Sample of a training manual for a software product

In October 2000, my department in New York Life was going to relinquish control of a product reference manual online help project and we needed to teach someone from our Home Office how to update it so they could take it over. A co-worker and I were tasked with the job. My co-worker did the first day of training (the introduction to the software) and I did the second day (training on updating the actual help file). It was a hands-on training course with the students going through the procedures on a copy of the help project on provided computers.

I created a user's guide (using Doc-To-Help 2000) containing conceptual information and procedures to be performed in the class. I also provided handouts to correspond with certain parts of the guide.

Field Technology Illustration System (FTIS)

Updating Product Manuals in RoboHELP HTML

New York Life
Created by
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Contents

Chapter 1: RoboHELP HTML Edition tutorial

Overview

Before you begin the procedures in this guide, it is recommended that you go through the **Basic** and **Advanced** lessons in the **RoboHELP HTML** tutorial.

The tutorial gives you a background with which to work when learning the procedures in this guide to update the Agent's Manual.

Procedures

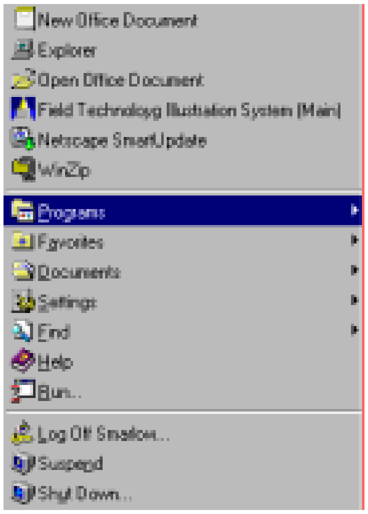
The best way to work with the **Quick Tour** is to print it and complete the lessons in order. You can print the **Basic** and **Advanced** lessons separately or at the same time.

Launching the RoboHELP HTML program

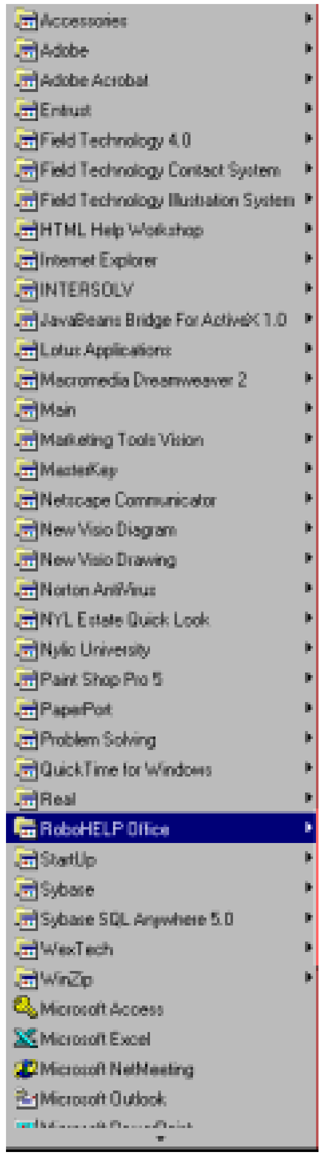
Follow the steps below to launch the **RoboHELP HTML** Edition program.

1. Click the **Start** button on the **Taskbar**.

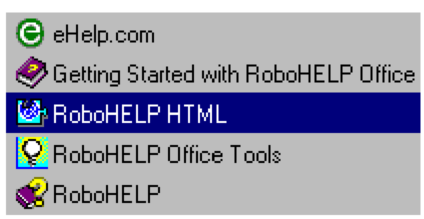
2. Select **Programs**.



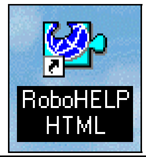
3. Select **RoboHELP Office** from the next menu.



4. Select **RoboHELP HTML** from the next menu.



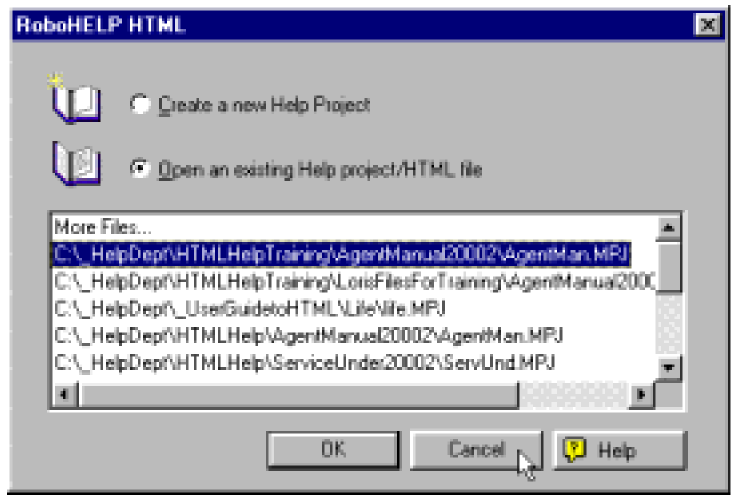
NOTE: You may also click the RoboHELP HTML icon on your desktop to start the program.



Opening the RoboHELP HTML tutorial

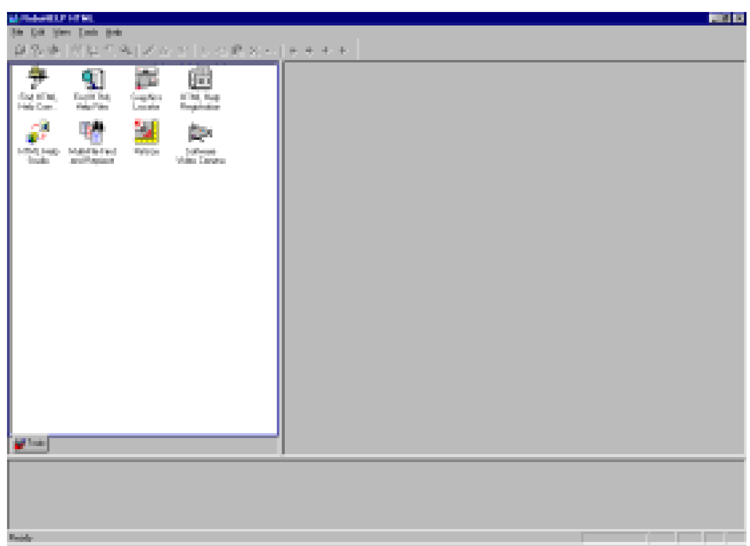
Follow the steps to open the RoboHELP HTML tutorial.

1. Once you have opened RoboHELP HTML (see "Launching the RoboHELP HTML program" on page 1), you will see the following screen.

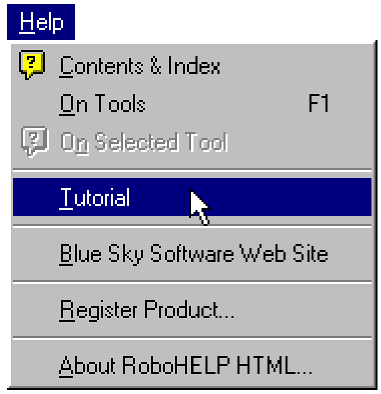


NOTE: The list of files you will encounter will vary according to your system.

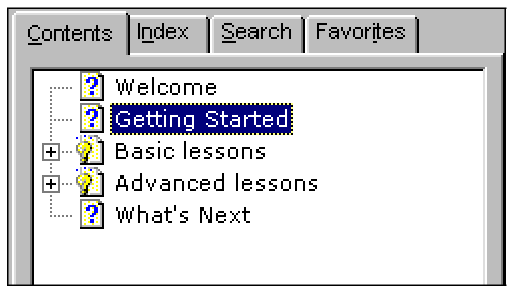
2. Click the **[Cancel]** button to proceed to this screen.



3. Select **Tutorial** from the **Help** menu.



4. Select **Getting Started** from the list under the **Contents** tab in the left pane.



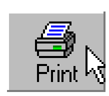
5. Read the information displayed in the right window pane.

Printing the Basic lessons OR the Advanced lessons

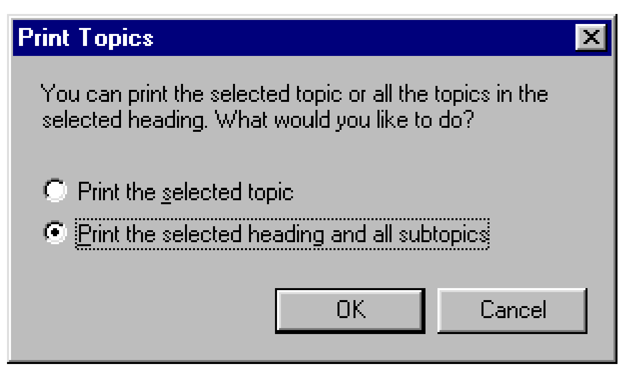
To print either the **Basic lessons** or the **Advanced lessons**, follow the steps below. If you want to print both sets of lessons, see "Printing both the Basic and the Advanced lessons at one time" on page 6.

1. Select the **Basic lessons** or the **Advanced lessons** item on the **Contents** tab.

2. Click the **[Print]** button on your browser's toolbar.



The **Print Topics** dialog displays and includes one or more options for printing.



3. If the option is available, you can select **Print the selected topic** which will only print the topic showing in the right hand pane.

Print the selected heading and all subtopics will print all the information displayed on the right-hand side, plus all of the other topics listed in the left hand pane. (If you have **Basic** or **Advanced** lessons open, everything in the topic prints.)

4. Alternatively, if the only option available is **Print the current page**, then do the following:
   - Open the **Basic lessons** book and print the first topic in this book. All the **Basic lessons** are in one topic so all the **Basic lessons** will print at one time. Then, open the **Advanced lessons** book and print the first topic. All **Advanced lessons** will print.

Printing both the Basic and the Advanced lessons at one time

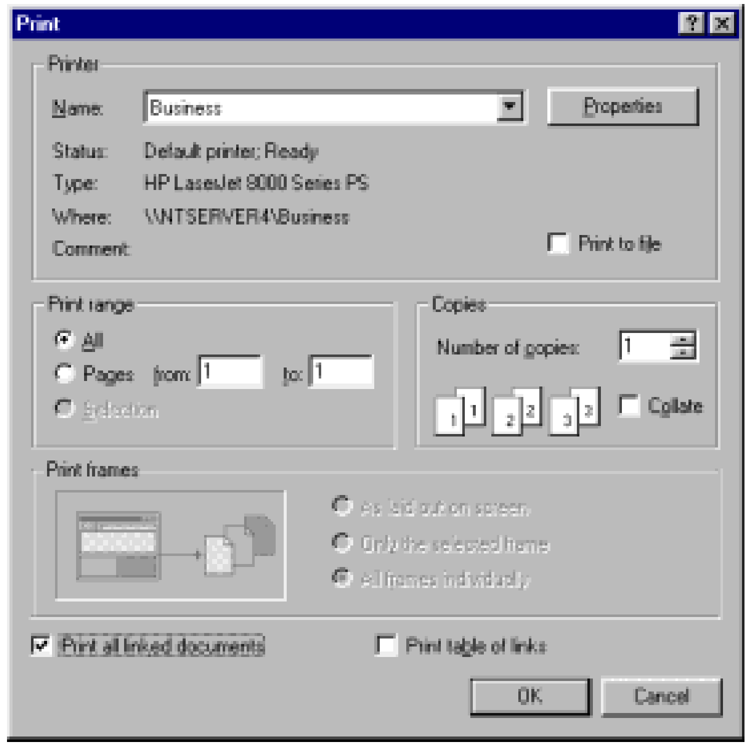
You can print both the **Basic lessons** and the **Advanced lessons** at the same time. Follow the steps below. If you only want to print the **Basic** or the **Advanced** lessons, see "Printing the Basic lessons OR the Advanced lessons" on page 5.

1. Open the **Basic lessons**.
2. Right-click inside the **Basic lessons** topic pane.

   A popup menu displays.

3. Select **Print**.

   The **Print** dialog box displays.



4. Select the **Print all linked documents** check box at the bottom of the dialog box.

NOTE:	The **Basic lessons** topic has a link to the **Advanced lessons** topic, so both lessons will print.

5. Click **[OK]**.

Chapter 2: Changing the Agent's Manual

Overview

This chapter provides procedures for making changes to current Agent's Manual topics and adding new products to the project.

Procedures

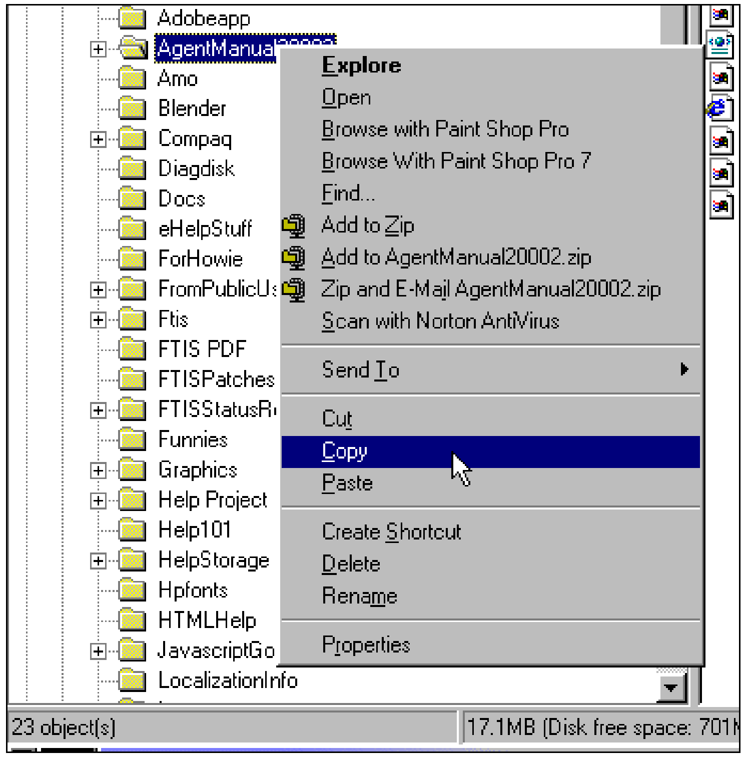
Backing up your HTML Help project folder

Before making changes to your project, you should make a backup copy of the HTML Help project folder. This is so you can make changes and have a backup copy to go back to if something goes wrong. Follow the steps below to create a backup copy of your project.

NOTE:	Before following the steps below, make sure you have closed **RoboHELP HTML Edition**. Select **Exit** from the **File** menu.

1. Open **Windows Explorer** and find the folder that contains your HTML Help project.
2. Right-click on your HTML Help project folder, in this example the folder is called **AgentManual20002**.

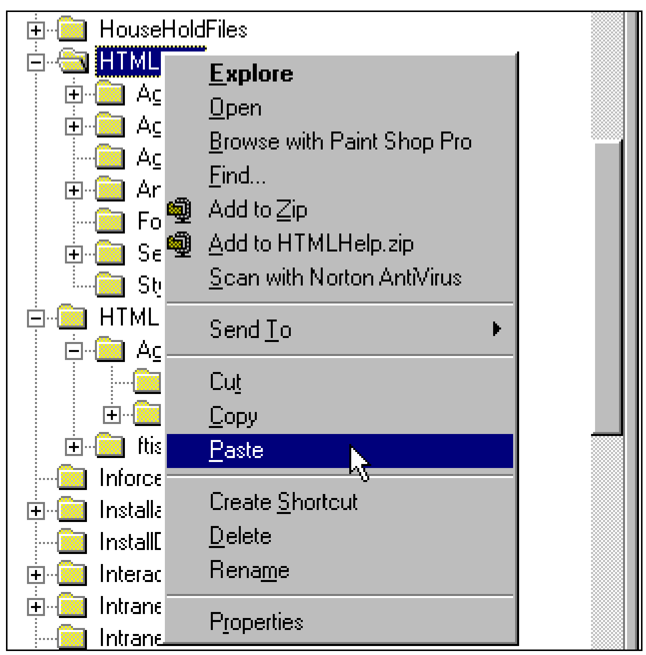
A popup menu displays.



3. Select **Copy** from the popup menu.

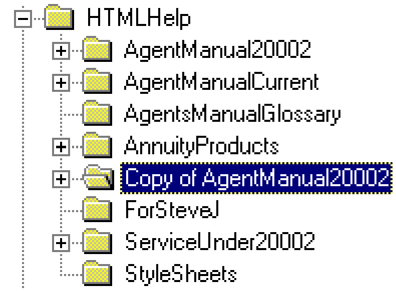
4. Right-click on the directory in which the HTML Help project folder resides.

   A popup menu displays again.



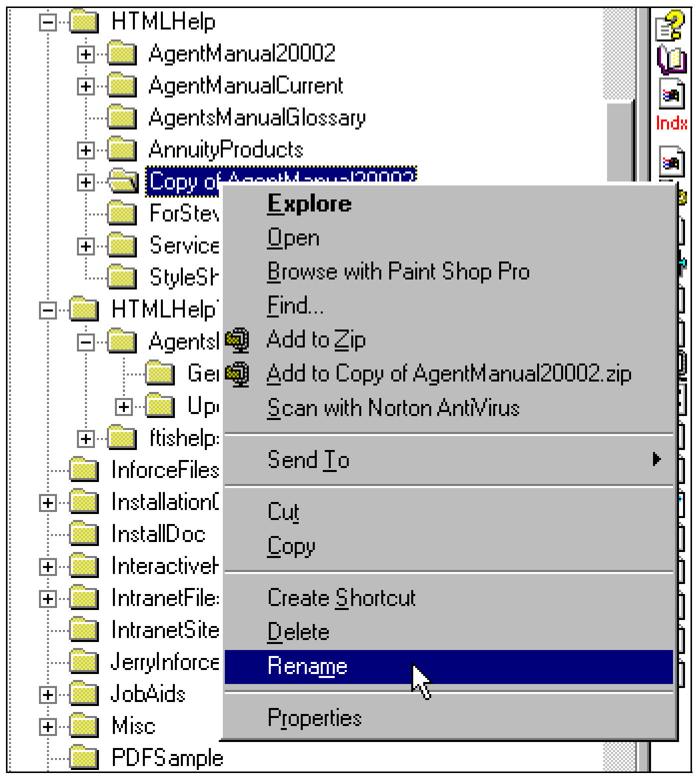
5. Select **Paste** from the popup menu.

A copy of the folder is pasted into the same directory as the HTML Help project folder. "**Copy of**" is inserted before the name of the HTML Help project folder.



6. Right-click on the "**Copy of...**" folder.

   A popup menu displays.



7. Select **Rename** from the popup menu.

   The name of the folder becomes highlighted.

8. Delete "**Copy of**" from the beginning of the folder name and add "**Backup**" to the end.

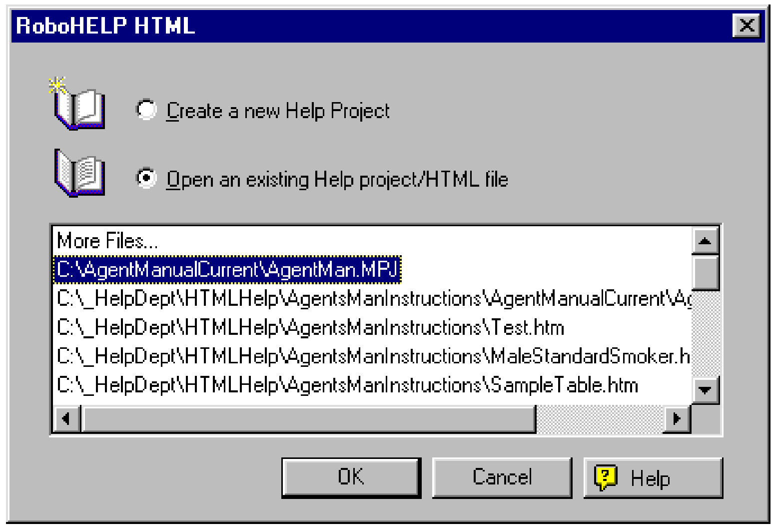
   Your renamed folder should look something like the following:

Opening the Agent's Manual project

Follow the steps below to open the Agent's Manual RoboHELP HTML project.

1. If **RoboHELP HTML Edition** is not open, see "Launching the RoboHELP HTML program" on page 1.

   When the program is open, the **RoboHELP HTML** dialog box displays.



2. If your project displays in the list of recently opened projects, select it. For this example, select **AgentMan.MPJ** (this is your copy of the Agent's Manual).

   If not, skip to step 4.

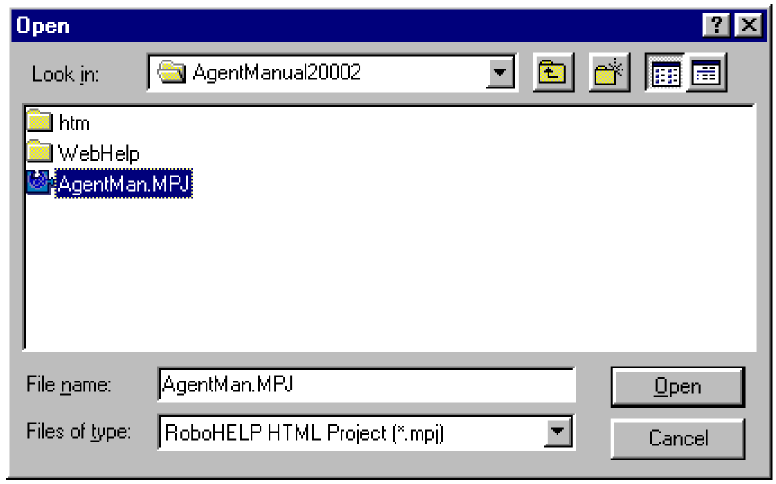
NOTE:	It is a good idea to make a back up copy of the original of this file prior to conducting and formatting changes, additions, or corrections. See "Backing up your HTML Help project folder" on page 9.

3. Click [OK].

   Your project opens displaying a list of all the files in your project.

4. If your project is not displayed in the list of projects, select **More Files**.

The **Open** dialog box dislays.



5. Navigate to your project directory. For this example, we are using the **AgentManual20002** directory.
6. Select the **AgentMan.MPJ** file and click **[Open]**. You can also double-click on the filename to open the project.
7. Click **[Open]**.

   Your project opens displaying a list of all the topics (files) in your project.

Adding a new product folder

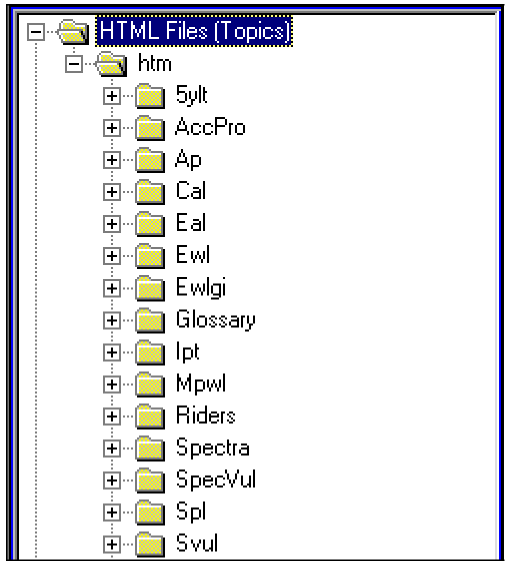
Each product in the Agent's Manual is contained in a folder within the project. When you add a new product, you need to add a new folder to contain the files you create for that new product. Follow the steps below.

1. Open your project in RoboHELP HTML, if it is currently not open.

   See "Launching the RoboHELP HTML program" on page 1, if RoboHELP HTML is not open and "Opening the Agent's Manual project" on page 12 if RoboHELP HTML is open but your project is not.

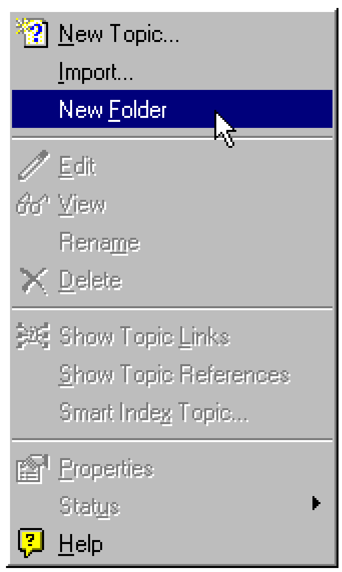
2. When the project is open, click the plus sign (⊞) next to the **HTML Files (Topics)** folder in the left pane, or double-click the folder to open the folder.
3. Click the plus sign (⊞) next to the **htm** folder, or double-click the folder to open it.

This displays the folders that correspond with the products (Agent's Manual) or sections (Service and Underwriting) within the help file.



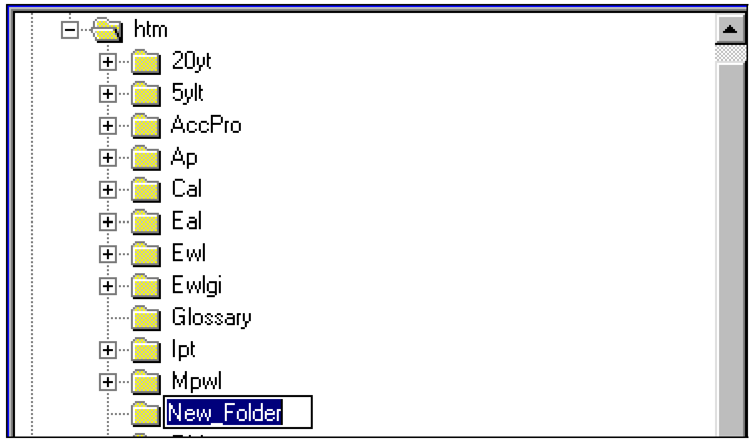
4. Right-click on the **htm** folder.

   A popup menu displays.

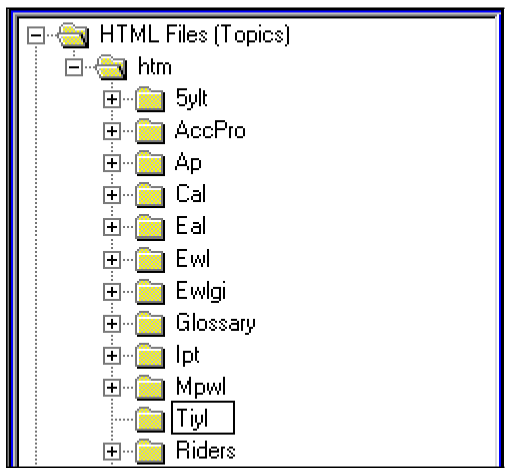


5. Select **New Folder** from the popup menu.

   A new folder is added and the text is highlighted.



6. Key in the name of the product, preferably using the acronym for the product to keep the name short. For this example, key in **Tiyl** for **This is your Life**.



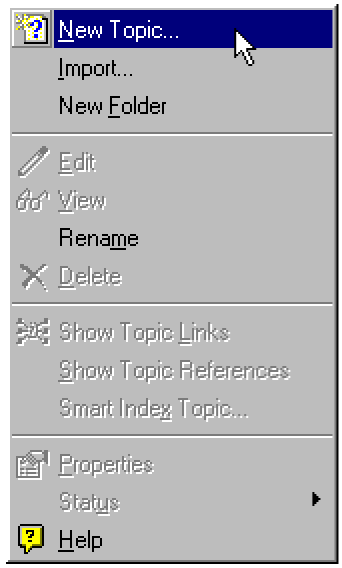
7. Press the **<Enter>** key to accept the new folder name.

Adding new topics within a product folder

Once you have created a new product folder within the project, follow the steps below to add new topics within that folder.

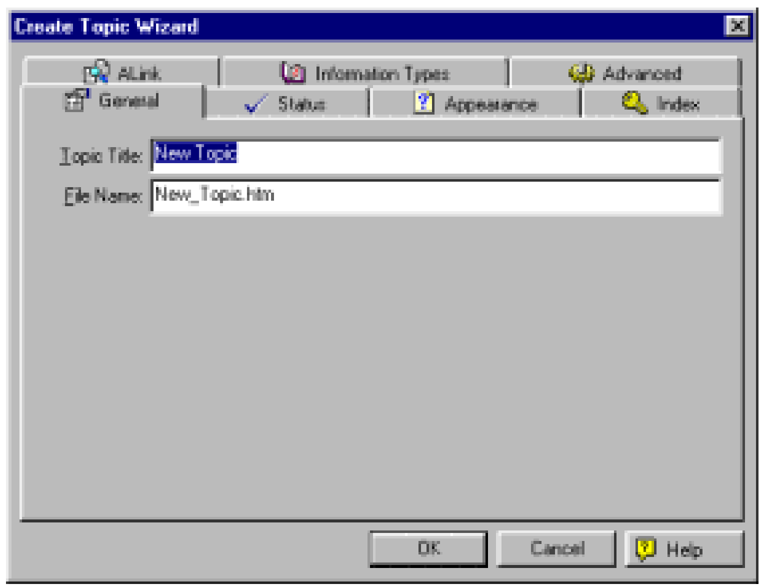
1. Right-click on the new folder you just created. For this example, that is the **Tiyl** folder.

The popup menu displays.

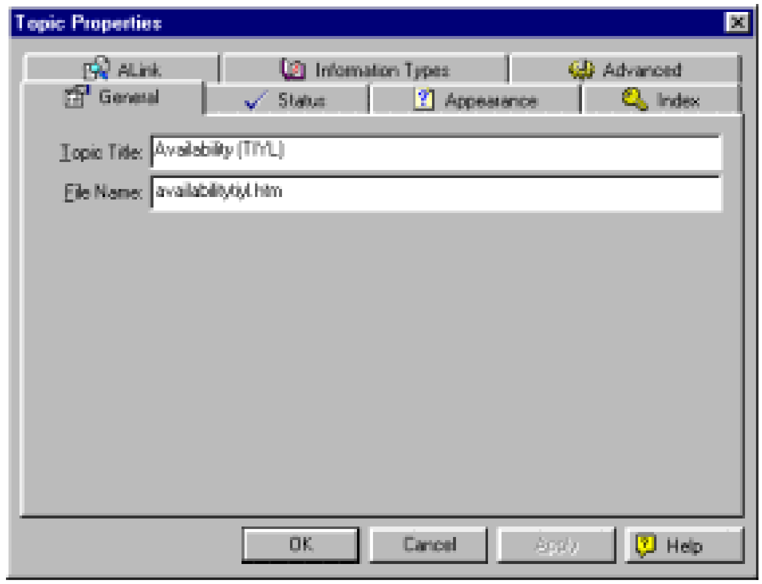


2. Select **New Topic** from the popup menu.

   The **Create Topic Wizard** dialog box displays.



3. Key in **Availability (TIYL)** as the name of the topic in the **Topic Title** edit box.



4. Click **[OK]**.

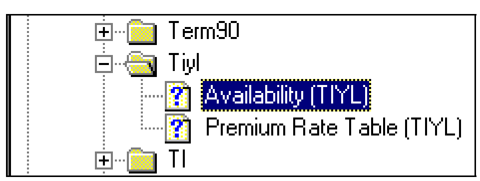
   The topic displays in the right-hand pane and the appropriate styles are applied to the topic. Your screen will resemble the following:

5. Create another topic the same way. Give it a **Topic Title** of **`Premium Rate Table (TIYL)`** and a **File Name** of **`premiumratetabletiyl.htm`**.

Changing topic properties

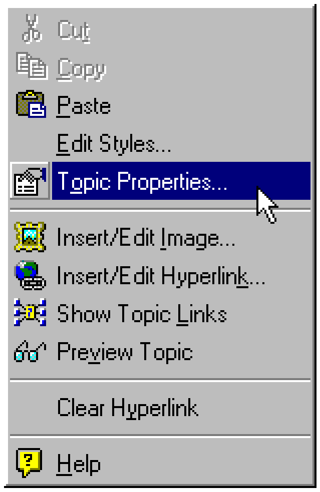
If you need to change a topic title, the file name or any other property of a topic, follow the steps below.

1. In the **HTML Files (Topics)** section on the **Project** tab, double-click the title of the topic for which you want to change the properties. For this procedure, we are selecting the **Availability (TIYL)** topic.



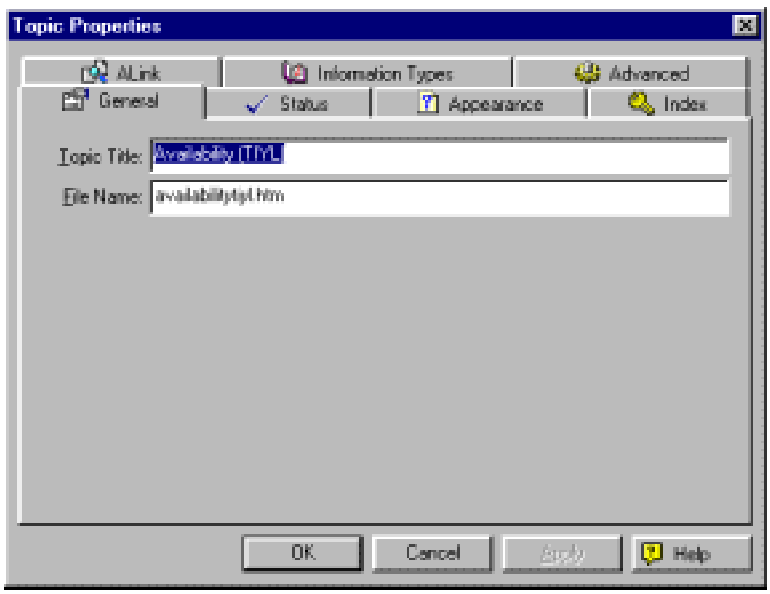
2. Right-click anywhere in the topic.

A popup menu displays.



3. Select **Topic Properties** from the popup menu.

   The **Topic Properties** dialog box displays.



4. Make any desired changes to the topic properties, such as changing the **Topic Title**, and click **[OK]** when you are finished.

NOTE: When you change the **Topic Title**, the **File Name** DOES NOT automatically change. If you want the **Topic Title** and the **File Name** to be the same, change the **File Name** manually to match the **Topic Title**. Be sure to leave the **.htm** extension on the end of the **File Name**.

In addition, when you change the **Topic Title** in the **Topic Properties** dialog box, the title of the topic in the topic on the right side of the RoboHTML window does not automatically change. You must manually change the title.

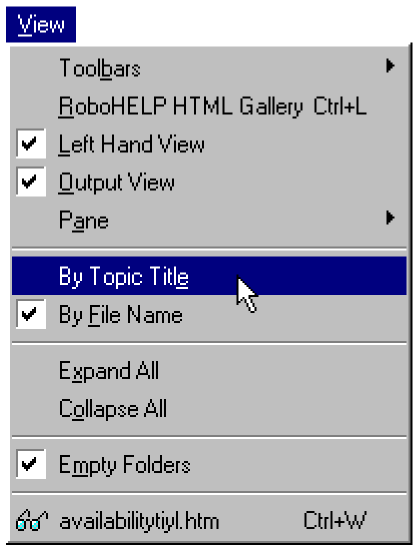
Changing the topic list view on the Project tab

You can view the topic list on the **Project** tab in the left pane by **filename** or by **topic title**. Follow the steps below to change the view of the topic list.

NOTE:	Changing the view to **By Topic Title** will make it easier later when creating **Related Topics** buttons. See "Adding a Related Topics button" on page 49 for more information.

1. Click the **Project** tab at the bottom of the left pane.

2. Select either **By Topic Title** or **By File Name** from the **View** menu. The current selection has a check next to the option.



Chapter 3: Converting rate tables to HTML format

Overview

This chapter provides procedures for converting rates tables to **HTML** format. You can create the rate tables in **Word** or **Excel** and then convert them to the necessary format to import to **RoboHELP HTML** or you can create the tables directly in **RoboHELP**. Before you begin the conversion process of the table, you must set up the **RoboHELP** file with a code to accept the table. The procedures cover converting rates tables created in **Word** and **Excel**.

Procedures

Inserting the table placement code

Before saving the table in **Excel** as and **HTML** table, you must insert a table marker in the file in **RoboHELP HTML** which you are going to insert the table.

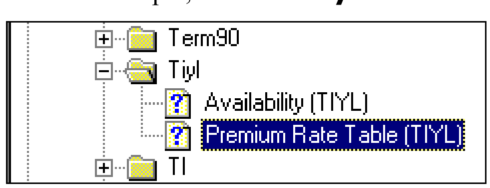
1. Open your project in RoboHELP HTML, if it is currently not open.

   See "Launching the RoboHELP HTML program" on page 1, if RoboHELP HTML is not open and "Opening the Agent's Manual project" on page 12 if RoboHELP HTML is open but your project is not.

2. Click the plus sign (⊞) next to the **HTML Files (Topics)** folder or double-click the folder to open the folder.

3. Click the plus sign (⊞) next to the **htm** folder or double-click the folder to open it. This displays the folders that correspond with the Products (Agent's Manual) or sections (Service and Underwriting) within the help file.

4. Click the plus sign (⊞) on the product folder containing the topic to which you want to add a table or for which you want to change a table. For this example, select the **Tiyl** folder.

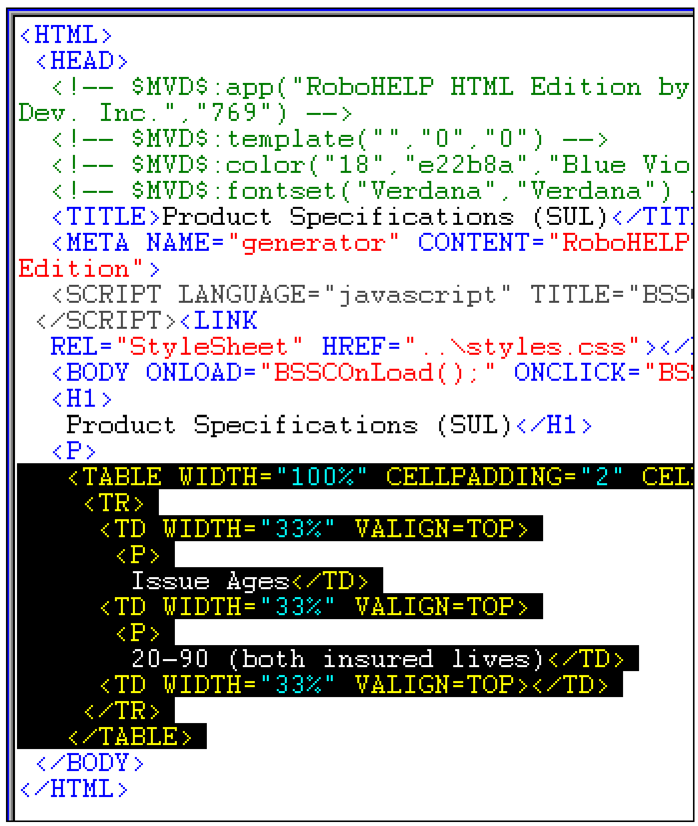


5. Double-click on the topic title to display it in the right-hand screen. For this example double-click on the **Premuim Rate Table (TIYL)** topic.

   The topic displays in the right-hand pane and is available for editing.

6. If there is a table that needs to be replaced already in this file, highlight the table and delete it.

NOTE: When higlighting a table to be replaced, be sure you include both the opening table tag (<TABLE…>) and the closing table tag (</TABLE>). See the picture below for an example.



```
<HTML>
 <HEAD>
  <!-- $MVD$:app("RoboHELP HTML Edition by
Dev. Inc.","769") -->
  <!-- $MVD$:template("","0","0") -->
  <!-- $MVD$:color("18","e22b8a","Blue Vio
  <!-- $MVD$:fontset("Verdana","Verdana")
  <TITLE>Product Specifications (SUL)</TIT
  <META NAME="generator" CONTENT="RoboHELP
Edition">
  <SCRIPT LANGUAGE="javascript" TITLE="BSS
 </SCRIPT><LINK
  REL="StyleSheet" HREF="..\styles.css"></
  <BODY ONLOAD="BSSCOnLoad();" ONCLICK="BS
  <H1>
   Product Specifications (SUL)</H1>
  <P>
   <TABLE WIDTH="100%" CELLPADDING="2" CEL
    <TR>
     <TD WIDTH="33%" VALIGN=TOP>
      <P>
       Issue Ages</TD>
     <TD WIDTH="33%" VALIGN=TOP>
      <P>
       20-90 (both insured lives)</TD>
     <TD WIDTH="33%" VALIGN=TOP></TD>
    </TR>
   </TABLE>
 </BODY>
</HTML>
```

7. Click the **TrueCode** tab on the bottom of the right-hand pane.

8. For this example, we want the **"table"** code to replace the text "**`Type topic text here`**" so select those words in the topic.

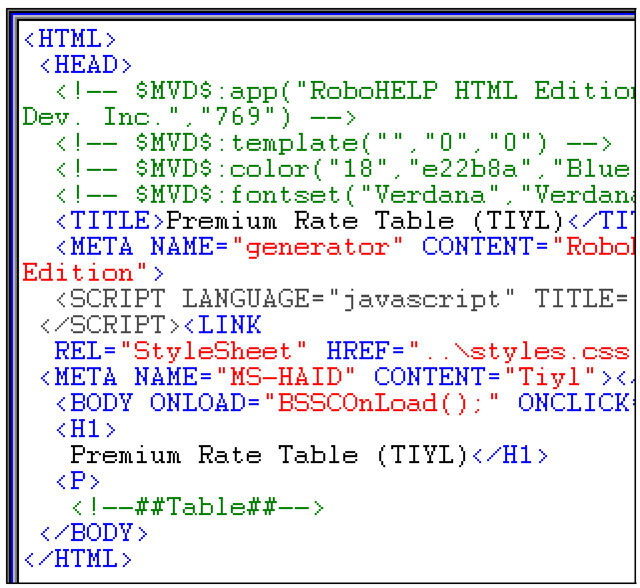
NOTE:	In general, highlight the text you want to replace and delete it, or place the cursor at the location at which you want to insert the table.

9. Key in the following with no spaces. It will display in green in the TrueCode.

   <!--##Table##-->

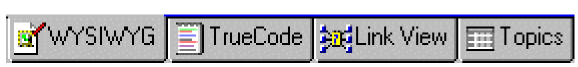
   See the picture below for an example. Your code may look slightly different depending on the contents of the file. However, the table marker code should go below the topic heading, which is between the **<H1>** and the **</H1>** tags.

NOTE:	**<H1>** and **</H1>** are codes indicating formatting for **Heading 1**. **"Tags"** indicate formatting placement.

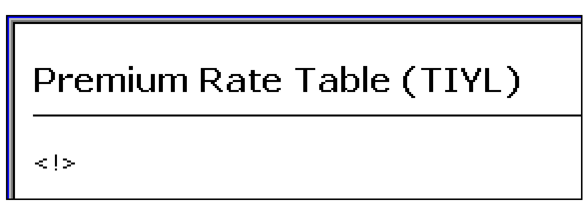


10. If the code **</BODY>** jumps to the same line as the **Table** code, press **<Enter>** and it will return to its correct position.

11. Click the **WYSIWYG** tab.



The code you inserted into the file displays as **<!>**.

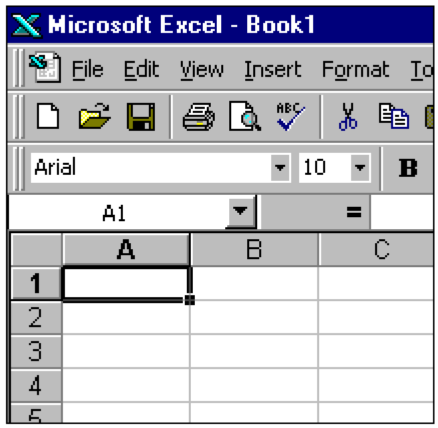


12. Select **Save All** from the **File** menu or click the **[Save All]** button to save your changes.

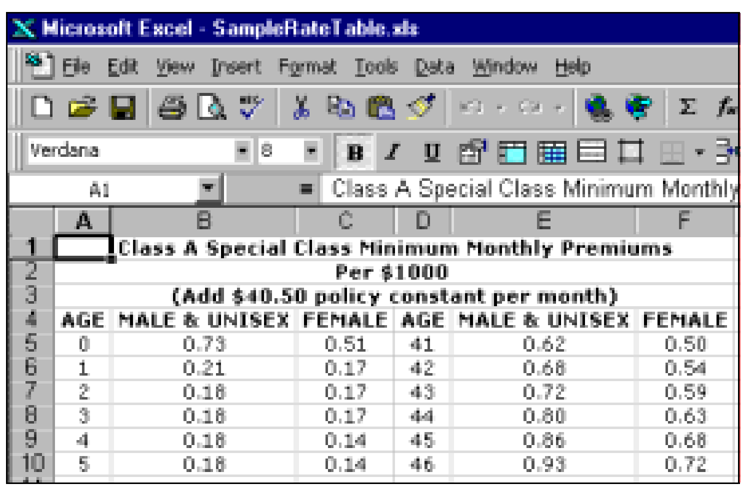
Converting a Word table to Excel

To convert a **Word** table into HTML, you will copy the table into **Excel** first. Follow the steps below.

1. Open the rate table file in **Word**.
2. Select the table.
3. Select **Copy** from the **Edit** menu.
4. Open **Excel**.
5. Make sure the cell in **Row 1**, **Column A** is selected.



6. Select **Paste** from the **Edit** menu.
7. Format the table cells the way you want them, centering headings across the whole table and bolding them, centering the rates within their cells, etc. The following picture is an example of a rate table formatted in Excel.



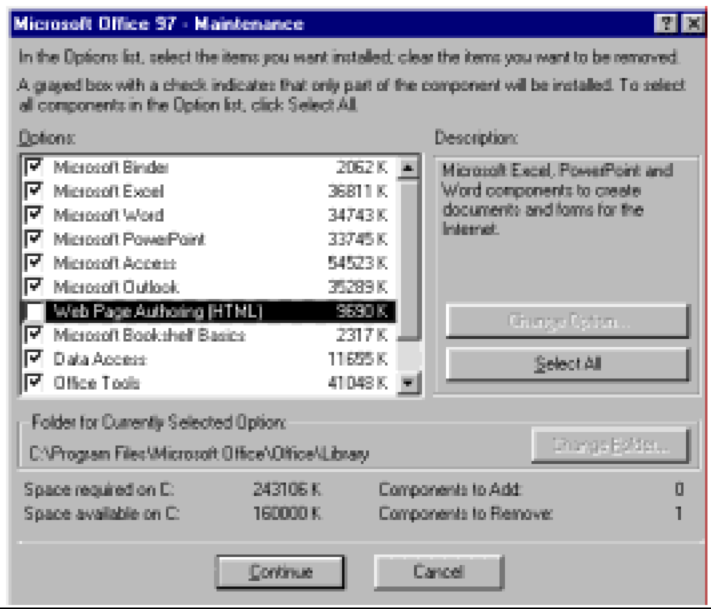
8. To convert the Excel HTML format, follow the steps in see "Converting an Excel table to HTML format" on page 25.

Converting an Excel table to HTML format

Now that you have inserted a table marker into your file, you must save the **Excel** table in HTML format. This procedure in **Excel** also inserts the HTML code for the table into the HTML file where the table marker was inserted.

For this procedure, a table that has already been inserted into the *Term to 90* section is being used as an example.

NOTE: The **Internet Assistant Wizard** should have been installed when Microsoft Office 97 was installed on your machine. If not, put your Microsoft Office 97 CD back the CD ROM drive and install the **Web Page Authoring (HTML)** feature. Follow the instructions provided with the installation.



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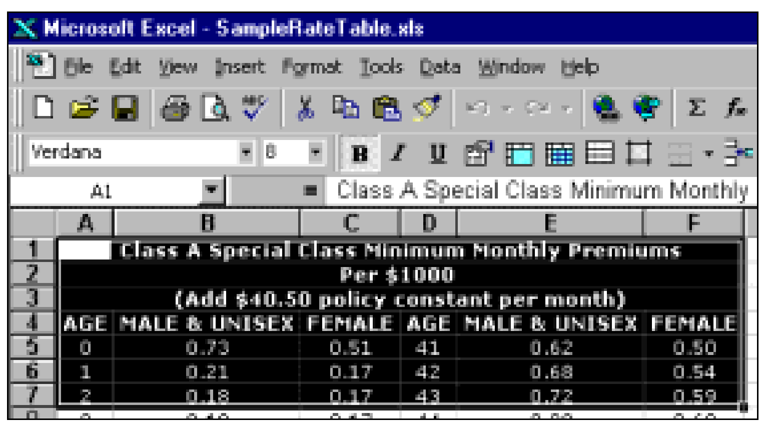
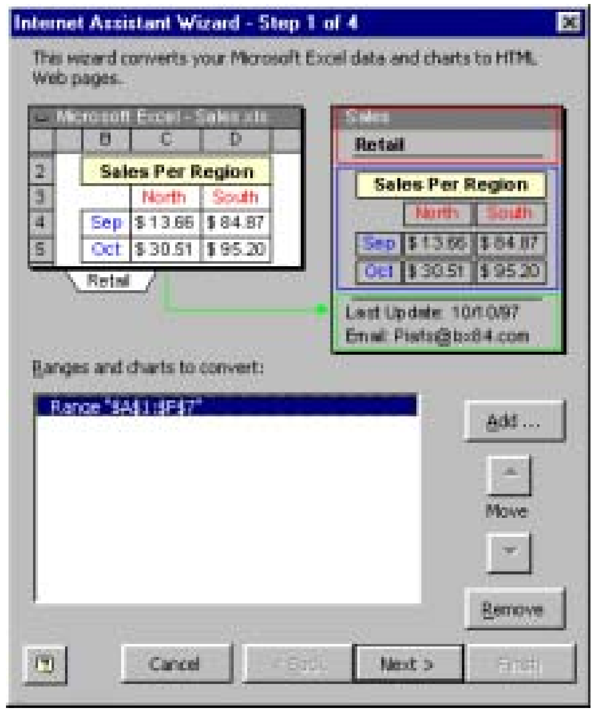
1. Open the rate or other table in **Excel**, if it is not already open.
2. Highlight the cells of the table.



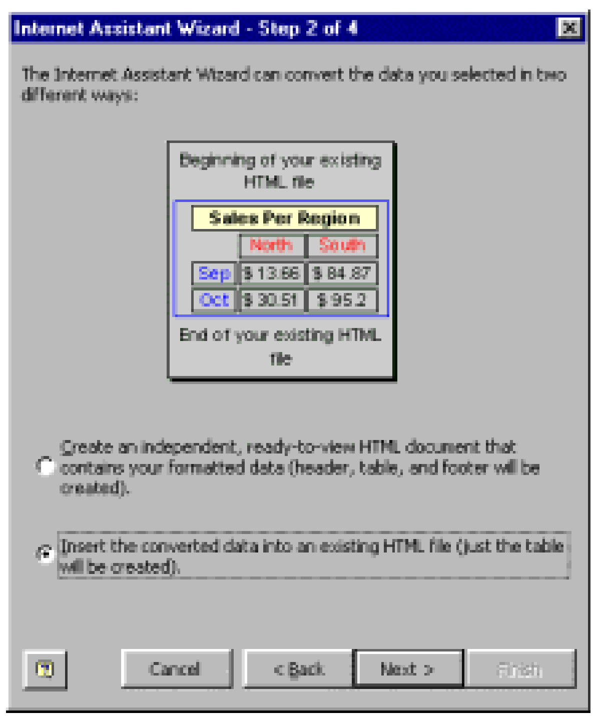
3. Select **Save as HTML** from the **File** menu.

   The **Internet Assistant Wizard** dialog box displays.



4. Accept the default on the **Step 1** screen and click **[Next>]**.

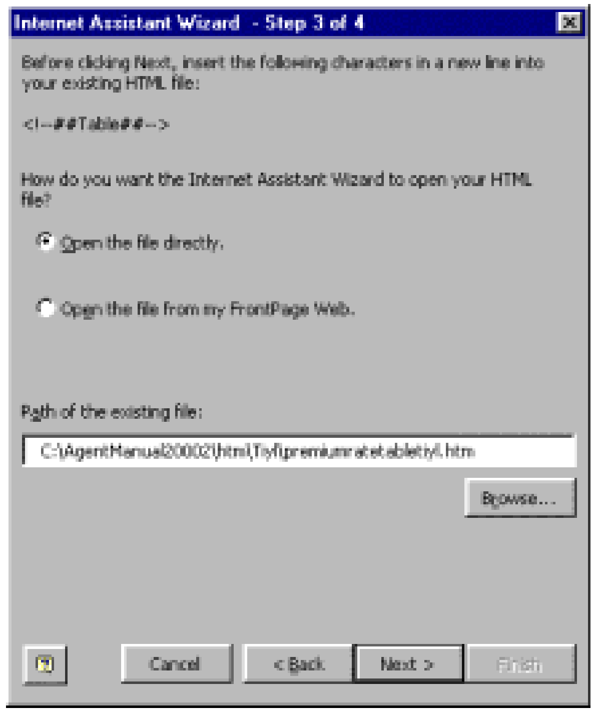
   The **Step 2** screen displays.



5. Select the **Insert the converted data into an existing HTML file (just the table will be created)** option.

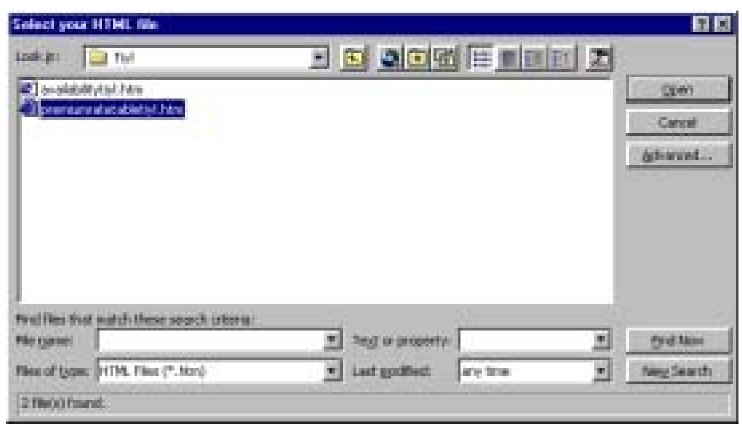
6. Click **[Next>]**.

   The **Step 3** screen displays.



7. Select the **Open the file directly** option.
8. Click the **[Browse]** button.

   The **Select your HTML file** dialog box displays.



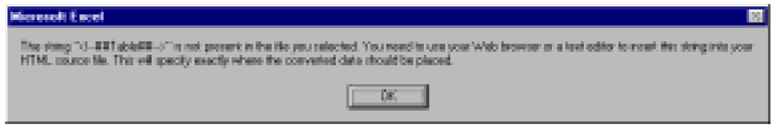
9. Navigate to the directory containing your project and the subfolder for the Product or section you are working on.

NOTE:	The pathname we used for this example is: **c:\AgentManual20002\htm\Tiyl**.

10. Select the file into which you want to insert the table. For this example, select **premiumratetabletiyl.htm**.
11. Click **[Open]**.

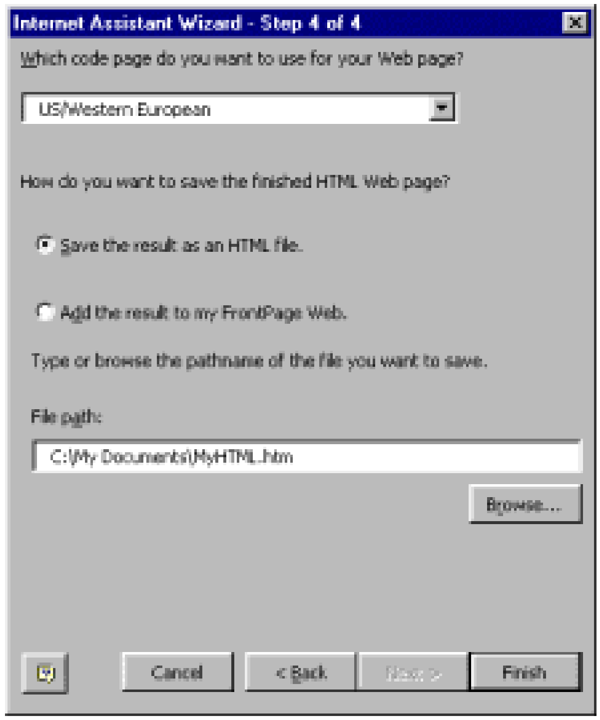
12. Click **[Next>]**.

    If you haven't put the correct **Table** code into the selected file, you will see a dialog box display that warns you to do so.



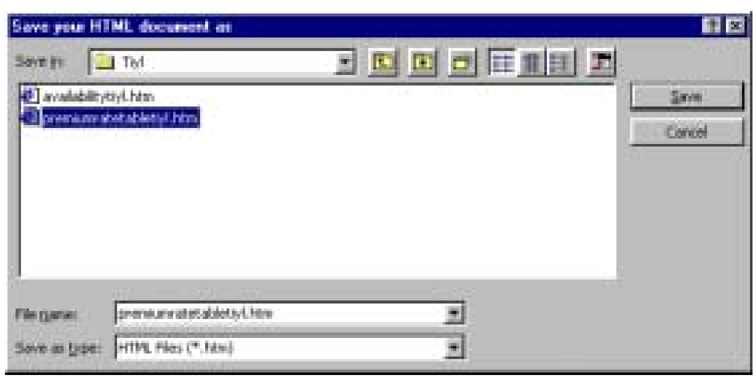
    See "Inserting the table placement code" on page 21 for procedures on putting the correct table code into your HTML file.

    If you have the correct table placement code in your file, the **Step 4** screen displays.



13. Select the **Save the result as an HTML file** option.
14. Click **[Browse]**.

    The **Save your HTML document as** dialog box displays.

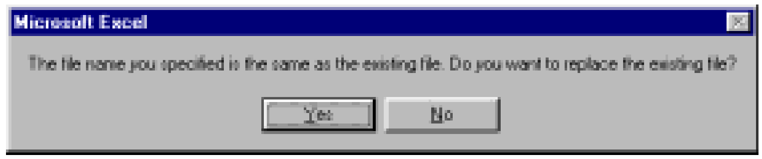


15. You will most likely see that you are already in the folder in which your file is located. If not, navigate to the same directory as the original HTML file within your project.

NOTE:	The pathname we used for this example is: **c:\AgentManual20002\htm\Tiyl**.

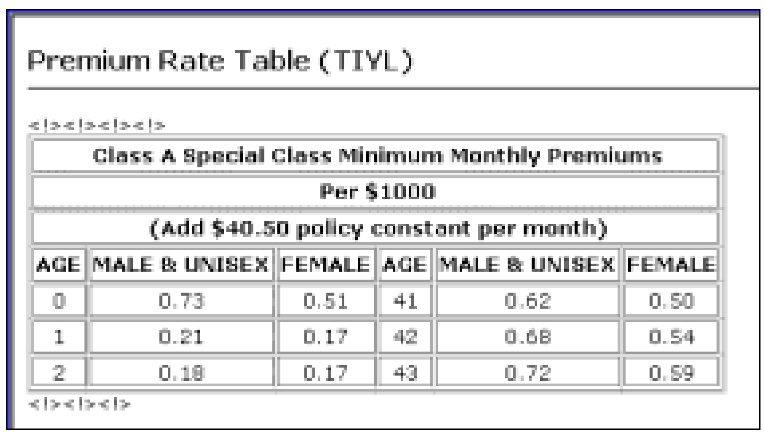
16. Select the same file you selected on the **Step 3** screen: **premiumratetabletiyl.htm**.
17. Click **[Save]**.
18. Click **[Finish]**.

    A dialog box displays telling you that the filename you selected is the same as the existing file.



19. You **DO** want to replace the existing file, so click **[Yes]** on this dialog box.

    Your table will be inserted into the existing file replacing the **Table** code you inserted. See "Formatting the table properties" on page 32 and "Formatting the cell properties" on page 34 for instructions on how to format the table you just inserted.



Premium Rate Table (TIYL)

<!><!><!><!>

Class A Special Class Minimum Monthly Premiums					
Per $1000					
(Add $40.50 policy constant per month)					
AGE	MALE & UNISEX	FEMALE	AGE	MALE & UNISEX	FEMALE
0	0.73	0.51	41	0.62	0.50
1	0.21	0.17	42	0.68	0.54
2	0.18	0.17	43	0.72	0.59

<!><!><!>

NOTE:	The lines above and below the table with the **<!>** symbols on them are not needed. Highlight these lines and delete them.

Chapter 4: Formatting

Overview

This chapter provides procedures on formatting rate tables and text in topics.

Procedures

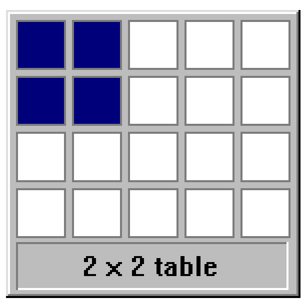
Creating a table in RoboHELP HTML

You can create tables and enter information directly into **RoboHELP HTML** by doing the following:

1. Click the **[Table]** button on the toolbar.

2. Select four squares to make a **2 X 2 Table**.

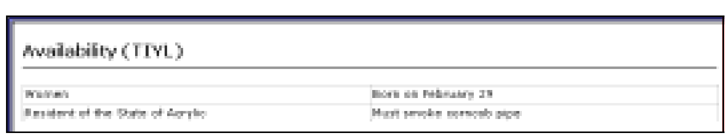
3. Key in information in the cells. We have keyed in the following information just for fun.

   a. Cell A1 – Woman

   b. Cell A2 – Resident of the State of Acrylic

   c. Cell B1 – Born on February 29

   d. Cell B2 – Must smoke a corncob pipe.

4. Click outside the table and press the **<Enter>** key to move the insertion point one line below the table.

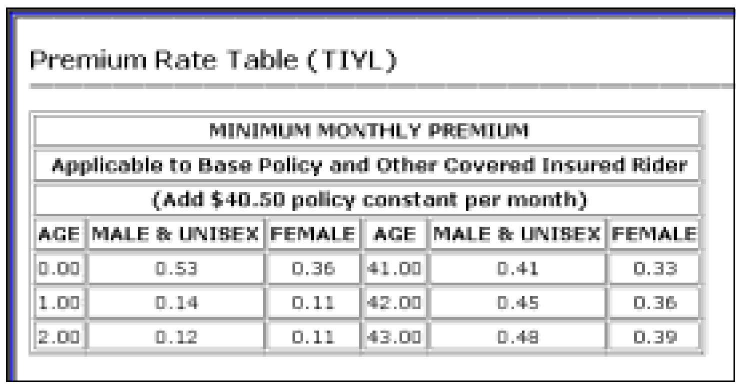
Formatting the table properties

Follow the steps below to put the correct table formatting on the rate table you converted into HTML format in the previous chapter. For your project, substitute your folder name and filenames for those provided in this tutorial.

NOTE: When you are finished formatting the rate table you imported, try formatting the table you created in the "Creating a table in RoboHELP HTML" procedure on page 31.

1. Launch **RoboHELP HTML.**
2. Open the **AgentMan.MPJ** project from the list.
3. Double-click the **HTML Files (Topics)** folder to expand its contents.
4. Double-click the **htm** folder to expand its contents.
5. Double-click the **Tiyl** folder to expand its contents.
6. Double-click **Premium Rate Table (TIYL)** filename.

   The topic displays in the right pane.



Premium Rate Table (TIYL)

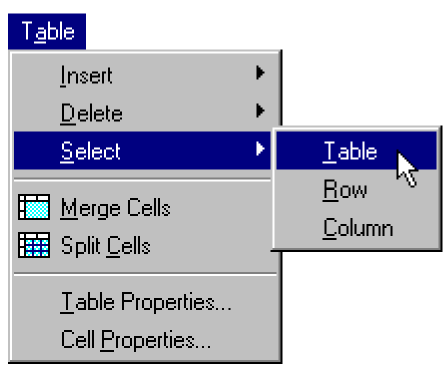
MINIMUM MONTHLY PREMIUM					
Applicable to Base Policy and Other Covered Insured Rider					
(Add $40.50 policy constant per month)					
AGE	MALE & UNISEX	FEMALE	AGE	MALE & UNISEX	FEMALE
0.00	0.53	0.36	41.00	0.41	0.33
1.00	0.14	0.11	42.00	0.45	0.36
2.00	0.12	0.11	43.00	0.48	0.39

7. Select the entire table.

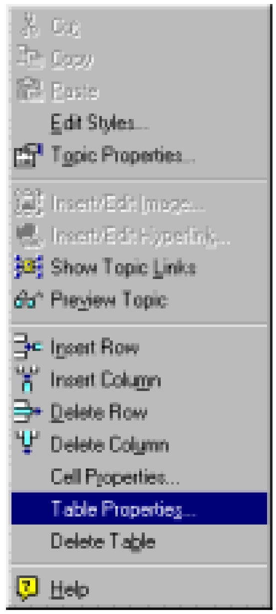
   a. Click anywhere in the table.

   b. Select **Select** from the **Table** menu.

   c. Select **Table** from the result submenu.

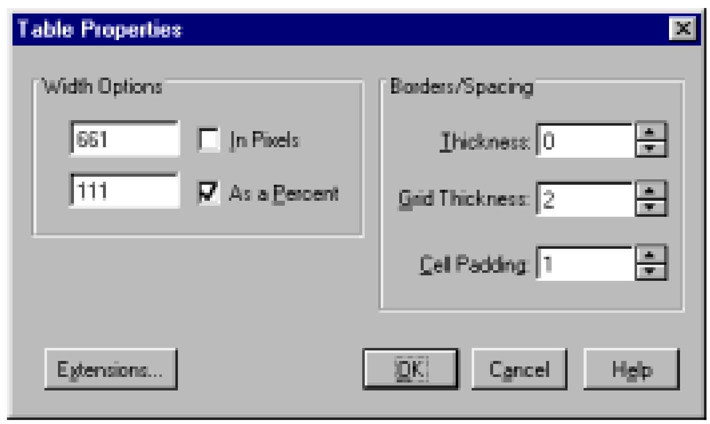


8. Right-click anywhere in the table to get the following pop-up menu.



9. Select **Table Properties**.

   The **Table Properties** dialog box displays.

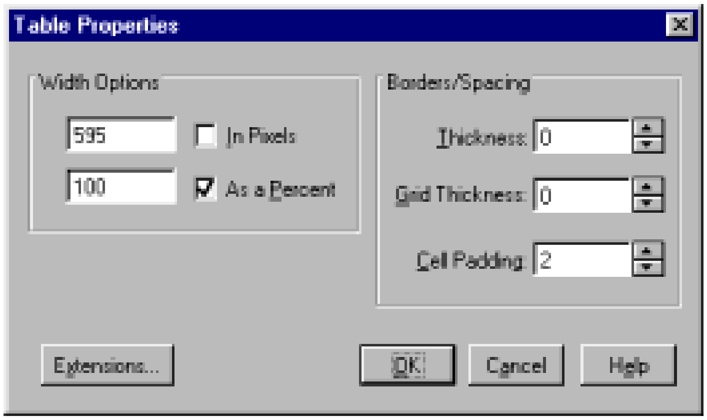


NOTE:	The **Table Properties** listed in the following steps are the same for all tables formatted in the **Agent's Manual**.

10. Under **Width Options**, select the number next to **As Percent**.
11. Change it to `100` and press the **<Tab>** key.
12. Under **Borders/Spacing**, **Thickness** should be "**0**" (zero).
13. **Grid Thickness** should be "**0**" (zero).

14. **Cell Padding** should be "**2**."

    Your input screen should resemble the following:

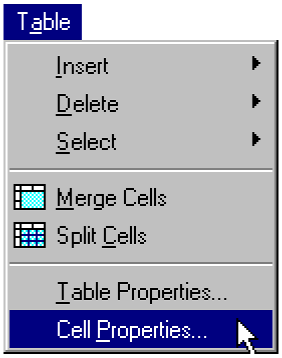


15. Click **[OK]**.

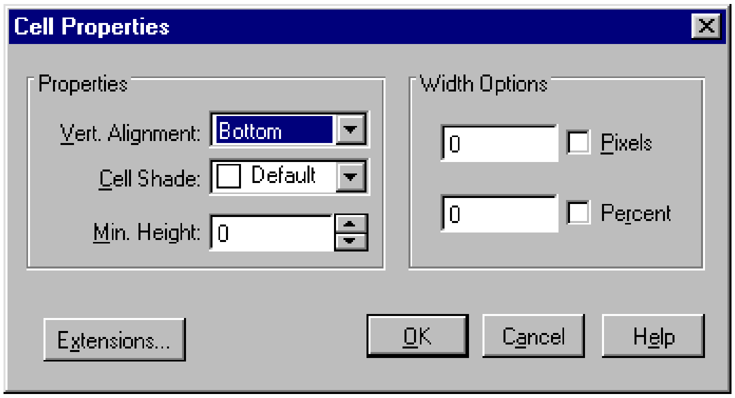
Formatting the cell properties

Follow the steps below to correctly format the cells such that they display correctly and within the width of the window when the data is viewed.

1. With the entire table selected, right click anywhere in the table.
2. Select **Cell Properties** from the **Table** menu.

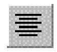


3. Make sure under **Width Options** that neither the **Pixels** check box nor the **Percent** check box are selected. There should NOT be a check mark in either check box, as pictured below.



4. Click **[OK]**.
5. Make sure the entire table is selected again.

6. Center the text in the table by clicking on the **[Center justification]** button on the toolbar.

7. Deselect the table by clicking anywhere outside of the table within the same topic.
8. Add or remove table lines, bold information, or provide any other formatting you deem necessary to make the table look the way you want it to appear.

Creating a numbered list

Follow the steps below to create a numbered list within a topic.

1. Key in the list of contents without the numbers.

Sample list:

Products:

Whole Life (WL)

Modified Premium Whole Life (MPWL)

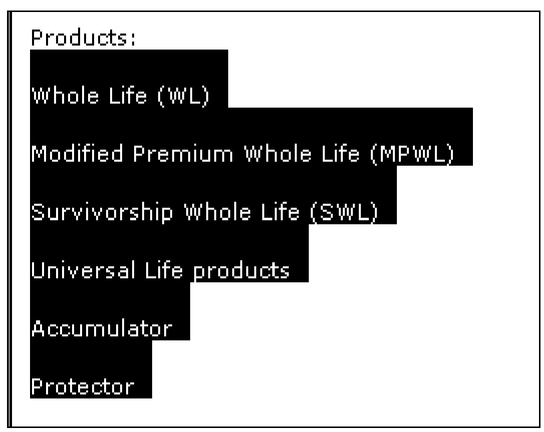
Survivorship Whole Life (SWL)

Universal Life Products

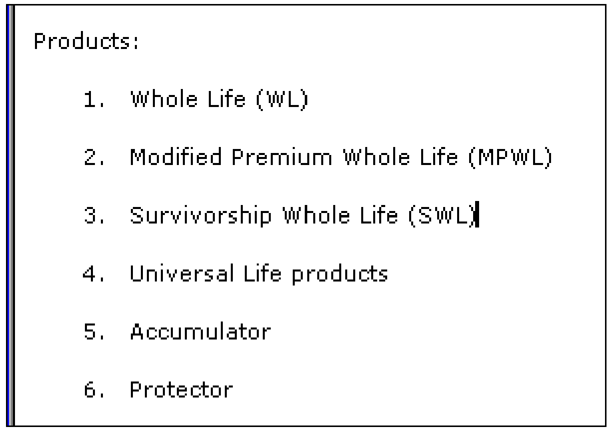
Accumulator

Protector

2. Select the items in the list. Do not select "Products:".



3. Click the **[Numbered List]** button on the toolbar.



Creating a bulleted list

Follow the steps below to create a bulleted list within a topic.

1. Key in the list of contents without the bullets.

Sample list:

Riders:

Accidental Death Benefit (ADB)

Disability Waiver of Premium (WP)

Option to Purchase Paid-up Additions (OPP)

Other Covered Insured (OCI)

Dividend Option Term (DOT)

Spouse's and Children's Insurance/Children's Insurance (SCI/CI)

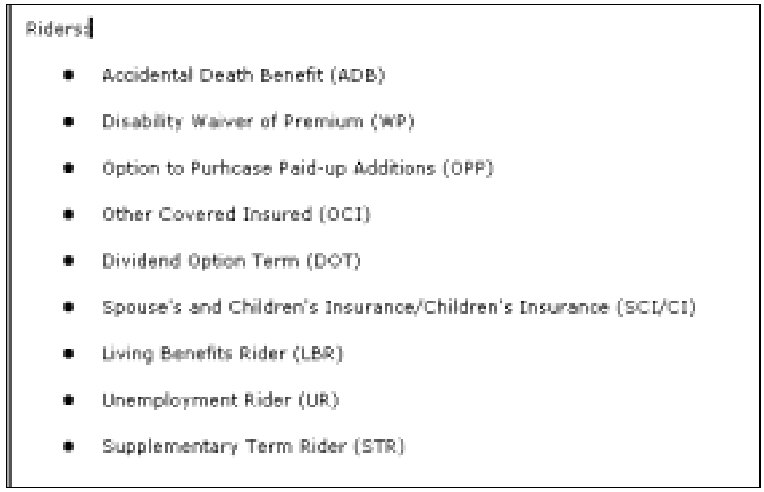
Living Benefits Rider (LBR)

Unemployment Rider (UR)

Supplementary Term Rider (STR)

2. Select the entire list, except "Riders:".

3. Click the **[Bulleted List]** button on the toolbar.

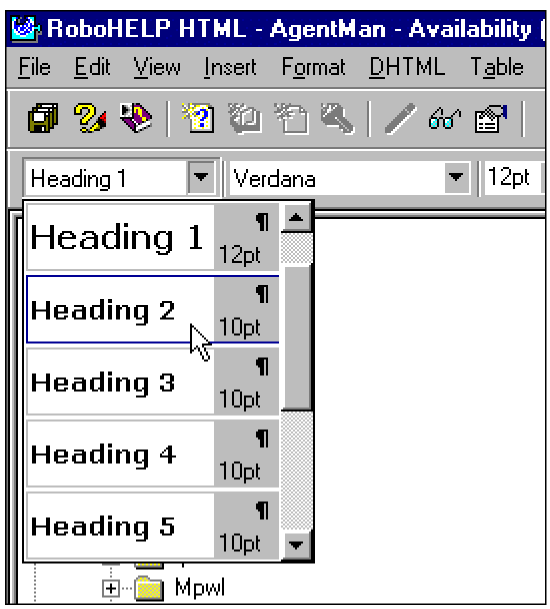


Formatting text in topics

The formatting completed to date in the text shows all Riders **bolded**, all products displayed in *italics*, and other items **bolded** or displayed in *italics* as a specific topic would warrant. Formatting is generally a matter of personal taste or style, or a matter of bringing attention to specific words or concepts in a particular file.

For **Topic Titles**, use the **Heading 2** style, except for the **Introduction**, which should be formatted with the **Heading 1** style.

To change the style on a paragraph, select the style from the Style drop down list in the toolbar. See the graphic below.



Chapter 5: ALinks and Related Topics

Overview

This chapter provides procedures on inserting **ALinks**, **ALink** buttons, and **Related Topics** buttons into topics. These features provide easier reference for the user when researching information on items that are related to the currently selected topic.

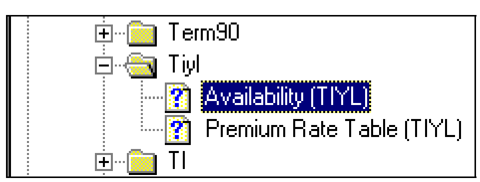
Procedures

Inserting an ALink through Topic Properties

ALinks are used for connecting the files within one Product or section. For example, all of the 5YLT topics have the 5YLT **ALink** associated with it. To access the other 5YLT topics, the user clicks an **ALink** button that displays a dialog box listing all the available topics that relate to 5YLT. Follow the steps below to add an **ALink** to a topic. We will be using the **TIYL** example product for this procedure.

NOTE:	See "Adding an ALink button" on page 43 to complete the **ALink** procedures.

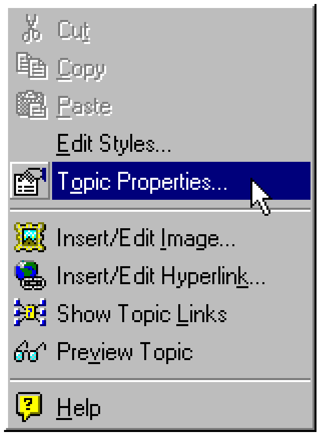
1. Double-click the filename of the topic on the **Project** tab to which you want to add an **ALink** .

   The topic displays in the right-hand pane.

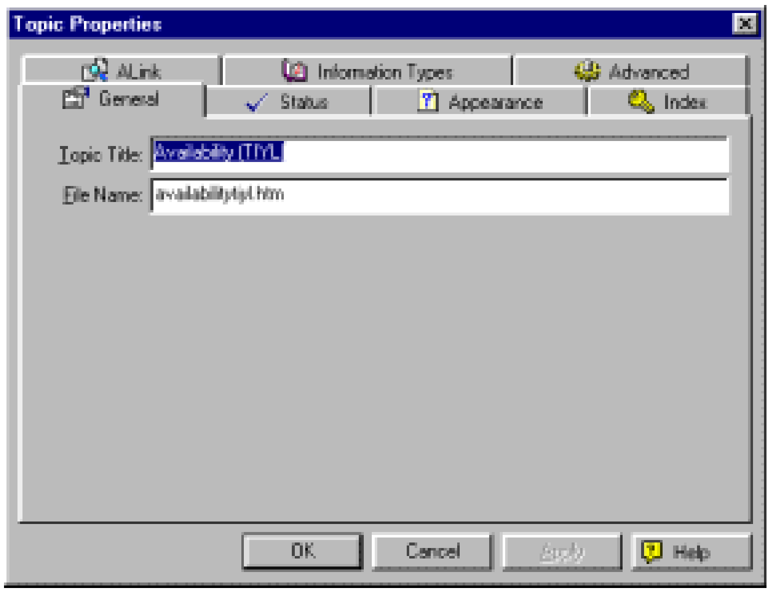
2. Right-click anywhere in the topic pane (the right-hand pane).

A popup menu displays.



3. Select **Topic Properties** from the popup menu.

   The **Topic Properties** dialog box displays.

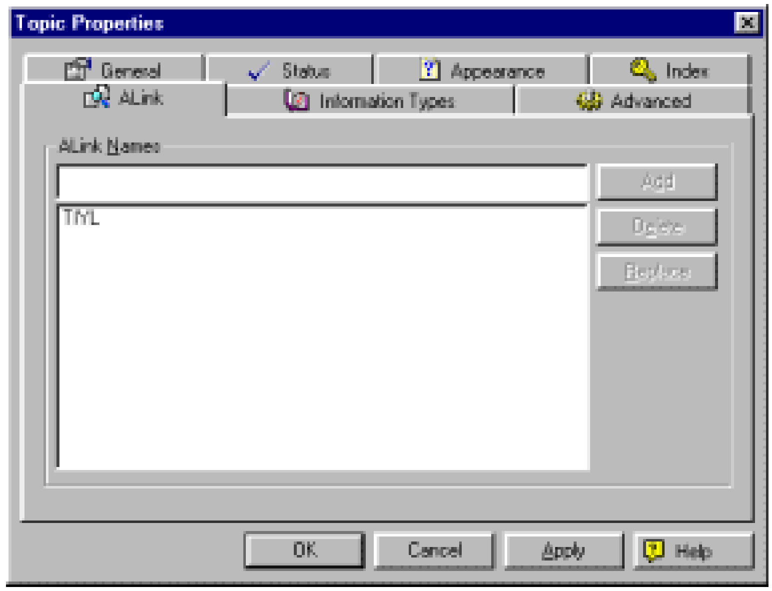


4. Click the **ALink** tab.

5. Key in the name of the **ALink** into the **ALink Names** edit box. For this example, key in **TIYL**.

6. Click **[Add]** or press **<Enter>**.

The **ALink** is added to the list.



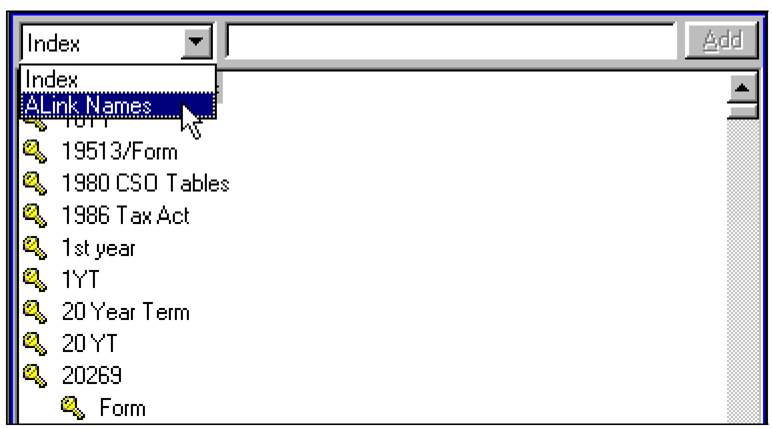
7. Click **[OK]**.

Inserting an ALink using the Index tab

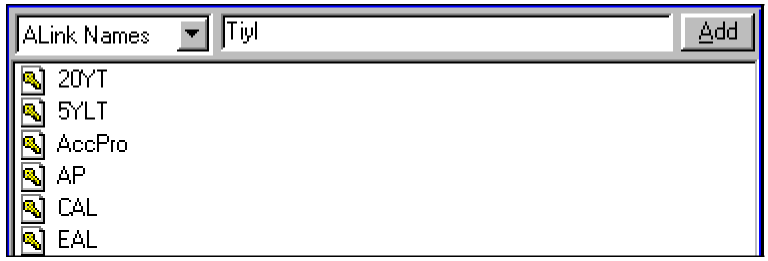
Another method of adding an **ALink** to a topic is to use the **Index** tab. Follow the steps below.

1. Click the **Index** tab in the **Project** pane.

2. Click the down-pointing arrow to access the **Index** drop-down list and select **ALink Names**.



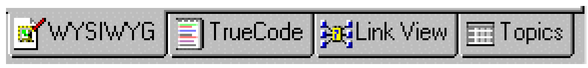
3. Key in **`Tiyl`** in the edit box to the right of **ALink Names**.



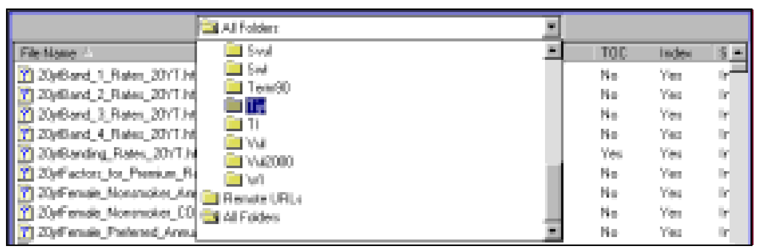
4. Click the **[Add]** button.

Tiyl is added to the list.

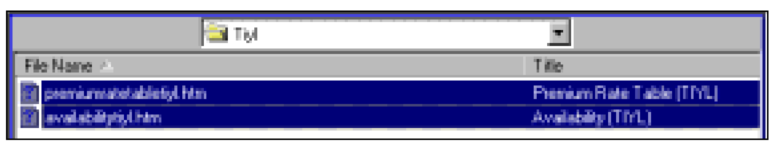
5. Click the **Topics** tab in the right pane.



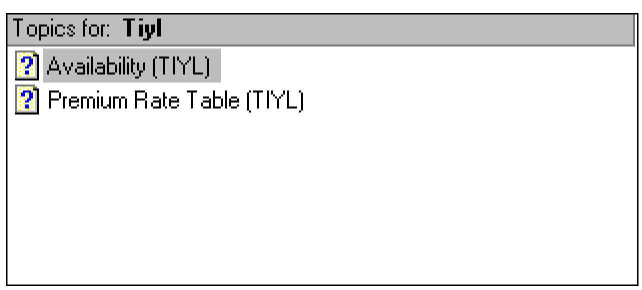
6. Click the down-pointing arrow to access the **Folders** drop-down list and select **Tiyl**.



7. Select all the topics in this folder.



8. Place your mouse on one of the icons and drag them to the pane on the bottom-left labeled **Topics for: Tiyl**.



The topic names display in this window.

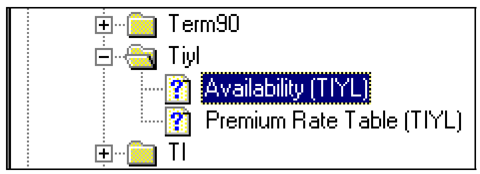
Adding an ALink button

ALink buttons are inserted into topics so the user can easily access the other topics from the current Product or section.

NOTE:	Be sure that each new topic you insert has an **ALink** associated with it. See "Inserting an ALink through Topic Properties" on page 39 or "Inserting an ALink using the Index tab" on page 41 for procedures on adding **ALink** keywords to topics.

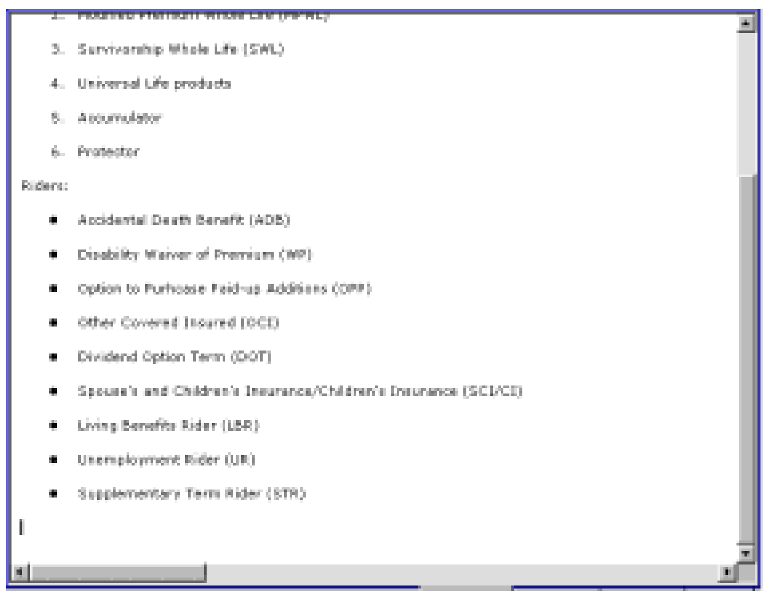
1. Click the **Project** tab.

2. Double-click the filename of the topic to which you want to add an **ALink** button.



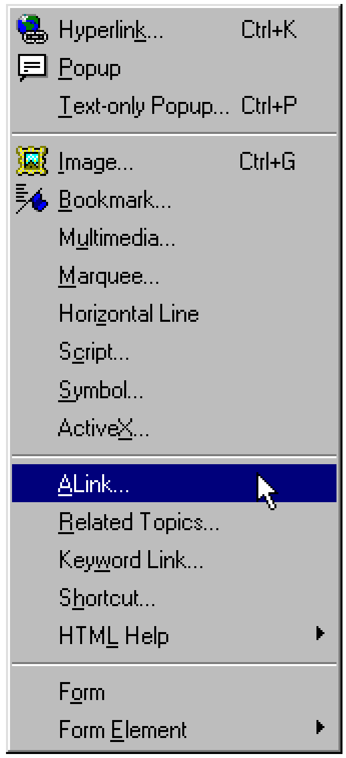
The topic displays in the right-hand pane.

3. Put the cursor (insertion point) at the bottom of the topic where you would like to insert the **ALink** button.

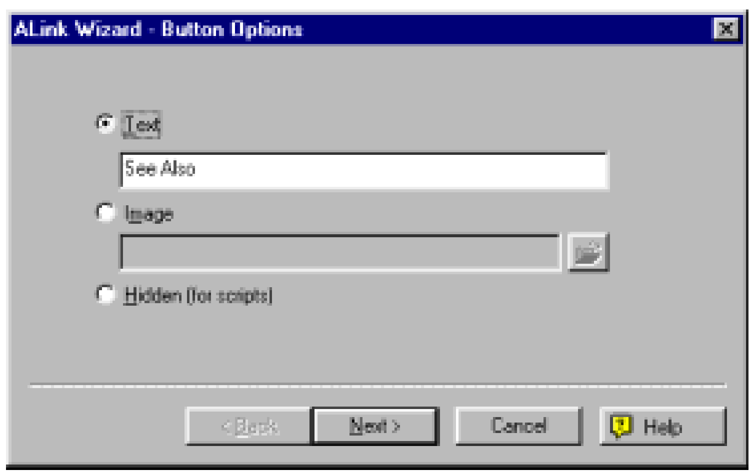


NOTE:	If there is a **[Related Topics]** button, put the cursor to the left of that button on the same line.

4. Select **ALink** from the **Insert** menu.

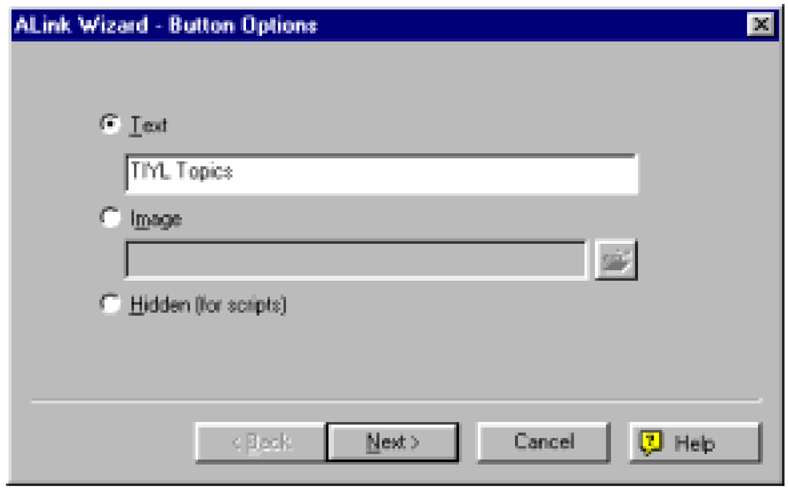


The **Button Options** screen of the **ALink Wizard** displays.



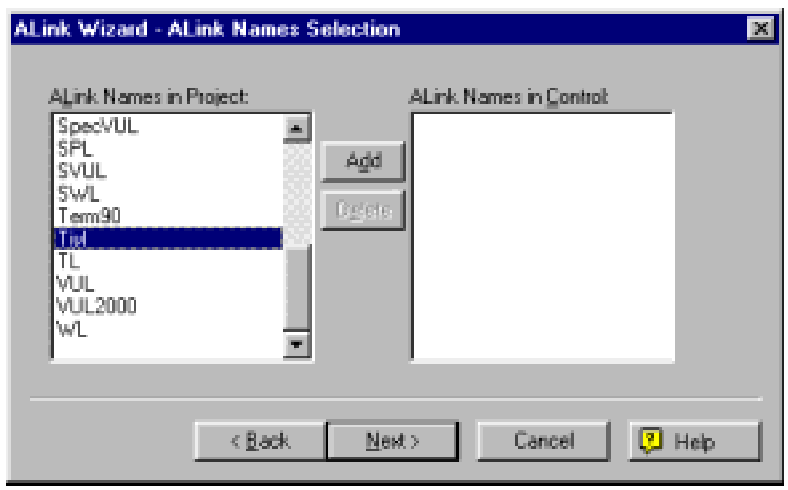
5. Accept the default choice of **Text**.
6. Change the text in the edit box to the acronym of the Product for which the topic is applicable, or a shortened version of the section name, and the word 'topics'.

For our practice, key in `TIYL Topics` in place of **See Also**.



7. Click **[Next>]**.

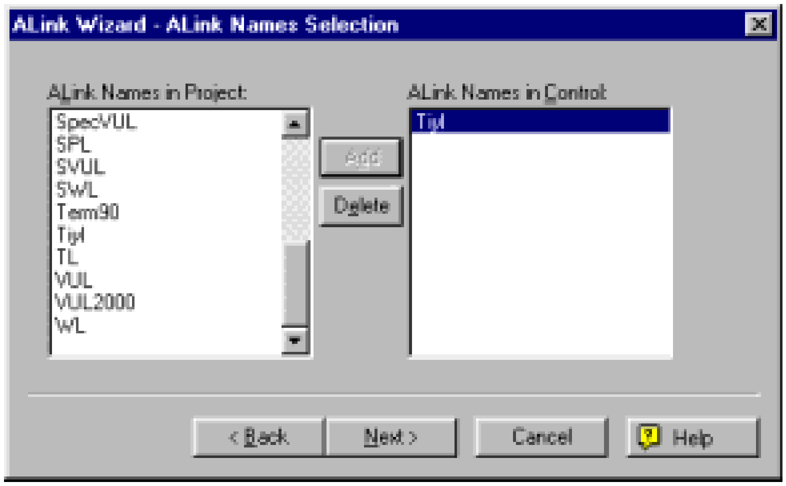
   The **ALink Names Selection** screen displays.



8. Select the appropriate **ALink** from the **ALink Names in Project** list on the left side of the dialog box.

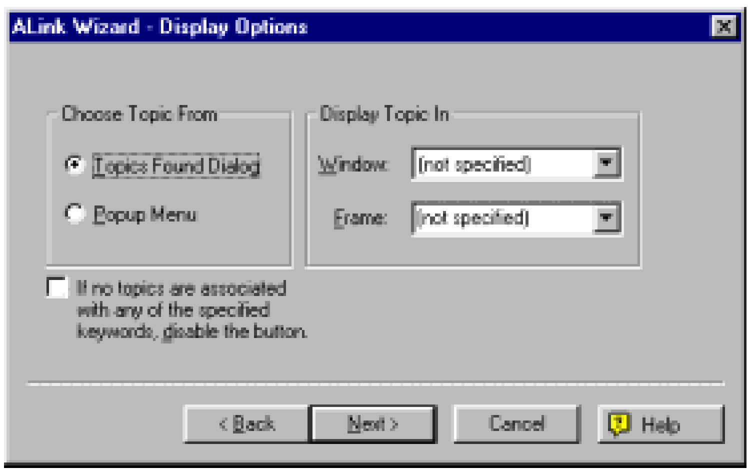
9. Click **[Add]**.

The **ALink** displays in the **ALink Names in Control** list on the right side of the dialog box.



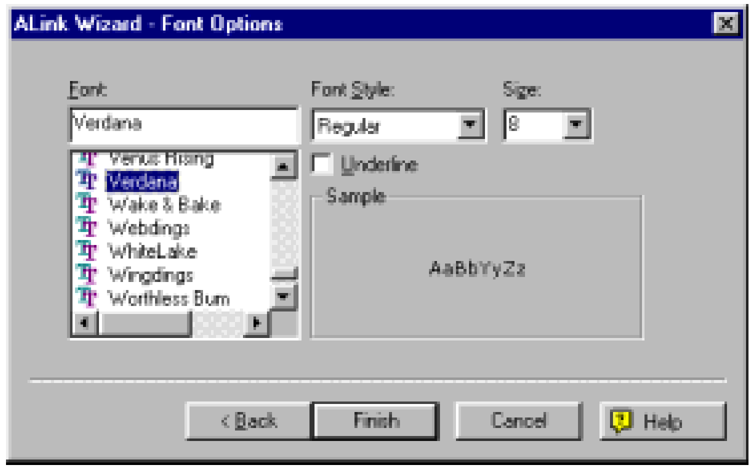
10. Click **[Next>]**.

    The **Display Options** screen displays.



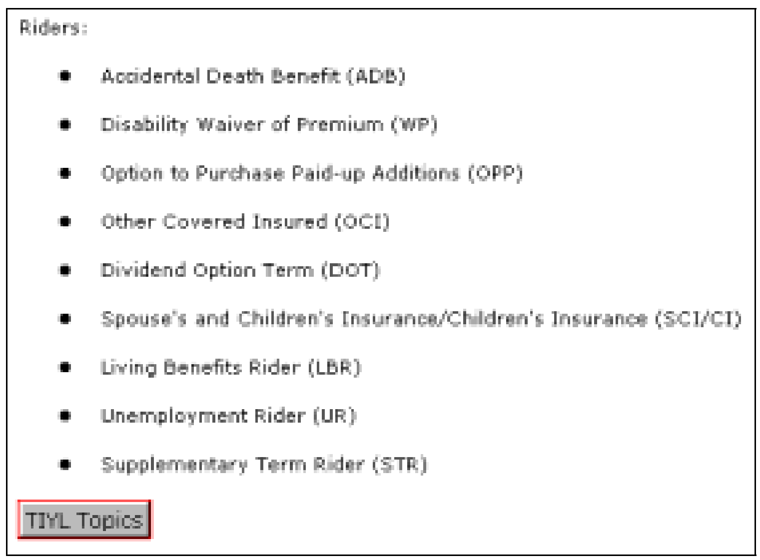
11. Select the **Popup Menu** option in the **Choose Topic From** section.
12. **DO NOT** specify a **Window** or a **Frame**.
13. Click **[Next>]**.

The **Font Options** screen displays.



14. Select **Verdana** from the **Font** list.
15. The **Font Style** should be **Regular** and the **Size** should be **8**. These should be the default values.
16. Click **[Finish]**.

    The **[Related Topics]** button is inserted at the cursor's location in the topic. The following picture displays an example **ALink** button.

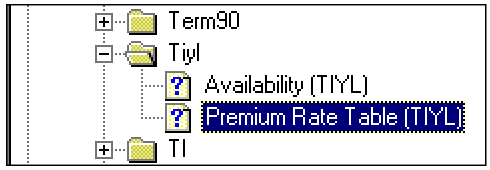


Copy an ALink button to all linked topics

The **ALink** button you created in the first topic needs to be copied to all topics it is related and linked to.

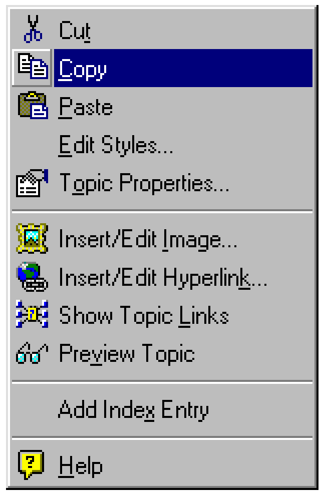
1. Click the **Project** tab.

2. Double-click the filename of the topic to which you want to add an **ALink** button.



The topic displays in the right-hand pane.

3. Right click the new **ALink** button and select **Copy** from the popup menu.

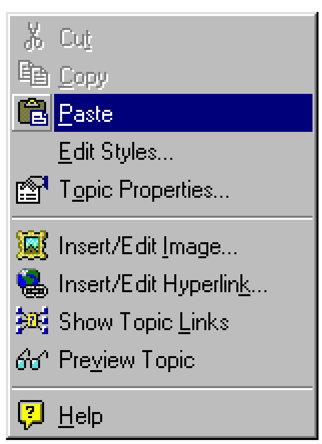


4. Select the next topic in the project folder.

5. Move the insertion point to the end of the topic and to the line under the last entry or under the table.

NOTE:	Remember, if there is a **[Related Topics]** button, put the cursor to the left of that button on the same line.

6. Right click the mouse on this line and select **Paste**.



The button is copied to this page. Continue pasting the button to all pages for that product.

Adding a Related Topics button

Some topics may have related topics to which you want the user to jump. Follow the steps below to add a **Related Topics** button. If there is an **ALink** button, the button goes to the left of it.

NOTE: It is recommended that you switch to the **Topic Title** view on the **Project** tab before creating a **Related Topics** button. want the **Topic Title** and the **File Name** to be the same, change the **File Name** manually to match the **Topic Title**. Be sure to leave the **.htm** extension on the end of the **File Name**. See "Changing the topic list view on the Project tab" on page 19 for more information.

In addition, when you change the **Topic Title** in the **Topic Properties** dialog box, the title of the topic in the topic on the right side of the RoboHTML window does not automatically change. You must manually change the title. See "Changing topic properties" on page 17.

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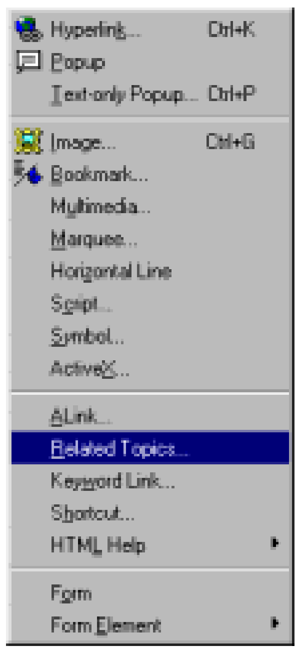
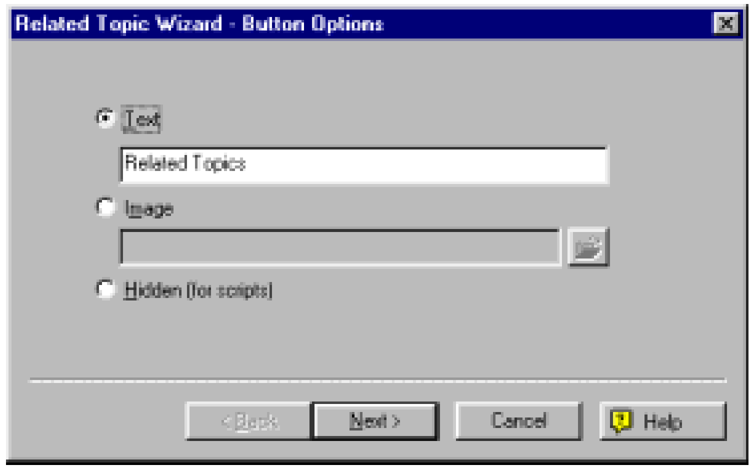
1. Put the cursor at the bottom of the topic.
2. Place the insertion point to the left of the **ALink** button.
3. Select **Related Topics** from the **Insert** menu.

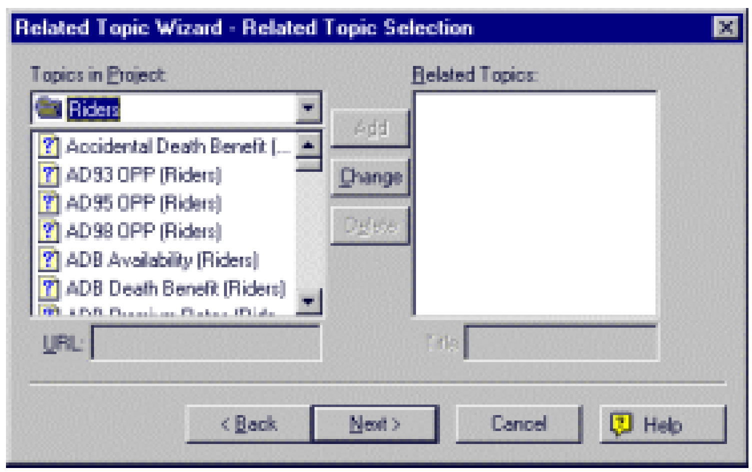


The **Button Options** screen on the **Related Topic Wizard** dialog box displays.



4. Accept the default selection of **Text**.
5. If there is only one related topic, delete the `'s'` from the end of the word `'topics'`.
6. Click **[Next>]**.

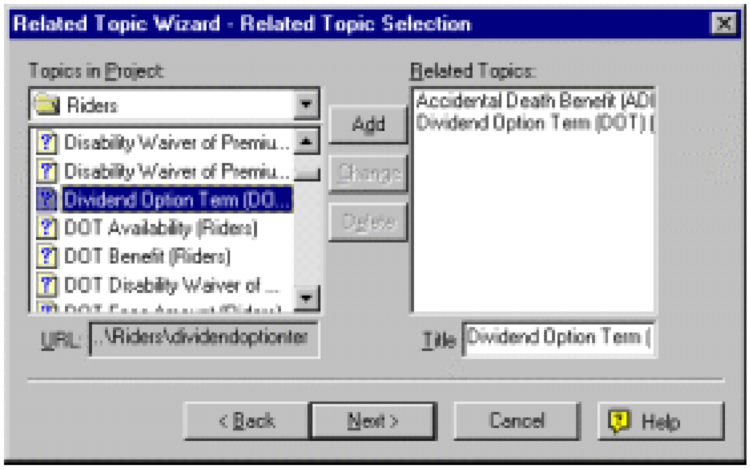
   The **Related Topic Selection** screen displays.



7. Select the product folder in which the desired related topic file resides from the **Topics in Project** drop-down list. This reduces the number of files you need to scroll through to find the desired topic.
   a. Select **Accidental Death Benefit (ADB) Rider**
   b. Click **[Add]**.
   c. Select **Dividend Option Term (DOT) (Riders)**
   d. Click **[Add]**.

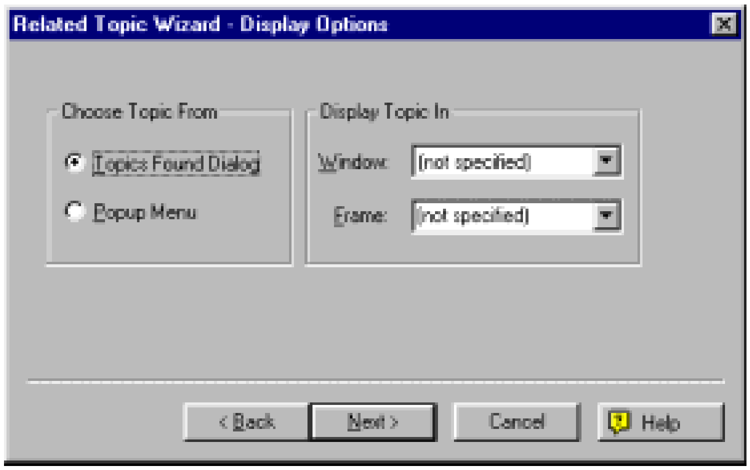
8. Continue to select related topics in this manner.

   The topic names display in the **Related Topics** list on the right side of the dialog box.



9. When you are finished adding topics to the **Related Topics** list, click **[Next>]**.

   The **Display Options** screen displays.

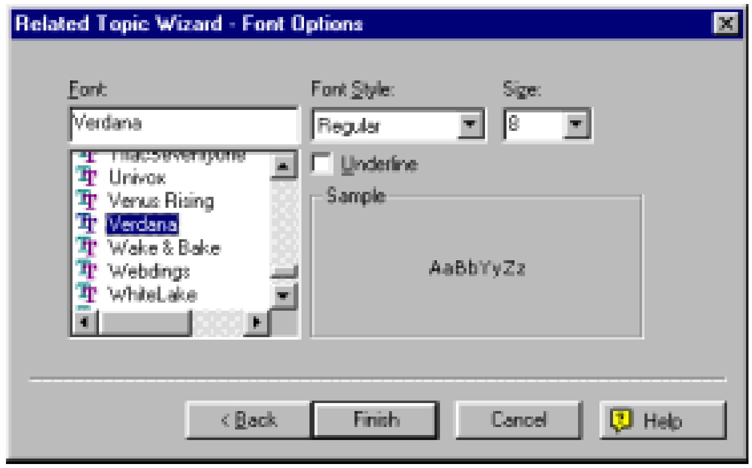


10. Select the **Popup Menu** option in the **Choose Topic From** section.

11. **DO NOT** specify a **Window** or a **Frame**.

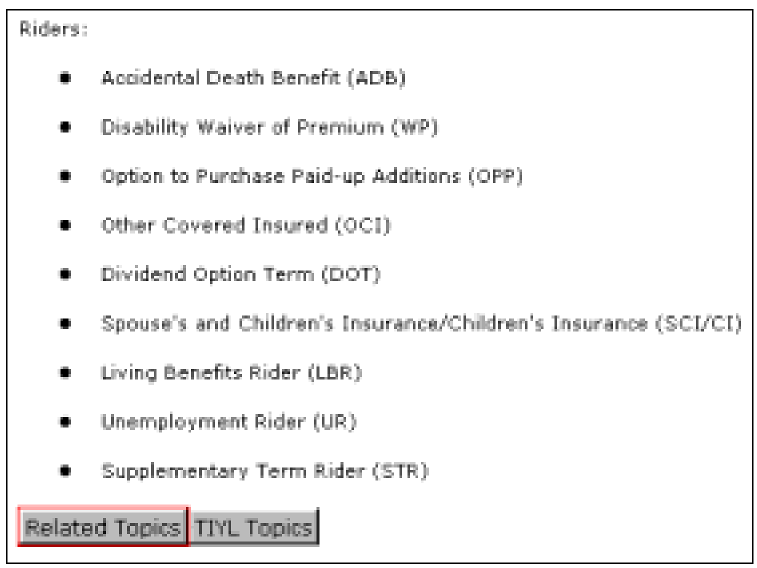
12. Click **[Next>]**.

    The **Font Options** screen displays.



13. Select **Verdana** from the **Font** list.
14. The **Font Style** should be **Regular** and the **Size** should be **8**. These should be the default values.
15. Click **[Finish]**.

    The **[Related Topics]** button is inserted at the cursor's location in the topic.



Chapter 6: Creating a Hyperlink

Overview

Hyperlinks allow you to refer to other parts of the manual for additional information and allow users to access the additional information by merely clicking on the link. A **Hyperlink** is displayed as underlined blue text.

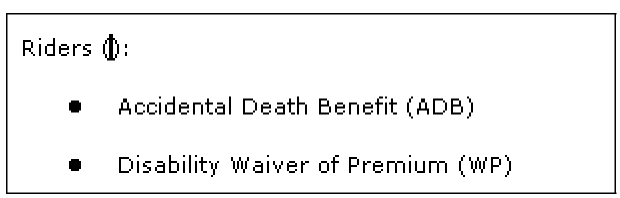
Procedures

The following procedures explain how to create a hyperlink to add to text, and how to create a hyperlink from existing text.

Creating a new Hyperlink

To add a new hyperlink, follow the steps below.

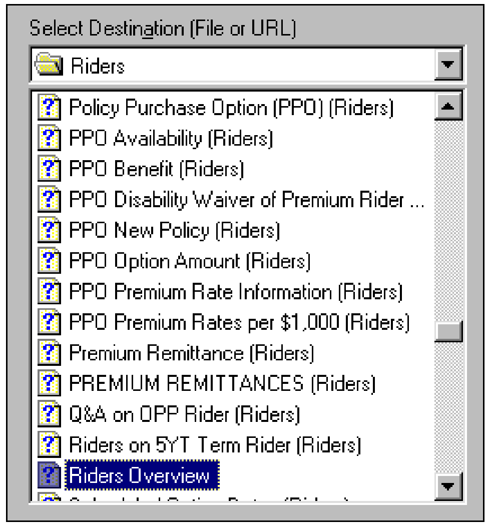
1. Launch **RoboHELP HTML**.
2. Open **AgentMan.MPJ**.
3. Double-click the **HTML Files (Topics).**
4. Double-click **htm**.
5. Double-click the **Availability** file.
6. Place the insertion point in between the word “**Riders**” and the semicolon (**:**) in the topic text in the right pane.
7. Key in a set of parentheses and place the cursor between them.



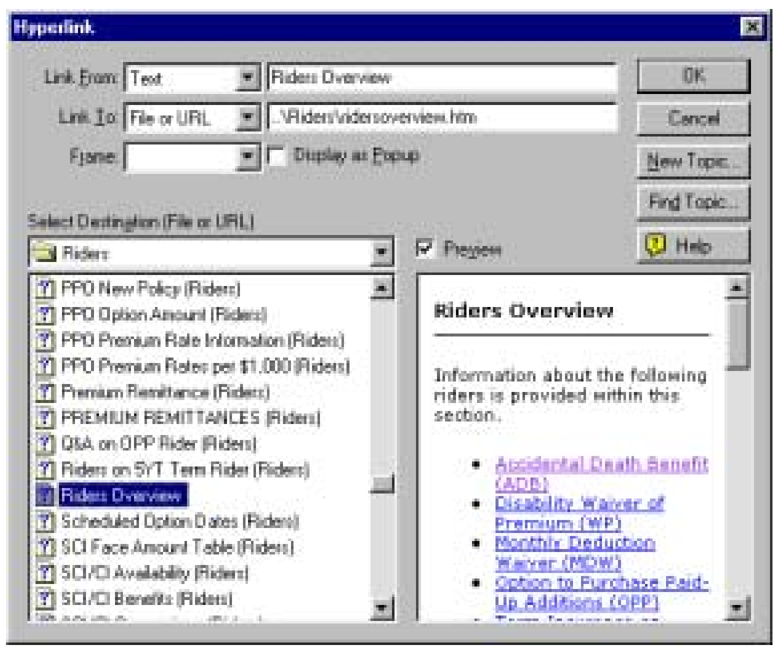
8. Click the **[Insert Hyperlink]** button on the Toolbar.

9. Click the down-pointing arrow to access the **Select Destination (File or URL)** drop-down list.

10. Select the **Riders** folder.
11. Scroll through the alphabetic listing to find **Riders Overview** and select it.

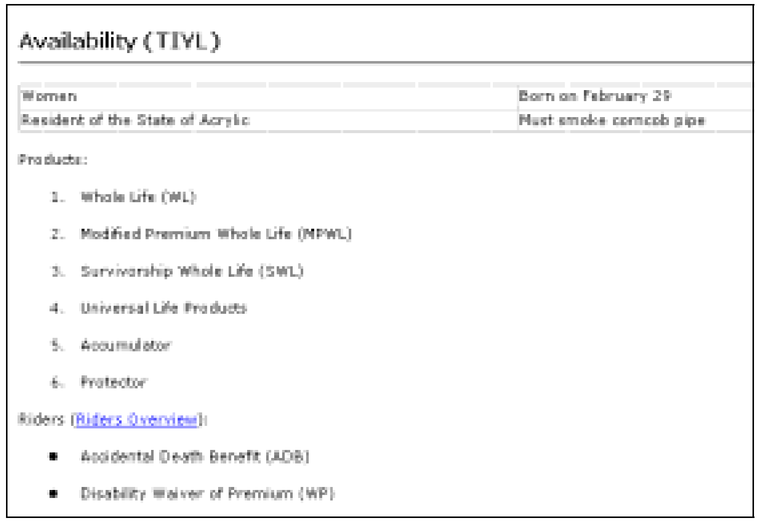


NOTE:	The **Link from** and the **Link to** edit boxes are automatically filled in for you. The **Link From** edit box pulls the text it places in the topic from the **Topic Title** of the topic you selected in the **Select Designation** list.



12. Click **[OK]**.

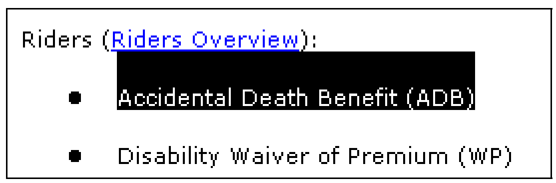
    A link is established at that point.



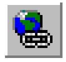
Creating a Hyperlink from existing text

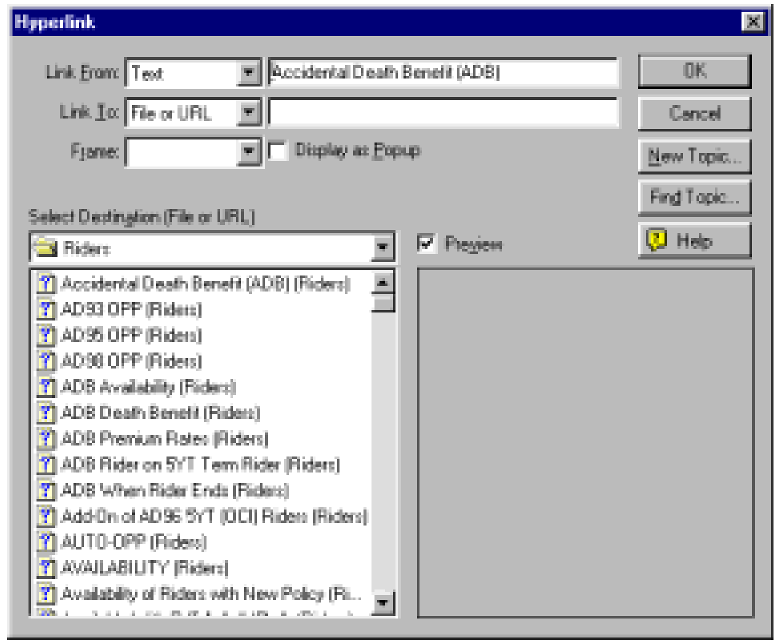
You have the option of creating a hyperlink for text that you have already keyed into the topic file. For example, **Disability Waiver of Premium (WP)** is also a topic that may be found in the **Agent's Manual**. You may turn this list item, or any other like list item, into a hyperlink.

1. Select **Accidental Death Benefit (ADB)**.



2. Click the **[Insert Hyperlink]** button.



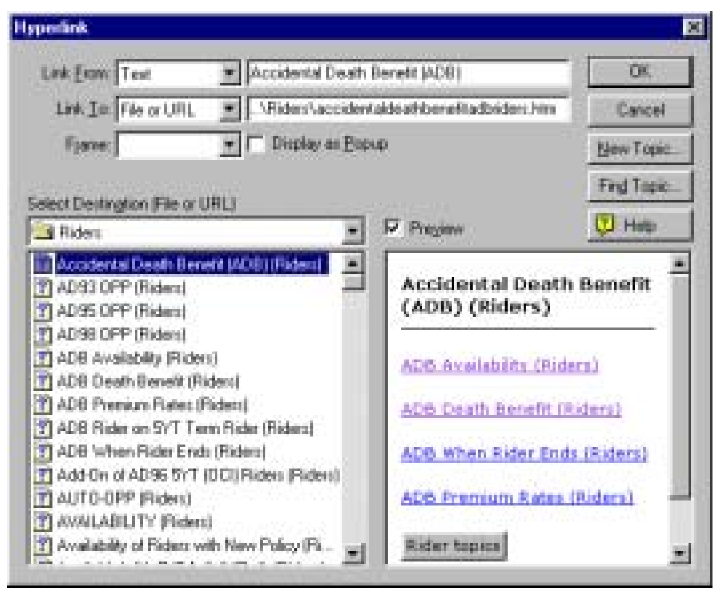


NOTE:	The **Link From** edit box is already filled in with the selected text.

3. Click the down-pointing arrow to access the **Select Destination (File or URL)** drop-down list.

4. Select the **Riders** folder.

5. Scroll through the alphabetical listing and select **Accidental Death Benefit (ADB) (Riders)**.



6. Click **[OK]**.

Riders (Riders Overview):

- Accidental Death Benefit (ADB)
- Disability Waiver of Premium (WP)
- Option to Purchase Paid-up Additions (OPP)

The **Accidental Death Benefit (ADB)** text becomes a hyperlink and replaces the plain text that was previously displayed.

NOTE:	If the next item in the bulleted list jumps up to the same line as the **Accidental Death Benefit (ADB)** link, press **<Enter>**.

Chapter 7: Indexing

Overview

Indexing each topic is an important part of working with the HTML files. Indexing allows users to quickly find and display the part of the manual that they need in order to continue working.

Indexing is a matter of practice. Good indexing involves putting yourself in the place of the average person that may be accessing the Agent's manual. When you are attempting to determine Keywords to use as indexes, think about what word or words the user may be thinking when they are looking for that particular page. For example, if the user wants to find the premium rate tables, they may think of premium, premiums, rate, rates, or table. You can index each rate table under all of these words.

Since there are so many premium rate tables, you will need to index them under the main word "Premium" and a subkeyword, for example, "Female" in order to not overuse the keywords.

Overuse of keywords will cause the program to truncate those topics that fall outside the maximum usage of the keyword. These topics may or may not show in the displayed list when the keyword is accessed through the index. To avoid overusing one keyword, create a keyword and a subkeyword whenever possible. See "Repairing truncated index entries" on page 64 to correct any keyword overuse.

Procedures

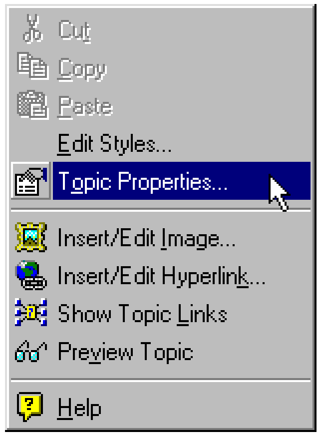
The following procedures show you how to create a keyword and a subkeyword for the Index.

Creating an Index keyword

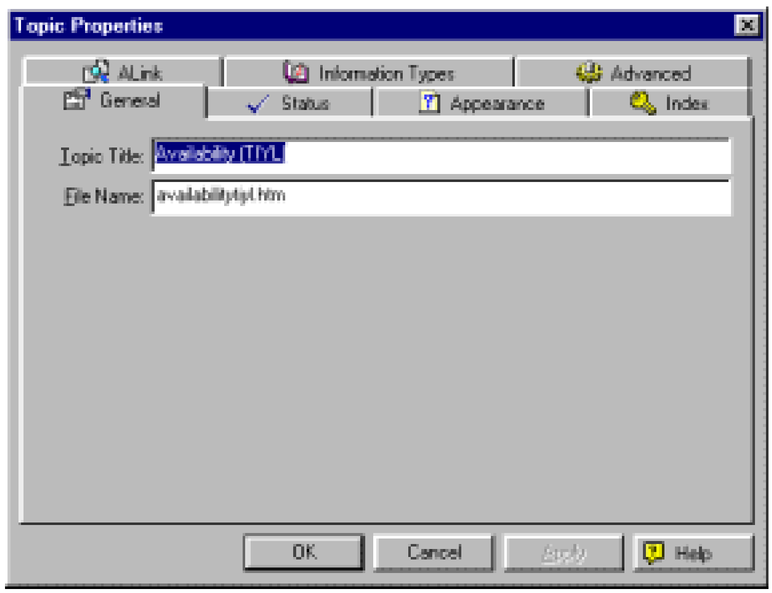
Follow the steps below to create an index keyword for a topic.

1. Launch **RoboHELP HTML**. Refer to "Launching the RoboHELP HTML" on page 1.
2. Open **AgentMan.MPJ**.
3. Double-click the **HTML Files (Topics)** folder on the **Project** tab.
4. Double-click the **htm** folder.
5. Double-click the **TIYL** folder.

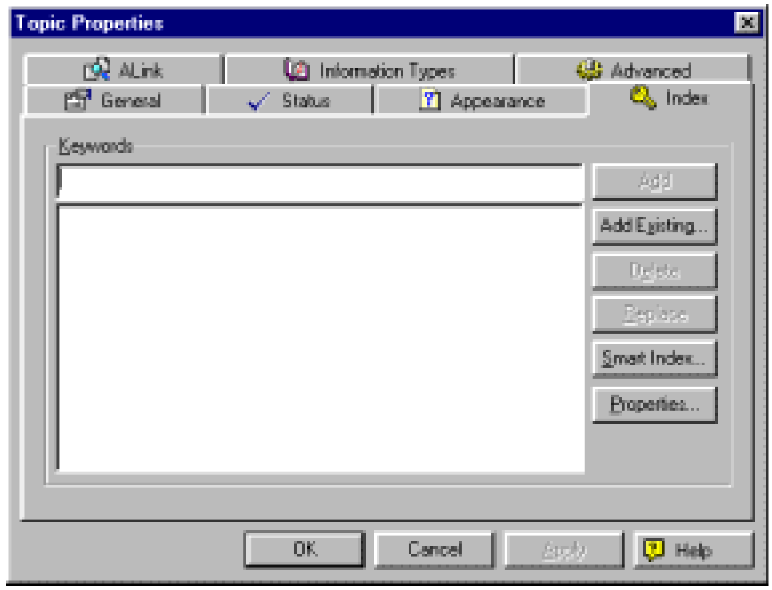
6. Double-click the **Availability (TIYL)** file or the first file in the folder.
7. It should be displayed in the **WYSIWYG** pane on the right.
8. Right click the mouse anywhere in the pane to get this pop-up menu.



9. Select **Topic Properties**.

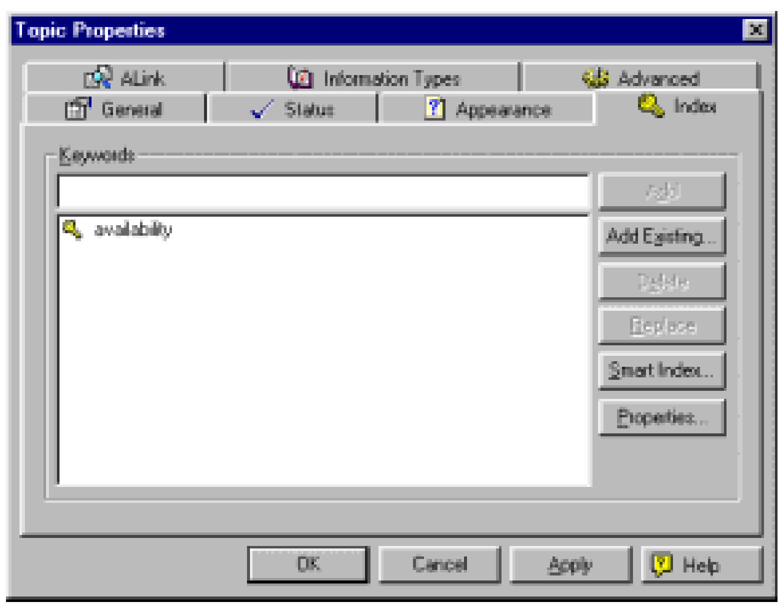


10. Select the **Index** tab.



11. Key in **`availability`** in the edit box and press **<Enter>** or click the **[Add]** button.

NOTE:	You do not have to key the words in any particular order. They will be appropriately alphabetized in the Index list with all the other words that are currently stored there. Words may be keyed in all lowercase. If it's a proper name for a rider or a product, you will want to key it in Initial Caps.



12. Continue keying in index keywords until you think you have referenced the topic as much as you can. Overindexing is better than not providing enough index words for a topic.
13. Click **[OK]** to save the indexing.

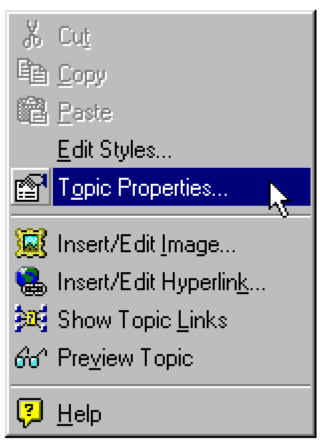
NOTE:	The indexing is not saved until you click the **[OK]** button.

14. Double-click the next topic and repeat the above steps to index that topic.
15. Continue indexing until you have provided keywords for all new topics and/or new products added to the Agent's Manual.

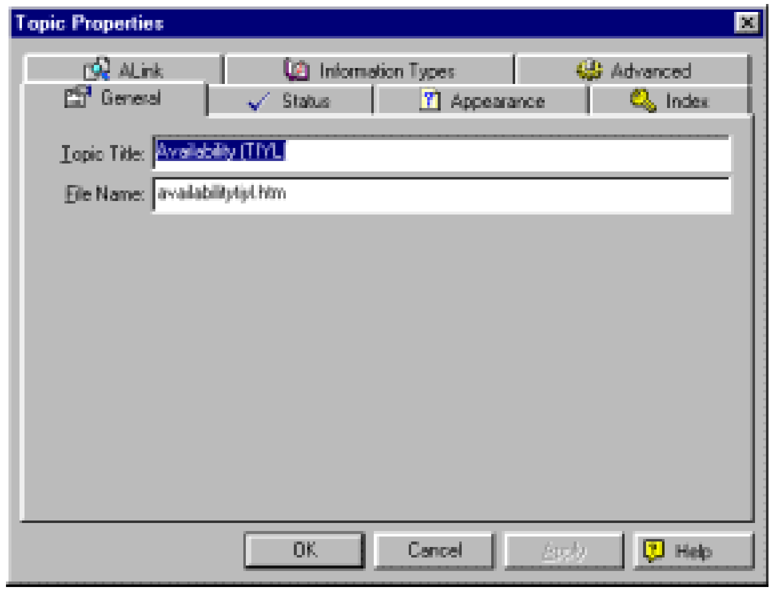
Creating Subkeywords for indexing

Subkeywords break down the indexing into smaller parts. It eases the use of keywords that may be linked to a large number of topics. Subkeywords make creating and using the **Index** more manageable.

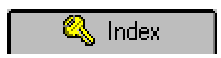
1. Launch **RoboHELP HTML**. Refer to "Launching the RoboHELP HTML" on page 1.
2. Open **AgentMan.MPJ**.
3. Double-click the **HTML Files (Topics)** on the **Project** tab.
4. Double-click the **htm** folder.
5. Double-click the **TIYL** folder.
6. Double-click the **Availability (TIYL)** file or the first file in the folder.
7. It should be displayed in the **WYSIWYG** pane on the right.
8. Right click the mouse anywhere in the pane to get this pop-up menu.



9. Select **Topic Properties**.



10. Select the **Index** tab.

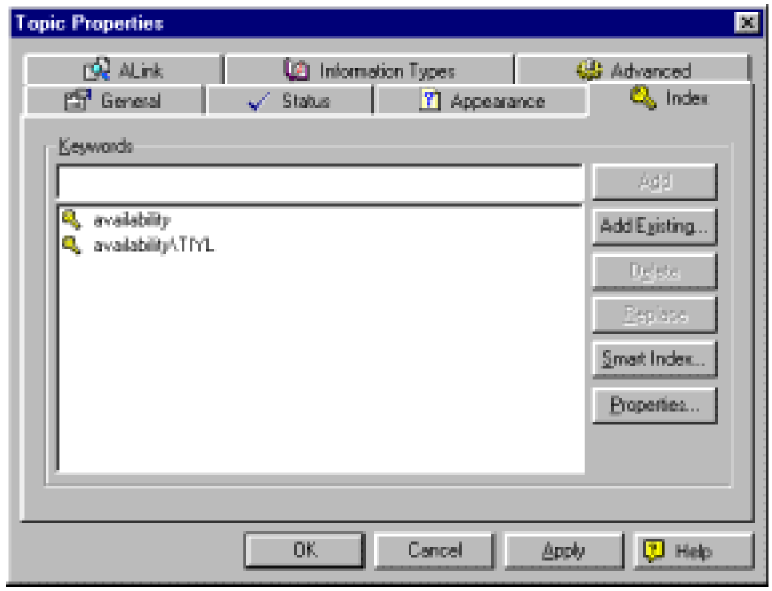


11. Key in the first keyword in the edit box.

NOTE: You do not have to key the words in any particular order. They will be appropriately alphabetized in the Index list with all the other words that are currently stored there.

12. Key in **`availability\TIYL`** in the edit box and press **<Enter>** or click the **[Add]** button.

NOTE:	Use the **backslash** key (****) to indicate a subkeyword. The forward slash is not a code for a subkeyword.



13. Continue keying in **Index subkeywords** until you think you have referenced the topic as much as you can.
14. Click **[OK]** to save the indexing.

NOTE:	The indexing is not saved until you click the **[OK]** button.

15. Double-click the next topic and repeat the above steps to index the next topic.
16. Continue indexing until you have provided keywords for all new topics and/or new products added to the Agent's Manual.

Repairing truncated index entries

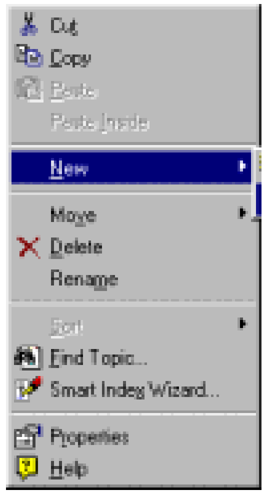
When you compile the file to test it, make note of any error messages or warnings that may appear. If you overused a keyword to index topics, it will index what files that it can and truncate the rest. Truncated files may or may not be viewable when using the **Help** feature.

To repair the **Index** so that there are no truncated files, do the following:

1. Select the **Index** tab in the **Project Manager**.

2. Select the **keyword** that has been overused. (For this example, we have used the keyword **"table"** to demonstrate how to make a correction).
3. Select the keyword **"table"** from the list.
4. Look through the list for topics that have a common theme. For example, in this list there are ten (10) **DOT** rate tables. These tables could be placed under a **subkeyword** that is under **table**.

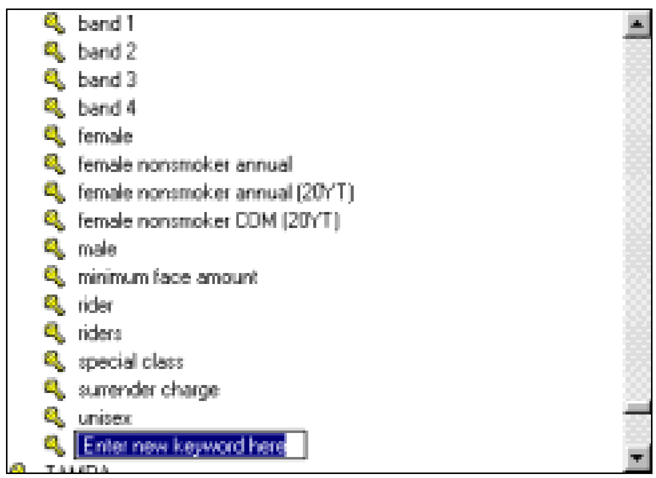
5. Right click the keyword **"table"** to get the following pop-up menu.



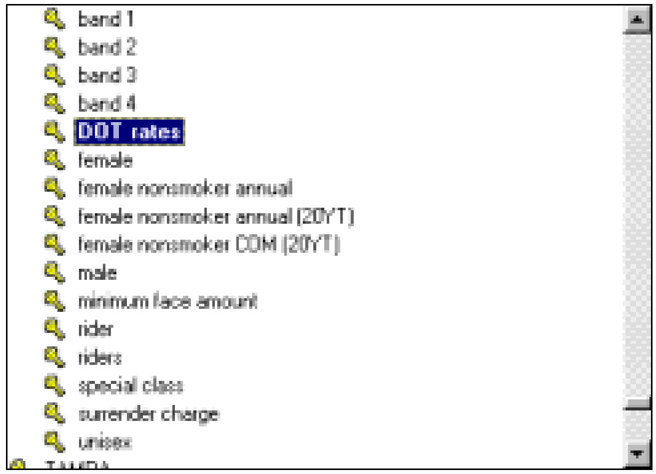
6. Select **New**.

7. Select **Subkeyword** from the resulting submenu.

An input box displays for you to key in a subkeyword title.



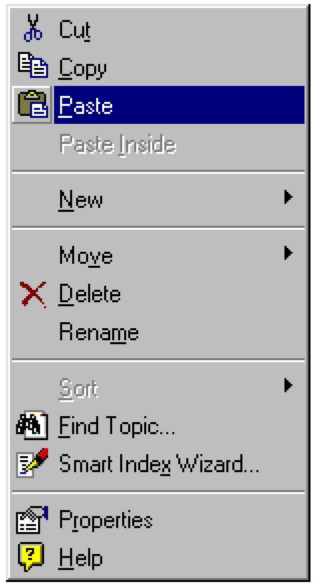
8. Key in **DOT rates** and press **<Enter>**.



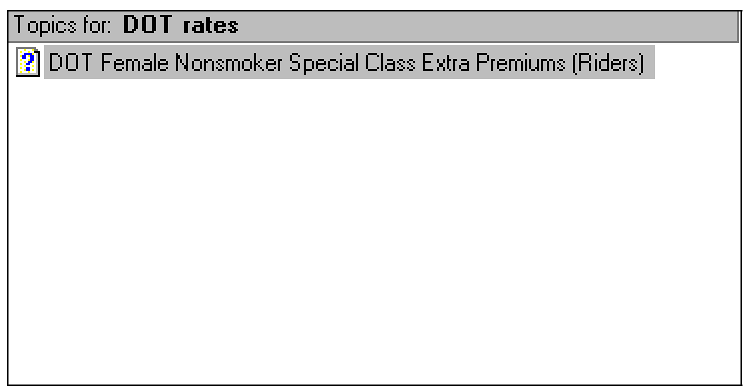
9. Click on the keyword **"table"** and scroll down to where the **DOT** topics begin.

10. Right click on the first topic, and select **Cut** from the pop-up menu.

11. Right click **DOT rates** and select **Paste** from the pop-up menu.

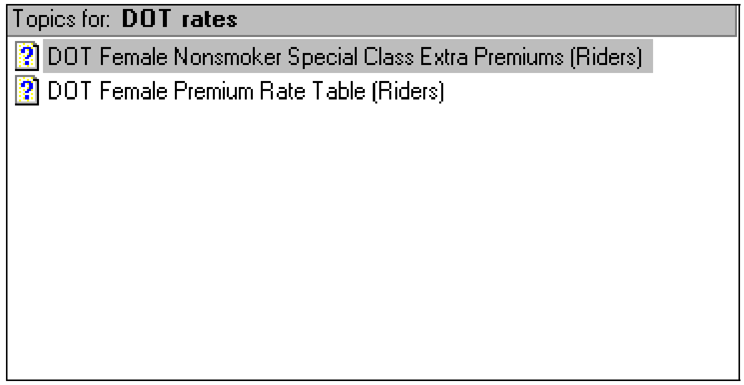


The topic is moved from the list of topics indexed to **"table"** to **DOT rates** and is displayed in the **Topics for: DOT rates** window.



12. Select the topic **"table"** again.
13. Scroll to the **DOT** topics.
14. Right click the next topic to be moved, and select **Cut** from the pop-up menu.
15. Right click the **DOT rates** subkeyword, and select **Paste** from the pop-up menu.

16. The next topic is moved from the list of topics indexted to **"table"** to **DOT rates** and is displayed in the **Topics for DOT rates** window.



17. Continue cutting and pasting topics until you have decreased the number of topics from the overused keyword by the number of files it reported were truncated. You may need to create several subkeywords to divide the topics into logical indexes.

18. **Re-compile**. There should be no more problems or warnings in regard to overused keywords reported during this compilation.

Chapter 8: Table of Contents

Overview

When you add a new Product to the **Agent's Manual**, you need to add it to the **Table of Contents**. Once you have added the new book(s), you will need to print the **Table of Contents (TOC)** in order the create a **Browse Sequence** in the help files. See "Chapter 10: The Browse Sequence" on page 81 for information on creating a browse sequence.

Procedures

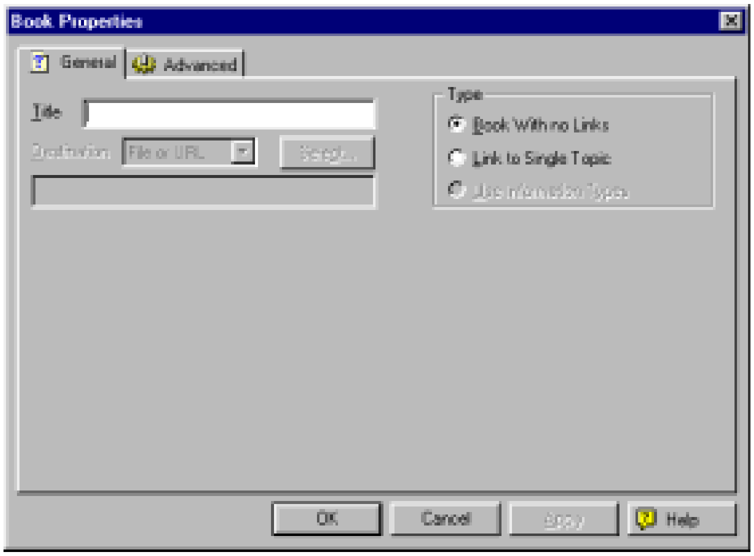
Creating a book in the TOC

To create a new book in the table of contents, follow the steps below.

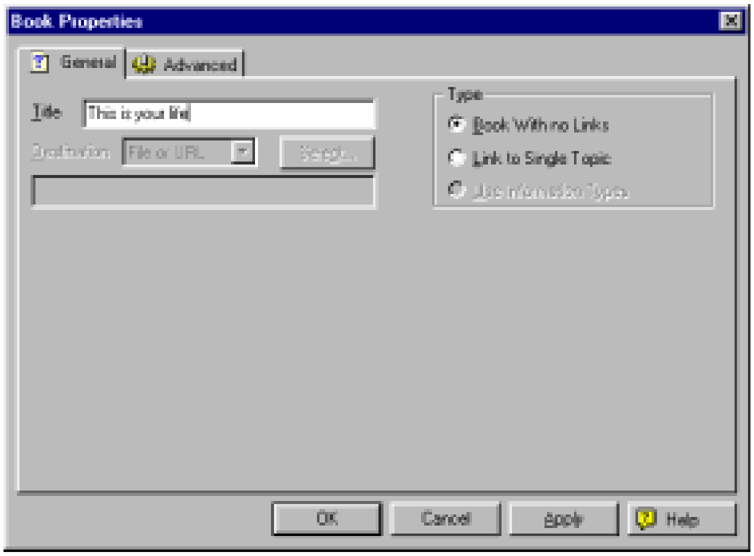
1. Launch **RoboHELP HTML**. Refer to "Launching the RoboHELP HTML" on page 1.
2. Open **AgentMan.MPJ**.
3. Click the **TOC** tab.

4. Click the **[New Book]** button on the toolbar.

The **Book Properties** window is displayed:



5. Key in the **Title** for the new book as `This is your life`.

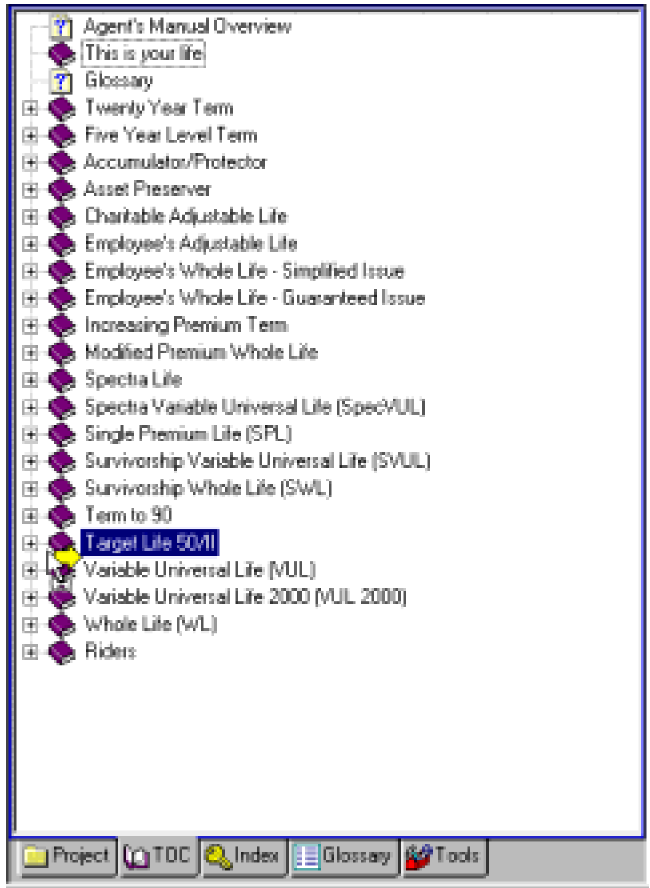


6. Under **Type**, make sure **Book With no Links** is selected.
7. Click the **[Apply]** button.

8. Click **[OK]**.

NOTE: Your book has been placed at the top of the list under the **Agent's Manual Overview** page.

9. Place the mouse on the book and drag it to the location in the list where you want it to be, and release the mouse.



NOTE: A yellow arrow moves to the new location. When you release the mouse, the book moves to the line targeted by the yellow arrow.

Adding pages (topics) to the book

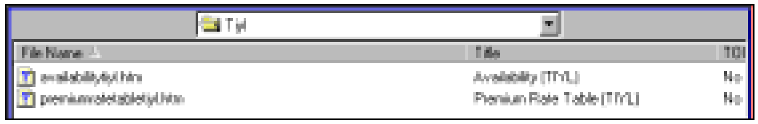
Notice that the book is **NOT** preceded by a **plus** sign (⊞). This indicates that there are no topics within the book. It is very easy to add topics to the book. The following steps explain this procedure.

1. Click the **TOC** tab on the bottom left if it is not already the active tab.

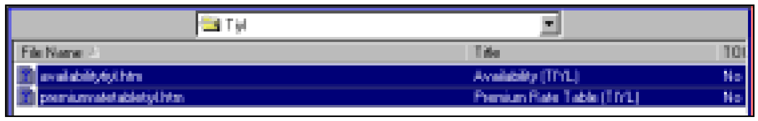
2. Click the **Topics** tab on the bottom right.

3. Click the down-pointing arrow to access the **Folders** drop-down list and select **Tiyl**.

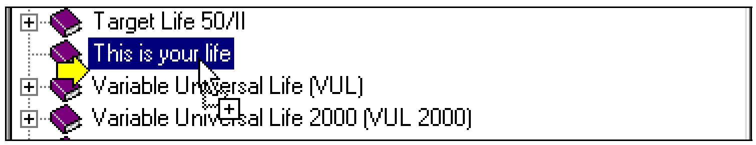
   The **Tiyl** folder displays and the topics are listed in the window.



4. Select all of the topics from the **Topics** list that you want to appear in the **Tiyl** book when it is selected.

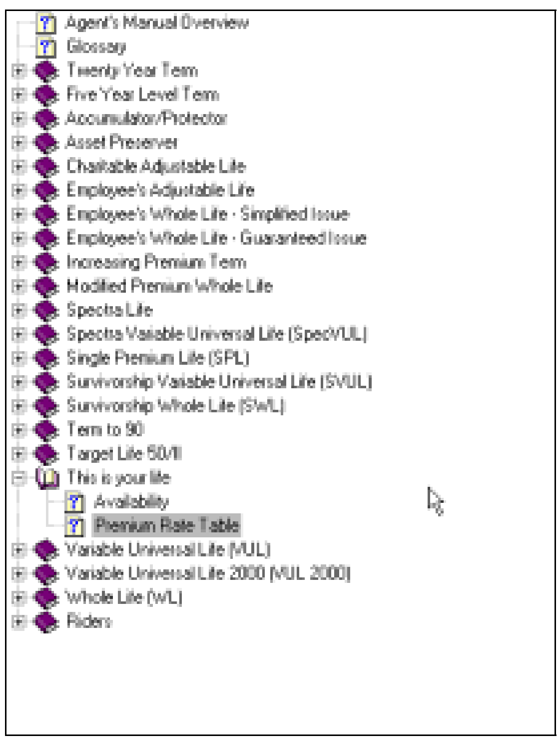


5. Place the mouse on the icon of one of the selected topics, hold the mouse button down over the icon, and drag it to the **This is your life** book in the **TOC** pane. Release the mouse.



NOTE:	A yellow arrow moves to the new location. When you release the mouse, the topic(s) move to the line targeted by the yellow arrow.

The screen displays the following:

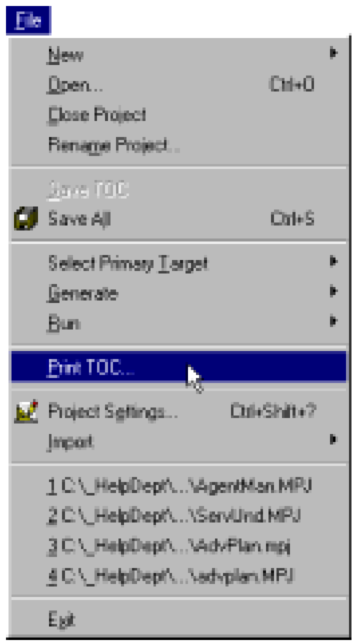


Printing the Table of Contents (TOC)

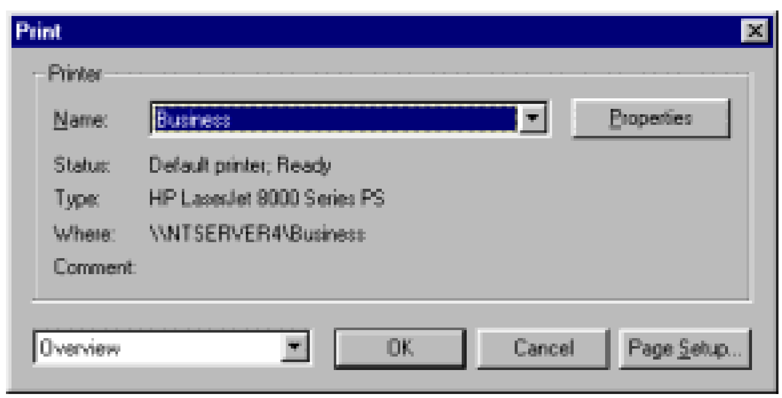
The **Browse Sequence** is set up in the order of the **Table of Contents**. It is recommended that you print the **Table of Contents** to use as a guide when creating the **Browse Sequence**, as described in "Creating a Browse Sequence" on page 81.

1. Click the **TOC** tab at the bottom of the left pane.

2. Select **Print TOC** from the **File** menu.



3. Click **[OK]** on the **Print** dialog box.



Chapter 9: Saving, Compiling, and Previewing Your Work

Overview

NOTE: **You should always work from a backup copy of your file. It is not a good idea to work on the original.** You should be saving your work frequently throughout the editing process. When you exit **RoboHELP HTML**, your file will save any changes you made automatically.

Compiling the file when you are done allows you to preview the features such as checking to make sure links take you to the correct file, clicking on buttons to make sure appropriate lists display, etc.

This section will address saving your work, compiling the file, and previewing the features you have created for accuracy.

Procedures

Saving the files in your project

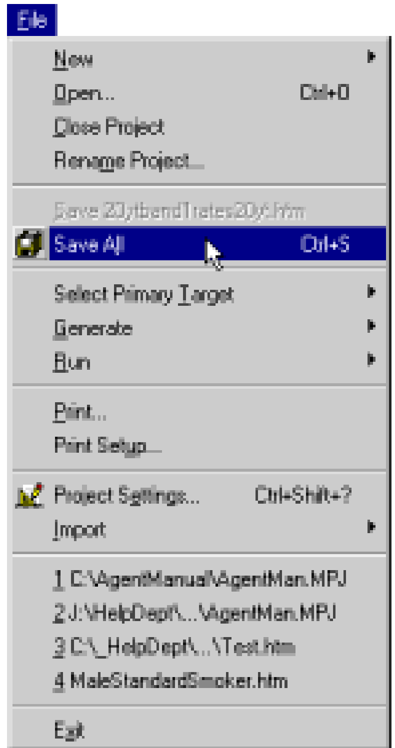
To save all the **HTML** files and settings in your project, follow the steps below.

1. Click on the **[Save All]** button on the toolbar;

   OR

2. Select **Save All** from the **File** menu;



OR

3. Hold down the **<CTRL>** key on your keyboard, and press the **<S>** key.

Compiling the HTML Help file

If you wish to test related topics buttons, indexing, and/or hyperlinks, you must first compile the **HTML Help** file.

1. Click the **Generate Primary Target** button on the toolbar.

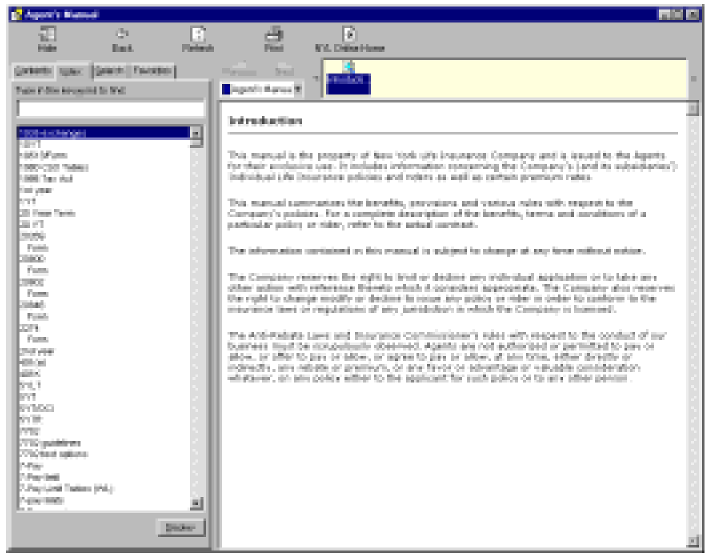
You will see the following **Output View** screen at the bottom of your screen. This screen tracks the compilation progress and notes any errors, warnings, etc. that may appear during the process.

NOTE: If you use a keyword too many times during indexing, you will get a warning message that it has been overused and some of the files it was indexed too have been truncated. **Truncated** files may or may not be accessible from the **Index** during use. See "Repairing truncated index entries" on page 64 to repair truncated indexing.

Previewing your work

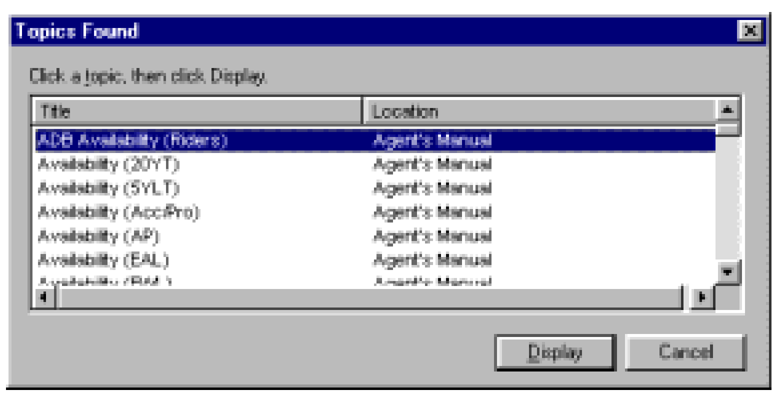
After the file has been saved and compiled, you may preview it and check the features you have set up.

1. Click the **Run Primary Target** button



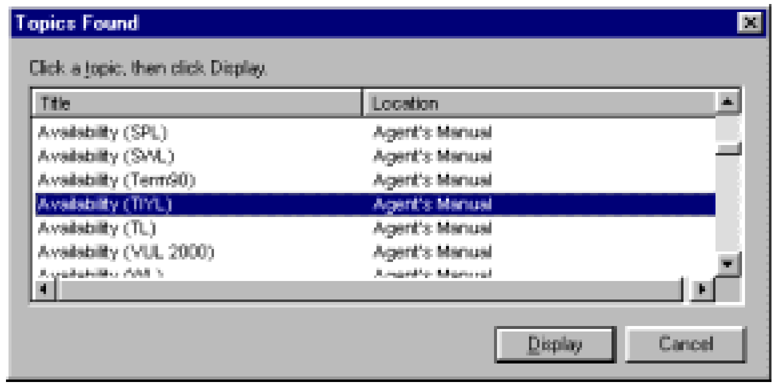
2. The **Index** tab may not be the active tab when you run the help file. If it is not the active tab, click on it to activate it.
3. Click in the **Type in the Keyword to find:** edit box.
4. Key in **`availability`**. Notice the list jumps to the word "**availability**."
5. Click the **[Display]** button at the bottom of the listing.

You will see a list of all topics that are indexed to the keyword "**availability**."



6. Scroll through the list and select **Availability (TIYL)**.

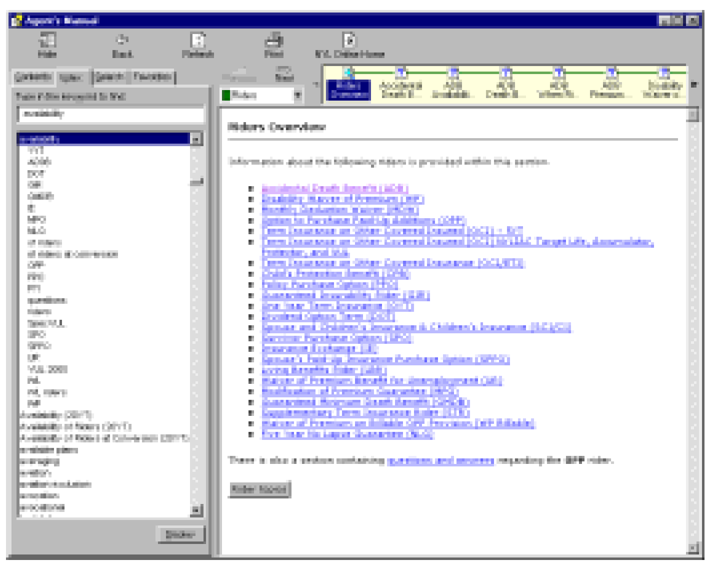
NOTE:	**Availability** is used in every product. If you do not reference the word “Availability” to the specific product, you will have difficulty finding it in the displayed list. Therefore, it is good practice to add the acronym of the current product to the end of the topic titles associated with that product. See "Changing topic properties" on page 17 to fix a topic title.



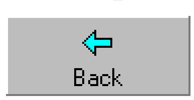
7. Click the **[Display]** button.

The **Availability (TIYL)** topic should display in the right pane of the resulting window.

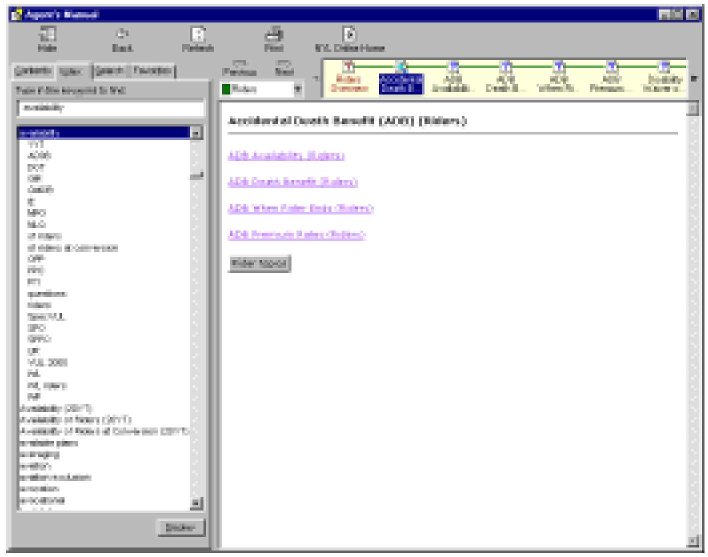
8. Click the **Riders Overiew** link to display the **Riders Overview** page.



9. Click the **[Back]** button on the toolbar.



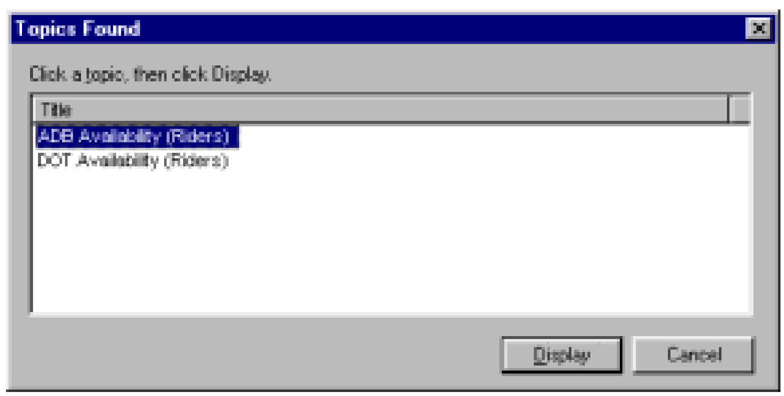
10. Click the **Accidental Death Benefit (ADB)** link to display the link to that file in the **Riders** section of the **Agent's Manual**.



11. Click the **[Back]** button on the toolbar to return to the **Tiyl Availability** page.

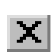
12. Scroll down to the bottom of the page and click the **[Related Topics]** button.

The **Topics Found** window displays a list of all topics linked to this button.



13. Click the **[Cancel]** button.

14. Close the **Run** window by clicking on the **[X]** in the upper right corner of the screen.



Chapter 10: The Browse Sequence

Overview

A **Browse Sequence** allows the users to move forward and backward in a Product in an order that you define based on how you want the pages and information to flow. The following procedures provide the steps necessary to create and test a set of **Browse Sequences**.

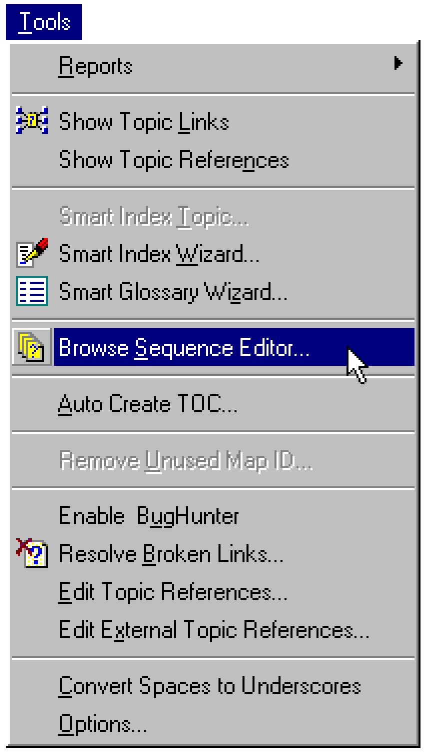
Procedures

Creating a Browse Sequence

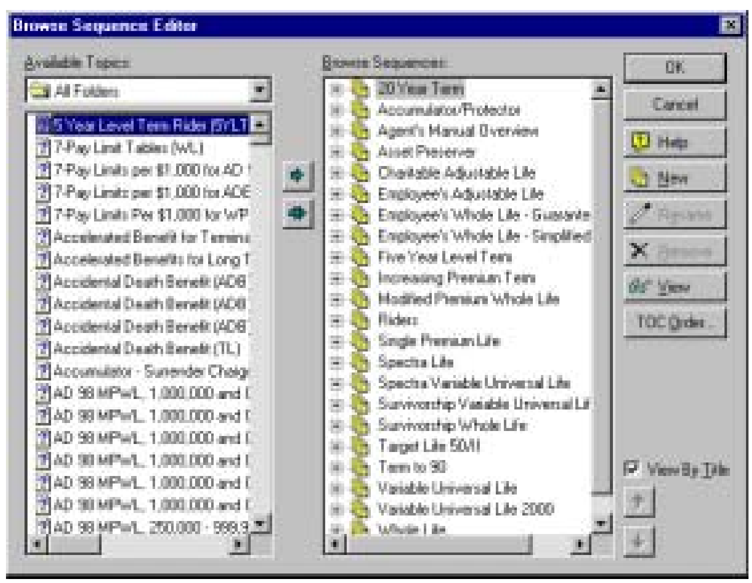
You can be anywhere in the project to produce a browse sequence. You need not be on a particular tab. However, we are instructing you to click the **Project** tab for consistency only.

1. Click the **Project** tab on the right pane.

2. Select **Browse Sequence Editor** from the **Tools** menu.



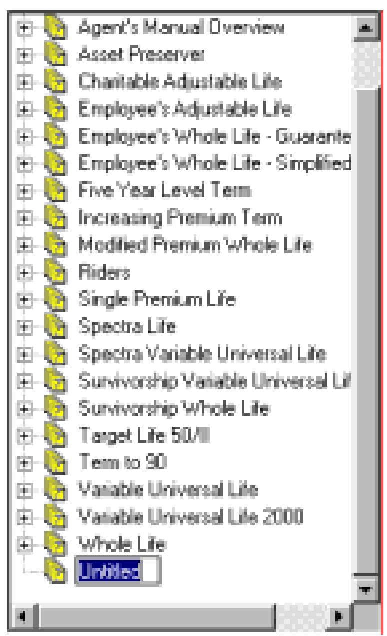
The **Browse Sequence Editor** displays.



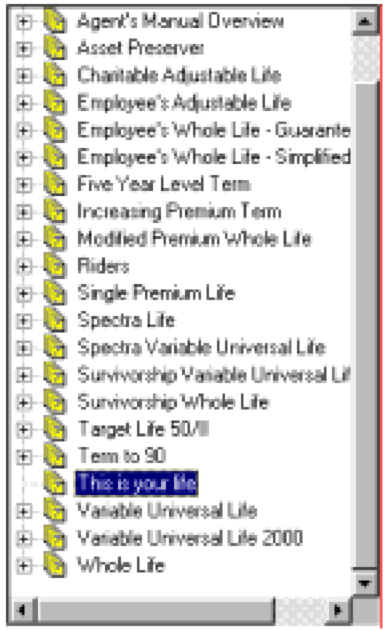
NOTE:	To view the topics by their titles rather than by their filenames, click the **View By Title** check box in the lower right corner of the **Browse Sequence Editor** dialog box. This makes it easier to find the topics.

3. Under **Available Topics**, click the down-pointing arrow to access the **Folder** drop-down list and select **Tiyl**.

4. Click the **[New]** button to create a new **Browse Sequence**.

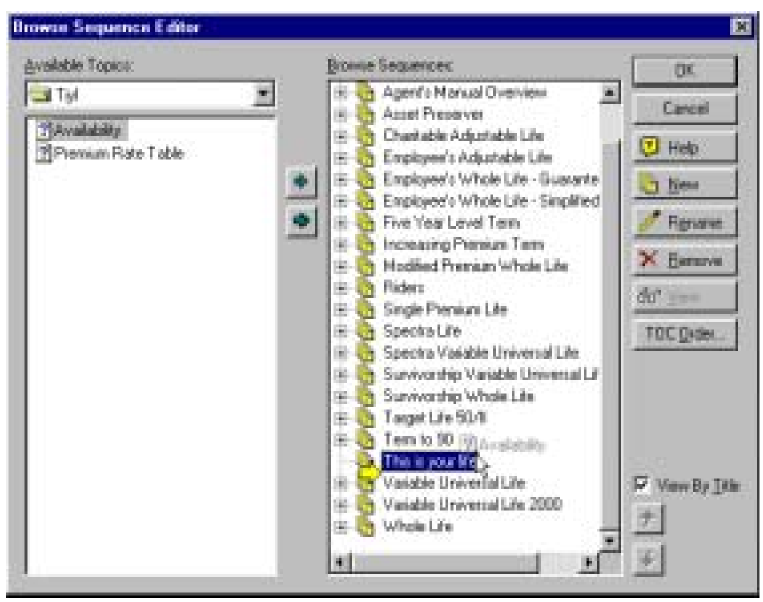


5. Key in **This is your life** as the title, and press **<Enter>**.

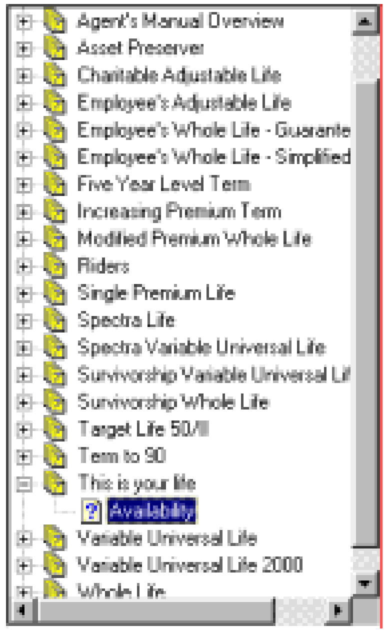


6. Make sure **This is your life** is selected.
7. Select the first topic you would like in the **Browse Sequence** from the list under the **Available Topics** drop down list.
8. Place the mouse on the icon, hold the mouse button down over the icon, drag the icon to the **Tiyl** folder, and release the mouse.

NOTE:	A yellow arrow moves to the new location. When you release the mouse, the topic(s) move to the line targeted by the yellow arrow.



9. The topic will display under the **Product** and a **minus (-)** sign will appear next to the **Product**.



10. Continue to drag and drop topics in the order you want them to appear in the **Browse Sequence** when using the **Help** feature.

11. Click **[OK]**.

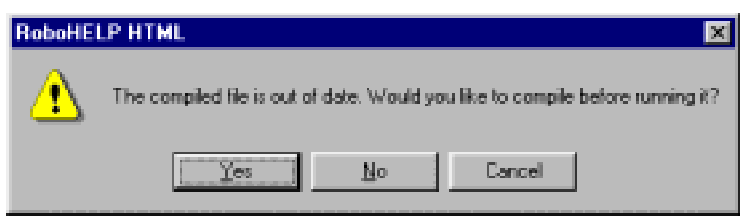
12. Save your work. Refer to "Saving the files in your project" on page 75.

Checking the Browse Sequence

Once you have created the **Browse Sequence** for the new Product, save the work, compile the project, and check the **Browse Sequence** for accuracy.

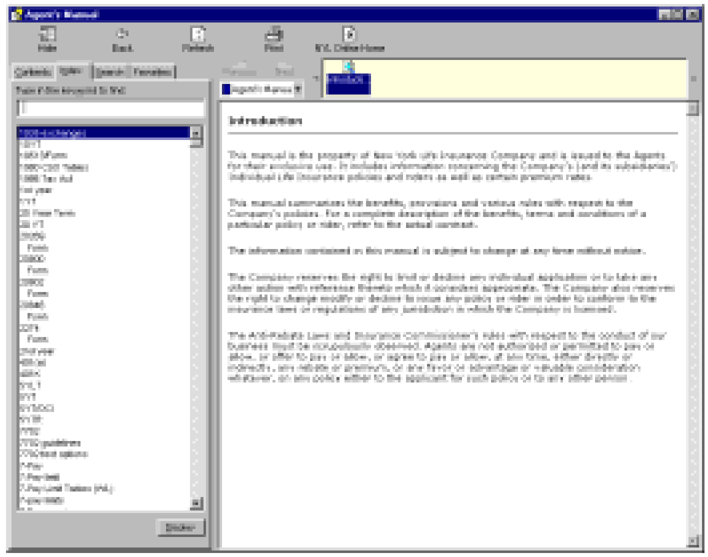
1. Click the **[Run Primary Target]** button.

A message displays if you haven't compiled your project since the last change.

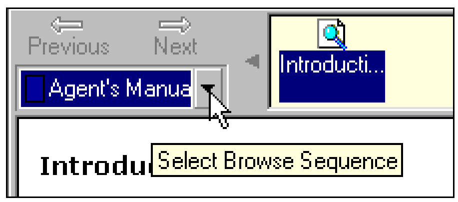


2. Click **[Yes]** to compile the file.

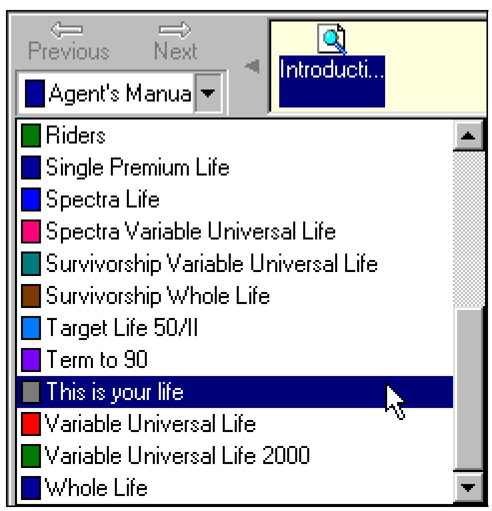
   The **Run** screen displays after compilation is complete.



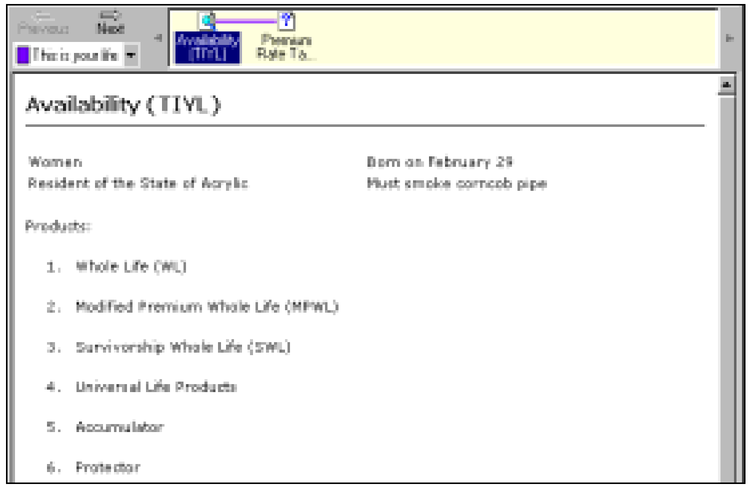
3. Click the down-pointing to access the **Browse Sequence** drop-down list.



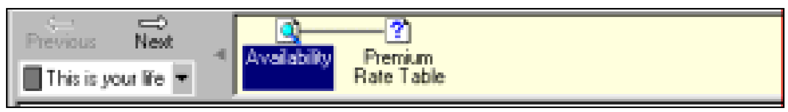
4. Select **This is your life** from the list.



The first page in the **Browse Sequence** displays for this product.



NOTE: The **Browse Sequence** pages are listed in a window over the topic display.



5. Close the **Run** window.

Chapter 11: Intranet site files and closing RoboHELP HTML

Overview

After updates have been made to the Agent's Manual and the Service and Underwriting manual, **WebHelp** files must be generated for use on the Intranet site. The **.CHM** file that is generated when the **HTML Help** is compiled cannot be run from a web server. It can only be run on a user's computer or from a CD.

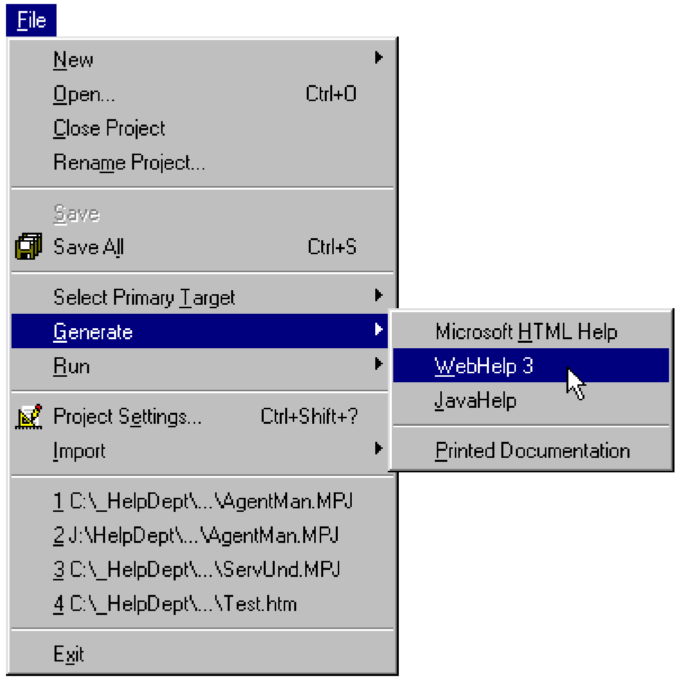
Procedures

Generating WebHelp

Follow the steps below to generate files that are ready for posting to the **New York Life Online** intranet site.

1. Open the **RoboHELP HTML**. See "Launching the RoboHELP HTML" on page 1 for instructions.

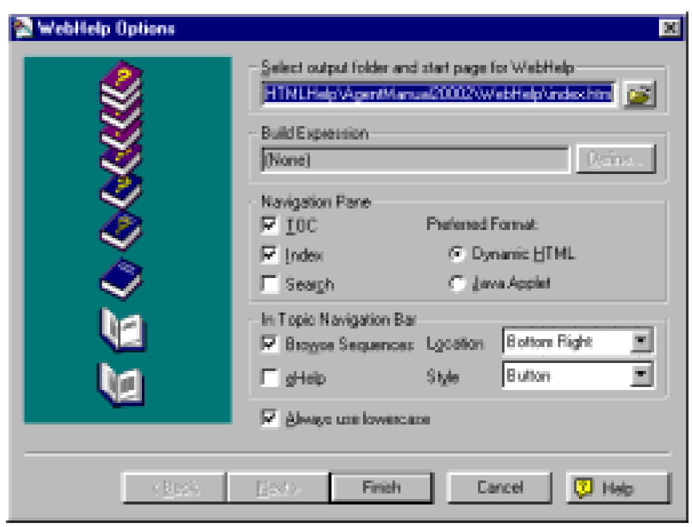
2. Select **Generate** from the **File** menu and select **WebHelp 3** from the resulting submenu.



The **WebHelp Options** dialog box displays.

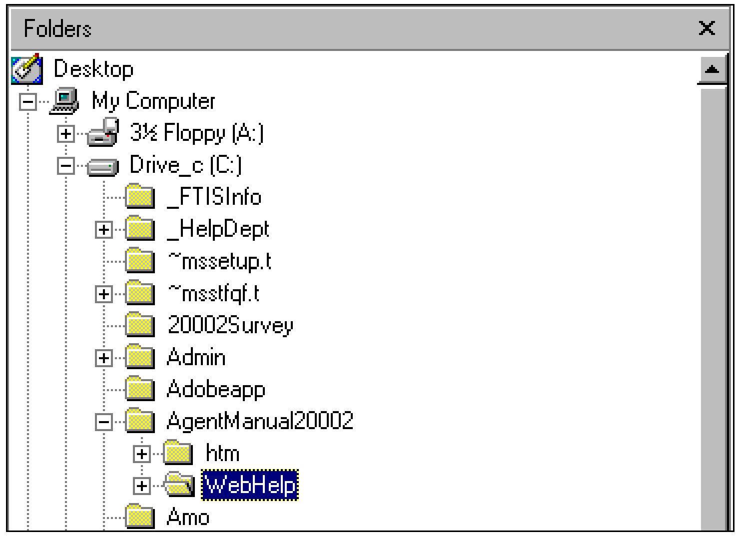
3. Specify the settings as pictured in the graphic below. The default location in **Select output folder and start page for WebHelp** put the WebHelp files within a folder inside the project folder. Call the start page **index.htm**.

NOTE:	It is good practice to double-check the location of the WebHelp files. If more than one person is generating the files, the directory structure (where they place the Agent's Manual project on their hard drive) may be different from other people working on the same project. Therefore, the output directory might be different for each machine.



4. Click **[Finish]**.

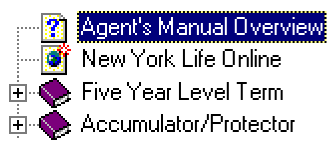
   RoboHELP HTML generates the necessary files. These files are placed in a **WebHelp** folder within the project folder.



5. Select **Exit** from the **File** menu to exit **RoboHELP HTML Edition**.

Adjusting the New York Life Online link

The link below the **Agent's Manual Overview** link in the table of contents links to the **New York Life Online** intranet site.



When you generate WebHelp, the **New York Life Online** link will display the **New York Life Online** intranet site in the right frame, as pictured below.

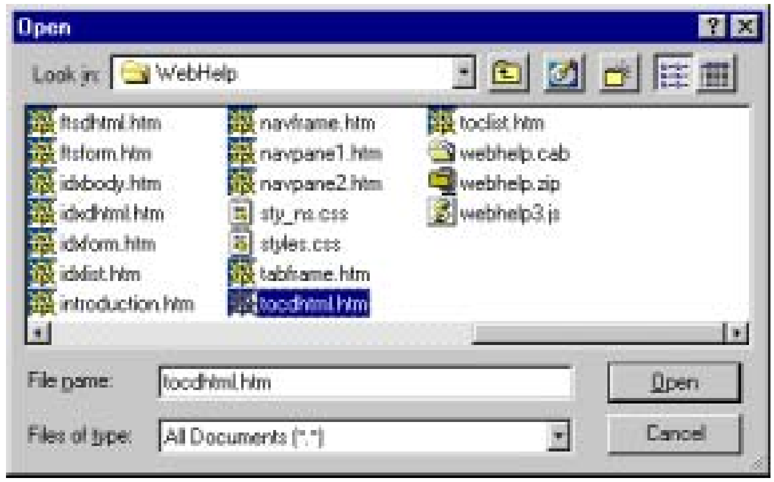
To have the **New York Life Online** intranet site display in the entire browser window, follow the steps below.

1. Open **WordPad** from the **Start** menu.

NOTE:	You may use **Notepad**, however, the file you are about to open is too big for **Notepad** to handle and will automatically be opened in **WordPad**.

2. Select **Open** from the **File** menu.

   The **Open** dialog box displays.



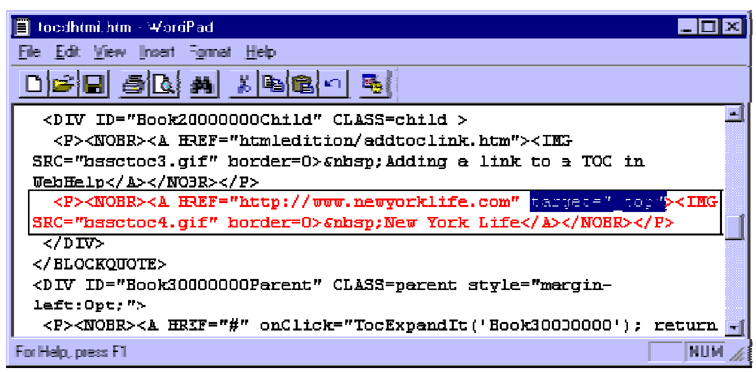
3. Select **All documents (*.*)** from the **Files of type** drop down list.

4. Navigate to the directory in which your **WebHelp** project was generated. If you accepted the defaults when generating **WebHelp**, this is a **WebHelp** directory within your folder.

5. Select the **tocdhtml.htm** file and click **[Open]**.

6. Find the link to the **New York Life Online** intranet site in the text. See the picture below the next step to see what that text looks like.

7. Add **target="_top"** to the **A HREF** tag. The graphic below displays the line that contains the link with a box around it.



8. Select **Save** from the **File** menu.

   A dialog box displays telling you that you are about to save the document in a format that will remove all the formatting. The dialog box differs depending on whether you have Windows 95 or Windows 98.

9. Click either the **[Yes]** button (Windows 98) or the **[Text Document]** button (Windows 95).

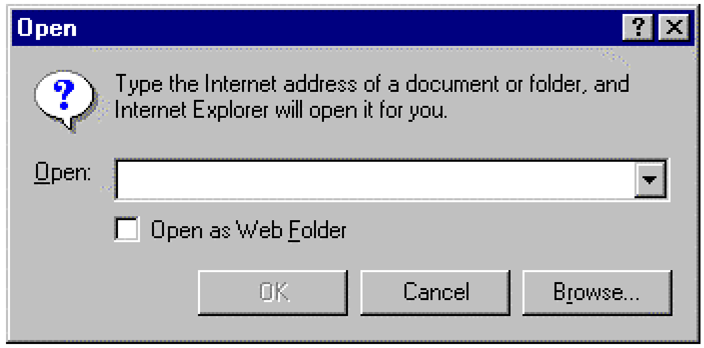
   The **New York Life Online** link will now display the site in the full browser window.

Viewing WebHelp files

To view the **WebHelp** files in a browser, follow the steps below. These steps cover viewing the files in Internet Explorer, which is the recommended browser for New York Life employees.

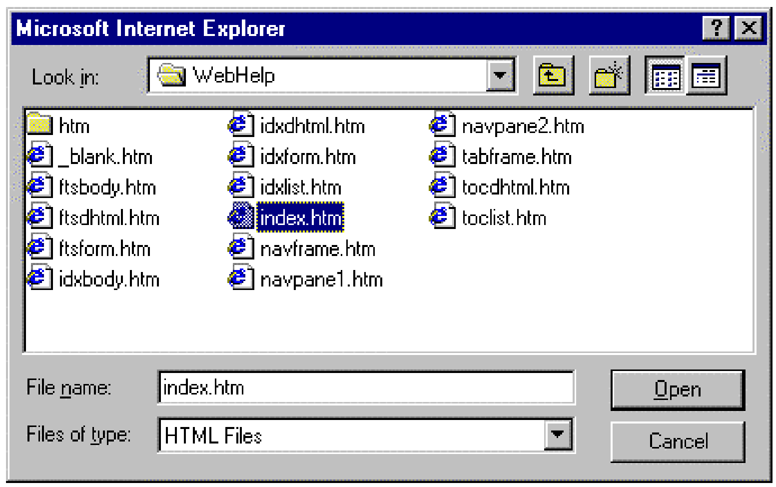
1. Launch **Internet Explorer** from the Windows desktop.
2. Select **Open** from the **File** menu.

   The **Open** dialog box displays.



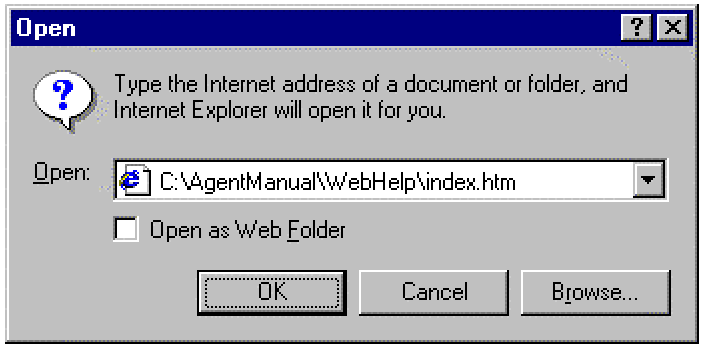
3. Click the **[Browse]** button.

   The **Microsoft Internet Explorer** dialog box displays.



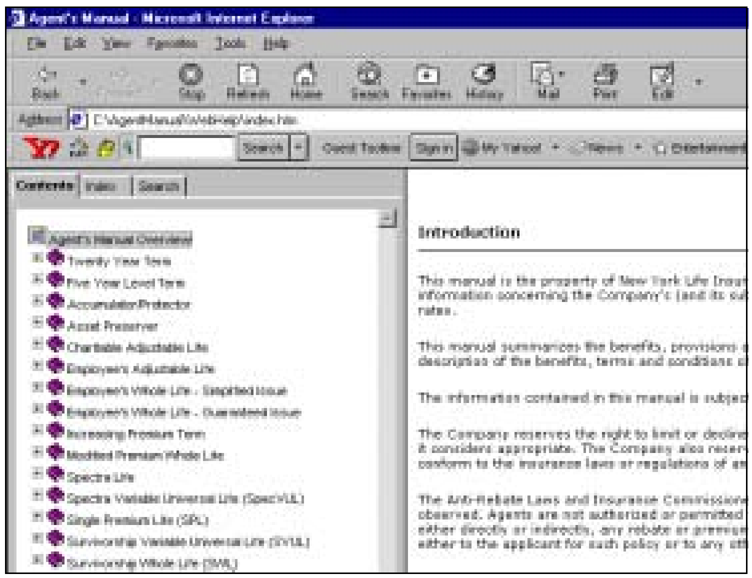
4. Navigate to the **WebHelp** folder within the **Agent Manual** or **Service and Underwriting** project folder using the **Look in** drop down list and the list box underneath the **Look in** list.
5. Select the **index.htm** file from the list.
6. Click **[Open]**.

The **Open** dialog is displayed again with the selected file displaying in the **Open** drop down list.



7. Click **[OK]**.

   The project is displayed in the browser window with a **Contents** tab, an **Index** tab, and a **Search** tab available.



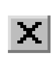
Posting WebHelp files to a server

To post the **WebHelp** project to the New York Life Online intranet server, you need to copy all of the files within the **WebHelp** folder for each project to a folder (one folder per manual - Agent's Manual and Service and Underwriting). The files must be kept in their own folder (the name of this folder doesn't matter to the WebHelp files) because the start file for each manual has the same filename – index.htm. Also, you must preserver the directory structure within the WebHelp folder such that the links within the project still work.

Exiting RoboHELP HTML

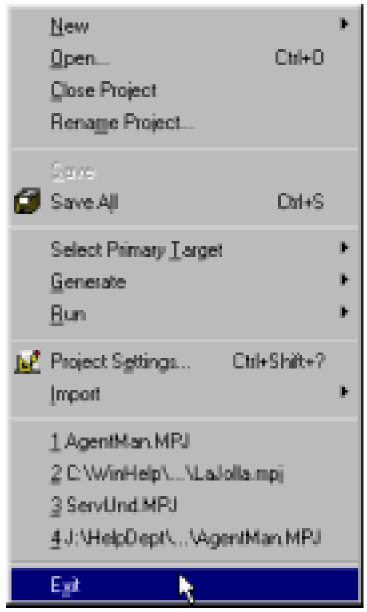
You can exit **RoboHELP HTML** in one of two ways:

1. Click the **[X]** in the upper right corner of the screen;

   OR

2. Select **Exit** from the **File** menu.



3. Did you **Save** your work before **Exiting**? Not to worry. **RoboHELP HTML** saves the work as it exits.

Appendix A: Updating Underwriting Charts

Key Concepts

This chapter explains how to update **Chart A**, **Chart B**, and **Chart C** in the **Medical** section and the **EAL Chart** in the **Special Plans and Programs** section of the **Service and Underwriting** manual.

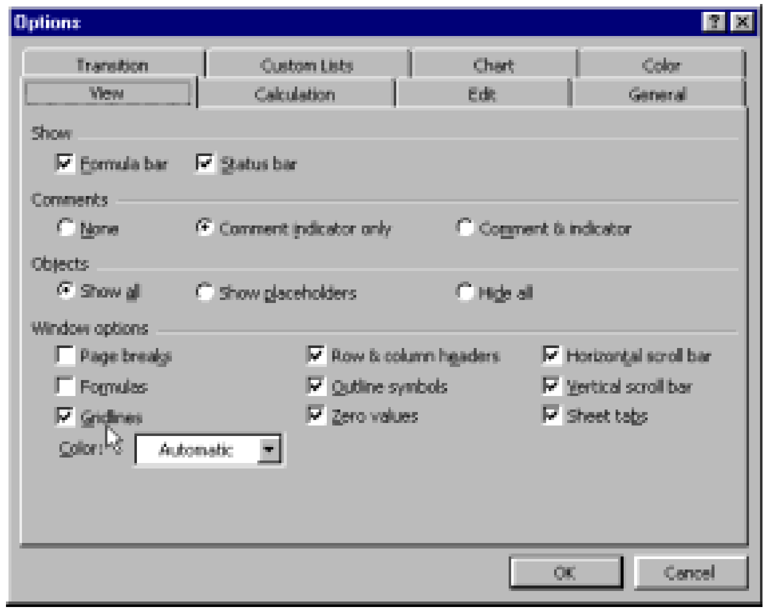
Procedures

Showing/hiding gridlines in Excel

For the following procedures, you will need to switch between showing and hiding the gridlines on the worksheet. Follow the steps below to do this.

1. Open **Microsoft Excel** and open the chart file you want to change.
2. Select **Options** from the **Edit** menu.

The **Options** dialog box displays.



3. Click the **View** tab if it is not already the active tab.
4. In the **Window options** section of the dialog box, click the **Gridlines** check box to turn on or off the gridlines.

   If there is a check in the check box, the gridlines will display. If there is no check in the check box, the gridlines will be hidden.

Applying lines/ borders to cells in Excel

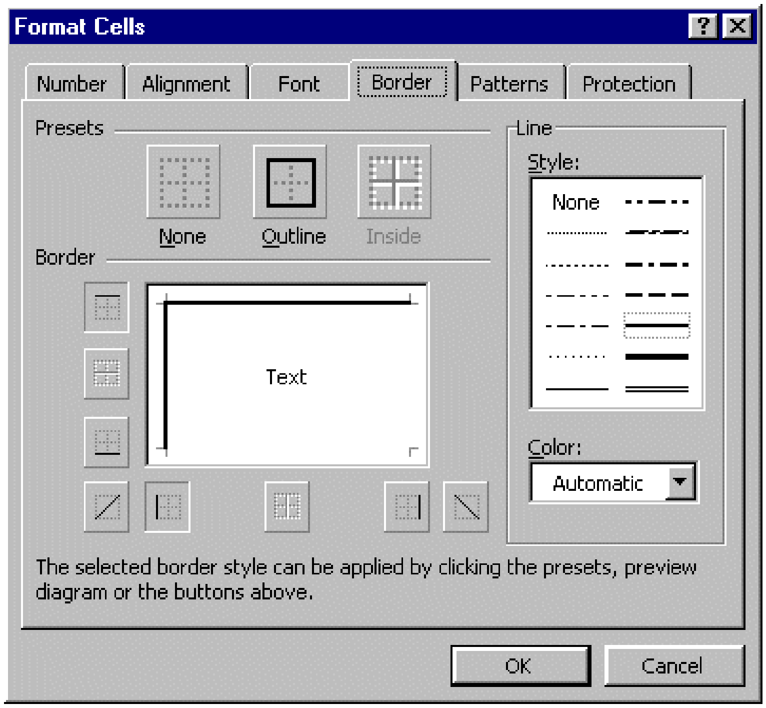
When changing the charts in Excel, you may need to move the lines around the cells to reshape the sections of the chart. Follow the steps below to add or delete lines from a cell.

1. For this example, open **Chart A** in Excel.
2. Select the cell in the chart to which or from which you want to add or delete a line.

NOTE:	If you want to see where the cells are to make it easier to select a cell, turn on the gridlines. See "Showing/hiding gridlines in Excel" on page 97.

3. Select **Cells** from the **Format** menu.

   The **Format Cells** dialog box displays.



4. Click the **Border** tab.
5. The line style used is the fifth one down in the right column of the **Style** box in the **Line** section. It is outlined in the picture above. Click the **Style** to select it.
6. In the **Borders** section, click on the sides of the box on which you want to put lines. In the picture above, the cell will have a line on top of it and a line on the left side.
7. Click **[OK]** to accept your changes.

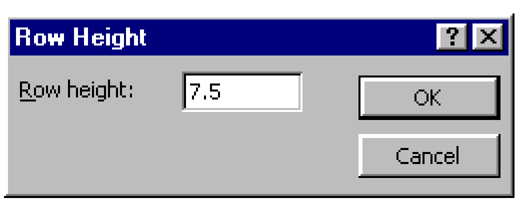
Creating a border around a chart

Each chart must start in Row 2, Column B, so that there is a blank border around the chart. There should be empty rows above and below the chart and empty columns on the left and right sides of the chart.

Follow the steps below to make the height of the empty rows consistent and the width of the empty columns consistent.

1. Select any cell in the row directly above the chart.
2. Select **Row** from the **Format** menu and select **Height** from the resulting submenu that displays.

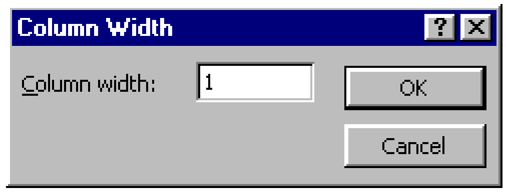
   The **Row Height** dialog box displays.



3. Key in `7.5` in the **Row height** edit box.

4. Select any cell in the row directly below the chart and follow steps 2 and 3 again.
5. Select any cell in the column to the left of the chart and select **Column** from the **Format** menu and select **Width** from the resulting submenu that displays.

   The **Column Width** dialog box displays.



6. Key in **1** in the **Column width** edit box.
7. Select any cell in the column directly to the right of the chart and follow steps 5 and 6 again.

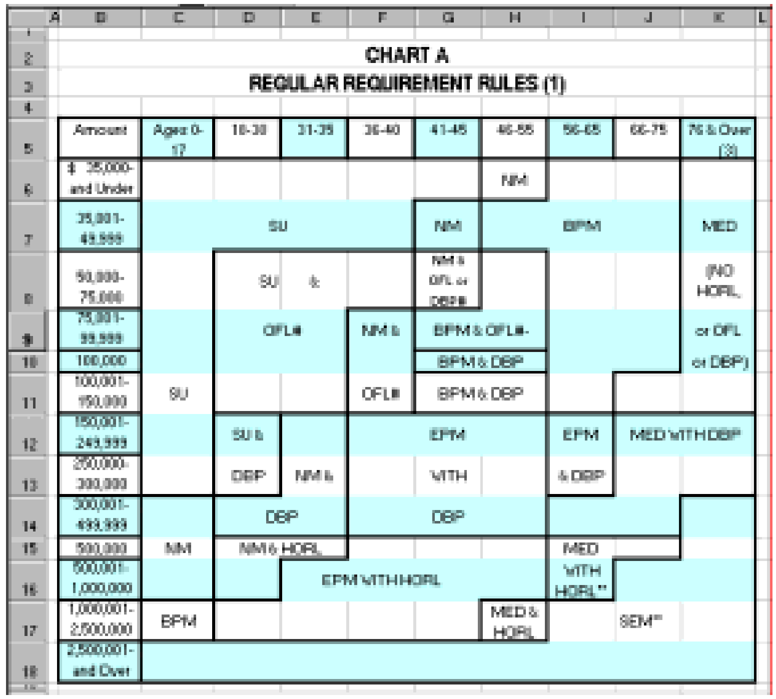
Creating a chart graphic from a chart Excel file

In order to insert an updated chart into the **Service and Underwriting** HTML Help project, you need to convert the chart from **Excel** format to **.GIF** format. Follow the steps below.

NOTE: This procedure assumes you have access to **Paint Shop Pro**.

1. Open **Windows Explorer** and navigate to the directory in which the Excel file containing the desired chart is kept.
2. Double-click on the chart's filename to open the file in Excel.
3. Make sure there are empty rows directly above and below the chart and empty columns directly to the left and right of the chart. See "Creating a border around a chart" on page 99 for instructions and for the row height and column width values.

NOTE:	If you can't see the gridlines, see "Showing/hiding gridlines in Excel" on page 97 for instructions on turning on the gridlines.



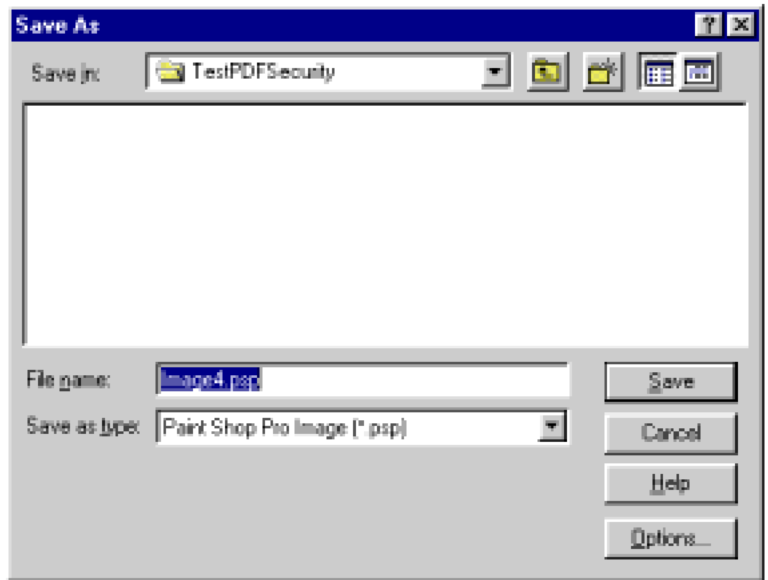
4. Highlight the chart with the rows and columns right around the outside.
5. Turn off the gridlines. See "Showing/hiding gridlines in Excel" on page 97.

NOTE:	If the gridlines are left showing, they will display on the picture when saved as a graphic file.

6. Select **Copy** from the **Edit** menu.
7. Select **Exit** from the **File** menu.
8. Open **Paint Shop Pro** from the **Start** menu.
9. Select **Paste As New Image** from the **Edit** menu.

10. Select **Save As** from the **File** menu.

    The **Save As** dialog box displays.



11. Select **Compuserve Graphics Interchange (*.gif)** from the **Save as type** drop down list.
12. Enter a name for the graphic file in the **File name** edit box.

NOTE:	The names used in the HTML Help project are: **ChartA.gif**, **ChartB.gif**, **ChartC.gif**, and **EALChart.gif**. Use whichever filename is applicable for the current chart when saving the graphic. Updating the charts in the HTML Help project becomes an automatic process if these filenames are used. See "Updating the charts in the HTML Help project" on page 102.

13. Navigate to the directory in which the **Service and Underwriting** HTML Help project resides.
14. Click **[Save]**.

Updating the charts in the HTML Help project

Now that you have created a GIF graphic file out of the chart, you need to insert it in the HTML Help project. Follow the steps below.

1. Open the **Service and Underwriting** manual HTML Help project.
2. In the **Undmed** folder under the **HTML Files (Topics)** folder, open the corresponding topic, such as **Chart A (Medical)**, by double-clicking on the topic title.
3. If the graphic was placed in the main directory for the **Service and Underwriting HTML Help** project, the graphic is automatically updated within the topic. You do not need to reinsert the graphic file. Be sure to double-check, however, that the graphic is the updated one.

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