge into this Java Runtime Environment."



The warning message will display the Java Runtime Environment that needs configured for the application you are recording. You may want to make note of this file in case multiple files display during the configuration process.

# Configuring Java Access Bridge

**1.** Browse to the application's installation folder.



The default location is C:\Program Files (x86)\[applicationdirectory]\ or C:\Program Files\[applicationdirectory]\.

- **2.** Locate and double-click the jinitefg.exe file.
- 3. Click Next.
- **4.** Select the Java Runtime Environment used to run the Java application and the corresponding JAB version.



If the JRE path you need to configure is not listed, you may also manually locate the JRE (if it is in a self-contained application) by clicking the Browse button.

- **5.** Select Always replace existing files.
- 6. Click Next.
- 7. Click Next.

# Appendix A: Configuring Java Access Bridge for Recording

- **8.** Click Finish after the configuration is complete.
- **9.** Start the recording process again.

# Glossary of Terms

#### Annotation

A note added to content by another author or a reviewer.

#### **Annotation Set**

The collection of reviewer notes on a particular document.

# **Application Mode**

One of three available recording modes. Allows the author to capture actions in one target application.

# **Assessment Page**

A page in a course that consists of questions, answers, and optional images. Assessment pages can be used as self-tests throughout the course or can be inserted into an assessment section for tracking via a Learning Management System (LMS).

#### **Assessment Section**

Part of a course that records an end user's answers and sends results to a Learning Management System (LMS) for tracking.

#### **Author**

A user who creates or edits content.

# **Auto Playback**

A simulation playback mode that automatically runs the lesson without user interaction. In this mode, the application performs the actions to complete the simulation with the user as an observer.

#### **Batch**

An operation performed on more than one document (for example, the batch publishing of content).

# Block

A content element containing the information required to render a discrete item in all available views. Types include step, note, free text, and the header and footer areas. A Free Text Block contains user-defined formatted text. A Note Block contains notation text and a single pre-defined

#### **Glossary of Terms**

icon graphic. A Step Block contains the information that describes a discrete action, including the screen image for the action.

#### **Branch**

An alternate sequence of steps used to accomplish a secondary flow within a course or simulation.

# **Branching Table**

A table inserted into the procedural section of a document to direct users to make a decision regarding going to other steps or options.

#### **Callouts**

Numbered objects or notes that allow you to bring attention to specific controls and regions on screen images within a published document.

# **Configuration Information**

A section within a document that contains configuration information and can be output as a publication.

#### Course

A collection of informational content and optional assessment tools such as multiple choice, drag-and-drop, and fill-in-the-blank.

# **Course Homepage**

A web page generated that contains the link to the published course.

# **Course Package**

A container for multiple content files output to a single master SCORM package.

#### **Cue Card**

A publication type created from the application's content and typically used in context-sensitive help.

#### **Definition**

Within the glossary functionality, amplifying information about a term used in the target application. A term can have multiple definitions based on the context of the document.

#### **Desktop Mode**

One of three available recording modes. Allows the author to capture the complete desktop and actions across a series of applications.

#### **Document**

A set of instructions, images, and associated objects intended for use as online help or performance support.

The XML content produced by the application as a result of recording author actions in a target application; includes the document, simulation, and screenflow views.

# **Drag and Drop Action**

A simulation action indicating mouse input is required. This action is used to identify a click, drag, and release mouse action required to navigate to the next step in a simulation or to answer a question in a drag-and-drop assessment page within a course.

#### **Edit Action**

A simulation action indicating text input is required. This action is used to identify a string of keyboard input (text input) required to navigate to the next step in a simulation.

#### **Editor**

The application used to create, record, and modify documents, simulations, and courses.

#### **End User**

Any person who accesses performance support content through a website.

# **Express Publish**

The process of publishing only those documents that have been modified since the last publish operation.

#### Flash

A file format developed by Adobe; this output type is used to display content within courses and simulations.

# **Glossary**

The function that enables the management of terms and definitions. Also, the name of an ANCILE Info Pak application.

#### **Guided Help**

Published HTML content designed to be used during task execution.

#### Hint

The nonessential data (for example, a user name) required to complete a simulation. Hints can be provided to the student during playback of the simulation.

#### **Hotspot**

A resizable box surrounding an action location in a simulation or course.

#### Inbox

Folder location containing source content to be published or leveraged.

#### **Key Action**

A simulation action indicating keyboard input. This action is used to identify a specific keystroke or sequence of keystrokes required to navigate to the next step in a simulation.

#### Lesson, Course

A component of an eLearning course. A lesson contains pages and is typically used as an introduction to a section.

#### **Glossary of Terms**

#### Lesson, Simulation

The output of a recording and subsequent editing that simulates a task in a software application.

#### Link

A hyperlink within a document, a course, or a website page.

#### Outbox

Folder location containing content that has been published.

#### Overview

The introduction section of a document that contains purpose, trigger, prerequisites, menu paths, and helpful hints; included in Work Instructions, Quick References, and Cue Cards after publishing.

# **Page**

A page contains the content of the eLearning course. Page layout is governed by the use of stencils. There are two different page types available: standard content and assessment.

# **Passing Grade**

Specifies the minimum percentage of correct responses that the user must achieve to pass the test.

#### **Phrase**

A group of culture-specific boilerplate text items that are placed into a content block by default.

# **Playback**

The interactive output mode of a simulation. Simulator supports four types of playback: Standard Tutorial, Auto Playback Tutorial, Self-Test Tutorial, and Assessment Tutorial.

#### **Preloader**

A performance-enhancing feature that enables preloading of the simulation or course on the target computer before the content begins to execute.

#### **Properties**

Metadata such as document title, owner, and version used to describe content. In addition to the standard built-in properties, custom properties may be created.

#### **Publication**

Content that is outputted to a publication; a publication is meant to be consumed by an end user.

# **Publish Format**

The output format of published content. Available formats include Flash simulations and PDF.

#### **Publish Type**

The output type of published content. Available types include work instruction, cue card, and simulation.

#### **Quick Reference**

A type of procedural publication often used in end user training.

#### **Quick Start Panel**

An interface feature of the Editor that provides expedited access to the recording and editing functions.

#### Recorder

The functionality that captures author actions in one or more target applications to produce a formatted document, simulation, and screenflow.

#### Redo

An editing option that allows the author to reverse the last Undo action performed.

#### Resources

Links or documents that can be added to a course to provide additional information.

#### Screenflow

A diagram representing the flow of steps in a task.

#### Section

A section represents a single, contiguous group of blocks in a document. In the document arrangement, a block must belong to a section. Each section element consists of a sequential array of cross-references to the available blocks. Similar items within a document can be grouped into discrete sections, and publications can include/exclude particular sections. A section cannot contain another section.

#### Self-Test

A simulation playback mode that includes no instructions, hotspot objects, notes, audio playback, or step status bar information. In this playback mode, the user is encouraged to remember and perform all necessary steps for testing purposes.

#### Simulation

A set of instructions, images, and associated objects intended for export as interactive output.

#### Simulation Assessment

A simulation playback mode with no instructions, hotspot objects, notes, audio playback, or step status bar information. In this mode, the user is encouraged to answer questions regarding material and to remember and perform all necessary simulation steps for testing and grading purposes.

#### Skin

The skin files define the style of the interface elements. Using skins, you can change the colors of the interface areas, set new fonts properties, use different images for icons in the interface, etc.

#### Stencil

A layout tool governing the design of a course page.

# Step

One of a series of actions that collectively form the procedure captured in the document or simulation.

#### **Glossary of Terms**

#### **Student Guide**

A collection of concepts, procedures, and exercises related to a series of tasks or a process.

# Style

A group of formatting options that relate to paragraphs or character text.

#### **Task Pane**

The area of the editing application that provides access to items such as annotations, document layout, and simulation steps.

# **Template**

A set of document, simulation, and course options that control formatting and content. Each content file is created from a template which determines the basic structure for content and specifies the content settings. The template also specifies information about the types and formats of content that can be published.

#### Term

The name of a field or option in the target application being documented. A term can have one or more definitions.

# **Testing Information**

A section that contains testing scenarios and history, and can be output as a publication.

# **Text to Speech (TTS)**

Converting text into voice output using speech synthesis techniques.

#### **Tooltip**

A type of note that displays during simulation playback when the user hovers over the specified area.

# Undo

An editing option that allow the author to reverse the last action performed. Undo caches up to twenty steps.

#### User

The consumer of final published content via online help or the website.

#### View

A way of displaying content to an author or user; there are four views of content available: document, simulation, screenflow, and course.

#### Voice Over

An option allowing for the inclusion of an audio file during simulation or course playback.

#### Website

A collection of performance support materials such as procedures, simulations, and courses that are available to end users via a web browser.

# **Work Instruction**

A type of content output typically used in user training that contains end user procedural information, including screen shots and field description tables.

# **XML**

Extensible Markup Language; the source format of application content.

# XSL

Extensible Stylesheet Language; the file used to control the format of the content displayed in an XML file.

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