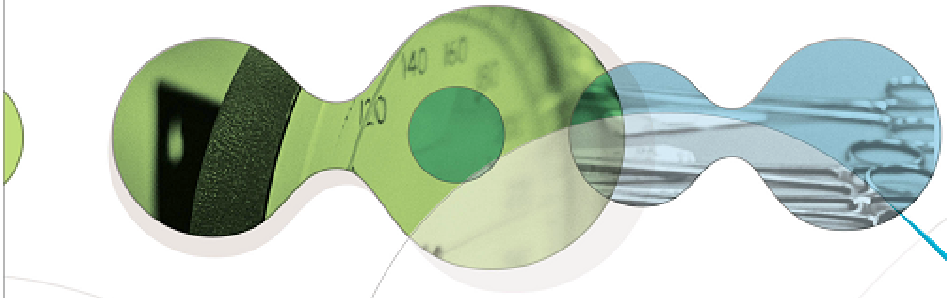
picis



# Training-in-a-Box

## Instructions for Creating Modules

## V10

## Revision History

| Version | Reason for Change | Date |
|---|---|---|
| | | |
| v2 | Added info on how to generate Word output from FrameMaker | Oct 14 2004 |
| v3 | Added info on creating PDFs | Jan 11 2005 |
| v4 | Added info on using graphics | Jan 14 2005 |
| v5 | Added info on blocks, conditions and importing slides | Jan 14 2005 |
| v6 | Added troubleshooting section | Mar 1 2005 |
| v7 | Updated for TIABv2. Slight changes throughout. | Mar 7 2005 |
| v8 | Added info on packaging and releasing TIAB modules | Mar 18 2005 |
| v9 | Added info on TIAB usage (aimed at instructors and sites who want to use our training material) | Apr 26 2005 |
| v10 | Updated formats. Corrected missing links. Added links to TIAB framework on P drive. | July 04, 2005 |

# Table of Contents

# 1. Introduction

Training in a box (TIAB) is a single source platform with the following features:

- It provides unified, self-consistent and searchable documentation, training material and help files.
- It allows learning developers to write content using one source (FrameMaker) and output to different formats (PDF and HTML Help).
- It allows learning developers to produce training material for instructors and attendees from the same source.

All edits are made in the source material; the output files never need editing. This is essentially the test for 100% single sourcing.

# 2. Deliverables

TIAB material is created in projects called modules. The amount of information in a module varies. The smallest modules contain enough training material for a half day course. Such modules can be slotted into a larger training course or used standalone. The largest modules contain enough training material for a five day course.

Regardless of its size, each module is composed of smaller units.

A TIAB module consists of three deliverables:

1. A zip file for training purposes. The zip file contains the following items:
    - An instructor workbook (PDF)
    - An attendee workbook (PDF)
    - A "Classroom Introduction" presentation (PowerPoint)
    - One presentation for the whole module or one per unit, depending on the size of the module (PowerPoint)
    - A list of skill objectives covered by the module (PDF)
    - An agenda for training (PDF)
    - A document describing classroom requirements that must be fulfilled (PDF)
    - A feedback form for attendees to fill in and give to the instructor (PDF)
2. A user guide PDF for each of the products covered by the module. (Usually only one.) PLS places the PDF(s) in a designated server folder or in Source Safe as agreed with the relevant Project Manager.
3. (Optional) HTML Help file for each of the products covered by the module. (Usually only one.) PLS places the PDF(s) in a designated server folder or in Source Safe as agreed with the relevant Project Manager.

# 3. Using TIAB Material (Info for Instructors)

TIAB training material has certain characteristics that instructors should bear in mind, as described below.

**Printing**

- The material is designed such that attendees must have the Attendee Workbook open in front of them as they follow the course. This is essential because headings and callout text for slides are not shown on the slides themselves, but in the workbook. The workbook also contains the exercises that will be followed during class.
- TIAB training material can also be used for web training. In such cases, the instructor should make the Attendee Workbook PDF available to attendees well in advance of the training session along with instructions to print it beforehand.

**Site-specific information**

- The same material is used for all sites and cannot be changed by the instructor. Any enhancement suggestions the instructor might have should be forwarded to the TIAB author at the earliest opportunity for incorporation into the next release of the material.
- The instructor is at liberty to refer to site-specific content during demonstrations and exercises throughout the training, although this will not be reflected in the workbook. The more site-specific info needed, the more time the instructor can spend on demos.
- If the instructor feels it necessary, he or she can prepare extra printouts with purely site-specific information to accompany the training material. The printouts should be fastened together with a cover page (provided in the TIAB module) in which it says "Site-specific information". The info should not be included inside the workbook.
- If a site will perform further training itself (without Flexibus involvement), we should recommend that they use the provided TIAB module as is. If they categorically tell us that they will not use the module because it doesn't meet their needs, PLS can supply them with a Word output of the workbook, which they can edit and reformat as required. At least this way we can make sure they start off on the right track.

**Presentation Guidelines**

- The Instructor Workbook contains instructor tips and answers to exercise questions.
- All PDF outputs have a notes column on the outer edge of each page, where readers can enter notes. (Some instructor notes may already appear in these columns.)
- PowerPoint presentations do not have headings or animated effects. (The headings are in the workbooks.)
- For slides showing screenshots of interface dialog boxes, the menu and command necessary to open the dialog box in the program is given in the workbook immediately below the graphic (E.g. "**File** menu, **Import** command").
- For graphics with callout letters, the key to the letters is given in the workbook. This means the instructor cannot simply read them from the slide.

# 4. Developing TIAB Modules

## 4.1 Overview

All files needed for creating a TIAB Module can be found here:

| BCN | UK |
|---|---|
| [illegible]\PES_Doc_Projects\TIAB | [illegible]\TIAB |

The TIAB folder has the following structure:

You create a TIAB module by copying the latest TIAB version folder structure to your working folder and then building the files in that structure using FrameMaker, Word and PowerPoint. Your working folder can be either a server folder or a local folder. In any case, you should make regular backups to a suitable location in the PES_Doc_Projects folder.

**Technical Note**

In particular, it is worth backing up your PowerPoint Presentation(s) regularly to avoid losing graphics due to the so-called "big red x" problem, described here:

[illegible]

Each version folder includes two folders: "_Skeleton Structure" and "Components". The skeleton structure folder contains the basic folders and files you will work from. The "Components" folder contains the basic FrameMaker blocks (paragraphs and graphics) you will use to build your project and the templates you need to apply for each output.

You should never need to copy the TIAB\Development folder.

You may want to copy contents from the TIAB\Tools folder.

## 4.2 Requirements

Before developing with TIAB, you need to have the following software installed:

Windows 2000, XP or greater

Adobe FrameMaker v.X.0 or greater

MS Word 2003 and PowerPoint 2003 or greater

Acrobat 7 or greater (commercial version)

The latest AdobePS driver (Acrobat 5 only)

The latest version of Mif2Go

The HTML Help Workshop

Paint Shop Pro 8 or similar for editing and converting graphics
FullShot or similar for screen captures

From the Documentation\Fonts\Current PLS Fonts\ folder
"CurrentPLSFonts.zip": Extract the fonts to your Windows fonts folder.

# 5. Workflow

**Important**

Do not change formats or create new formats.

Do not use inset files.

Do not create new master pages or change page layouts in any way.

Do not change the number of levels in the TOC.

If you feel you need to do any of these things, please contact the TAB Administrator (Nelson).

The workflow for creating a TAB module is as follows:

1. Copy the latest versioned folder (e.g. TABv2) to your working folder.
2. Rename the skeleton structure folder to match the name of the TAB module you are working on. You can use spaces, but not underscores. E.g. change "_Skeleton Structure" to "HR Manager".
3. Create a skill objectives document using the template in the subfolder named "_TAB supplementary documents".
4. Create a unit plan in the "_raw material" folder. The plan can be in Word, Mind Map or whatever you like as it does not form part of the TAB delivery.
5. Create empty presentation(s) by copying and renaming the template in the skeleton structure "_Presentations" folder named "TAB MODULE OR UNIT NAME Presentation.ppt. You can either create one presentation for the whole module or an individual presentation per unit. The choice will depend on the size of the module and units. Use your judgment, asking Jamie or Adam for advice if needed.
6. Make a copy of the "Unit" folder for each unit you want in your module and name the files accordingly. The first unit after the introduction should be a program overview.

   (If your units are large, you may want to add an intermediate TOC file for each unit although this is not recommended for reasons to be described later.)
7. Rename all four Frame books that have "TAB MODULE NAME" in their filename, replacing this string with the appropriate module name. You can use spaces, but not underscores. E.g. change "TAB MODULE NAME Attendee Workbook.book" to "HR Manager Attendee Workbook.book". (Note that the final PDFs will have the same names.)

   There is also a book file called "Global Workbook do not use". This file allows the TAB Administrator (Nelson) to update formats or correct formatting problems and should not be used by anyone else unless they are sure of what they are doing.

8. Open each Frame book one at a time and add the unit files for the new units. The first unit file should follow the unit called "Introduction" (already in the book). The last unit file should precede the Index file (already in the book).
9. Open all files in each of the Frame books and edit the title on the first page. Then update links for the whole book (Edit\Update Links) to check that the TOC and IX are behaving correctly.
10. Create the content for your PowerPoint presentations, according to the guidelines given in section 6. If you need to create a help file for the project and are up against a deadline, you should use placeholders in the Presentation for now while you concentrate on the help.
11. Create multi-purpose source content in the FrameMaker files by adding the files based on your unit plan, adding blocks and importing PDF slides as necessary (see section 7). Note that the introduction files are for the classroom introduction and do not need changing. The first page of each file is for the title, the second page of each is left blank; you should begin adding blocks from the third page onwards.

    As you work, follow the guidelines for format usage needed for the Help file.

    Apply conditions to your text as appropriate.

    Recommendations:

    Work using the Instructor book first. Do not use the other books until you are ready to create output.

    Leave importing PowerPoint PDF slides till as late as possible and do it painlessly with the file PDFImporter (see section 12.1).
12. Prior to creating any output, import the necessary cross-reference/condition formats into your project by importing formats from the appropriate template and then update all links in the book.
13. Create the PDFs, according to the instructions in section 8.
14. Create the Help file(s), according to the instructions in section 9.
15. Package the final TAB training material.
16. Package the final CD material (User Guide and Help file).

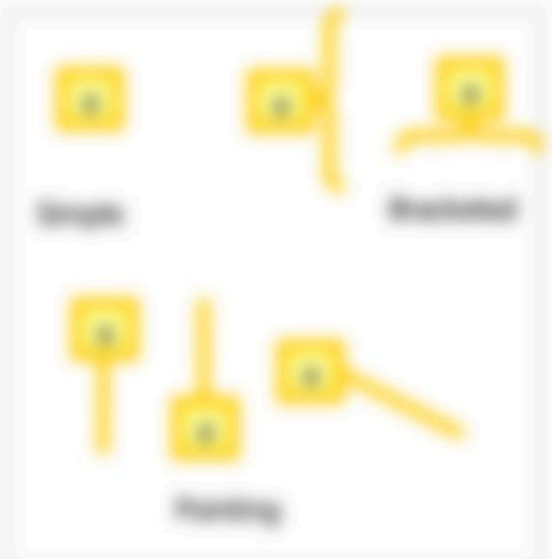
# 6. PowerPoint Presentations

## 6.1 Creating a Presentation

Use the PowerPoint presentation in the skeleton structure.

## 6.2 Callout Letters

The skeleton structure slide includes a variety of callout letters that you can copy and paste.



Note that the pointing callouts are "intelligent" in that they allow you to move the box while keeping the end of the arm fixed.

You can change the length and angle of brackets and lines, but do not change anything else (e.g. size of the callout letter box, font, color, border thickness).

**Technical Note:** The pointing callouts were made using Visual Basic, they cannot be created using PowerPoint.

When adding callout letters to slides, the order should reflect the workflow. For example:

ACCOMPANYING TEXT IN FRAME FILE:

a) View all planned and taken leave for all staff

b) Select a member of staff

For a selected member of staff:

c) Choose the facility the staff member works in

d) Enter the date and time of the planned or taken leave

e) Enter a reason for the leave

When you create callouts in the presentation it is important that you know what you will say for each callout letter in the manual.

## 6.3 Creating a PDF

Note: Do not use the Acrobat macro buttons or command to print the PDF. It takes much longer and can crash. (The cross-reference features that the macros support are not needed.) Instead, print to the Acrobat Distiller printer instance directly from the Print dialog box. (Do not choose Print to file unless you configured Acrobat to print to a real printer when you installed it.)

1. On the **File** menu, click **Print**.
2. In **Name**, select **Acrobat Distiller**.
3. Click **Properties**.

4. On the **Adobe PDF Settings** tab, select PrintLandscapeJobOptions as the conversion settings file. (See Appendix A.)
5. On the **Layout** tab, check that **Portrait** is selected under **Orientation**. Then click **Advanced** and check that the settings are suitable for high quality postscript printing (see Appendix A).
6. Click **OK**.
7. Click **Print**.

**Technical Note:** In PowerPoint, the slide orientation is Landscape, which means the intermediate postscript file will "print" as landscape too. If the PDF is created with the same job option file as you would normally use for Portrait documents, the pages in the PDF will all be rotated by 90 degrees. There are three possible ways to correct this:

- Change the slide orientation in PowerPoint. Bad idea.
- Rotate every landscape PDF you make in Acrobat each time. Not such a good idea.
- **Use a job options file that is for Landscape documents.** Good idea.

## 6.4 Crop the PDF before Importing it into FrameMaker

Each TAB slide has a surrounding frame and margin. Before importing the PDF slides into Frame, you should crop the PDF to remove these frames using Acrobat. (This will make the useful part of the graphic larger in the manuals.)

1. Open the PDF in Acrobat.
2. On the **Document** menu, click **Crop Pages**.
3. Click the **Remove white margins** check box.
4. Under **Page Range**, click **All**.
5. Click **OK**.

**Technical Note:** The frame around each slide is set up in the master page. It is not controlled by the Frame Slides setting in the Print dialog box.

# 7. Creating Source Content in FrameMaker

## 7.1 Adding Content to Unit Files

You build the content of a unit by adding "blocks" to your unit files and filling in those blocks with appropriate text and graphics. Blocks are Frame files that contain skeleton structures of the basic components that you will need such as groups of paragraph formats, icons, or tables.

### 7.1.1 Block List

Blocks are located in the "Components\BLOCKS folder" as follows:

| BLOCK | CONTENTS |
|---|---|

| | |
|---|---|
| Exercises.fm | Use for instructions to attendees to interact with the PC and answer questions (optional). (Uses the "Workbooks" condition.) |
| InstructorNote.fm | Use to give information to the instructor. (Uses the "Instructor" condition.) |
| Lists.fm | Contains an example of each type of list that you can copy/paste to your project: BULLETED, CALLOUT, NUMBERED, AND STEP PROCEDURE. |
| MidpageHeadings.fm | Contains the **How To…** heading which should always be used before a procedure, and a midpage heading for use in the middle of a page. |
| Procedures.fm | Contains a standard procedure (Step1 gif) or one that doubles as class exercise (Step1 gif + "Exercise"). The latter uses the "Workbook" condition. |
| ReviewQuestions.fm | Use for review questions at the end of a unit. (Uses the Workbook condition). |
| Subtopic.fm | Contains a subtopic heading. Can follow a Topic or another subtopic. A subtopic must always be immediately followed by text. |
| TABLES.fm | Contains a variety of tables with indications of how to use them. |
| Tips.fm | Lightbulb graphic with tip text, plus indented version. |
| TOPIC.fm | Contains main heading and frame to import PDF of slide. |

- The first page of each unit file is for the title, the second page of each is left blank; you should begin adding blocks from the third page onwards starting with a TOPIC block. (One topic block is included in the default unit file).
- If you want a main heading that does not contain an imported PDF, just select the Frame and delete it.
- Topics and SubTopic headings appear in the TOC.
- It may be that you need two presentation slides to cover one heading e.g a long list of bullet points may be split into two. In this case, you do not want the heading of the second page to appear in the TOC. To get around this, select the heading of the second page, change its format to H1topicContinued or H2topicContinued and make sure the text says "(xxx continued)". E.g if your first page heading says "Dogs", the second one would say "Dogs continued".

### 7.1.2 To Add a Block

Add blocks by copy/pasting, not importing (all blocks can be copy/pasted, but not all can be imported).

1. Open the block.
2. Copy the structure or part of the structure you want.
3. Open your unit file.
4. Paste to the appropriate place in your unit file.

### 7.1.3 Multi-usability

You should write text in such a way that it can be used in as many outputs as possible, only using conditional text where really necessary.

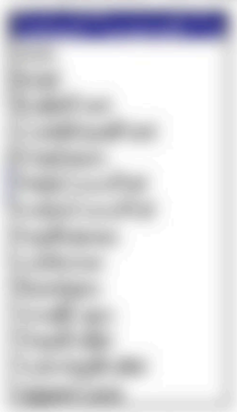
In particular, the text for callout letters should be written such that it can be read not only in the manuals (with the accompanying graphic of the slide), but also in the Help file, without the accompanying graphic.

| Correct | Incorrect |
|---|---|
| The Insert/Applications dialog box allows you do the following:<br>a) Search for a group. The search begins as you start typing.<br>b) Set the field to search by.<br>c) View all groups. | a) Use this field to search for a group.<br>b) Click to set the field to search by.<br>c) This box shows all groups. |

### 7.1.4 Character formatting

If you need to apply character formatting, please use the character catalog; do not apply formats directly (i.e. do not use CTRL + B or CTRL + I etc).

The possible formats are as follows:



The only formats you should need to apply directly are bold (for command names etc), emphasis (italics), SmallCaps (e.g. CTRL keys) and UpperCase. The other formats are needed by paragraph formats and cross references.

Do not create new formats or modify existing formats. Please speak the TMB Administrator if you have a problem with this.

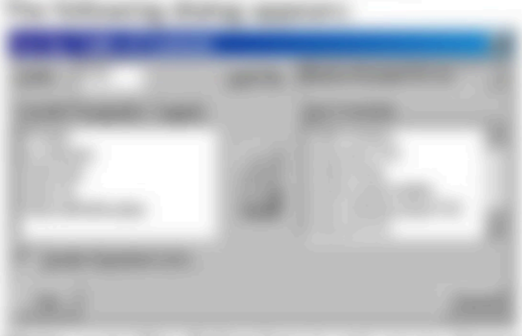
### 7.1.5 General Notes

1. For slides showing screenshots, the first paragraph below the imported PDF of the slide should indicate how the particular window is accessed by the user, using the following format:

   **Staffing** menu, **Staff Leave** command

## 7.2 Setting up the Table of Contents

The default TOC file should already be set up for your project. If you have any problems with it, perform the following checks:

1. Right-click the TOC file in the book and click **Set Up Table of Contents**. (If you do not see this command, please speak to [illegible].)
   The following dialog appears:
   
2. Make sure the dialog box is set up as shown above.
3. On the **Edit** menu, click **Update Book**.
   The following dialog box appears:
   
4. Check all boxes.
5. Make sure the TOC and IX (index) files are listed under **Generate**.
6. Click **Update**.
7. Resolve any error messages you may get before proceeding.
8. Check the TOC and IX.

Do not add any other paragraphs to the TOC. Speak to [illegible] if you cannot generate a TOC or it does not look right.

## 7.3 Setting up the Index

You should be consistent with word forms when adding index entries. It doesn't read well if "Adding orders" is at the same level as "Add events" or "To add a fluid"! (Check a previous CD help file to get an idea.)

Frame only lets you edit index entries one at a time, which can be a right pain. To edit index (and other) markers en masse, please install the [illegible] "Extract specified marker" plugin.

## 7.4 Using Conditions

The following conditions are used in TAB:

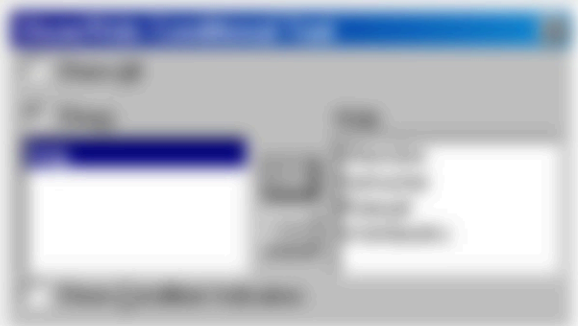
Attendee
Help
Instructor
Manual
WriteIn only

---

Text in black is for all outputs.
Text in [illegible] is for the **Attendee workbook** only.
Text in red is for the **Help** only.
Underlined text in green is for the **Instructor workbook** only. (E.g. instructor notes)
Text in blue is for "**Manuals**" [illegible], but not the help. E.g. [illegible] appendix
Text in magenta is for the [illegible] only. E.g. [illegible]

---

| Output | Conditions to show when generating? |
|---|---|
| **Instructor workbook** |  |
| **Attendee workbook** |  |

| | |
|---|---|
| **User guide** |  |
| **Help file** |  |

*After setting the conditions to show, you must update book links before generating the output.

### 7.4.1 To apply a condition to selected text

1. Press CTRL + 4.

The status bar will change to blue and show the name of one of the conditions.

2. Use the arrow buttons to move through the list of conditions to the one you want.
3. Click ENTER.

### 7.4.2 To remove all conditions from selected text

- Press CTRL + 6.

When using TAB, you should never set text with more than one condition.

We do not use conditions for different CS products. The best way to deal with this is to use a separate FrameMaker book for each product and try to keep product specific changes together in one file of the book if possible, so that most other files in the book can be used in the book for the other product.

**Technical Note:** Frame shows conditional text using OR logic. For example, suppose you add condition A and condition B to the left box. Frame will show all text conditioned with condition A or condition B or both. (If it used AND logic it would only show text with both conditions applied).

## 7.5 Importing slide PDFs

A slide PDF page must be imported into the anchored frame below each main heading of your unit and resized to fit the frame. You can do this one at a time or you can import all PDF pages at once into a temporary document (PDFImporter.fm) and then copy each imported PDF page into the relevant anchored frame in your unit file. If you have more than three slides to import, it is much quicker using the PDFImporter method (as described in section 12.1.)

To import one PDF page at a time, follow these instructions:

1. Select the anchored frame.
2. On the **File** menu, point to **Import** and then click **File**.
3. Browse to the PDF you want to import from and select it.
4. Select **Import By Reference**.
5. Click **Import**.
6. Enter the number of the PDF page you want to import.
7. Click **Select**.
8. Right click the imported graphic (not the anchored frame) and select **Object Properties**.
9. In **Width**, type 5.0".
10. In **Height**, type 4.0".
11. Click **Set**.
12. Select the graphic or anchored frame and click **ESC M P** to shrinkwrap the frame to the graphic.

## 7.6 Using Graphics

### 7.6.1 General Considerations

- Use the \Graphics folder to store all graphics in your TMX project.
- Most screenshots are not needed in the Help file. However, if you want to include a screenshot there is no problem as long as you follow the guidelines in section 9.
- Reference all graphics except those that are already included with Ebooks or those that are not subject to change with the interface (e.g. TLS logo).
- All graphics should be in PNG format because it is lossless and permits more than 256 colours (unlike GIF, which is also lossless, but does not permit more than 256 colours).
- Graphic names should not have spaces, underscores or non alpha-numeric characters. The following format should be used:

  For graphics that do not need localising:

  `TYPE-Name-xxx.png`

  For graphics that need localising:

  `TYPE-Name-enu.png` (for languages other than English, change "enu" as appropriate)

  The type can be:

  BAR (for toolbars)

  BTN (for buttons)

CLL (for a flowchart cell)
DLG (for a message window)
FLW (for a flowchart or flowchart section)
ICO (for an icon that is not a button)
MNU (for a menu)
WND (for a window)
DIA (for a diagram)
e.g. FLW-Laboratory-xxx.png

### 7.6.2 Resizing Graphics

- All screenshot graphics have a native DPI of 96 (no matter what the screen resolution was when the graphic was taken). This cannot be changed. If you paste a graphic into Frame, it will be pasted at 96dpi by default.
- Never resize the frames used for imported PDF slides.
- To resize a graphic in Frame, you should set a new "DPI" value for it directly, never resize by dragging a graphics borders. (The "DPI" you see is actually a "FrameMaker DPI" setting used to determine how to display the graphic., you are not changing the native dpi setting for the graphic which remains 96dpi.)
- See the appendix for details on how to find the DPI setting of a graphic.
- The DPI setting should be either 96, 100, 120 or 150 dpi so that the graphics have a standard appearance.

# 8. Converting Source Content to PDFs

Creating a PDF involves printing a postscript file from the Frame book using the Acrobat Distiller printer instance and then converting this file to a PDF using the Acrobat Distiller program. Before starting, you should set FrameMaker to output imported PDFs in color and configure the Acrobat Distiller printer instance and job options for the Distiller program, as described in Appendix A. You only need to do this once.

## 8.1 Set FrameMaker to output imported PDFs in color

1. Browse to the maker.ini file in the same folder as the Frame executable.
2. Add the following line to the start of the "Misc Preferences" section:
   **EPSUsedForPlacedPDF=1**

## 8.2 Create a PDF

1. Browse to the "Components\Templates" folder and select the relevant FrameMaker template for your output from the options below:
   - TAB Live Guide TEMPLATE.fm
   - TAB Instructor Guide(book) TEMPLATE.fm
   - TAB Help TEMPLATE.fm
   - TAB Reader Guide(book) TEMPLATE.fm
2. Open the book file.
3. Open all files in the book.
4. In the book file window, select the book and all files.
5. On the **File** menu, point to **Import** and then click **Formats**.
   The following dialog box appears:

6. In **Import from Document**, select the template.
7. Check the **Cross-Reference Formats** and **Conditional Text Settings** boxes.
8. IMPORTANT: Clear all other boxes.
9. Click **Import**.
10. In the book file window, select the book and all files.
11. On the **Edit** menu, click **Update Book**.
    The following dialog box appears:

12. Check all boxes.
13. Make sure the TOC and IX (index) files are listed under **Generate**.
14. Click **Update**.

15. Resolve any error messages you may get before proceeding. (Ask Adrian or Catherine)
16. In the book file window, select the book and all files.
17. On the **File** menu, click **Print Book**.
    The following dialog box appears:

18. Check **Print Only to File**. (The default filename is usually ebwp)

    **Technical Note:** If you do not select **Print Only to File** Acrobat will create one PDF for each file in the book.

19. Check **Generate Acrobat Data**.
20. Click **PDF Setup** to set the bookmark options. (See below). You only need to do this the first time you print or if you want to change the options.
21. Click **Setup** to select the Acrobat Distiller printer.
22. Click **Print**. This will print the postscript file.
23. In an Explorer window, browse to the postscript (ps) file you just created and double-click it to start the Acrobat Distiller program. If the conversion does not start automatically drag the ps file to the main pane of the Distiller program and drop it. The PDF will be created.
24. Test the final PDF, as described in the following section.

## 8.3 Set the PDF Bookmark Options

1. Click **PDF Setup** from the **Print Book** dialog box.
2. On the **Bookmarks** tab, click **Generate PDF Bookmarks**.
   The following dialog box appears:

Bookmarks will be created for all paragraphs having a format listed under **Include Paragraphs**.

3. Under **Don't Include**, select a format and then click the left arrow to add it to the **Include Paragraphs** pane. (You can only add one at a time.)
4. When you have all the formats you want in the Include Paragraphs pane, use the <- and -> arrows to set the bookmark level of each bookmark relative to the others.
5. Click **Set**.

## 8.4 Test a PDF

Open the PDF and check the following:

- Printed page numbers should match page numbers in Acrobat
- Hyperlinks in the TOC
- Hyperlinks in the IX
- Cross-reference hyperlinks
- Colours appear correctly in imported PDF pages
- On the **File** menu, click **Document Properties** and then **Fonts**. Check that all non-system fonts are embedded.
- You are strongly advised to print the PDF and check footers etc.

# 9. Converting Source Content to a HTML Help File

## 9.1 Preparing your source content for conversion to Help format

### 9.1.1 Structure

Take a look at the CS 7.2 Second Edition Help files to get an idea how the structure of your help file should look.

Make sure you use heading levels consistently. If one heading is followed by text, all such headings should be followed by text. You may need to adjust your Frame files accordingly.

Some headings in the Help file will only be followed by links directly to the topics below, with no text. In most cases, such links should have the Help condition applied, so that they do not appear in the manuals.

For example,

The Patient Chart

Introduction

Flowsheets and Trends

Demographics

Events

Guidelines

### 9.1.2 Graphics

- You can make any graphic from a Frame file appear crisp and clear in the Help file. If a graphic has been reduced in size in the Frame file, it will be larger in the Help file. If a graphic has been increased in size in the Frame file (unlikely), it will be smaller in the Help file. If a graphic has not been resized in the Frame file, it will not be resized in the Help file either.
- We assume that if someone can see the Help file they can also see the program interface so many graphics from the PDF are not needed. Such graphics should be hidden by using the condition "manual".
- When WWhelp recreates graphics it actually processes the anchored frame and not the graphic itself. By default, it recreates each anchored frame at 96dpi, which assumes that the graphic inside it has not been resized. Obviously this is not correct in most cases, and such graphics created by WWhelp are of very poor quality.
- WWhelp allows you to specify that all anchored frames be recreated at a global resolution other than 96dpi. If most graphics in your files have been resized, you would use this feature to specify that WWhelp recreate all of them using the average Frame DPI setting used. In general, Catherine and I have usually sized graphics to 150dpi, so the standard TAB [illegible] on file uses this setting.
- You can override the global DPI setting used for creating graphics on a graphic-by-graphic basis. You do this by adding a hidden "GraphicDpi" marker to the Frame file immediately before the graphic concerned. The value for this marker must be the Frame DPI setting for the graphic. (See the appendix).

## 9.2 About MS HTML Help Systems

- HTML Help appears in CS as a single file, with the extension ".chm"
- It is compiled using the (free) MS HTML Help Workshop (HHW) compiler.
- The "raw" input to the compiler consists of HTML (topic) files, the HHK (index) file, the HHC (contents) file, and the HHP (project) file.
  The HHP file is an ASCII file. The HHK and HHC files are HTML files.
- We can add context-sensitive help easily, if needed.

## 9.3 Workflow Summary

1. Condition text in your Frame files as appropriate and make sure any graphics other than slides have preceding markers to set the correct resolution.
2. Set up a FM book for generating the Help.
3. Set up the MIF2GO conversion file.
4. (Optional) Set up the Help project file.
5. Import a FM template that contains the conditions to show in the document plus the cross reference formats.
6. Update all links in the book.
7. Delete all extraneous html files from the folder where the Help file will be generated. (If you don't do this, these files will be compiled as part of the CHM together with the correct files - they may not appear in the TOC or IX, but words in these files will be searchable via the Find tab.)
8. Run the MIF2GO conversion to create the help source files.
9. Compile the help source files into a CHM file using HHW.
10. Check the output and modify the input accordingly. (See the troubleshooting section.)

## 9.4 Setting up a FM Book for Help Generation

When creating the Help, you should work with a Frame book that only contains the files you need for the Help. You do not need the first title page file for the module or End of Unit/End of Module files (although you do need the title page files for each unit.) You do not need TOC or IX files as Mif2go will create these on the fly.

## 9.5 Setting up the Mif2go Conversion File

Before running the conversion you should make sure that your system is set up to use the standard TAM conversion file for HTML Help conversions. This file is always called mif2htm.ini and is located in the "_Help" folder of the master TAM project. Set up the conversion file as follows:

1. Copy the master mif2htm.ini file to the folder where the Help will be generated for your project (i.e. the "_Help" folder).
2. Double-click mif2htm.ini to open it and edit the following two lines:
   FullHelpName=PathToYourBookFile\Help.pcl (e.g. C:\TAM\FM\Help.pcl)
   IWFileName=PathToYourBookFile\mif2go.ini (e.g. C:\TAM\FM\mif2go.ini)
3. Save the file.

Note: Do not edit the mif2go.ini file or the Help.pcl file directly.

## 9.6 (Optional) Setting up the Help Project File

The standard TAM help project file can be used with any help project because the only interface text it generates is "Help". You can customise the Help project file so that the help shows custom text although I recommend against this as it makes it less portable.

## 9.7 Importing FM Formats from a Template

Before using [illegible], you need to import cross-reference and condition formats from a template file [illegible] for all files in the book. Do this as follows:

1. Open the book for help generation and all files in it.
2. Open the template file [illegible].
3. In the book window, select the book and all files.
4. On the **File** menu, select **Import** and then **Formats**.
   The following dialog box will appear:

5. In **Import from Document**, select the template file.
6. Check **Cross-Reference Formats** and **Conditional Text Settings**. Clear all other boxes.
7. Click **Import**.

## 9.8 Updating Book Links

After importing formats, you need to update all links in the book as follows:

1. In the book window, select the book and all files.
2. On the **Edit** menu, click **Update Book**.
   The following dialog box will appear:

3. Check all boxes and then click **Update**.

4. Confirm that everything is okay before proceeding. Save all files in the book, close them and reopen them. If any links are not resolved correctly you will get a warning message.

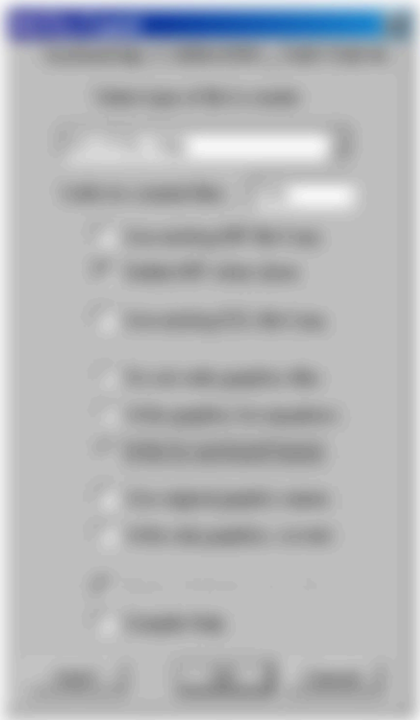
## 9.9 Delete extraneous files

In order that they do not later appear in the CHM, you must delete extraneous HTML files before creating a new output from MIF2GO. The easiest way to do this is by running the batch file called "_WARNING Batch Delete Graphics HTM BAK v2.bat" found in the Help folder of the skeleton structure. This batch file works when run locally or when run via a mapped drive. If you are working on the server, you are therefore advised to create a permanent mapping to the folder you are working in for the purpose of running this macro.

Note. There are also a whole bunch of mif2go internal files created every time you convert. If you are having problems converting with mif2go, run the other batch file, "_WARNING Batch Delete Mif2go xxx files v2.bat" to delete these files.

## 9.10 Converting the Frame Book to Help Source Files Using Mif2go

1. In the book window, select the book and all files.
2. On the **File** menu, click **Save Using mif2go**.
   The following dialog box will appear:
   
3. In **Name**, enter the name of the TABmodule. (It doesn't really matter what you enter here. By default, the book name is shown.)
4. Next to **Path**, click to browse to the folder where you want the raw files for the Help to be created. (By default, the files are created in the same folder as the Frame Book file...change this.)
5. In **Format**, select **MS HTML Help**. (By default, Word RTF is shown.)
6. Click **OK**.
   The following dialog box will appear:

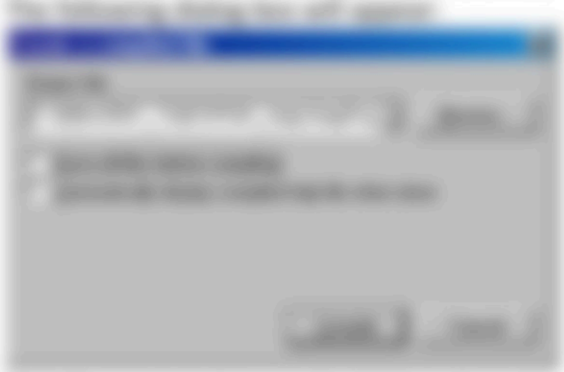


7. What you choose here depends on whether you are producing a final help file or are testing during development. In general, you should clear all check boxes except **Delete HHT when done** for final help files, or if you are testing graphics, then select **Write for sectioned frames**. Note that the conversion will take much longer when you do this; if you are testing text, then select **Do not write graphics files**.
8. Click **OK** to start the conversion.

Note that both dialog boxes in this procedure retain the previously used settings for the book, so you only have to set them once.

## 9.11 Compiling the Help Source Files into a CHM Help File

1. Start the HTML Help Workshop by double-clicking the HHP file.
2. On the **File** menu, click **Compile** (or click ).
   The following dialog box will appear:



3. Click **Browse**, navigate to the folder where the HHP file is located and then click **OK**.
4. Click **Compile**.

Check the log window for warnings and act accordingly.

If everything is satisfactory, locate the help file and check it (double click it to open it).

## 9.12 Troubleshooting

1. **A big yellow square appears at the top of my Frame docs after importing formats**
You have imported the page layout (and probably all other formats) instead of just conditional text settings and cross-references. (The yellow square has been set up as an error catcher.) Close your files without saving and start again.

2. **I get a missing reference error when updating the book links**
Check that the correct conditions are showing in all files and try again. If it still happens, use the Find dialog box to find unresolved cross references.

3. **I get error messages when trying to run the Mif2go conversion**
Make sure the paths in the mif2htm.ini file point to the correct folder (the one where the Frame book is located). If they do, delete the mif2go.ini file and the Help.prj file, restart FrameMaker and try again. If you still have problems, ask Adrian or Catherine.

4. **I see an error messages in HHW when compiling the help**
HHC6020: Error: Cannot open "I:\[illegible]_[illegible]_Help\Help.chm".

→ Close the file Help.chm and try again.

HHC5003: Error: Compilation failed while compiling http://www.[illegible].com/.

→ Benign warning. Just ignore it.

HHC5003: Error: Compilation failed while compiling Help.hhc.

HHC5003: Error: Compilation failed while compiling Help.hhk.

→ Check that these files exist in the "_Help" folder for the project. If not, it means the Mif2go conversion did not go well. (This could be because the conversion was performed on a file instead of on the book.)

5. **There are boxes in the Help file instead of graphics**
Delete all HTM and Graphic files in your "_Help" project folder then rerun the Mif2go conversion, taking care to select "Write for Anchored Frames".
6. **Some graphics are fuzzy**
To appear well in the Help file, graphics must be set to the correct resolution by entering markers in the Frame file. Ask Adrian for more info.

7. **General format problems on a topic page**
First check if the problem is with the style sheet. (It sometimes helps to open the HTML file used to create the help topic - right click the Help topic page and click Properties to identify this file). If the problem is not with the style sheet, then it will be with the Mif2go conversion file.

In any case, please report the problem to Adrian.

# 10. Creating Supplementary Documentation (in Word)

Edit the names and contents of the following documents in the '…_TIAB supplementary documents' folder of the skeleton structure, as necessary:

TIAB MODULE NAME Agenda.doc

TIAB MODULE NAME Requirements for Classroom Course.doc

TIAB MODULE NAME Skill Objectives.doc

# 11. Packaging Final Material

When ready, copy files to the appropriate folder within the '…_RELEASE FILES' folder, as follows:

**…_RELEASE FILES\UG files**
Help files and User Guide.pdf

**…_RELEASE FILES\TIAB files\v1.x**
TIAB files: workbooks, supplementary documents and presentations. If you update a TIAB module, create a new version folder and make sure to change the version number on the front of the workbooks.

After copying all TIAB files here, make a zip file and name it according to the following convention:

<Product> <Version> TIAB module.zip

For example, Security Manager 7.2 1st Edition TIAB module.zip

## 11.1 Releasing TIAB Training Material

Upload the TIAB zip file to the Implementation\Training Materials folder on the P drive and then send a mail to the PM implementation group, with the following format:

---

The User Guide for **<Product>** is now available on the P drive:

\\[illegible]\Public\Product_Documentation\<PATH TO FOLDER>

The User Guide has been updated as follows:
Bla, Bla, bla

The guide is complemented by a 'training-in-a-box' PowerPoint presentation and course workbooks that share common content with the user guide including descriptive text, graphics, an index, and table of contents. (The workbooks also include classroom exercises.)

The 'training-in-a-box' (TIAB) module for **<Product>** is available here:

\\[illegible]\Public\Implementation\Training Materials\<PATH TO FOLDER>

**TAM** modules are zip files with the following contents:
Attendee workbook
Instructor workbook (same as the attendee workbook, plus notes for the instructor)
Requirements for classroom training
Agenda for classroom training
Skill Objectives covered by the training material
Standard Training Evaluation form
Two PowerPoint presentations – a classroom introduction and the main course

## 11.2 Releasing CD Deliverables (User Guide PDF and Help File)

Ask the Project Manager where to place such deliverables to make sure they are included in the build.

# 12. Tools

## 12.1 PDF Importer

To import multiple PDF pages into Frame semi automatically:

1. Make a copy of your PDF (it doesn't matter where) and name it 999.pdf

2. Open PDFImporter.fm. In the Missing File dialog box, make sure "Update…" is selected. Then browse to 999.pdf and click **Continue**.

-> The Frame file will now fill with all the slides from your PDF.

3. In PDFImporter.fm, copy the slide you want (click the graphic not the frame) and paste it inside the relevant anchored frame in your own Frame file (select the frame and then paste). Do this for all slides.

4. Save your Frame files and close them.

5. Delete the file 999.pdf

6. Reopen all your Frame files. When each file opens, the Missing File dialog box will appear. Make sure "Update…" is selected. Then browse to your original pdf and click Continue. You will have to do this once for every slide that you copied over.

7. Save your Frame files.

## 12.2 FrameMaker to Word conversions

There are a number of reasons why you may want to convert a FrameMaker file or book to Word format. For instance, you may want to provide an editable version of your material to a reviewer, or you may want to use Word's grammar checker.

With Mif2Go, you can easily set up a conversion from Frame to Word/RTF. As it is an option that you will probably repeat quite often, you are advised to do create a simple base project and simply add your Frame files to the project whenever you need to convert them.

Note that the conversion process is one-way. If you copy the content of the generated Word RTF file and paste it back into Frame, you will have lost formatting during the cycle.

### 12.2.1Create a base project for Frame to Word conversions

(You only need to do this once.)

1. Copy this folder to any local folder:

[illegible]

The folder contains five files:

- FM2WordConversions.book
- FM2WordConversions.pri
- [illegible]
- mif2go.ini
- SimpleLayout.fm

2. Open mif2rtf.ini in Notepad and edit the file path in these two lines:

PrjFileName=<Path to FrmWordConversions.book>\FM2WordConversions.pri

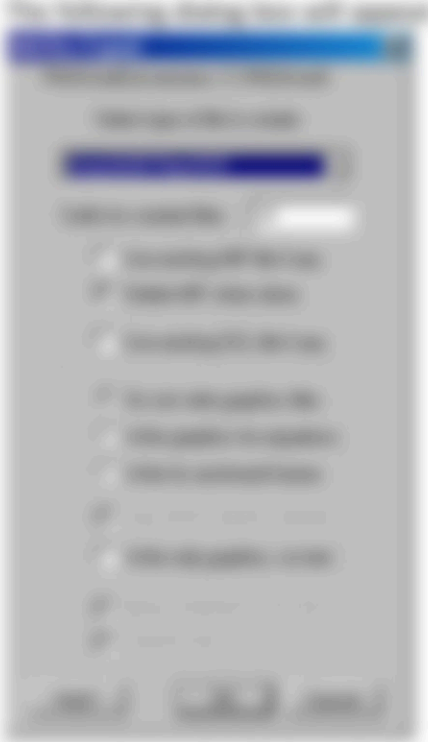
IDFileName=<Path to FrmWordConversions.book>\mif2go.ini

e.g. IDFileName=C:\FM2Word\mif2go.ini

3. Open FM2WordConversions.pri in Notepad and edit this line:
FM2WordConversions=<Path to FrmWordConversions.book>

### 12.2.2Convert your FrameMaker files to Word

1. Open the file FM2WordConversions.book in FrameMaker.
2. Add the Frame files for which you want to generate Word output.
If you want to generate Word output in a simple page layout, without sideheads then copy all the text into the file SimpleLayout.fm, which is included in the book by default. (If you do not use it, just leave it in the book.)
3. In the book window, select the book and all files.
4. On the **File** menu, click **Save Using mif2go**.
The following dialog box will appear:



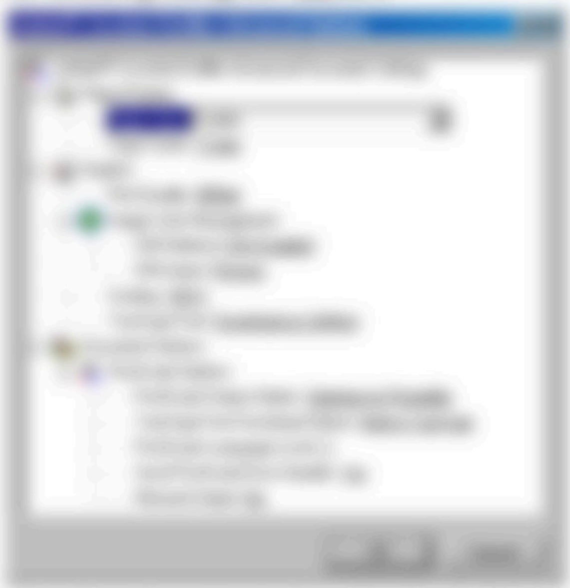
# Appendix A Printing High Quality PDFs

## A.1 Install Distiller job options

1. Browse to the "Components\Templates" folder.
2. Copy the files [illegible] and [illegible] to the local folder "[illegible]"

## A.2 Configure the default Acrobat Distiller printer settings

1. In the **Printers** panel, right-click "Acrobat Distiller" and select **Printing Preferences**.
2. Select the **Adobe PDF Settings** tab.
3. In **Conversion Settings**, select "[illegible]". (This will be the default conversion file.)
4. On the **Paper/Quality** tab, select "Color".
5. On the **Paper/Quality** tab, click **Advanced**.
   The following dialog box appears:



6. In **TrueType Font**, select **Download as Softfont**.
7. In **PostScript Output Option**, select **Optimize for Portability**.
8. In **TrueType Font Download Option**, select **Native TrueType**.
9. In **PostScript Language Level**, select 3.
10. Leave all other settings as they are by default.
11. Click **OK**.
12. Click **OK**.

# Appendix B FrameMaker Tips

## B.1 Find the DPI value of a graphic

When you look at the Object Properties for a graphic, you will only see the Frame DPI value if the graphic was explicitly set to this value. If the graphic was resized by dragging with the cursor, the FM DPI value will say "Unknown". In such cases, you have to calculate the FM DPI as shown below:

1. Right click the graphic, then click Object Properties.
2. Read the width of the graphic as seen in Frame (in inches).
3. Click **Set dpi** and read the number of pixels in the source file width.
4. Then, calculate the Frame DPI as follows:
   Frame DPI = number of pixels in original file ÷ number of image inches

In this example, the Frame DPI setting = [illegible] ÷ [illegible] = **[illegible]**

Note that the DPI is not equal to 72 as suggested by the bulleted option in the Imported Graphic Scaling box. Nor is it equal to 130, the value showing by default in the Custom dpi box (130 was the last DPI value explicitly entered for the graphic but not necessarily the current value).

In most cases, the dpi will be 96, 100, 120 or 150.

# Appendix C Troubleshooting

**Q. Instructor notes sometimes cannot be entered because there is no insertion point visible when clicking in the Frame, what's up?**

This seems to be a bug in Frame. I don't know why it happens, but the workaround is as follows:

I. Go to every page where the problem occurs and delete the sidehead Frame on that page (ie the Frame underneath the words "Instructor Notes").*

II. Change the view to "Master pages".

III. Change the view back to "Body pages". When you do this, you will be asked to keep or remove overrides. Select "REMOVE overrides".

* Click to open the drawing tools palette then click to change the cursor to the selection tool and then click the Frame edge to select it. Once selected, click DEL.