



**Technical Note:** 003

**Effective:** 3/6/2001

**Issuing Office:** Office Name Here

## Working with SourceSafe and RoboHelp Manuals

### 1. Purpose

This technical note details how to coordinate your computer with SourceSafe, check files in and out of SourceSafe, create WebHelp manuals, and generate printed documentation within RoboHelp.

### 2. Scope and Applicability

This technical note applies to all technical writers.

### 3. Responsibilities

None.

### 4. Procedures

#### I Coordinating SourceSafe and your Desktop

In order to facilitate file check in and check out, it is a good idea to set your working folders (i.e., those folders to which files will be checked out) as a mirror of the SourceSafe directory structure. Use the following steps to set all the working folders you will use:

1. Open SourceSafe and select the directory with which you want to work. For example, P1 Documentation.
2. From the **File** menu, choose **Set Working Folder....** In the **Set Working Folder** dialog box, type the path and folder you want to use as your working folder, then click **OK**. For example, C:\P1 Documentation.
3. If the folder does not exist on your computer, you will be prompted to create it. Click **Yes** to create the folder.
4. In the future, when you check files out of this project (or one of its subprojects), they will be placed in an identical folder on your computer.

## II Adding, Checking in, and Checking out Files and Projects

Whenever a manual or other documentation is created or updated, it must be checked in to SourceSafe. Use the steps below to add, check in, and check out files:

1. Use the following steps to add files to existing projects in SourceSafe:
  - A. If you are adding a new project to SourceSafe, a project folder must be created. Contact a Senior Technical Writer or CM Manager to have the project folder created.
  - B. Once the project folder is created and your working folder has been set, select the folder, then choose, **Add Files...** from the **File** menu. (*NOTE*: See section I, steps 1 through 4 for detailed instruction on setting working folders.)
  - C. In the **Add Files...** dialog box, select the files you want to add from the **File name** list, then click **Add**.
  - D. Enter any comments in the **Comment for...** box, then click **OK** to add the file(s). (*NOTE*: Before adding files, ensure you are adding the correct files to the correct project.)
2. To check files out of SourceSafe, use the following steps:
  - A. Select the project or file(s) you want to check out, then choose **Check Out** from the **SourceSafe** menu.
  - B. Enter any comments in the **Comment for...** box, then click **OK** to continue.
3. To check files in to SourceSafe, use the following steps:
  - A. Select the project or file(s) you want to check in, then choose **Check In** from the **SourceSafe** menu.
  - B. Enter any comments in the **Comment for...** box, then click **OK** to continue.

## III Creating an HTML Help Manual

When creating a new user's manual, use the following steps:

1. Open RoboHELP HTML and select **Create a new help project** in the **RoboHELP HTML** dialog box, then click **OK** to continue.
2. In the **New Project** dialog box, select **HTML Help**, then click **OK** to continue.
3. In the **New Project Wizard** dialog box, enter the following information:
  - A. In the **Enter the title...** box, enter the title for the new manual (e.g., e-Information Exchange User's Manual).
  - B. In the **Enter the file name...** box, enter the desired file name. This name will be assigned to the project's .Mpj file (i.e., the project's main file).

- C. In the **Enter the location...** box, ensure that you are selecting the correct location. By default, the project's folder will be the same as the name assigned to the .Mpj file in step 4. (*NOTE*: When naming the folder, ensure that it adequately describes the manual being created.)
  - D. In the **Enter the title for the first topic** box, enter the title you want to use for the first topic.
  - E. **DO NOT** check the **Enable WebSearch** check box. When finished, click **Finish** to create the project and begin working.
4. Once the project has been created, import the appropriate cascading style sheet to be used as the default style sheet. (*NOTE*: These style sheets can be found on the floppy disk distributed as part of the technical writer's handbook.)

## IV Generating a WebHelp Manual

Once you have successfully created and finished the user's manual in HTML help, you must generate the WebHelp that will be posted on the Internet as part of the application. To generate the WebHelp, use the following steps:

1. Open the user's manual. From the **File** menu, point to **Generate**, then choose **WebHelp** to open the **WebHelp General** dialog box.
2. In the **WebHelp General** dialog box, set the following parameters for the WebHelp manual:
  - A. In the **Select output folder...** box, ensure that the WebHelp is being saved as a subdirectory of your HTML help project. By default, the directory will be called WebHelp. This must be changed to reflect the manual's contents. For example, rename the directory to something like postal\_webhelp.
  - B. In the Navigation Pane section, select your options (many times these will be established by the team lead or customer). Under **Preferred Format**, select **Java applet** unless customer requirements specifically prohibit the use of JAVA.
  - C. Select the **Always use lowercase** check box, then click **Next** to open the **WebHelp In-topic Navigation bar** dialog box.
3. In the **WebHelp In-topic Navigation bar** dialog box, set the following parameters:
  - A. Select the **Show/Hide Navigation Pane** check box.
  - B. Leave the default options for Location and Style.
  - C. Click **Finish** to generate the WebHelp manual.
4. After generating the WebHelp for the first time, you can set WebHelp as the primary target; this will speed the update process and maintain the options you selected in steps 2 and 3.
5. To set WebHelp as the primary target, from the **File** menu, point to **Select Primary Target**, then choose **WebHelp**. After doing so, each time you compile the manual, an updated manual will be generated and overwrite the old manual.

6. Once you have finished, the manual must be checked in to SourceSafe, then released to the QA environment. (*NOTE*: See section II for detailed instruction on checking files in and out of SourceSafe.)

## V Generating Printed Documentation in RoboHelp

Printed documentation is generated in order to facilitate peer review, QA review, and cross-checking manuals. Keep in mind that the printed documents will not be perfectly formatted and are only used for review purposes. To generate printed documentation in RoboHelp, use the following steps:

1. Open the HTML help manual. From the **File** menu, point to **Generate**, then choose **Printed Documentation**.
2. In the **Document Wizard** dialog box, you must set the following parameters for the printed document:
  - A. In the **Specify path...** box, ensure that the document is being saved in a subdirectory of your HTML help project. By default, the directory will be called PrintDoc.
  - B. In the **What source files...** box, select the files (i.e., topics) that you want to include in the printed document. Click **Next** to open the **Style Sheet** dialog box.
3. In the **Style Sheet** dialog box, select **Use Style Sheet**. Leave the default option in the **Style Sheet** drop-down list. Click **Next** to open the **TOC and Index** dialog box.
4. In the **TOC and Index** dialog box, *only* select **Base heading levels and topic order on TOC** and **Create TOC**. Click **Next** to open the **Text and Color Images** dialog box.
5. In the **Text and Color Images** dialog box, select **Change all colors to black** and **Remove all Images from documents**. Click **Next** to open the **Page Options** dialog box.
6. In the **Page Options** dialog box, *only* select **Insert page numbers**. Deselect **Insert page break...** if it is selected. Click **Finish** to generate the document.