Microsoft Dynamics™ NAV

Online Help Guide for Microsoft Dynamics™ NAV

Microsoft Dynamics

ONLINE HELP GUIDE FOR MICROSOFT DYNAMICS™ NAV

TABLE OF CONTENTS

Chapter 1

Introduction to Online Help

This chapter introduces the principles of online Help for Microsoft Dynamics NAV. It explains what the components of a Help project are and how to manage the many files. It also explains how to create a new Help project.

The chapter is divided into the following sections:

- Prerequisites
- Introduction to Online Help
- The Contents of Microsoft Dynamics NAV Online Help
- Object IDs, Context Strings and GATE Codes
- The Modular Help System
- Organizing Your Files
- Starting a New Help Project

1.1 Prerequisites

You need to have the following installed on your computer in order to work with Microsoft Dynamics NAV online Help:

- RoboHelp for HTML Help
- GATE
- Translate.exe
- Master.css
- Source files
- MS HTML Help Workshop

If you want to test the Help files, you also need:

- HH Tool
- LinkChecker

Setting Up RoboHELP HTML

Before you start working with RoboHELP HTML, there are some option settings that you should select. You should turn off RoboHELP HTML's **Save without prompt** option. You should ensure that RoboHELP HTML will use underscores in file names instead of spaces. You should also choose RoboHELP HTML as the default editor for all topics.

Automatic Save

RoboHELP HTML has the **Save without prompt** option enabled as default. This means that if you make changes to a topic, for example, and then close the topic, your changes will automatically be saved. You do not have the option of closing the topic and reverting to the last saved version.

If you disable the **Save without prompt** option, RoboHELP HTML will ask you whether you want to save your work when you exit a topic. This gives you the option to try something out in your text without losing the original. If your "experiment" doesn't work, you can discard the changes.

Use Underscores in File Names

RoboHELP HTML will allow you to create file names that contain spaces. However, there are a number of situations in which file names with spaces can cause problems. Therefore, we require all file names in the Help to contain underscores instead of spaces.

RoboHELP HTML has the **Use underscore in file names** option enabled as default. When this option is enabled, RoboHELP HTML replaces spaces in file names with underscores.

Set RoboHELP HTML as Default Editor

RoboHELP HTML gives you the option of opening different Help topics with different editors. For example, you could specify that if a Help topic has been created in Notepad and imported into your project in RoboHELP HTML, RoboHELP HTML must open the topic in Notepad. You will, however, probably want to work in a WYSIWYG

(What You See Is What You Get) editor, so you will want all topics to open in RoboHELP HTML.

Adding new Keywords

In RoboHELP, you should setup where new Keywords are stored. Under File, Project Settings select the Topics option button.

Changing the RoboHELP HTML Settings

To select the **Use underscores in file names** option and cancel the **Save without prompt** option, do the following:

1 Click Tools, Options. The ***Options*** window appears.

2 On the ***General*** tab, click the **Save without prompt** field to remove the check mark. Ensure that there is a check mark in the **Use underscores in file names** field.

To force all topics to be opened in the RoboHELP HTML WYSIWYG editor:

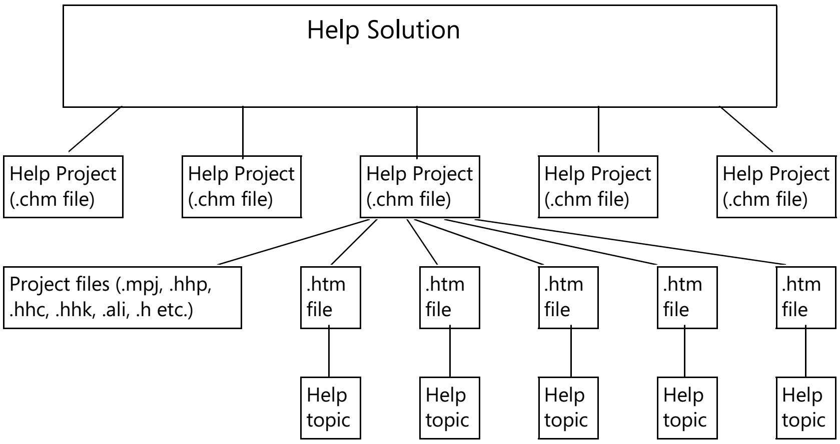
3 On the ***HTML Editors*** tab, select *RoboHELP WYSIWYG* and click **Set as Default**.

4 Click the **Use Default Editor**

5 Click OK.

1.2 Introduction to Online Help

The following diagram illustrates the relationship between a Help solution and its components:



Help Terminology

This chapter uses various terms related to online Help, such as Help solution, Help project, .chm file and Help topic, so we need to define these terms.

Help Solution

A Microsoft Dynamics NAV Help solution consists of all of the online Help for a Microsoft Dynamics NAV suite. It can include a number of Help projects. Some of the projects are developed at core development and some may be externally developed (by a Microsoft Dynamics NAV partner or by the customer).

The various projects in a solution can be more or less integrated with one another. For example, the Help for the base application is divided into several projects but it appears to the user as one unit, with one table of contents and one index. The C/SIDE® Reference Guide is also part of a Microsoft Dynamics NAV Help solution.

Help Project

To facilitate Help development by many writers, we have chosen to divide our Help solution into a number of modules, or Help projects (see also The Modular Help System on page 16). Each Help project contains all the elements that are required to create one compiled Help file (.chm file).

The Help for the base application and C/SIDE consists of approximately 40 projects:

- The master Help project manages the integration of all application Help projects. This includes Help developed at NSW1 for the base application and Help developed externally for additional functionality.
- For each application area, there are two or three Help projects.
- The C/SIDE Help project contains all the Help for the development environment.

.chm File

A .chm (pronounced "chum") file has the extension .chm. This extension indicates that the file contains a compiled HTML Help project. When a Help project is finished, that is, when all the text has been written in RoboHELP HTML and post processed with GATE (See How GATE Codes are Formed on page 11), all of the information in the project is compiled and compressed into one compiled Help (.chm) file.

Files in a Help Project

A Help project contains the following files:

File Extension	Description
.htm	HTML file. Each HTML file contains one Help topic. There are many HTML files in a Help project.
.hhp	HTML Help project file. The project file contains information about the project such as a list of files in the project, definitions of the windows that the Help will be displayed in, and more. There is one project file per project. Core development writers select this file to open the project in RoboHELP.
.hhc	HTML Help contents file. This file contains the table of contents for the project.
.hhk	HTML Help index file. This file contains the index file keywords for the project but we save all keywords in the individual topic files (See Adding new Keywords on page 3)
.mpj	RoboHELP HTML project file. This file is created and used by RoboHELP HTML. It is an Access database and it contains the same information as the .hhp file, plus additional information. Core development writers use the .hhp file.
.ali	RoboHELP HTML alias file. This file is created by RoboHELP HTML and contains aliases.
.h	Map file. RoboHELP HTML updates this file when you create aliases. Each project has a file called <projectname>.h, for example gl_t.h
BSSCDefault.h	RoboHELP HTML default map file. IF YOU HAVE THIS FILE, IT IS AN ERROR! When you create aliases, RoboHELP HTML creates this file if you do not specify that the <projectname>.h map file should be used.
.brs	RoboHELP HTML browse sequence file. RoboHELP HTML creates this file even if the project does not have a browse sequence.This file is not necessary for the daily build.
eHelp.xml	RoboHELP HTML eHelp file. RoboHELP HTML creates this file even if the project does not have eHelp enabled. This file is not necessary for the daily build.
eHlpDhtm.js	If the project contains dynamic HTML, for example expanding text, RoboHelp creates this file, and you must include it in the project.
BSSCDHTM.js	RoboHELP HTML dynamic HTML support file. RoboHELP HTML creates this file even if the project does not contain dynamic HTML. This file is not necessary for the daily build.
.gif	A help topic may contain a .gif file (See Prerequisites on page 24.)
FEEDBACK.js	Documentation feedback link.

sExpCollapse.js	HIDE/SHOW All
master.css	Stylesheet (See Formatting the Text on page 33.)

All of the above files are used to create the compiled Help (.chm) file. In addition, there must be one or more .hh file for C/SIDE to find the correct Help topic. There is one .hh file for each Help project.

All of the .chm files, together with the .hh files, are all installed together in order for the online Help to function correctly.

Help Topic

A Help topic is the basic unit of information in an online Help system. Many of the Help topics in our online Help describe an element in C/SIDE or Microsoft Dynamics NAV program. These are the descriptions that appear when you press F1 in Microsoft Dynamics NAV or C/SIDE. The Help also contains task topics that describe how to do something, and overview topics with background information.

Each topic is stored in an HTML (.htm) file.

Procedures

You can divide the work involved in writing online Help into five phases:

1 Writing

This is the phase that takes the greatest amount of time by far, however, you should also allow a realistic amount of time for the other four phases.

2 Proofreading and correcting errors

When the Help texts have been written, they must be proofread for both language and technical accuracy. It is important that the texts do not contain spelling errors and that technical misunderstandings do not arise.

3 Post Processing (GATE)

When the texts are finished, you must use the Microsoft Dynamics NAV post-processing tool, GATE, to prepare the files for compilation. GATE updates object texts (names of tables, fields, reports, and so on) in the Help topics, inserts standard links like the list of all fields in a table, and more. For instructions on using GATE, see page 91. To read about what GATE does, see page 104.

Core development writers don't usually have to run GATE because the daily build runs GATE automatically.

4 Compiling

Compilation is the final process that the texts must undergo. In this phase, the hundreds of .htm files in a project are compiled and compressed into one file. GATE can compile the files after processing them, if you choose the relevant option.

Core development writers should always compile their work in RoboHelp before checking a Help project into VSS. However, the final compilation after GATE processing is performed automatically by the daily build.

5 Testing

The finished online Help must be tested to ensure that the user interface functions as intended and that there is Help for everything in the program. See Test of the Online Help on page 95.

1.3 The Contents of Microsoft Dynamics NAV Online Help

Online Help in Microsoft Dynamics NAV allows you to press F1 to get Help about what you see on the screen. This kind of Help is called context-sensitive Help.

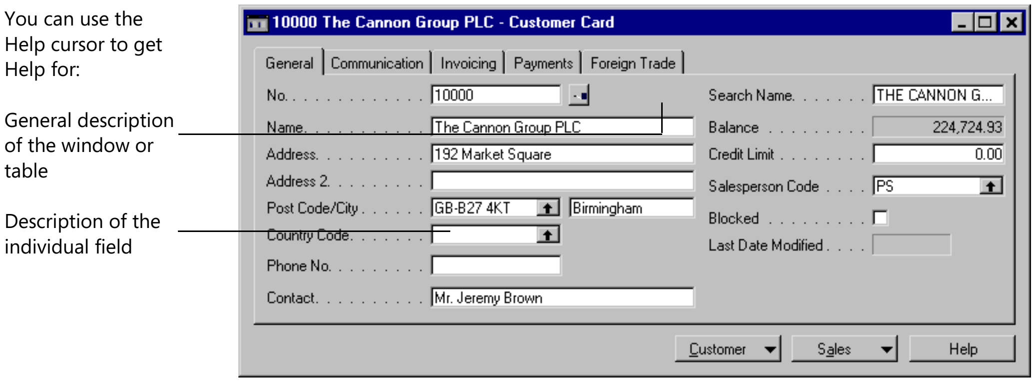
Microsoft Dynamics NAV online Help also contains additional Help that is not directly linked to elements of the screen image.

The following two sections describe context-sensitive, procedural and conceptual Help.

Context-Sensitive Help

There is Help for the following components of a screen image:

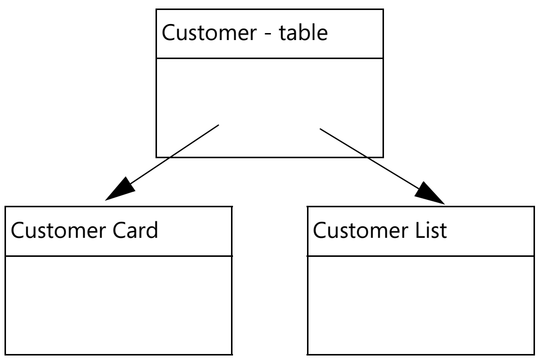
- For the table, batch job, or report that is displayed in the window or for the window itself. This Help is displayed when you click the Help button or you use the Help cursor to click outside a field in the window.
- For most fields in the window, Help appears when you press F1 or use the Help cursor to click in a field.



What is Described in Context-Sensitive Help

The data that the user enters in Microsoft Dynamics NAV is stored in tables. The information in a single table is displayed in the program in various windows.

The following diagram illustrates the relationship between the ***Customer*** table and the ***Customer Card*** and ***Customer List*** windows:



If there is no Help for a window, the Help for the underlying table is displayed.

Help for Everything

When the windows, tables, batch jobs and reports have been described, almost everything will have been described. However, we also write Help topics for controls (fields on forms) that do not display table fields.

Hyperlinks

Most Help topics contain links to other Help topics that may be relevant.

Links are used to help the reader quickly get as much information as possible on a specific subject.

GATE automatically inserts links between table topics and the topics for fields in the table. Links from field topics to the respective table, report or batch job are also inserted.

While a Help topic may contain multiple links, it may never contain more than one link to the same Help topic.

Note

It is not helpful to have too many links in the same Help topic because the user will lose sight of what is important.

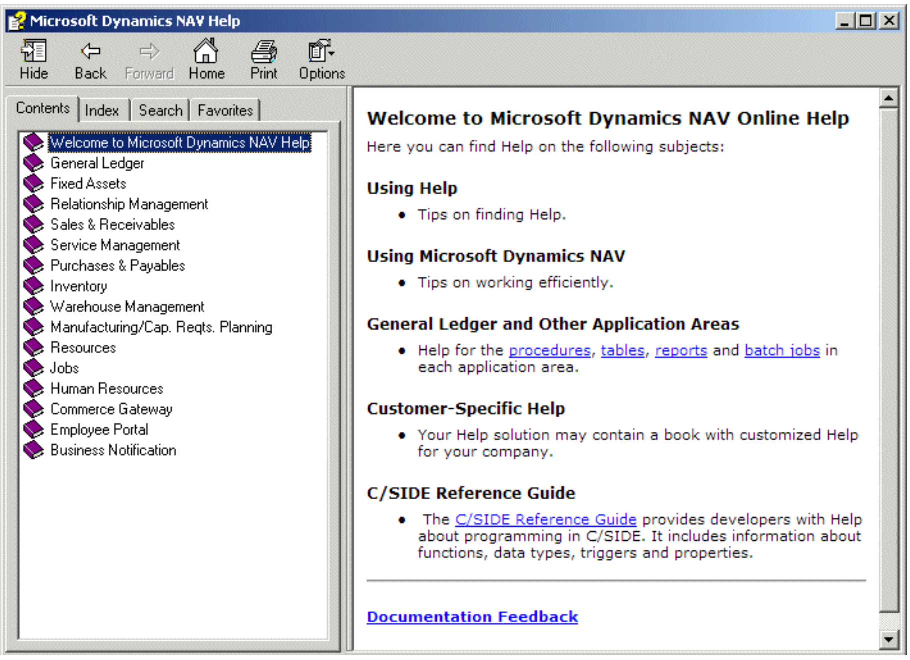
Shortcuts

A task topic usually contains a shortcut to open a window in the application. These shortcuts replace the paths from the main menu that were previously used to help the user open a window.

Additional Help

In addition to using F1 or the Help cursor, you can also access Help by clicking Help, Microsoft Dynamics NAV Help. The Help window that appears contains a navigation pane.

You can use the ***Contents***, ***Index, Search*** or ***Favorites*** tab to navigate within the Help:



From the navigation pane, you can access the topics that are not directly related to the screen picture. For example, each of the application area books in the table of contents contains a number of task and overview topics. Other tasks can be found in the index.

The table of contents contains the following books:

- The Using Help book contains tips about how to use the Help.
- The Using Microsoft Dynamics NAV book contains information about entering and manipulating data in the program (Entering Data in Fields, Setting Filters, and so on).
- A book for each application area. Each book contains sub-books for various subject areas and sub-books for tables, reports and batch jobs in that application area (thus, Help that can be accessed as "context sensitive" can also be accessed from another angle). There is a book for each application area as well as any other application areas or additional functionality that the user might have Help for.
- If the Help solution includes customer-specific Help, it will appear in a book in the table of contents.

The index can be used to look up Help topics that are associated with a keyword.

The search function can be used to find topics that include a specific word or phrase anywhere in the text.

The ***Favorites*** tab can be used to "bookmark" topics so that you can easily find them again. When you have a useful topic in the topic pane, you can simply add it as a link in your list of favorites.

1.4 Object IDs, Context Strings and GATE Codes

As described in the previous chapter, much of the Help for Microsoft Dynamics NAV is Help for a specific object (part of the program such as a table or field). Every object in the program has an object ID. We use these object IDs to form a unique context string to identify each context-sensitive Help topic. We use the context string in the file name for the topic.

When we want the correct name for the object to be filled in automatically, we use the GATE code, which is based on the context string. The text within the code is automatically updated when you run GATE on your files. GATE fills in the name of the object corresponding to the context string.

This section describes how the context strings that we use in the Help are related to Microsoft Dynamics NAV. It explains how to write the codes that GATE uses. Finally, it explains a couple of ways to look up the context string for an object.

How Context Strings Are Formed

Each object in Microsoft Dynamics NAV is assigned an ID number. This ID is unique within the object type; for example there is only one table that has ID 18. On the other hand, there is also a form with ID 18. In order to ensure that two objects do not have the same ID, each object type has a letter before the ID number (the initial letter of the English name of the object type). T_18 is the object number 18 of the type Table, for example. We call this a context string – a string that places the object in the right context.

Each control and field is associated with an object, so these are identified by placing a number after the context string that the control or the field belongs to:

Example

The Customer table has a context string T_18; T stands for object type Table; 18 is the number of the table.

The No. field, which is a field in the Customer table, is assigned the context string T_18_1 – T_18 because the field belongs to the Customer table and 1 because the No. field is the first field in the Customer table.

How GATE Codes are Formed

Anytime you include the name of a Microsoft Dynamics NAV object in the online Help, you must use a GATE code to allow GATE to update the object name. A GATE code consists of a context string and an object text, surrounded by dollar signs ($) and parentheses. The GATE code for the ***Customer*** table is: ($ T_18 Customer $).

Attention

It is necessary to use the GATE code in all object-related links - otherwise the link text will not be updated when running GATE.

It is important that there is not a formatting change in the middle of a GATE code. If you mark part of the code as bold, for example, you must mark the entire code as bold.

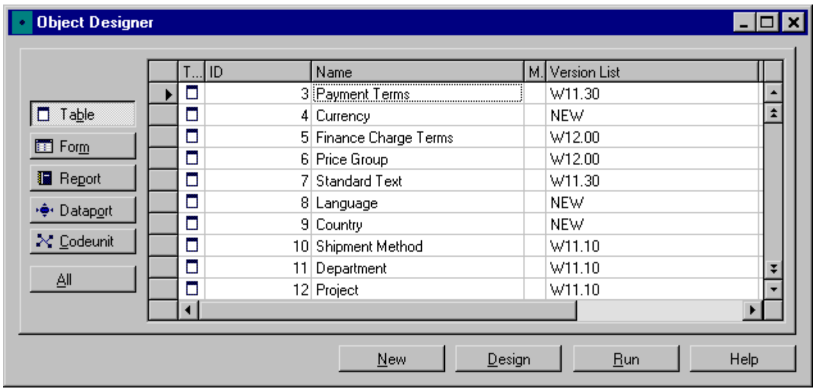
If you have typed a GATE code and you wish to mark it as a hyperlink, make sure you select the entire code.

Attention

Do not use reminder notes that resemble the codes used by GATE. Always use *** for notes that must be removed before the Help is completed.

Using the Object Designer

You can use the Object Designer in Microsoft Dynamics NAV to find the object ID for an object. In order to use the Object Designer, you need a special license. If you have this license, click Tools, Object Designer. The following window appears:



To choose the object type, click one of the buttons on the left. A numerical list of the objects is displayed.

Field IDs

To see a list of the fields in a table, select the line with the table and then click Design.

Using ShowHelpID

Another way to find the context string for an object is to use ShowHelpID. You can use the ShowHelpID function to see which topics the Help program looks for, and in what order.

C/SIDE looks for the most specific Help first, then more general Help. If there is no Help for the form or the object (table, report or batch job) underlying the form, C/SIDE eventually displays the default Help topic and the navigation pane. (For more details, see page 112.)

This is how you enable the ShowHelpID function:

1 Right click on the icon that you use to start Microsoft Dynamics NAV (on your desk top, toolbar or in the Start Menu). Remember, that it has to be a shortcut icon that you create manually - not the one created automatically by the installation program.

2 Click Properties.

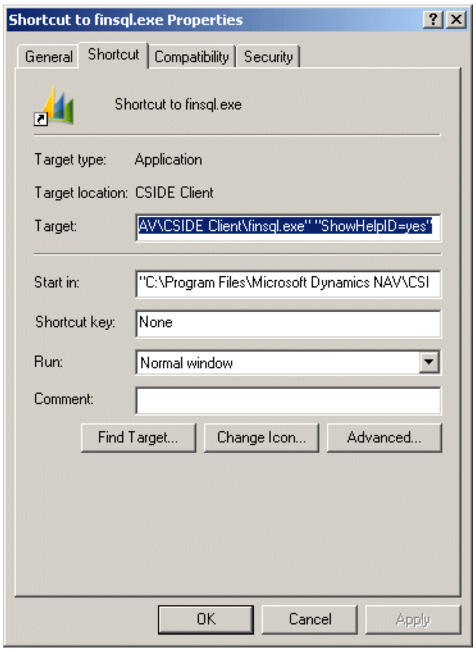
3 Click the ***Shortcut*** tab.

4 Insert the following after the command line in the **Target** field: *ShowHelpID=Yes*

Note

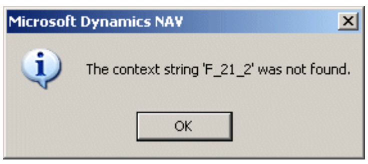
Do not delete the contents of the Target field. Add one space and then the text ShowHelpID=Yes at the end of the command line.

It should look like this:

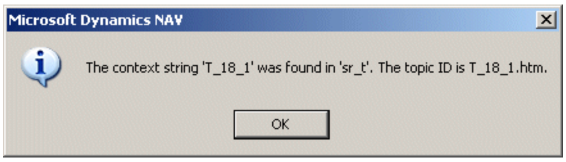


5 Click OK.

The function is now active. When you request Help on any element in Microsoft Dynamics NAV, the program will show which code(s) it is searching for Help for and which code it finds Help for. For example, if you click F1 in the number field on the customer card, the following window is displayed:



If you click OK, the following window is displayed:



When you click OK, the Help window appears with the Help for field 1 in table 18.

Reading a Context String

The context strings can be read as follows:

Object or Control	Context String	Means
Table	T_y	Table number y
Table Field	T_y_x	Field x in Table y
Form	F_y	Form y
Control in Form	F_y_x	Control x in Window y
Report	R_y	Report or Batch Job y
Request Form	R_y_F_1	Definition window for Report or Batch Job y
Control in Request Form	R_y_F_1_x	Control x in the definition window for Report or Batch Job y
System Form	S_y	System Window y
Control in System (form)	S_y_x	Control x in System Window y
Dataport	D_y	Dataport number y
Menu Choice	MC_y	Menu item on the menu bar

The Help topics for the objects, controls and fields in the program are identified by their file names, which contain these context strings.

Context Sensitive Help

When we write a Help topic for an object in the program, we always use the object's context string for the topic file name. The program uses the context string to identify which Help topic should be displayed. For example, the **Department Code** field on the Customer Card has the context string T_18_16. If you press F1 in the **Department Code** field, the program looks for a Help topic that has file name T_18_16. When you make a link from within one topic to another topic, you use the file name to identify which topic must be displayed.

Attention

In the program, both reports and batch jobs have the context string R_x, but in the Help texts batch jobs are called B_x (for batch jobs). This is because GATE must be able to tell the difference between reports and batch jobs.

1.5 The Modular Help System

A Microsoft Dynamics NAV Help solution consists of a number of individual Help projects, which are integrated so that they appear to the user as one system. This is called a modular Help system.

Each externally developed Help project is a "module" in this system. In addition, the base application Help is broken down into a number of modules, or projects.

Integration of Externally Developed Help

The modular Help system is the key to integrating externally developed Help with the core development Help. With a modular Help system, it is possible to configure individual Help solutions for different users. Externally developed Help projects can be "plugged into" the base application Help solution if a user has externally developed functionality.

The Base Application Help is Also Modular

We have also chosen to divide the base application Help into modules. Working with a modular Help system allows multiple authors to work simultaneously on the Help. The most straightforward way to work with the Help is for an author to have all of the source files for an entire Help project on their computer.

In addition, it is easier to work with a smaller number of files, for example, when checking the project into or out of Visual SourceSafe.

How the Modular System Works

The modular Help system consists of one master Help project and many secondary Help projects.

The master project only contains one Help topic, which is the default page of the Help system. It contains a list of all the secondary projects that make up the whole, and information about how to merge them together.

Each project is compiled separately into a .chm file with its own index and table of contents for the topics in that project.

In the master table of contents, there is a slot for each secondary table of contents to appear.

When the Help is installed on the user’s computer, the .chms for all of the base application areas are installed. Help for additional functionality is only installed if the user has the functionality.

When the user runs the master Help project, the table of contents, index and search only include those projects that are installed on their computer.

1.6 Organizing Your Files

By the time you have compiled all of the Help projects, you will have worked with a large number of files in different formats. Because the process of creating a Help project includes so many files in various formats and stages, it is necessary to keep close track of where the files are and what stage they are in. Therefore, this section describes the proper directory structure and what the different directories (folders) contain.

The Directory Structure

The following diagram illustrates the directory structure that you must use on your computer. RoboHELP HTML should be installed in the Program Files folder on your computer. You retrieve the source files that you need from PartnerSource or Visual SourceSafe.

```
\HTML Help
├── \Tools
└── \W1W1
    ├── \Shared
    ├── \Compiled
    ├── \Base
    │   ├── \Application
    │   ├── \master
    │   ├── \cm_a
    │   ├── \cm_m
    │   └── \etc.
    │       ├── \Source
    │       └── \Processed
    ├── \C/FRONT
    └── \"other"
```

The contents of the other folders are described below:

Folder	Contents	Description
\Tools	GATE Create Topic Files HHTool LinkcheckerTool HTML Help Tool HTML Help Workshop Translate.exe	Microsoft Dynamics NAV custom tools.
\W1W1	\Shared \Compiled \Base \"other"	This folder contains the worldwide English language version of all Help projects.

Folder	Contents	Description
\W1W1\Shared	Gate.txt Project Settings.txt master.css	Files that are used for all W1W1 projects.
\W1W1\Compiled	master.chm cm_a.chm cm_m.chm fa_m.chm (etc.) "other".chm	You can have GATE copy the compiled Help (.chm) files for all Help projects into this folder. Then you can test how they work together.
\W1W1\Base	\Application \master \cm_a \"etc."	Everything in this folder is part of the base application Help.
\W1W1\Base\Application	object.txt	You must put the object.txt for the base application in this folder. (To create the object.txt, you must extract application texts from the application. See page 86 for instructions.) You can create a sub-folder in this folder and install the latest version of the application.
\W1W1\Base\master	\Source \Processed	This folder contains the master Help project.
\W1W1\Base\master\Source	master. hhp master.hhc master.hhk	The source files for the master project. Do not open these files in RoboHELP HTML! They must be edited in HTML Help Workshop or a text editor. Otherwise they will be ruined.
\W1W1\Base\master\Processed	as above	The master project source files after post-processing.

Folder	**Contents**	**Description**
\W1W1\Base\cm_a	\Source \Processed	The Contact Management Help project. The \Base folder contains a folder for each Help project that is part of the base application Help: cm_a, cm_m, fa_m, fa_t, fa_r, gl_m, gl_t, gl_r and so on.
\W1W1\Base\cm_a\Source	cm_a.mpj cm_a.hhp cm_a.hhc cm_a.hhk cm_a.ali .htm files other RoboHELP HTML files	All of the source files for the Contact Management Help project, before processing. (They still contain context-string codes.) These are the files that you work with in RoboHELP HTML.
\W1W1\Base\cm_a\Processed	same as Source folder	All of the source files for the Contact Management Help project after processing by GATE. These are the files that you compile into the finished Help project. Attention: Do not open these files in RoboHELP HTML!
\W1W1\Base\"etc."	\Source \Processed	In the Base folder, there is a folder for each Help project that is part of the base application Help. (See the cm_a folder, above.)
\W1W1\"other"	\Application \Source \Processed	In the W1W1 folder, there is a folder for each Help project. For example: ECT.

Folder	Contents	Description
\W1W1\"other"\Application		You must put the object.txt for this project in this folder. It may differ from the object.txt for the Base project. You can create a sub-folder in this folder and install the latest version of the application to which this Help project belongs.
\W1W1\"other"\Source	.htm files, etc. (See cm_a\Source)	Source files for the Help project. See cm_a\Source for a description of source files.
\W1W1\"other"\Processed	Same as Source	Processed files for the Help project. See cm_a\Processed for a description of processed files.

1.7 Starting a New Help Project

When you create a new Help project, you must use the correct procedure to apply the design rules for Microsoft Dynamics NAV online Help.

Using The Template Project

A template project has been developed that contains the settings that comply with the Microsoft Dynamics NAV standard. The Dynamics NAV UA department maintains the template files and instructions for using them.

The template files can be retrieved from PartnerSource, or from VSS (User Education - HTML Help:/Templates/Project Template).

To use the template project, you should do the following:

1 Before you start, delete the following files: addin_a.hhp and addin_a.hpr. You won't need these.

The addin_a.h file doesn't get renamed and you must delete this file in RoboHELP HTML:

2 In the left pane, click the ***Project*** tab. Click Context-Sensitive Help, Map Files, and delete addin_a.h

This removes the file from the project, but it will still exist on your hard disk.

3 You must also delete addin_a.h from the \Source folder in Windows Explorer.

4 If you create any aliases, you will need to create <projectname>.h (see page 45).

Chapter 2

Creating a New Topic

This section describes how to set up a new topic with RoboHELP HTML.

The chapter is divided into the following sections:

- Prerequisites
- Checklist for Creating a New Topic
- Using the Create Topics Macro
- Creating a New Topic Manually
- Adding a Topic to the Table of Contents
- Formatting the Text
- Inserting Shortcut Images
- Hyperlinks and ALinks
- Creating Hyperlinks and Shortcuts
- Creating ALinks
- Using Aliases

2.1 Prerequisites

Before you create new topics, you must:

1 Find out which project the new topics belong in. Check out the relevant files from Visual SourceSafe to your computer.

2 Ensure that there is a copy of master.css (the cascading stylesheet) in the Source folder of the project you are working in. RoboHELP HTML requires a copy of the cascading style sheet to be stored in the folder of every project that uses it.

Note

You must make sure that the file on your computer is not read-only or RoboHELP HTML will not be able to use it.

3 If you are working on task topics, ensure that there are copies of the graphics files (DrillDown_12pix.gif, DropDown_12pix.gif, Edit_12pix.gif, LookUp_12pix.gif, shortcutCold.gif, expandtri.gif, collapsetri.gif, blueup.gif, bluedrop.gif) in your Source folder.

Note

Because the gif files are shared by all the projects that use them, they are not checked out when you select all the files in a project in VSS and check out the selected files. You must select the .gif files and use "get latest version".

4 Check that you have set up RoboHELP HTML as described on page 2.

5 Open the project in RoboHELP HTML.

2.2 Checklist for Creating a New Topic

For each topic that you create, you must remember to complete each of the following tasks:

Done	Task
	Assign a topic title.
	Assign a file name.
	Assign index keywords, if appropriate.
	Assign a cascading style sheet.
	Add the topic to the table of contents, if appropriate.
	Apply styles while you write.
	Insert Shortcut images (task topics only).
	Create hyperlinks or ALinks to related topics.
	Create a shortcut to the first window in a task (task topics only).

2.3 Using the Create Topics Macro

Use the Create Topics macro to set up "empty" .htm files for table, field and form topics. Then you can import the files into RoboHelp.

The macro generates topic files with filename, title and heading. It assigns the master.css to the topic.

Attention

If you are creating window topics, you *must* use the Create Topics macro to ensure that the ALinks are created correctly.

When you use the macro to set up topic files for forms, it also inserts the Related Tasks and More Information Links at the bottom. (Because it is difficult to create these links, it is preferable for you not to create them manually.) Once you have created these files, you will have to enter only the body text.

You can either manually type a list of topics to be created, or you can cut and paste the list from an Excel spreadsheet. Each of the methods is described in the following sections.

Typing Text Directly into the Macro Document

Table and Field Help Topics:

When you run the macro, you can create topic files for more than one table by entering data for more than one table into the document. The word "table" tells the macro where each table begins. Fields in a table are listed directly under the table.

1 Copy the CreateTopics.doc to the temporary working folder where you want to create the topic files.

Warning

Do not copy the CreateTopics macro to the folder containing your project files. The macro overwrites existing files without warning. Instead, create a temporary working folder, for example C:\TempDir\CreateTopics.

2 Using Microsoft Word, open the CreateTopics.doc.

3 Type Table, press Tab, type the table's object code minus "T_", press the Space Bar, and type the table name. Press Enter to complete the line. You must follow this procedure even if you only want to create field topics.

4 Press Tab and type the field's object code minus the table's object code. Press the Space Bar and type the field name. Press Enter to complete the line.

5 Repeat Step 4 if you want to create topic files for other fields in the table.

6 Repeat Steps 3 to 5 if you want to create topic files for other tables and table fields.

7 On the Create Topics menu, click the Create Topic Files button to run the macro.

8 Close the Create Topics.doc macro file without saving any changes to the document file.

If you now look in your temporary working folder, you will see the newly created HTML files.

9 Import the files into the relevant online Help project (See page 28).

Form (F_xxx ONLY) Topics:

When you run the macro, you can create topic files for more than one form by entering data for more than one form into the document. The word "form" tells the macro where each form begins.

1 Copy the CreateTopics.doc to the temporary working folder where you want to create the topic files.

Warning

Do not copy the CreateTopics macro to the folder containing your project files. The macro overwrites existing files without warning. Instead, create a temporary working folder, for example C:\TempDir\CreateTopics.

2 Using Microsoft Word, open the CreateTopics.doc.

3 Type Form, press Tab, type the table's object code minus "F_", press the Space Bar, and type the form name. Press Enter to complete the line.

4 On the Create Topics menu, click the Create Topic Files button to run the macro.

5 Close the Create Topics.doc macro file without saving any changes to the document file.

If you now look in your temporary working folder, you will see the newly created HTML files.

6 Import the files into the relevant online Help project (See page 28).

Copying Data from a Spreadsheet

Developers or writers working on new features for Microsoft Dynamics NAV will often create a spreadsheet that lists new tables, fields and so on. Using Microsoft Excel, open the spreadsheet containing the list of new tables, fields and so on.

Warning

Do not copy the CreateTopics macro to the folder containing your project files. The macro overwrites existing files without warning. Instead, create a temporary working folder, for example: C:\My Documents\TempDir\CreateTopics.

1 Copy the CreateTopics.doc to the temporary working folder where you want to create the topic files.

2 Select and copy the cells containing the number and name of the tables, fields and forms that you want to create topic files for.

3 Using Microsoft Word, open the CreateTopics.doc.

4 Paste your selection into the document using Edit, Paste Special, Unformatted Text.

Note

Excel will paste the text you have copied and separate it with tabs. You must change the tab between the number and name of the table, field or form to a space. Alternatively, set up the Excel sheet to have the number and name separated by a space in the same cell.

5 On the Create Topics menu, click the Create Topic Files button to run the macro.

6 Close the Create Topics.doc macro file without saving any changes to the document file.

If you now look in your temporary working folder, you will see the newly created HTML files.

7 Import the files into the relevant online Help project (See page 28).

Importing Topic Files Created by the Macro into RoboHELP HTML

The RoboHELP HTML online Help describes in detail how to import topic files into an existing project. When importing, be careful to select only files that do not already exist in your project. This is particularly important if you are adding fields to an existing table, because the CreateTopics macro automatically creates a topic for the table as well as for the fields you want to add. If you then attempt to add a topic file that already exists, RoboHELP HTML asks you if you want to overwrite the existing topic. Always click No to keep the existing file. To limit the chance of overwriting an existing topic delete the topic files that you do not need to import from your temporary working folder.

RoboHELP HTML also attempts to copy the stylesheet master.css from your working folder. You do not need to copy this file, so you can safely click No when you are prompted for this file.

2.4 Creating a New Topic Manually

The following procedure describes how to complete the first five tasks in the checklist on page 25. If you have used the Create Topics macro to set up the topics files, all of these tasks except assigning index keywords will already be completed.

1 Click File, New, Topic (CTRL+T). The ***New Topic*** window appears.

The Topic Title

2 Enter the title in the **Topic Title** field:

- If the topic is for an object in the program, enter the GATE code of the object. (See How GATE Codes are Formed on page 11.) For example, for the ***Customer*** table, you would type *($ T_18 Customer $)*.
- If the topic is for a task, overview or example, the title must be identical to the topic heading. (The guidelines for topic titles and headings are described in Types of Help Topics).

Attention

Do not press ENTER after completing the following step. If you do, the topic will be created with an incorrect file name. To move the cursor to the next field, press the TAB key.

The File Name

3 Fill in the **File Name** field as follows:

Type of Topic	File Name
Object (table, field, etc.)	The object's context string followed by the .htm extension. For example, for the **Customer** table you would enter *T_18.htm*.
Task	Application area + task_<4-digit number>.htm, for example, fatask_0023.htm
Overview	Application area + overview_<4-digit number>.htm, for example, faoverview_0023.htm
Example	Application area + example_<4-digit number>.htm, for example, faexample_0023.htm
Object-Specific Overview	<The field's context string>_overview.htm, for example, T_160_12_overview.htm

Note

RoboHELP HTML automatically suggests a file name similar to the topic title. For example, if the title is ($ T_18 Customer $), RoboHELP HTML suggests ($_T_18_Customer_$).htm for the file name. The file name for a topic about an object in the program must contain the context string only (in this case T_18.htm). Remember to delete the extra characters.

Extra Index Keywords

4 You can create extra keywords to supplement the keywords that GATE automatically creates for the topics. (See Indexing Facilities in RoboHelp HTML on page 57.) To create additional keywords, on the ***Index*** tab, in the **Keywords** field, enter the keyword. Click Add.

The Style Sheet

5 On the ***Appearance*** tab, in the **Style Sheet** field, select *master.css*.

Note

When you create a new Help topic in RoboHELP HTML, the cascading style sheet that was used with the last new topic is the default style sheet. This means you usually do not have to do anything to apply the correct style sheet.

6 Click OK.

The topic appears in the WYSIWYG view. The heading is filled in automatically with the same text as the title. The topic title and heading have to be the same, so if you change the heading, remember to change the title, and vice versa. If the topic is for an object, GATE will automatically insert the object type, for example Table, Field, Window, Report or Batch Job, after the object name.

Writing Comments in the Text

You may sometimes need to write notes to yourself while you are working on the Help text. You should always mark notes that must be removed later with three asterisks (***). Then you can search all of your files for *** before compiling the finished Help.

2.5 Adding a Topic to the Table of Contents

All topics for tables, reports and batch jobs must be added to the table of contents. For each task or overview topic, you must consider whether or not to include the topic in the table of contents. (see Tasks and Overviews in the Table of Contents on page 50.) Other topics, such as fields, windows, buttons and examples are not in the Table of Contents.

To add a topic to the table of contents, follow this procedure:

1 In the left pane, click the ***TOC*** tab. In the right pane, click the ***Topics*** tab.

2 Select the topic from the list of topics and drag it to the correct position in the table of contents. (For object topics, you must manually alphabetize according to the name of the object. If the object changes names after you have added it to the Table of Contents, you must remember to move it.)

3 Click File, Save All.

Topics That Belong to More Than One Application Area

Although many objects in the program can be used in several application areas, most of them belong primarily to one area. For example, you can enter items on sales and purchase order lines in the Sales & Receivables and Purchases & Payables application areas respectively, but the ***Item*** table belongs to the Inventory application area. Therefore, it only appears in the table of contents in the Inventory book.

However, there are a few objects that belong equally to two or more application areas. For example, the ***Salesperson/Purchaser*** table. This table appears in the table of contents under Sales & Receivables, Purchases & Payables and Relationship Management.

Most tasks and overviews belong to one application area. If a task or overview topic is relevant for the entire program, include it in the use_m project. If you wish to list a topic in two application areas in the table of contents, follow the procedure for object topics described in the following section.

Including an Object Topic in the Table of Contents for More Than One Application Area

When possible, a topic should only appear in the table of contents once. When a topic cannot be assigned to a single application area, follow this procedure:

1 In the Help project for one of the application areas that the object is used in, create the Help topics (table topic and field topics, for example) for the object. Add the table, report or batch job to the table of contents. Close the Help project.

2 Open another Help project that the object belongs to.

3 In the left pane, click the ***Table of Contents*** tab. Select a line in the table of contents. The new entry will be inserted under the selected line.

4 Click File, New, Page (CTRL+SHIFT+P). The ***Page Properties*** dialog box appears.

5 In the **Title** field, enter the GATE code for the object.

6 In the **Destination** field, select *Remote Topic*. In the field below the Destination field, enter the name of the Help project that contains the topic plus the topic file name. Use the following syntax:

```
<project name>.chm::/<topic file name>
```

7 Click OK. The new entry appears in the table of contents. The icon indicates that it is a remote topic, but it will have the same icon as the other pages in the compiled Help.

8 Save your work.

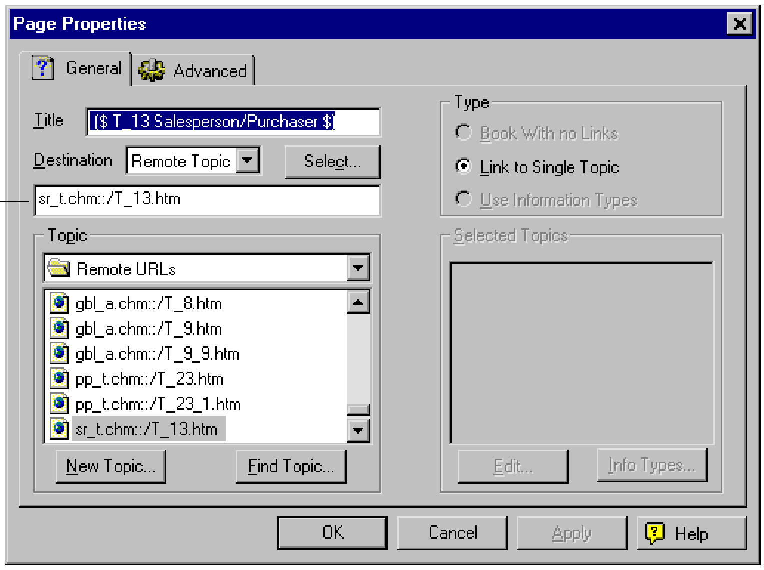
The following example illustrates how you create a table of contents entry for a topic in another Help project.

Example

The topics for the **Salesperson/Purchaser** table are in the sr_t project, and the table appears in the table of contents for Sales & Receivables. In addition, the tables of contents in the cm_a and pp_t projects also include references to the **Salesperson/Purchaser** table.

To see how the Salesperson/Purchaser entry in the Contact Management table of contents is set up, open the cm_a Help project. Select the ($ T_13 Salesperson/Purchaser $) page in the table of contents. Click Edit, Properties. The **Page Properties** window appears:

Note: The destination includes the name of the Help project and the topic file name



2.6 Formatting the Text

A cascading style sheet for HTML files is like a template for a Word or FrameMaker file. It contains information about the appearance of the HTML files. It defines some general information about the file, for example, the background color and default font type. It also defines the font type, size and color, margins, and so on, for various styles. There are both paragraph styles, which format an entire paragraph, for example, headings and attention paragraphs; and character styles, which you apply to one or more words, for example field and table names or keys on the keyboard.

The style sheet is a file with the extension .css. You must store a copy of the style sheet in the folder of every project that uses it. Our style sheet is called master.css. Make sure that you have a copy of master.css in the Source folder of the project you are working in.

Using Paragraph Styles

The cascading style sheet contains definitions of a number of different paragraph styles and character styles. This section contains a description of how to apply a paragraph style, followed by descriptions of the paragraph styles in master.css.

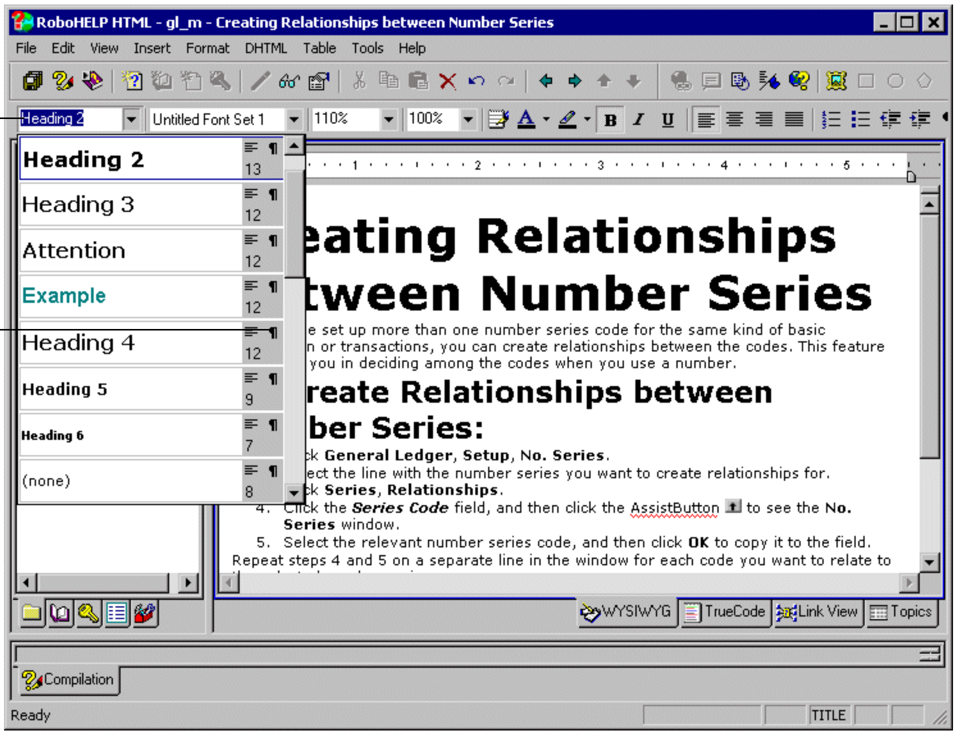
To apply a style to a paragraph, follow this procedure:

1 Click the paragraph to which you want to apply a style. If you want to apply the same style to two or more adjoining paragraphs, you can select the paragraphs.

2 Click the drop-down button to the right of the **Style** field. A list of styles appears, as you can see in the following picture:

The **Style** field

This symbol indicates that this is a paragraph style



3 Paragraph styles appear first on the list, followed by character styles. Click the relevant style.

Note

Some styles have subclasses. For example, Heading3 has subclasses Attention and Example. The Normal style has subclasses Attention, CellHeading, Code and Example. RoboHELP HTML does not indicate which styles are subclasses of other styles, except by the order in which they are listed. Thus, Attention appears on the list twice, but the Attention style that follows Heading3 is for a heading, while the Attention style following Normal is for the body text of a warning.

The following two tables show when to use the paragraph styles that are defined in master.css. Both tables contain the same information, but in a different order. The first table lists the styles in the same order RoboHELP HTML lists them. The next table lists the styles in the order in which they are likely to appear in a topic. You can choose which table to refer to, depending on your needs.

Attention

RoboHelp lists a number of additional styles that are not in our style sheet. Only use the styles in this list.

Paragraph Styles in the Order RoboHELP HTML Lists Them

Style	Type of Paragraph	Description
Heading1	Topic Heading	The first line in the topic.
Heading2	Secondary Heading	Heading within a topic. Infinitive heading in task topics. Also commonly used in report and batch job topics.
(Heading3) Attention	Attention Heading	Heading for Warning, Note or Tip.
(Heading3) Example	Example Heading	Heading for an example.
Heading4	Link Heading	Heading before a list of links, for example *Related Topics*.
Normal	Normal text	All body text that does not have special formatting.
(Normal) Attention	Attention Body Text	Body text for Attention, Warning, Note or Tip.
(Normal) CellHeading	Table Heading	A heading for a table row or column.
(Normal) Code	Code	Command text, for example: `d:\fin\finw.exe`
(Normal) Example	Example Body	Body text for an example.

Paragraph Styles in the Order in Which They Are Likely to Appear in a Topic

Type of Paragraph	Description	Style to Apply
Topic Heading	The first line in the topic.	Heading1
Attention Heading	Heading for Warning, Note or Tip.	(Heading3) Attention
Attention Body Text	Body text for Attention, Warning, Note or Tip.	(Normal) Attention
Secondary Heading	Heading within a topic. Infinitive heading in task topics. Also commonly used in report and batch job topics.	Heading2
Normal text	All body text that does not have special formatting.	Normal
Example Heading	Heading for an example.	(Heading3) Example
Example Body Text	Body text for an example.	(Normal) Example
Table Heading	A heading for a table row or column.	(Normal) CellHeading
Code	Command text, for example: `d:\fin\finw.exe`	(Normal) Code
Bullets	A bulleted list.	Use the Bulleted List button on the toolbar
Numbering	A numbered list.	Use the Numbered List button on the toolbar
Link Heading	Heading before a list of links, for example *Related Topics.*	Heading4

Using Character Styles

This section contains a description of how to apply a character style, followed by descriptions of the character styles in master.css.

To apply a character style, follow this procedure:

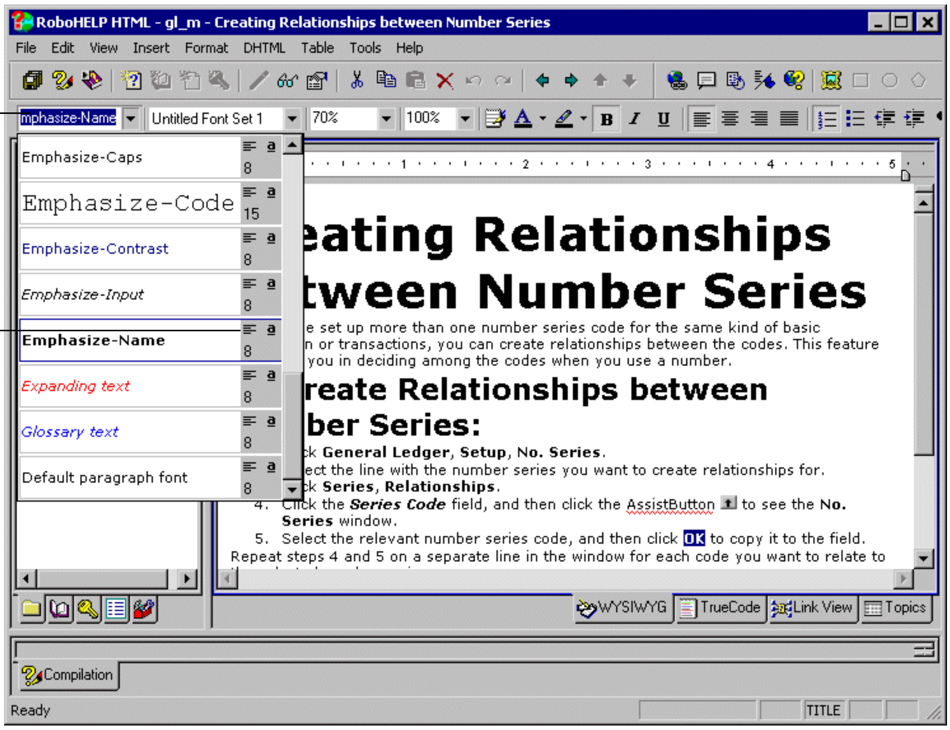
1 Select the text to which you want to apply a style.

2 Click the drop-down button to the right of the **Style** field.

A list of styles appears, as you can see in the following picture:

The **Style** field

This symbol indicates that this is a character style



Paragraph styles appear first on the list, followed by character styles. Some of the styles in the list are not defined in our style sheet. Only use the character styles in this table:

Type of Topic	Type of Word	Example	Style to Apply
All	Keys on the keyboard	Keys like ENTER or CTRL	Emphasize-Caps
All	Commands	`d:\fin\finw.exe`	Emphasize-Code
Task Topic (only)	Text that the user must input (enter). Output from the program. Options.	In the **No**. field, enter *CASH*. The field now contains *0.00*. In the **Type** field, select *Item*.	Emphasize-Input
Task Topic (only)	Names of buttons, menu items or objects.	Click **Sales & Receivables**, **Customers**.	Emphasize-Name
Task Topic (only)	Keys on the keyboard	Keys like **ENTER** or **CTRL**	Emphasize-Caps + the Bold button on the toolbar

3 Click the relevant style.

Using Other Forms of Typographical Emphasis

It is important that the user/reader can easily recognize different terms that are discussed in the documentation. One basic rule is that all words and designations that come from the program (such as field names, window names, tabs, buttons and so on) must be written exactly as they appear in the program. That is, they should be capitalized and abbreviated as they are in the program.

Technically, you are able to use any formatting that RoboHELP HTML allows you to use. However, you must use the styles that are defined in the cascading style sheet wherever possible. This will ensure that all topics are formatted consistently. In particular, if we decide to redefine a style at some time in the future, the only way it will be updated everywhere is if the style has been applied consistently.

Attention

Access keys are not underlined in the online Help.

Hyphenation

You do not know how large a Help window the user will choose. Thus, you cannot predict which word will appear at the end of a line in the Help window. Therefore, do not use any hyphenation in online Help.

Creating Tables and Columns

Tables must be set up using RoboHELP HTML's default table settings so that they will appear correctly in the finished Help text. (For lists with more than one column, you should also use a table.)

To insert a table in your text, click Table, Insert, Table and specify how many cells the table should contain.

RoboHELP HTML will insert a table with settings that allow the table to resize when the Help window is resized.

If you need a row or column heading in the table, use the (Normal) CellHeading paragraph style.

2.7 Inserting Shortcut Images

If you include a shortcut to an application window, you must insert the shortcut graphic (shortcutCold.gif) before the link.

How to Insert an Image in RoboHelp

Importing images into RoboHelp is very intuitive: place the cursor where you want the image (one space before the shortcut text) and click Insert, Image (the icon on the toolbar that looks like a picture frame). Select the relevant file from the **Images in Project** field and click OK.

2.8 Hyperlinks and ALinks

The online Help includes two types of links, hard-coded links and ALinks.

- Hard-coded links are links that are written into the individual topics by the writers. They must not be changed by the NTRs. Hard-coded links may occur in all topics.
- ALinks are links that are displayed in a pop-up window or Topics Found dialog box, which assembles the links "on the fly" and lists them in alphabetical order. ALinks have the advantage that they can be used to include new topics added by country and regional offices. The maximum number of ALinks from core development in a window topic is 12.

We have ALinks only at the bottom of window topics and at the top of table topics.

Placement of Links

The type of link can be identified according to its position:

Name of link	Position	Example	Type
Top link	At the top of the text	Table topics linking to field topics (List of Fields in the Table).	ALinks (GATE)
		Field topics linking to table topics (The XYZ Table).	Hard-coded links (GATE)
Intertextual links	In the middle of the text	Field topics linking to other field topics. Shortcut in the first step of a task, which launches an application window.	Hard-coded links (writer)
Bottom links	After the text	Window topics linking to task, overview and table topics (Related Tasks, More Information).	ALinks (macro/writer)
		Task topics linking to other tasks and/or overviews (Related Topics).	Hard-coded links (writer)

See the descriptions of the individual topic types for details on which types of links belong in each topic type.

Note that the top links in table and field topics are inserted by GATE (the post processing program) immediately before the Help is compiled. The writer does not have to do anything. The bottom links in window topics can most easily be inserted using the Create Topics macro before the topic is written. The writer must specify which topics will be displayed. For more information, see Creating ALinks on page 44.

2.9 Creating Hyperlinks and Shortcuts

RoboHELP HTML allows you to easily insert hyperlinks into your text. The following pages describe how to:

- link to a topic within the same Help project.
- use an alternative hyperlink text.
- link to a topic in another project.
- insert a shortcut that launches a window in Microsoft Dynamics NAV.

Linking to a Topic in the Same Project

To insert a hyperlink to a topic within the same Help project:

1 Select the text that you want to make into a hyperlink. If the topic is for an object in Microsoft Dynamics NAV, the text must include the GATE code for the object. GATE will then be able to update the text.

2 Click Insert, Hyperlink (CTRL+K). The ***Hyperlink*** window appears.

3 In the list in the lower left corner of the window, select the topic that you want to link to.

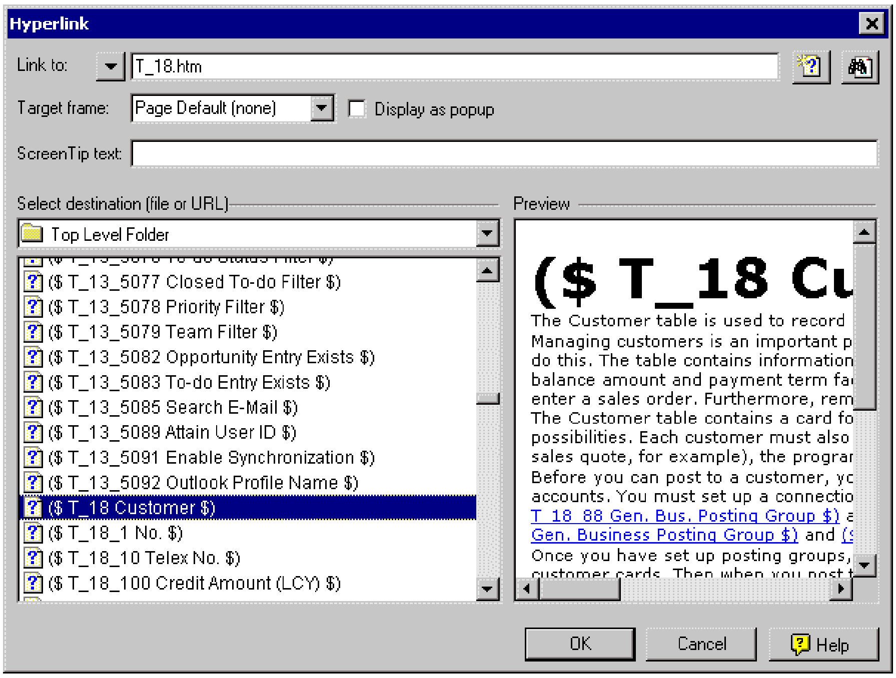
The program automatically inserts the file name in the **Link To** field.

4 Click OK.

The following example illustrates a hyperlink that uses the GATE code for the link text:

Example

You are working in the Sales & Receivables tables project. You want to create a hyperlink to the ***Customer*** table and you want the link in the compiled Help to appear as: Customer. In your current topic, you enter and select the text *($ T_18 Customer $)*. Then you fill in the ***Hyperlink*** window as follows:



Using an Alternative Text in a Hyperlink

You must use the GATE code if you want the hyperlink text to contain the name of an object in Microsoft Dynamics NAV. Otherwise, simply enter the text as you want it to appear.

Example

You are working in the Sales & Receivables tables project. You want to create a hyperlink to the ***Customer*** table and you want the link in the compiled Help to appear as: customers. You enter and select the text *customers*. Then you fill in the ***Hyperlink*** window as above.

Linking to a Topic in Another Project

Sometimes you will need to link to a topic in another project. Then you must fill in the Hyperlink window in a different manner:

1 In the **Link To** field, enter the name of the Help project that contains the topic, plus the topic file name. Use the following syntax:

```
<project name>.chm::/<topic file name>
```

2 Click OK.

3 Save your work.

Inserting a Shortcut that Launches a Window in Microsoft Dynamics NAV

The first step in a task will often need to include a shortcut that launches a window in Microsoft Dynamics NAV. To insert a shortcut, do the following:

1 Type the text of the step. "Open the <Form Name> window". For example, "Open the ($ F_5050 Contact Card $) window".

2 Insert the cursor after "the" and then insert a space.

3 Click Insert, Image. Browse to locate the shortcutCold.gif file in the Source folder for the current project and click OK.

Attention

RoboHelp may suggest the shortcutCold.gif in the last project you worked in.

4 Select the window name (including the GATE code) and then click Insert, Hyperlink (CTRL+K).

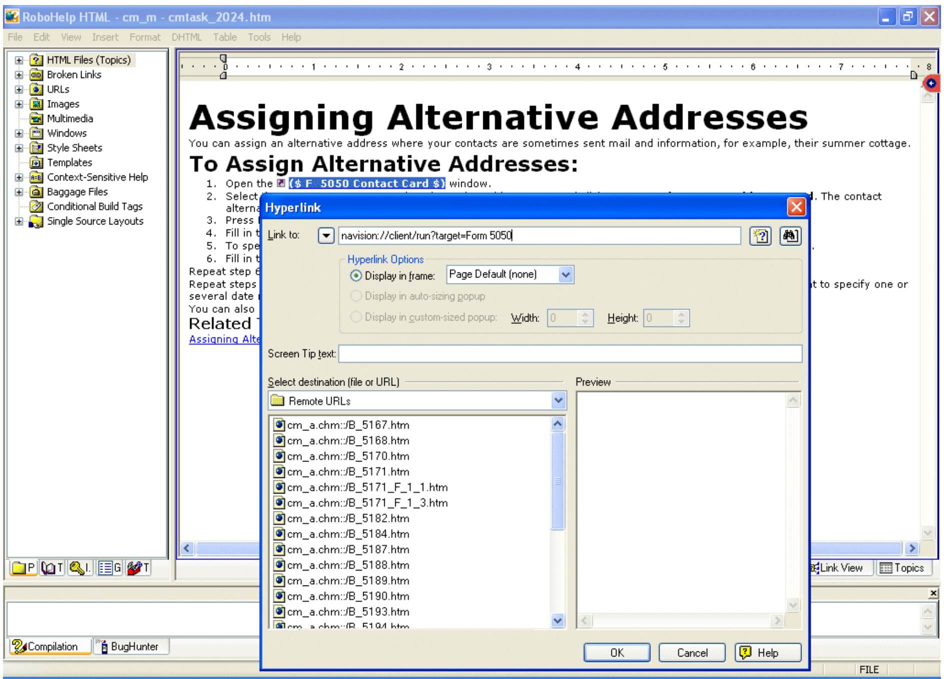
5 In the **Link to** field, insert one of the following:

Type of window	Link
Form	*navision://client/run?target=Form 123*
Report or Batch Job Request	*navision://client/run?target=Report 123&requestform=1*

6 Replace 123 with the number of the form, report or batch job and then click OK.

Example

The following picture shows how you would create a shortcut to Form 5050, the Contact Card:



7 Format the link as Emphasize.Name.

8 To test the shortcut: click the View Selected Item button (CTRL+W). Click the link and ensure that it opens the correct window in Microsoft Dynamics NAV.

2.10 Creating ALinks

When you create window topics, you must use ALinks for the related topics links. These are the only ALinks you need to worry about. All other ALinks in our Help are generated automatically by GATE.

Creating ALinks in window topics involves two steps:

1 Inserting an ALink control on the window topic where the link should be displayed. This is most easily done with the Create Topics macro. (See Using the Create Topics Macro on page 26.)

2 Assigning ALink names (keywords) to the related tasks, overviews and tables.

Assigning ALink Names to Related Topics

The Create Topics macro inserts two ALink controls in each form topic. One link has the text Related Tasks and the keyword <the context string of the form>_TASKS. The other link has the text More Information and the keyword <the context string of the form>_OVERVIEWS.

For example, the links on Form 123 would have the keywords F_123_TASKS and F_123_OVERVIEWS, respectively.

The tasks that should be displayed when the Related Tasks link on F_123 is clicked must be assigned the ALink name F_123_TASKS. The table topic and overviews that should be displayed when the More Information link is clicked must be assigned the ALink name F_123_OVERVIEWS.

Attention

Remember that every form should have a table topic included as “More Information.” You must assign the OVERVIEWS keyword to the table that underlies the form.

Assigning ALink Names to Topics

To assign ALink names to topics, follow this procedure:

1 In RoboHelp, open the Help project that contains the target topics (the topics that should be displayed when the link is clicked).

2 In the left pane, click the Index tab.

3 Select See also from the drop-down menu at the top-left corner of the pane.

4 In the field to the right, enter the ALink name (for example: F_123_TASKS) and click Add.

5 In the right pane, click the Topics tab.

6 Select all of the topics that you want to assign the ALink name (for example, all of the task topics that are related to Form 123) and drag them to the bottom of the left pane.

The ALink name is now assigned to the topics.

2.11 Using Aliases

You can use an alias when you want to use the same Help topic for more than one object in the program. For example, we do not always write a topic specifically for items on the main menu. Instead, we define that a relevant table or report topic should be displayed when the user asks for context-sensitive Help on the item. This is the case with the menu item Chart of Accounts on the General Ledger menu. When the user clicks this item with the Help icon, C/SIDE looks for a topic with the context string F_332_4. There is an alias that tells C/SIDE to display the topic T_15.htm (***General Ledger*** table) instead.

Creating an Alias

You can only create an alias in the project containing the target topic (the topic that is to be displayed). To create an alias, follow this procedure in RoboHELP HTML:

1 Open the Help project containing the existing Help topic.

2 In the left pane, click the ***Project*** tab. Open the Context Sensitive Help folder and double-click the Aliases icon. The ***Edit Map IDs*** window appears.

3 In the **Topic ID** field, enter the context string of the object for which there is no Help.

4 RoboHELP automatically inserts *(Auto)* in the **Map #** field.

5 In the **Map File** field, select <*project name*>.*h*. (If this file doesn't exist, create it by clicking the button to the right of the **Map File** field, entering <*project name*>.*h* and clicking OK.)

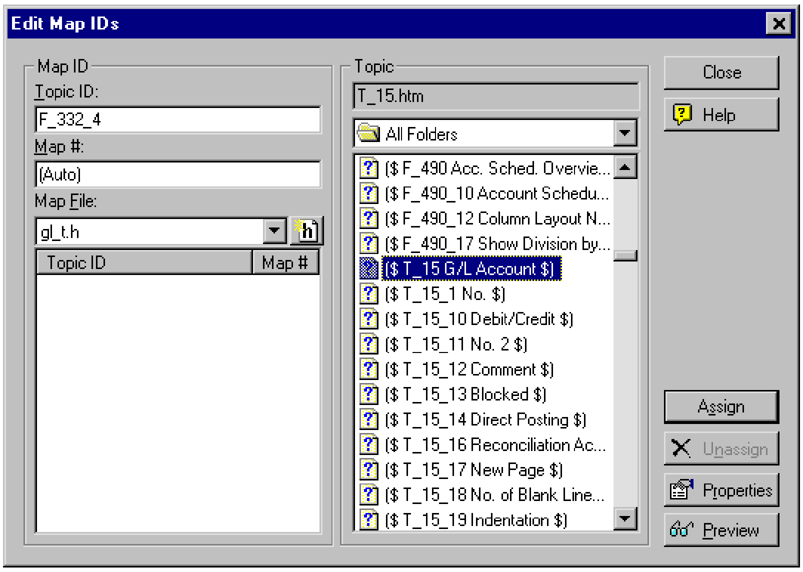
6 In the list of topics on the right side of the window, select the topic that you want to use for the alias.

7 Click Assign.

8 Save your work.

Example

The window below shows how you would create an alias for the Chart of Accounts menu item on the main menu:



Internal Tables

Tables that are used internally by the program are not seen by the end user. Therefore, we do not write specific Help for these tables. Instead, we have one topic stating that there is no Help for internally used tables. If you have an internally used table in your project, you must alias the table to the topic Internal_Tables.htm in the use_m Help project. (Open the use_m Help project to do this.)

Editing an Alias

Sometimes you may need to change an existing alias. To edit an alias in RoboHELP HTML, follow this procedure:

1 In RoboHELP HTML's left pane, click the ***Project*** tab. Open the Context Sensitive Help folder and double-click the Aliases icon. The ***Edit Map IDs*** window appears.

2 In the **Map File** field, select <*projectname*>.*h*.

3 Select the incorrect alias from the list in the bottom-left corner of the window. (Point at the selection with the cursor. The tool tip displays the file name of the file that the topic ID is aliased to.)

4 In the list of topics on the right side of the window, select the topic that you want to use for the alias.

5 Click Assign.

6 Save your work.

The correct topic has now been assigned to the topic ID.

Chapter 3

Creating the Table of Contents and Index

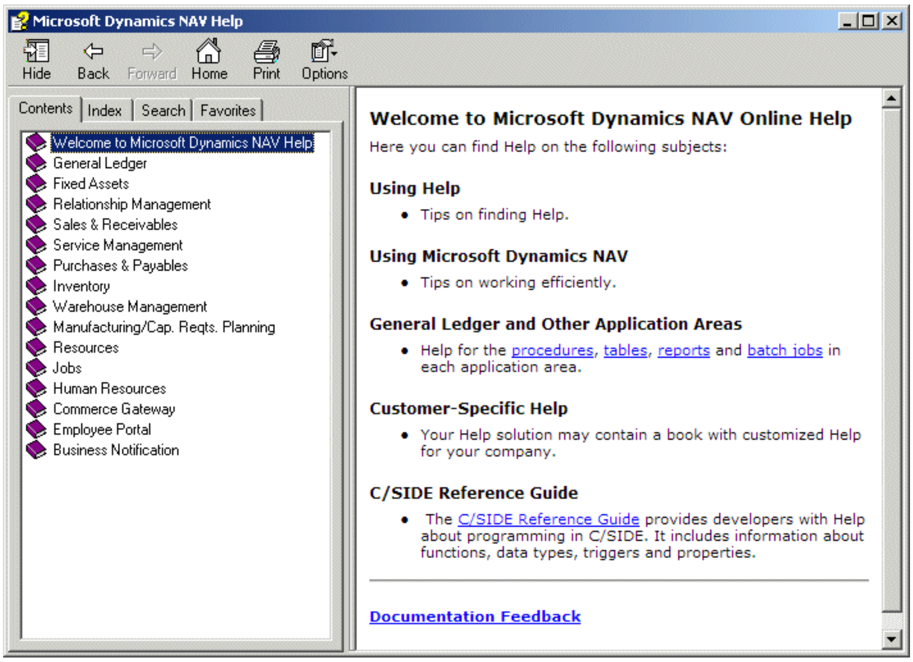
This chapter contains guidelines and procedures for creating a table of contents and an index for the online Help.

The chapter is divided into the following sections:

- The Online Help Table of Contents
- Tasks and Overviews in the Table of Contents
- The Online Help Index
- Words That Automatically Become Keywords
- Guidelines for Choosing Main Keywords
- Indexing Facilities in RoboHelp HTML
- Guidelines for Choosing Subentries
- Generating Synonyms
- Indexing Checklist

3.1 The Online Help Table of Contents

The table of contents consists of six areas of information. This is what the user sees when the online Help is opened from the Microsoft Dynamics NAV Menu:



The table of contents contains the following:

- Welcome to Microsoft Dynamics NAV Help
- Using Help and Using Microsoft Dynamics NAV Books
- Customized Help Book (optional, not visible in the picture above)
- Application Area Books.

Each of these is described below.

Welcome to Microsoft Dynamics NAV Help

This topic is an introduction to the online Help. It contains a description of the different elements in the Help and explains what the user can find in the different main areas. The topic is intended for the novice user and for the first time user of the Help. The topic is automatically displayed when the user activates the Help from the Microsoft Dynamics NAV Menu.

Using Help and Using Microsoft Dynamics NAV

These two books contain topics from the use_m Help project.

In the Using Help book, the novice user can get information on how to use the Help system. Using Help describes how to navigate in the Help system and where to find different types of information.

Using Microsoft Dynamics NAV provides the user with instructions for generic tasks that can be used across application areas. The user can get Help for generic functionality to make it possible to manoeuvre around in Microsoft Dynamics NAV, to view different kinds of information and to enter data.

If there is a sufficient number of topics, they will be grouped in sub-books by subject.

Customized Help

A book containing customer-specific Help can be inserted after the Using Microsoft Dynamics NAV book. The Microsoft Dynamics NAV certified partner or the customer can insert a Help project containing Help topics related to the specific customer solution. The title should be customized so that it fits the customer needs, for example "Cronus Help".

For further information, see Maintaining the Master Project on page 100.

Application Areas

The individual application areas are listed directly in the table of contents as separate books. Each book contains task and overview topics (which may be grouped according to their contents, for example, Purchase Invoicing) and a sublevel book called Tables, Reports and Batch Jobs.

All topics for tables, reports and batch jobs must be added to the table of contents. Topics for fields, windows, and examples are not included in the table of contents.

For each task or overview topic, you must consider whether or not to include the topic in the table of contents. The following section gives guidelines as to how to include task and overview topics in the table of contents.

3.2 Tasks and Overviews in the Table of Contents

The table of contents should help the user to understand the logical structure of the Help system. The table of contents should not include every topic in the Help. Instead, it should lead the user to the more general topics on a subject. From there, the user should be able to access more specific topics.

Microsoft's guidelines

Microsoft's guidelines for tables of contents in online Help state the following:

- "You do not have to include all topics on the Contents page. Some topics, especially advanced or seldom-used topics, can be made available as links from other topics or through the Index and Search tabs. This keeps the table of contents simpler for users. Topics that are not essential should be removed from the table of contents. For example, if the subject is backing up a database, you might move topics about networking out of the table of contents." Reference from "Microsoft User Experience - Official Guidelines for User Interface, Developers and Designers", Microsoft Professional Editions, Microsoft Press.
- There should be a maximum of 3 levels. (Note that each "_m" Help project starts on the second level.)

First of all, if there is a general task and some more specific versions of the same task, only the general one should be in the table of contents. In addition, if there is a series of tasks that are usually completed in a specific order, only include the first/main task. That topic should then include links to the other topics. This can also be applied in the case of Setting Up XYZ Codes and Assigning XYZ Codes, for example. It is sufficient to include only the setting up task in the table of contents. (The user may not even understand the distinction - assigning the codes is part of setting up the data, you might say.) But make sure there is a link from the Setting Up task to the Assigning task.

It is not necessary for every topic to be one link away from the table of contents. Note that according to Microsoft's guidelines, some topics may only be accessible from another "angle" - like the index.

Applying the Guidelines

When you work with a Help project, you only see the table of contents for the topics in that project. However, you must keep in mind how it will appear when it is merged with the rest of the Help.

The Microsoft Dynamics NAV Help includes a book for each application area. Each application area book includes the task and overview project (for example sr_m or pp_m) and the *_t and *_r (or *_a) projects. The latter are grouped in a book called Tables, Reports and Batch Jobs that includes all of the objects in alphabetical order.

When you work with an *_m project, remember, that level 1 in your project is level 2 in the complete table of contents. So your goal should be to only have books on the top level of your project.

Related tasks and overviews are grouped into books. The books should be in a logical order. The topics should also appear in a logical order (as opposed to alphabetical order). For example: Setting Up X, Using X, Setting Up Y, Using Y.

Working with the Table of Contents in RoboHelp HTML

RoboHelp makes it easy to work with the table of contents. To begin with, click the ToC tab in the left pane and the Topics tab in the right pane. You can select one or more topics from the topics list in the right pane and drag and drop them into the table of contents in the left pane. Click the New Book button (an open book with a yellow star), to create a book in the table of contents. In the **Type** field, select *Book With no Links*. Use the green arrow buttons to move a book or topic up or down, or indent it left or right.

See also Adding a Topic to the Table of Contents on page 31.

Changing Titles in the Table of Contents

While you are working with the table of contents, you may find out that some of the topic titles have to be changed. If you change a title in the table of contents, you must remember to change:

·The topic title.

·The topic heading (and maybe heading 2).

·Any links to the topic (RoboHELP's "Link View" makes it easy to find the links - see below).

Using RoboHELP's Link View

To update all of the links to a topic (Topic A):

1 Open Topic A in WYSIWYG, and check that the heading matches the title.

2 Right-click anywhere in the topic, and click Show Topic Links. The Link View tab appears with Topic A in the center. On the left are topics with links to topic A. You must edit each of them.

3 To edit a topic in the Links View pane, point at the topic in the Links View, right click and then click Edit. Find the link and correct the text. (You can type directly on the page – you don't have to use the Hyperlink dialog box to change the text.) When you are finished with that topic, click the Link View tab and the links to topic A are displayed again.

3.3 The Online Help Index

The index is the most common place users look when they want to find information online. It is a tool for information retrieval. A good index allows users to see the scope and content of online Help and to navigate through information. The index should enable fast, random access to the topics in the Help.

The online Help index is made up of a list of keywords or index entries that are associated with topics. The index includes two levels of keywords: main entries and subentries.

The basic principles of indexing apply to both online documents and printed manuals. However, in printed indexes you don't usually include a page reference (or locator) by a main entry that has subentries, but in the online Help index we have to. Another difference is that a computer screen can only display about one-third as much as a printed page; we have to consider readability and ease-of-use when creating the online index.

There are two ways of creating the keywords in the index. Some keywords are created automatically when the Help project is run through GATE. Other keywords must be set up manually. In this chapter, you can read about which words become keywords automatically and which do not. You can also read about what to bear in mind when choosing main entries and subentries, about the rules you must follow and about how to create keywords manually.

Issues to Consider in the Compiled Index

Try to keep in mind how the master index will look when compiled with all of the projects that make up the base Help. Get a copy of the daily build and check the index to see the keywords that are already there. In addition, remember that in the finished compiled Help:

- The same keyword shouldn't point to more than about nine topics, preferably fewer (otherwise the user is overwhelmed by a list of topics to choose from).
- The number of subentries should be restricted (to less than about 15). This is because too many subentries will fill the pane and the user loses the overview of the main entry.

3.4 Words That Automatically Become Keywords

GATE automatically creates keyword entries for:

- Tables
- Reports
- Batch jobs
- System windows

A keyword is also created automatically for a Help topic if the topic heading includes a context string starting with D_, S_, MC_, DA_, P_, A_ and U_.

The keyword entry in the finalized index is exactly the same as the topic title (but without the GATE code). You can also create additional, alternative keywords for these topics.

Words That Do Not Automatically Become Keywords

The following do not automatically become keywords:

- Help topics that do not have a context string in the topic heading. These are the task and overview topics.
- Help topics whose context strings begin with F_ . This means that keyword entries are not created automatically for most windows. (But keyword entries are created for system windows.)
- Field help topics do not receive keywords automatically.

This means that you manually need to create index entries for task and overview topics. Do not create keywords for windows, fields, or examples.

Setting Up an Index Stop List

You can prevent keywords from automatically being added to a topic by GATE by setting up an index Stop List. To set up the index Stop List, use the following procedure:

1. Using Windows Explorer, browse to your project's Source folder.
2. Find the file named IndexStopList.txt or create a new file with this name.
3. In RoboHelp HTML's left pane, click the project tab and right-click the Baggage Files folder in the project explorer. Select New Baggage File.
4. In the Select Baggage File dialog box, type IndexStopList.txt and click Open. The index Stop List file now appears in the Baggage Files folder.

To add an entry to the file, double-click the file in the project explorer. The file opens with your default text editor. Type the context string of the keyword that you do not want to add automatically. Press Enter, and close the index stop list file. For example, to instruct GATE not to add the keyword Customer to the index, you create the following entry:

```
T_18
```

Each entry must be entered on a new line.

3.5 Guidelines for Choosing Main Keywords

Choosing the keywords for each topic is the most important part of developing the index. Keywords determine whether users can quickly find the information they need or not. There is no magic formula for deciding what keywords to use, you just have to think like a user. In addition, if you follow these rules when you create keyword entries manually, the index will be consistent and easy to understand:

Identifying Keywords

- Create keywords based on the important words in topic headings, subheadings and in the body text.
- Index users' questions. Users check indexes for terms based on their questions (which may not always match the terminology of the product). Don't include the actual question, rather include an entry that represents the concept behind the question.
- If a keyword has more than one meaning (because, for example, it is a function that is found in more than one part of the application), you must create keyword entries that explain which context the meaning applies to.
- Avoid starting the index entry with words that are in the **Words to Avoid in Main Entries** list (see page 55). In most cases, do not start an entry with a verb such as "using" or "changing." The user is more likely to be looking for the thing that is being used or changed. Use your judgement. For example, if a topic is about a report and how to print it, use the report name as the keyword. If, on the other hand, you have a topic about printing in general make sure you have "printing" as a keyword for that topic.
- Use the Smart Index wizard in RoboHELP (see page 60) to help you find synonyms and keywords (but you need to be selective about accepting the suggestions).

Keyword Style

- Use two levels of index entries (main entries and subentries).
- Keywords should be written in lowercase (except for keywords that are created automatically, for example table names, names of batch jobs and reports, and so on, and reversed versions of these names).
- Nouns should be written in the indefinite, singular form; for example, "address," not "the address" or "addresses."
- Use the verb in the gerund form (ending with -ing) but preferably include it as a subentry. (See the list of **Words to Avoid in Main Entries** on page 55.)
- There should not be more than one entry for the same word in different forms, for example singular and plural, or two entries that are almost the same. For example, the conversion program will create an entry "General Journal," so you should not create a manual entry "General Ledger; Journal."
- Use a semicolon when creating reversed entries. For example, "service charge" can be entered as "charge;service."
- Avoid unnecessary prepositions (only use prepositions in subentries).
- Don't begin an index entry with articles, conjunctions or words such as "about," "another," "how," "what," "where," and so on.

Level of Detail

- Check that the main entries are relevant, specific and comprehensive. They should be meaningful, something the user is looking for.
- Create at least one index entry for all task and overview topics. The number of entries for a given type of information should reflect its importance in the Help file

and the complexity of the topic. For example, overview topics may have a larger number of entries than task topics.

- Aim for between one and five keyword entries per task and overview topic, but beware of over-indexing. You should not index passing references or words and phrases that are more specific than the topic itself.
- For many entries that consist of more than one word, a second entry should be created with the word order inverted, because the user might search for the last word in a phrase. This means, for example, that "General Journal" can also be found as "Journal; General."Reversed keyword entries must be created manually. Do not use commas when you create a main entry, use a semicolon instead. (If you use a comma in a main keyword, RoboHELP will interpret the second word as a subentry.)
- You must consider whether it is necessary to create additional entries to supplement those created automatically by the conversion program (for example, "printout" in addition to "report" or "post more" in addition to "batch post."
- Include synonyms for important terms and concepts.
- Include important, relevant subentries as main entries so that the user can look them up.

Words to Avoid in Main Entries

Try to avoid starting your main index entry with the following words. This is because we want to avoid a large number of consecutive entries starting with the same word.

Words to avoid at the beginning of main entries:

assigning

canceling

changing

copying

creating

deleting

maintaining

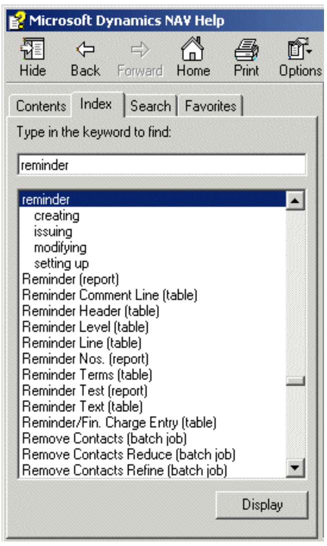
modifying

posting

printing

setting up

Instead, reverse the entry so that you start with the thing that you are adding, deleting, and so on. For example, "reminder; canceling."Alternatively, you can include these words as subentries. For example:



If your topic really is about printing (for example) and only links to one or two topics about printing in general (but has no subentries), you can use "printing" as a main entry keyword. But remember that we want to avoid having a word like printing as a main entry with over 50 subentries.

Assigning Topics to Main Entries

There should be a logical reason behind the topics that are displayed when a main index entry (that has subentries) is selected. (In printed indexes, you don't usually include a page reference by the main entry, but in the Help index we have to.) Follow these rules to ensure consistency:

- Assign a main entry keyword (that has subentries) to the topic with the most general information, or to the topic that users are most likely to be looking for if they click on the main entry (rather than assigning all the topics that are assigned to the subentries below).
- Check that topics attached to a main entry are also assigned to a subentry below this main entry (that is, don't only assign topics to a main entry if the main entry has subentries). This is because the user might overlook the topics assigned to the main entry.
- Ensure that the exact same topics are linked to both the keyword and its reversed entry. For example, if the keyword "network connection" is linked to seven topics, the keyword "connection;network" should also be linked to the same seven topics.

3.6 Indexing Facilities in RoboHelp HTML

This section describes how to use RoboHelp HTML to make the index.

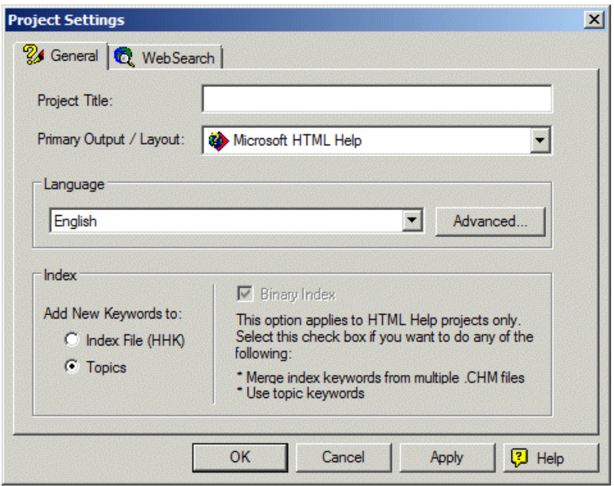
Where to Store Keywords

Index keywords can be stored in the topic (.htm) files or in the index (.hhk) files. To facilitate localization, we would like to store keywords in the topic files. Before you create index entries, check that the project is set up to store keywords in the topic file.

To ensure that keywords are stored in the topic file, follow this procedure:

1 Open the project in RoboHELP.

2 Click File, Project Settings.



3 Under **Add New Keywords To** select *Topics*.

4 Click OK.

Creating Keywords for Online Help

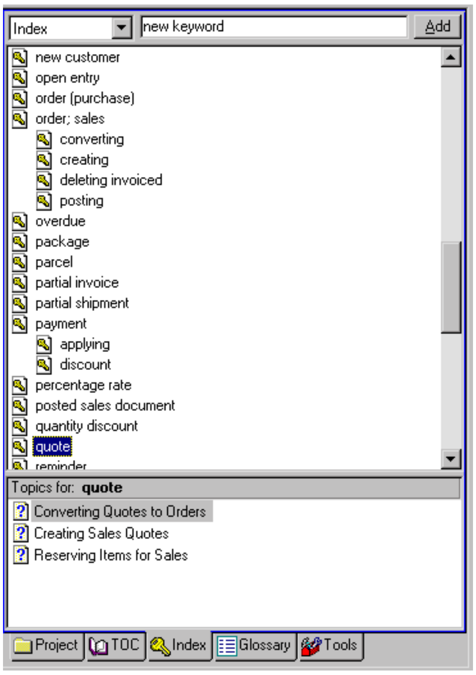
You can create keywords at the same time as you create a new topic. There are several ways to create keywords. One method is to enter keywords into the index manually and associate topics to them. Using this method, you can maintain a good overview of your index as you add entries.

To add a keyword and link it to an existing topic, follow this procedure:

1 In the left pane of RoboHELP, click the ***Index*** tab.

2 In the field in the upper-left corner, select ***Index***.

3 In the adjacent field, enter the new keyword or phrase.



4 Click **Add**. The keyword will be displayed in the keyword pane. It appears in bold to indicate that it is not yet linked to any topics.

To link a topic to the keyword:

5 Ensure that the keyword you want to link a topic to is selected.

6 In the right pane of RoboHELP, click the ***Topics*** tab.

7 Select the topic(s) you want to link to this keyword. To select multiple topics, press and hold CTRL as you click each one.

8 Drag and drop the topic(s) into the **Topics For** pane.

A white icon beside a topic means that it has not been linked to any keywords and a blue icon means that the topic has at least one keyword linked to it in the index.

To modify a keyword, right-click the keyword and click *Rename*. Type the new keyword name and press ENTER. To delete a keyword, right-click the keyword and click Delete.

3.7 Guidelines for Choosing Subentries

When you create subentries, follow the same principles as for creating main entries. In addition to this, follow these rules:

- The number of subentries should be restricted to 15 or fewer (ideally seven or fewer). This is because in the finished total compiled help, too many subentries will fill the pane and the user will lose the overview of the main entry.
- Use subentries when a main entry has too many topic references (more than about four or five). However, if a main entry only has one subentry, eliminate the subentry and include the link in the main entry.
- If the term is important, you should also include a subentry as a main entry.
- Use subentries to avoid consecutive entries starting with the same word or phrase. However, be careful of combining entries where the words are the same but their meaning is not.
- Include synonyms as subentries as well as main entries.
- Don’t use subentries if all the subentries reference the same topic.

Creating Subentries for Online Help

To add a subentry to an existing main entry in RoboHELP, follow this procedure:

1. In the left pane of RoboHELP, click the ***Index*** tab.
2. Right-click the keyword that you want to add a subentry to, and click New, Index Subkeyword.
3. You can then enter your subentry in the highlighted field.

3.8 Generating Synonyms

We can improve the index by including synonyms that users are likely to think of. This will provide the user with a greater opportunity to find the information they need, even if they don't know our terminology. RoboHELP offers a Smart Index wizard that can help you find synonyms (and keywords). To use the wizard:

1. In the right pane of RoboHELP, click the ***Topics*** tab.
2. Select the topic whose keywords you want to work with. Right-click and select *Smart Index Topic*. The ***Smart Index Wizard*** window appears.
3. Under **Select search criteria**, select *Find new and existing index keywords*. Under **Search for index keywords in**, select *Topic title and topic text*.
4. Ensure that there is no check mark in the **Capitalize all new keywords** field. Click Next.
5. In the pane containing suggested keywords, select the keyword that you want to create a synonym for. Click Options, Synonyms. The ***Synonyms*** window appears, displaying suggested synonyms for the selected keyword.
6. If you decide to include one of these synonyms in the index, select the word and click Add to Topic.

3.9 Indexing Checklist

Here is a summary of things to remember when creating index entries for online Help.

Identifying Keywords	✔
Choose keywords based on important words in topic headings, subheadings and body text.	
Don't assign the same keyword to more than about nine topics.	
If a keyword has more than one meaning, create keyword entries that explain the context the meaning applies to.	
Try to think like a user.	
Avoid starting a main entry with words in the **Words to Avoid in Main Entries** list.	
Use RoboHELP's Smart Index wizard to help you find synonyms.	

Level of Detail	✔
Create at least one index entry for all task and overview topics.	
Create entries to supplement the ones automatically created by GATE.	
Create reversed entries that reference the same topics as the original keyword.	
Include synonyms.	
Main entries should be relevant, specific and comprehensive.	
Include relevant subentries as main entries.	

Keyword Style	✔
Use two levels of index entries (main entries and subentries).	
Use lowercase entries (except with references to parts of the program that are usually capitalized).	
Use nouns in the indefinite, singular form.	
Use the verb in the gerund form (ending with -ing). Preferably include it as a subentry rather than a main entry.	
Check for non-significant differences in capitalization or plurals that cause separate entries to appear. Either make the entries identical or make the difference explicit in a subentry.	
Avoid unnecessary prepositions.	

Keyword Style	✔
Don’t begin an index entry with articles, conjunctions or words such as "about, " "another, " "how," "what, " and so on.	
Avoid consecutive entries starting with the same word or phrase.	

Subentries	✔
Have fewer than 15 subentries (ideally seven or less).	
Use when a main entry has too many topic references.	
Don’t have only one subentry for a main entry.	
Include subentries as main entries where appropriate.	
Don’t use subentries if they all reference the same topic.	

Chapter 4

Types of Help Topics

This chapter describes guidelines for the content of Microsoft Dynamics NAV Help. The most important principle on which the guidelines are based is of keeping various information types separate. There are three basic types of information: procedural, conceptual and reference. The user should be able to see easily which type of information a Help topic provides.

This chapter contains guidelines for creating the various types of Help topics.

The chapter is divided into the following sections:

- Principles of Online Help
- Types of Help Topics
- Table Topics
- Field Topics
- Window Topics
- Task Topics
- Overview Topics
- Business Process Topics
- Example Topics

4.1 Principles of Online Help

The Microsoft Dynamics NAV online Help consists mainly of reference topics for fields, tables, reports and batch jobs, as well as procedural, contextual and conceptual Help.

Principles of Online Help

The general principles that have been applied in developing our Help standards are:

Windows Standard

Our Help standards comply with Microsoft standards. The overall goal is simplicity, relevance and efficiency. Simplicity means a simple structure and simple access. Relevance means that only information relevant to the users' needs is documented and that it is displayed at the right moment. To be efficient, the Help must focus on the users' work and not on the computer program.

Amendable

Microsoft partners and individual customers may add their own topics into our Help system. This is practical for the users because it makes it possible to have user-specific Help developed to reflect the customers' way of working with the system. However, to facilitate this, we must ensure a flexible and visible structure for the system.

Minimalism

If there are alternative ways of achieving a goal, we will only document one way to achieve it. Do not describe what is not problematic to the users. Avoid redundancy. It is not necessary to document everything.

Reading to Learn versus Reading to Do

End users typically do not consult Help systems to read about the program and how they will proceed with a task before they embark on a new task. Instead, they explore the program on their own and try to solve their tasks, and only if they encounter difficulties will they consult the Help system. When they do so, they will typically scan (not read) the information and quickly jump back to their tasks again. To support this "reading-to-do" behavior, we develop task topics that are easily accessible and allow the user to easily find the information they need. These topics focus on the tasks to be solved, and avoid extraneous information.

Partners and super users, however, need more conceptual information and more in-depth reference material. To support their "reading-to-learn" behavior, we have changed the online Help guidelines for content, as described below.

Changes from Microsoft Dynamics NAV 3.0 to 5.0

The standards for Microsoft Dynamics NAV online Help have evolved from 3.0 to 5.0 in that we focus more on the advanced user and less on the novice user. (In 5.0, these new standards have been applied to new topics, and not to existing topics.) The result is that we include less elementary information, and we no longer emphasize brevity to the same extent as before. Instead, we try to gather more of the information a user needs for a given area. We have done this by introducing longer business process topics that provide more background information and a better overview of sequential tasks.

4.2 Types of Help Topics

One of the key features of Microsoft Dynamics NAV Help is the clear distinction between three types of information:

- procedural (task topics)
- conceptual (overview topics)
- descriptive/reference (table, field and window topics)

Note

Business process topics may combine two or more types of information.

You should always assume that the user is familiar with basic functionality – remember that a lot of the basic information can be found under Using Microsoft Dynamics NAV.

The online Help for Microsoft Dynamics NAV contains the following types of Help:

- table topics
- field topics
- window topics
- task topics
- overview topics
- business process topics
- example topics
- batch job and report topics

The following sections in this chapter describe all of the topic types except topics for batch jobs and reports.

4.3 Table Topics

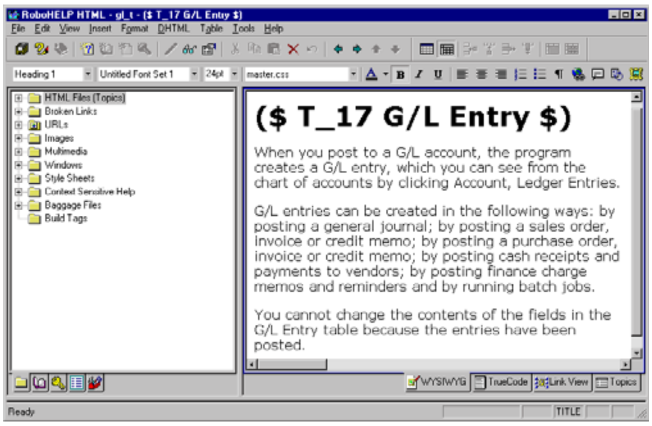


Table topics can be accessed from the table of contents or index, from a link in a window or field topic, or occasionally from a task or overview topic. They contain descriptive and reference information.

Elements of Table Topics

A table topic does not describe how to do something. It merely describes the characteristics of the table.

The topic includes:

Title:	Name of the table. You must use the GATE code.	(The GATE tool will fill in the word "Table")
Top Link:	List of fields. Do not insert manually!	(This is an ALink inserted by the GATE tool.)
Text:	Concise text describing: what the table includes, any mandatory fields (if it is not self-evident or if there is more than one primary key, for example), dependencies, source of the data, and maybe what the table is used for.	
Intertextual links:	Other relevant table or field topics.	
Bottom links:	Heading = Related Topics (Heading 4) If necessary, you may link to all topic types, except Window topics. However, only link to topics that elaborate upon the subjects treated in the table topic.	

Characteristics of Table Topics

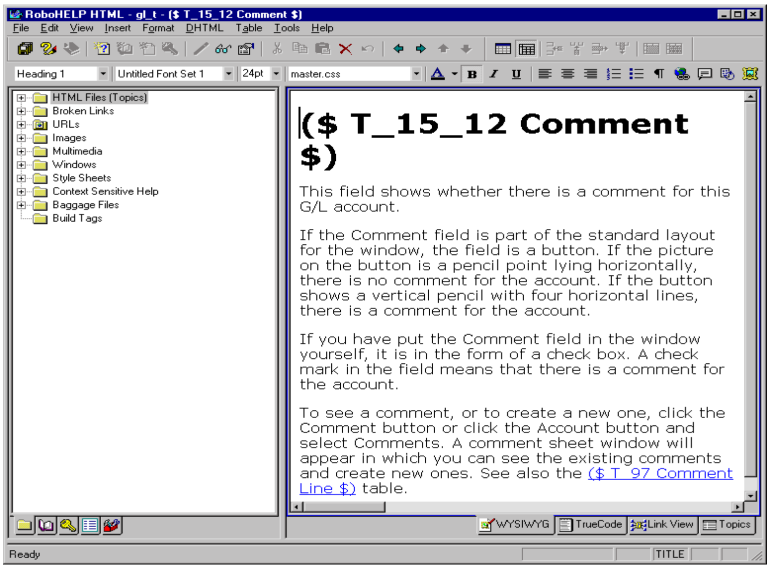
The following are things to keep in mind when you write table topics:

- Table topics are mainly meant for developers and super users to read and consult, and the intention is to describe the program so that they will understand the structure.
- These topics should be descriptive, not procedural. Do not use the imperative verb form. Avoid any sentences that instruct user action, such as "to see a list of ..., click the AssistButton to the right of the field." These types of sentences should be restricted to task topics.
- Keep in mind that these topics are for technical users: skip any elementary information.
- You must assign to the table topic one ALink keyword for each form that is based on the table. Then when the user clicks the "More Information" link in the window topic, the table topic will be included in the list of topics. See also Creating ALinks on page 44.

Index and Table of Contents

The table topics are included in a special section in the table of contents and are also included in the index.

4.4 Field Topics



Field topics can be accessed as context-sensitive Help from a field, or from a table topic, where there is a link to all fields in the table. They contain descriptive and reference information.

Coverage

There are field topics for most fields. However, do not write a topic for a field if the purpose of the field and what it should contain are self-evident.

Elements of Field Topics

A field topic includes:

Title:	Name of the field. You must use the GATE code.	(The GATE tool will fill in the word "Field".)
Top Link:	Reference to the table. Do not insert manually!	(Filled in by GATE tool.)
Text:	What does this field contain?	(Relevant to all users.)
	Where does the data come from?	(Especially relevant to technical users.)
	Any restrictions on the field, such as special formats (number of characters, digits, percentage, formula), automatic calculation or updating, dependencies on other fields or tables.	
Intertextual links:	In fields with dependencies on other fields, there may also be inter-textual links to these field topics.	

Characteristics of Field Topics

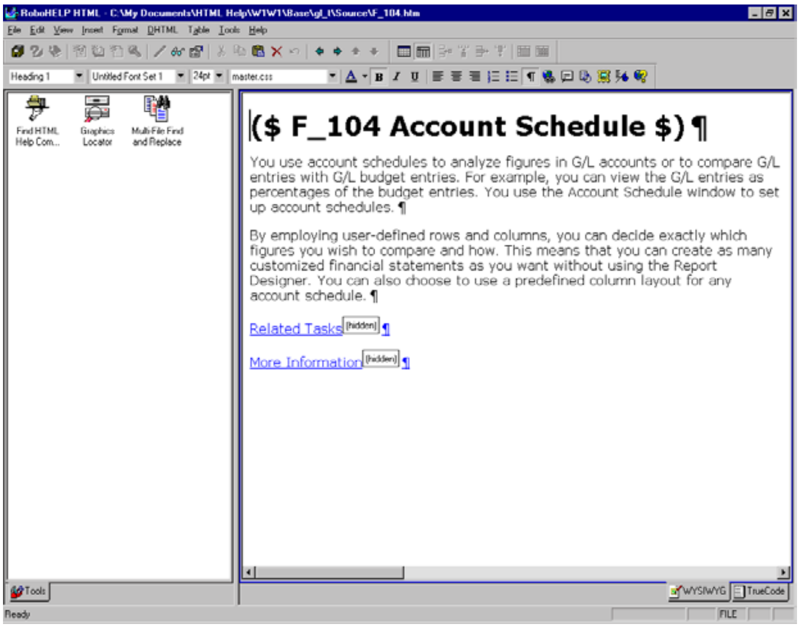
The following are things to keep in mind when you write field topics:

- Precise description of the purpose of the field, what the field contains and where the data comes from.
- Avoid mentioning user action in the field topic. Do not write: "In this field you can enter..." - because the field Help is also displayed when the user clicks on a field at a point where it is not editable. Instead use "This field contains...."
- Also avoid any sentences that instruct user action, such as " to see a list of ...., click the AssistButton to the right of the field". These types of sentences should be restricted to task topics.

Index and Table of Contents

Field topics are not included in the index nor in the table of contents.

4.5 Window Topics



Window topics can only be accessed as context-sensitive Help, and contain descriptive and reference information.

Coverage

There is a window topic for every window, except for message boxes without a Help button.

Note

If a window consists of a form with several tabs, it is considered as one window, because the window shows different aspects of the same form. Consequently, only one window topic has to be written for this form. In the same way, one window that is composed of several forms, for example header and lines, only requires one window topic.

Elements of Window Topics

The topic briefly answers the questions "What is this Window?" and "What should I use it for?"

The topic includes:

- The title - the name of the form, for example Prospect Card (the GATE tool fills in the word "Window").
- The text - the topic must be as short as possible. A maximum of two paragraphs is ideal.
- ALinks - use the Create Topics macro to insert these - see the following.

Links from the Window Topic

Bottom links (ALinks to be displayed in a pop-up window) are included in the window topic to guide the user into more specific, relevant Help:

- Related Tasks - task topics (if any).
- More Information - overview topics (if any) and table topics (if any)

Attention

The ALinks are difficult to create manually. Instead, use the Create Topics Macro to set up empty .htm files for your window topics. See Using the Create Topics Macro on page 26. See also Hyperlinks and ALinks on page 39 and Creating ALinks on page 44.

Characteristics of Window Topics

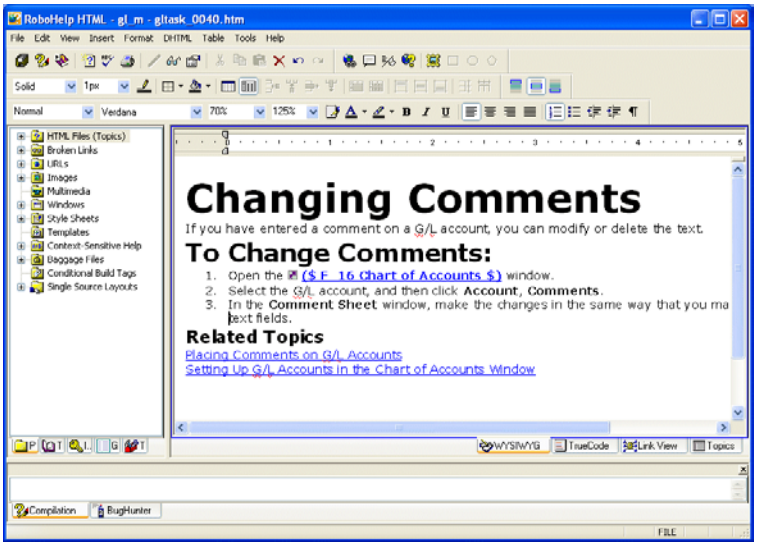
The following are things to keep in mind when you write window topics:

- The window topic is designed to guide the user to more specific information. It should be short - one, two or maximum three paragraphs - saying what the window is and what it is used for. Because the window topic is designed to guide the user to other Help, it is important that all the links at the bottom of the topic are visible without scrolling.
- A window topic should start with a brief description of what the user can use the window for (for example viewing, entering, posting). Then there should be, if necessary, a brief definition of the thing in the window (for example chart of accounts, contact, BOM) of no more than one sentence.
- There should be no procedural information. There should also not be any information that is covered in the links.
- A window topic should not introduce a concept that requires further explanation if there is not a link to the explanation.
- Do not use name or input tags in window Help. A heading 2 should not be necessary, otherwise the topic is too long.

Index and Table of Contents

Window topics are not included in the index nor in the table of contents.

4.6 Task Topics



Task topics contain procedural information. In Microsoft Dynamics NAV 5.0, we have introduced business process topics, which are similar to task topics, but with less restrictive guidelines. Business process topics can be longer than task topics, and they can combine procedural and conceptual information, and/or cover a series of tasks in one topic.

The user may access a task or business process topic from a window topic, by searching/looking it up in the table of contents or the index, or they may access a task or business process topic using links from overview, task or business process topics.

Coverage (Tasks & Business Processes)

A given procedure can appear in either a task topic or a business process topic, but not both. We do not need to cover all procedures.

When choosing what to cover in tasks and business processes, give high priority according to these criteria:

- Key business processes.
- Complex processes
- Critical processes (for example, changes in data may result in data loss)
- Infrequent processes
- Long processes where an end-user might need a customized, printed check list

Give low priority to procedures that satisfy these criteria:

- Simple, daily processes
- Processes that are self-explanatory or intuitive.

Elements of Task Topics

A task topic includes the following elements in the following order (bold indicates mandatory components):

Topic Title and Heading 1	Gerund and plural, for example "Creating Customers from Prospects". The title must be context-independent. For example, "Sales" or "Purchase" may need to be included.
Conceptual element	Short description of purpose of task and why you perform it, 1-2 sentences. The explanation must be context-independent.
Warning	If necessary.
Prerequisites	If necessary. You may insert an inter-textual link here.
Subheading	Infinitive followed by colon, for example "To Create Customers from Prospects:" (Heading 2)
Numbered Steps	Use the imperative form. Use numbering even if there are only 2 steps.
Shortcut Link	The first step will usually contain a shortcut that opens a window in the program.
What to do next/Result of the process	If necessary. You can include an intertextual link here, if necessary.
Note	If necessary.
Tip	If useful. For example, ways to optimize the procedure or shortcuts.
Links - Related Topics	Heading = Related Topics (Heading 4) Links to relevant topics except window topics. Avoid links to fields in task steps.

Characteristics of Task Topics

The following sections describe things you should keep in mind when writing task topics.

Formatting

Styles

- Names of buttons, menu items and objects in the program should be tagged <Emphasize-Name>.
- Keys on the keyboard must always be tagged with <Emphasize-Caps> and, in task topics, they should also be marked bold. (You must apply the character style first and then click the bold button. If you click bold and then apply <Emphasize-Caps>, RoboHELP removes the bold tag.)
- Use the <Emphasize-Input> style (appears with italics) for text that the user enters in a field.
- Also use the <Emphasize-Input> style for program output, for example, "The XYZ field now contains *0.00*".

- Options that you can select by clicking should also be tagged <Emphasize-Input> (for example, "In the **Type** field, enter *Item*"*)*. This style can also only be used in task topics.

Ellipsis

- Some controls have their name followed by an ellipsis(...). Do not include the ellipsis when you refer to the name of the control in the Help.

Steps

- If you want to add extra information in the middle of a procedure, it should be aligned with the relevant step. This also applies to tables that are part of a step. To align an unnumbered paragraph with a step, include the paragraph as part of the numbered list, and then click Format, Skip Numbering.
- If a paragraph contains a general comment not related to the particular step, this should not be aligned with the step.

Title

The task title should be specific and reflect as much of the user's work goal as possible.

The title should be in the plural unless:

- the procedure is something you can only do once (for example, "Setting up the General Ledger") or
- the noun involved is used as an uncountable in this context (for example, "Canceling and Recalculating Depreciation").
- Otherwise, keep the title in the plural, for example, "Assigning Business Relations to Contacts". Occasionally there may be exceptions - things that sound odd - use discretion here.

Introduction

The introduction serves several purposes:

- It gives a definition of the task. This should allow the user to see whether this task topic is the one he or she needs. The introduction needs to relate the task to user goals, in user terms - avoid technical terms.
- It states the result of the task, so that the user may decide whether or not to continue.
- It states prerequisites or warnings that the user should know before proceeding to the steps.

Generic Procedures versus Specific Procedures

It is tempting to describe a generic procedure by using a specific procedure as an example. If you do this, be sure to describe the specific procedure as an example (where the user can infer the logic to similar instances) and be sure that the example works generically. For example, if you want to explain the procedure "Reserving Items While Transferring Them" by telling how to do this for a sales order, you must ensure that the example of a sales order is illustrative for all instances (sales invoice, credit memo, and so on).

Steps

The first step in the procedure must be context-free - we do not know where the user is accessing the Help from. Usually the first step should include a shortcut link to the first window in the task. For example, "Open the Customer window." However, if there is a prerequisite to the task, the task can start where the prerequisite left off. Make sure there is a link to the prerequisite task.

The last step must finish the task, that is, must be the last action that is part of the task. It is not necessary to say "Close the window."

System Feedback

Omit feedback about what the program does (the **XYZ** window appears) unless there is reason to believe the user may not have found the right screen.

Alternative Methods

If there are two or more ways to perform a procedure, only write one way so as not to confuse the user.

Examples

You don't need to include examples in task topics. However, in some cases, a procedure may benefit from a short example in addition to the procedure itself. Short examples can be included in the topic. Longer examples should be in a separate topic. For short examples: the example is enclosed after the steps and before the Related Topics header. The example is included as expandable text/drop-down text and may be activated by the user by clicking on the hot-spot. In this way, only users with the need for the example will have the text. For longer examples, see Example Topics on page 84.

Intertextual Links versus Related Topics

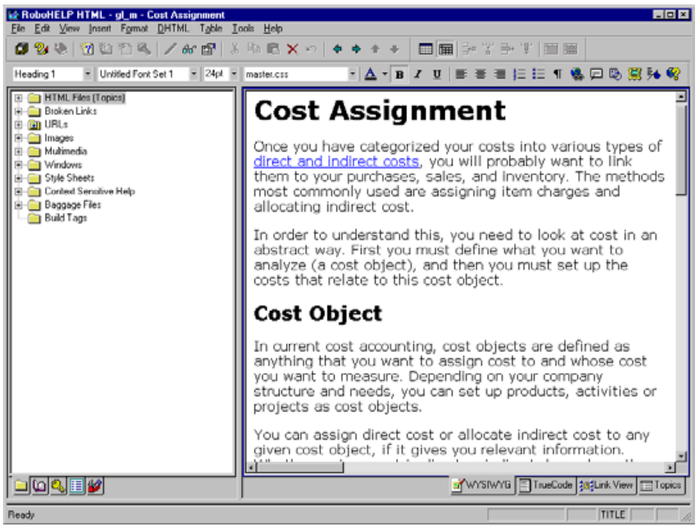
Use an intertextual link if the link relates to something the user must do to finish the current procedure. Topics that are related to the current topic, for example things you might want to do afterwards or related concepts, should be listed as related topics. However, the tasks listed under Related Topics should not be necessary to complete the current task.

Links to fields should be avoided in task steps. Use the standard sentence instead: "For Help about a specific field, click the field and press **F1**."

Index and Table of Contents

All the task topics should be included in the index. The most important tasks should be included in the table of contents. Alternative or less common procedures should not be in the table of contents, but then they must be linked to the main procedure. Similarly, if we have a row of procedures that are usually done in a certain order, only include the main procedure/first procedure in the table of contents. The related tasks should then be linked to each other. See Tasks and Overviews in the Table of Contents on page 50.

4.7 Overview Topics



The user may access an overview topic from a window topic, by searching/looking it up in the table of contents or the index, or they may access it using links from task topics or other overview topics. Overview topics contain conceptual information.

Coverage

Coverage should be selective. Give high priority for these areas:

- Complex areas
- Areas where the system does not match the user's work in an intuitive way
- Areas where a user's work goal is achieved by following several procedures
- Areas where the program terminology has to be explained

Elements of Overview Topics

These topics should cover the user's need for understanding. They are not procedures, but explain why you do the procedures, the theory behind the procedures, corporate decision-making processes that result in the tasks, and other conceptual or theoretical information.

An overview topic includes the following:

Title	Avoid the gerund. The title must be specific enough to be understood out of context. (Include the application area if necessary.) For example **Sales Invoice Discounts**, **Depreciation Methods.**
Subheadings	It is important to "chunk" the information in the topic. Use subheadings and bullets to make the text scannable and easy-to-read.

Text	Conceptual topics typically have more text than task topics. The user is not expected to act as a direct result of reading the topic, but is expected to gain a better understanding of the subject matter. An overview topic may help the user decide what action to take or what procedure to follow.
Links - inter-textual	Links to relevant topics except window topics.
Links - Related Topics	Heading = Related Topics (Heading 4) Links to relevant topics except window topics.

Characteristics of Overview Topics

There is no particular model that an overview topic must follow, in terms of how it should be built up or what parts it should contain. There is no maximum length. However, principles of good writing must be applied - make sure the topic has a clear structure. If it covers more than one subject, divide it into multiple topics.

Subheadings

To make it easier for the user to scan the text, the subheadings should indicate the information that is included in the following section - be specific.

Formatting

Do not use the <Emphasize-Name> or <Emphasize-Input> tags in overview topics.

Hyperlinks embedded in text

You can embed a hyperlink within the text if it is necessary to indicate how the link relates to the topic. However, links to topics that are related in a general sense should be listed under Related Topics.

Related topics

If there is a link at the bottom of the topic that relates to something that is mentioned within the topic, the wording of the link and the topic should be similar, so that it is easy to recognize the relationship. For example, if the topic says you must set up XYZ windows and the link says you must set up XYZ cards, it is unclear whether you are talking about the same thing.

The related topics should include, in addition to related tasks and other topics directly related to the overview, also topics that are parallel - for example Sales Invoice Discounts might contain a link to Sales Quantity Discounts.

Index and Table of Contents

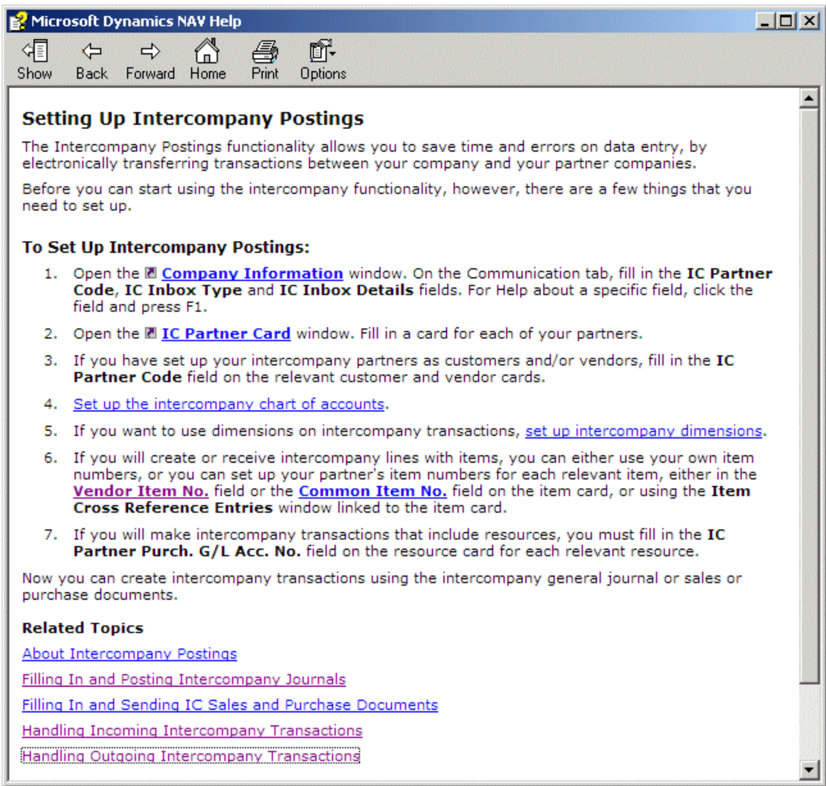
Most overview topics should be included in the index and in the table of contents in some form. If several Overview topics are linked together and relate to the same subject, only include the main/starting overview topic in the table of contents. (See Tasks and Overviews in the Table of Contents on page 50.) If the information in the overview topic is only relevant in connection with a procedure, you may only link to it from the task topic and not include it in the index or table of contents.

4.8 Business Process Topics

In Microsoft Dynamics NAV 5.0, we have introduced business process topics, which are similar to task topics, but with less restrictive guidelines. Business process topics can be longer than task topics, allowing them to offer either breadth or depth of information. They can combine procedural and conceptual information, and/or cover a series of tasks in one topic.

Examples

The Setting Up Intercompany topic pulls together all of the tasks involved in setting up the intercompany functionality. The most simple setup tasks are included in the topic as a single step, while the longer setup tasks are described in a separate topic, and included as a link from a step in this topic:



Microsoft Dynamics NAV Help

Show Back Forward Home Print Options

Setting Up Intercompany Postings

The Intercompany Postings functionality allows you to save time and errors on data entry, by electronically transferring transactions between your company and your partner companies.

Before you can start using the intercompany functionality, however, there are a few things that you need to set up.

To Set Up Intercompany Postings:

1. Open the **Company Information** window. On the Communication tab, fill in the **IC Partner Code**, **IC Inbox Type** and **IC Inbox Details** fields. For Help about a specific field, click the field and press F1.
2. Open the **IC Partner Card** window. Fill in a card for each of your partners.
3. If you have set up your intercompany partners as customers and/or vendors, fill in the **IC Partner Code** field on the relevant customer and vendor cards.
4. Set up the intercompany chart of accounts.
5. If you want to use dimensions on intercompany transactions, set up intercompany dimensions.
6. If you will create or receive intercompany lines with items, you can either use your own item numbers, or you can set up your partner's item numbers for each relevant item, either in the **Vendor Item No.** field or the **Common Item No.** field on the item card, or using the **Item Cross Reference Entries** window linked to the item card.
7. If you will make intercompany transactions that include resources, you must fill in the **IC Partner Purch. G/L Acc. No.** field on the resource card for each relevant resource.

Now you can create intercompany transactions using the intercompany general journal or sales or purchase documents.

Related Topics

About Intercompany Postings

Filling In and Posting Intercompany Journals

Filling In and Sending IC Sales and Purchase Documents

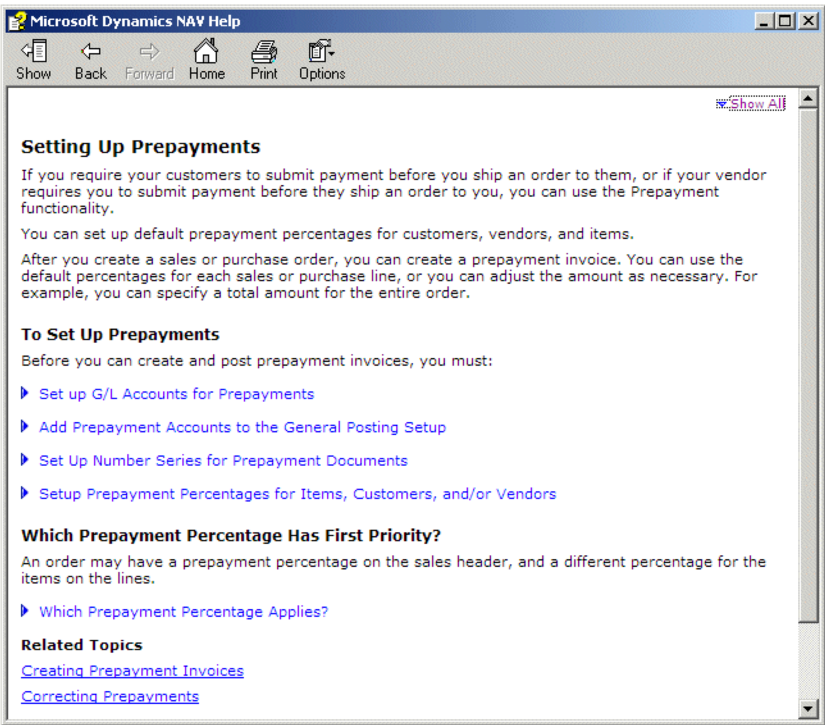
Handling Incoming Intercompany Transactions

Handling Outgoing Intercompany Transactions

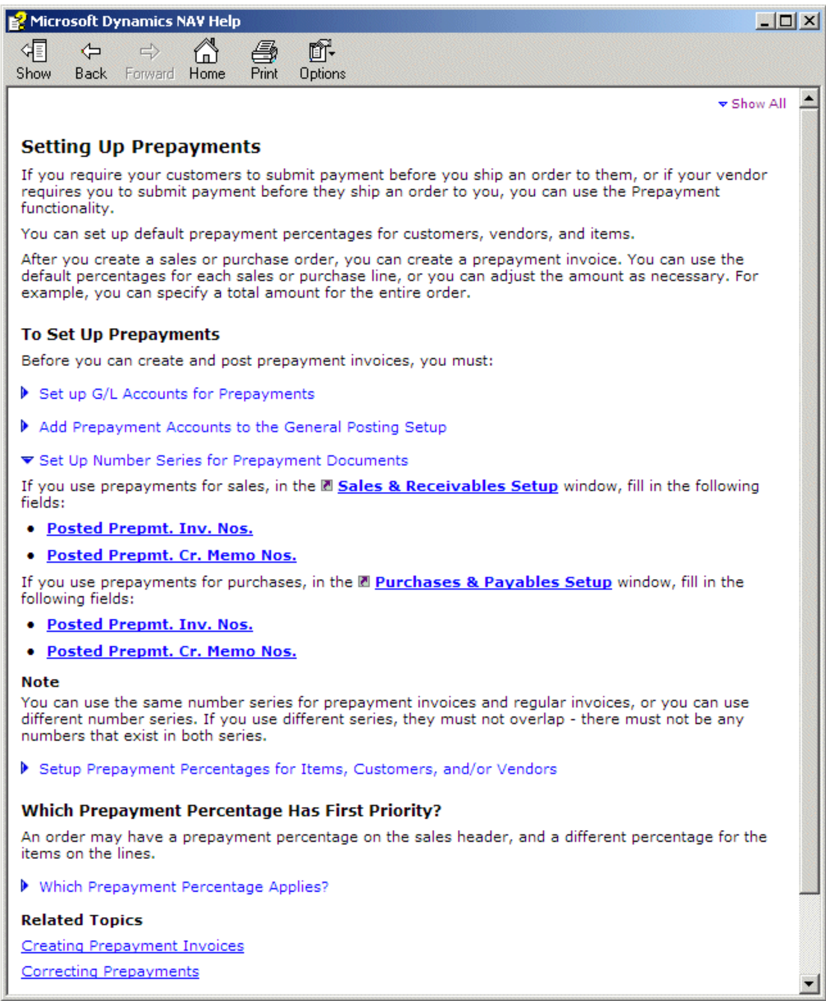
A business process topic can also use collapsible text so that the user can first get a quick overview of the process with the text collapsed, and then expand the text for the individual tasks.

The Setting Up Prepayments topic lists all of the tasks that must be completed before the prepayments functionality can be used.

When all the text is collapsed, the topic gives an overview of the tasks to be done:



The user can expand a section for more detail:



Microsoft Dynamics NAV Help

Show Back Forward Home Print Options

Show All

Setting Up Prepayments

If you require your customers to submit payment before you ship an order to them, or if your vendor requires you to submit payment before they ship an order to you, you can use the Prepayment functionality.

You can set up default prepayment percentages for customers, vendors, and items.

After you create a sales or purchase order, you can create a prepayment invoice. You can use the default percentages for each sales or purchase line, or you can adjust the amount as necessary. For example, you can specify a total amount for the entire order.

To Set Up Prepayments

Before you can create and post prepayment invoices, you must:

Set up G/L Accounts for Prepayments

Add Prepayment Accounts to the General Posting Setup

Set Up Number Series for Prepayment Documents

If you use prepayments for sales, in the **Sales & Receivables Setup** window, fill in the following fields:

- **Posted Prepmt. Inv. Nos.**
- **Posted Prepmt. Cr. Memo Nos.**

If you use prepayments for purchases, in the **Purchases & Payables Setup** window, fill in the following fields:

- **Posted Prepmt. Inv. Nos.**
- **Posted Prepmt. Cr. Memo Nos.**

Note
You can use the same number series for prepayment invoices and regular invoices, or you can use different number series. If you use different series, they must not overlap - there must not be any numbers that exist in both series.

Setup Prepayment Percentages for Items, Customers, and/or Vendors

Which Prepayment Percentage Has First Priority?

An order may have a prepayment percentage on the sales header, and a different percentage for the items on the lines.

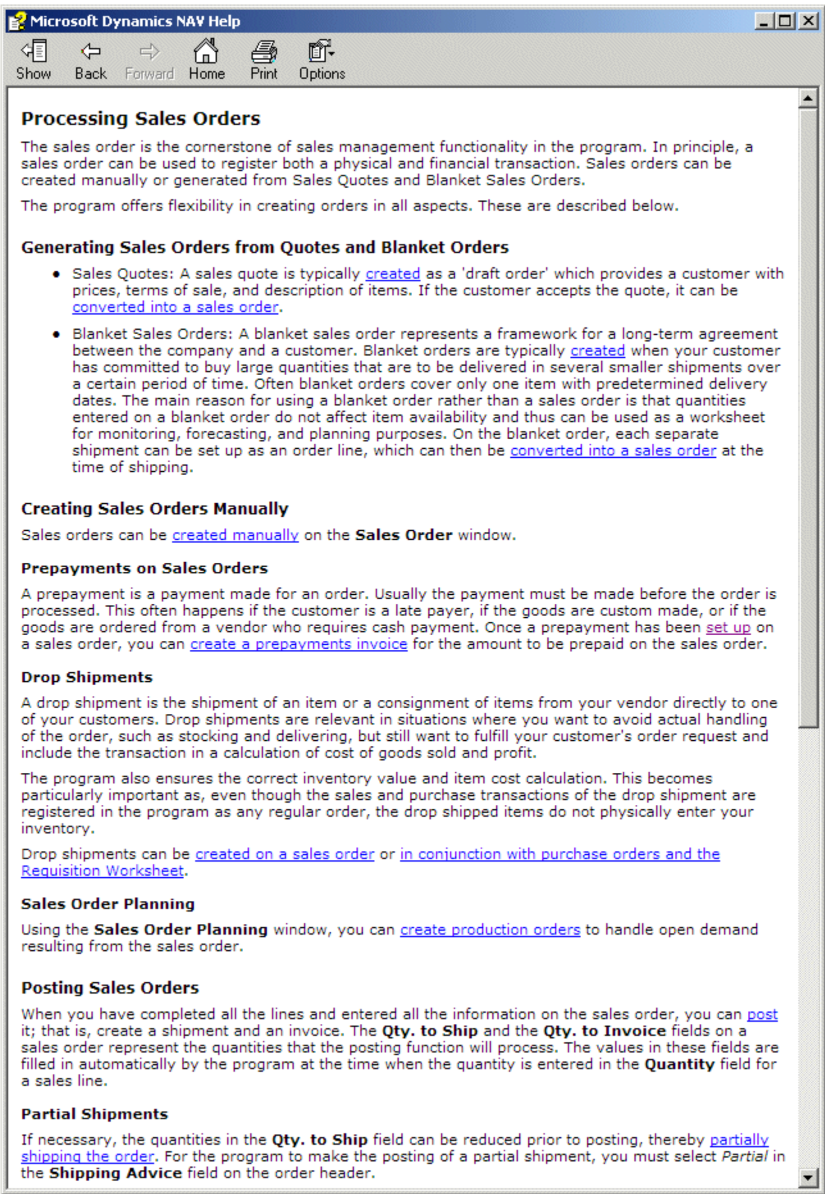
Which Prepayment Percentage Applies?

Related Topics

Creating Prepayment Invoices

Correcting Prepayments

The Processing Sales Orders topic gathers conceptual information about the sales order life cycle into one topic, and contains a number of links to related information, to help the user find the relevant information:



Processing Sales Orders

The sales order is the cornerstone of sales management functionality in the program. In principle, a sales order can be used to register both a physical and financial transaction. Sales orders can be created manually or generated from Sales Quotes and Blanket Sales Orders.

The program offers flexibility in creating orders in all aspects. These are described below.

Generating Sales Orders from Quotes and Blanket Orders

- Sales Quotes: A sales quote is typically created as a 'draft order' which provides a customer with prices, terms of sale, and description of items. If the customer accepts the quote, it can be converted into a sales order.
- Blanket Sales Orders: A blanket sales order represents a framework for a long-term agreement between the company and a customer. Blanket orders are typically created when your customer has committed to buy large quantities that are to be delivered in several smaller shipments over a certain period of time. Often blanket orders cover only one item with predetermined delivery dates. The main reason for using a blanket order rather than a sales order is that quantities entered on a blanket order do not affect item availability and thus can be used as a worksheet for monitoring, forecasting, and planning purposes. On the blanket order, each separate shipment can be set up as an order line, which can then be converted into a sales order at the time of shipping.

Creating Sales Orders Manually

Sales orders can be created manually on the **Sales Order** window.

Prepayments on Sales Orders

A prepayment is a payment made for an order. Usually the payment must be made before the order is processed. This often happens if the customer is a late payer, if the goods are custom made, or if the goods are ordered from a vendor who requires cash payment. Once a prepayment has been set up on a sales order, you can create a prepayments invoice for the amount to be prepaid on the sales order.

Drop Shipments

A drop shipment is the shipment of an item or a consignment of items from your vendor directly to one of your customers. Drop shipments are relevant in situations where you want to avoid actual handling of the order, such as stocking and delivering, but still want to fulfill your customer's order request and include the transaction in a calculation of cost of goods sold and profit.

The program also ensures the correct inventory value and item cost calculation. This becomes particularly important as, even though the sales and purchase transactions of the drop shipment are registered in the program as any regular order, the drop shipped items do not physically enter your inventory.

Drop shipments can be created on a sales order or in conjunction with purchase orders and the Requisition Worksheet.

Sales Order Planning

Using the **Sales Order Planning** window, you can create production orders to handle open demand resulting from the sales order.

Posting Sales Orders

When you have completed all the lines and entered all the information on the sales order, you can post it; that is, create a shipment and an invoice. The **Qty. to Ship** and the **Qty. to Invoice** fields on a sales order represent the quantities that the posting function will process. The values in these fields are filled in automatically by the program at the time when the quantity is entered in the **Quantity** field for a sales line.

Partial Shipments

If necessary, the quantities in the **Qty. to Ship** field can be reduced prior to posting, thereby partially shipping the order. For the program to make the posting of a partial shipment, you must select *Partial* in the **Shipping Advice** field on the order header.

Guidelines

Business process topics generally follow the same guidelines as task topics, with the following exceptions:

Title

The business process title can follow either the guidelines for task topics or for overview topics, depending on whether the topic is primarily conceptual or procedural.

Expandable Text

As shown in the examples, you can use expandable text to provide more information in a topic, while the unexpanded topic makes it easier for the user to scan the topic to find the information they need.

It is not possible to use RoboHelp's functionality for formatting expandable text because it cannot include the expand/collapse icon. The editing must be done on the TrueCode tab in RoboHelp. Also future edits to the expanded text must be done in TrueCode, as RoboHelp does not display the expandos in WYSIWYG.

Files to Include in the Help project

In order for the expandos to work and the icons to appear correctly, you must include the following files in your Help project:

- Bluedrop.gif
- Blueup.gif
- Expandtri.gif
- Collapsetri.gif
- sExpcollapse.js

Inserting the Show All/Hide All link

All topics that have dropdown texts or inline expansions must include the following line right after the `<body>` tag (this must be done in TrueCode view in RoboHelp):

```
<p id="ExpandAllLine" class="ExpFav"><a href="#"
onclick="ExpandAll()" onkeypress="ExpandAll()"class="DropDown"><img
id="picHeader" border="0" src="expandtri.gif" alt="Show All"><span
id="ExpandAll">Show All</span></a></p>
```

On one line, without any line breaks.

How to Insert Dropdown Text

To insert a clickable text where the expanded text will start on the next line, do the following:

1. Insert the following code to create the text that the user will click in order to open the dropdown:

   ```
   <a href="#" class="DropDown" onclick="Outline2()"
   onkeypress="Outline2()"><img border="0" src="blueup.gif"
   alt="Show">%%TEXT TO CLICK%%</a>
   ```

Note

The link must be Inserted inside other tags. For a normal paragraph, `<p>…</p>`, for a header `<h2>…</h2>`, and so forth. Do not embed it in the middle of a line.

2. Replace %%TEXT TO CLICK%% with your own text.
3. On the next line, enter:

   ```
   <div id="ExpCol" class="collapsed" border="0">
   ```

4. Enter the expandable text.

5 After the text, enter:

```
</div>
```

6 Always test the result.

Inserting an Inline Expando

To insert a clickable text where the expanded text will continue on the same line as the clickable text, do the following:

1 Insert the following code to create the text that the user will click in order to open the inline expando:

```
<a href="#" class="DropDown" onclick="MyOutline2()"
onkeypress="MyOutline2()">%%TEXT TO CLICK%%</a>
```

2 Replace %%TEXT TO CLICK%% with your own text.

3 Enter:

```
<span id="ExpCol" class="collapsed" border="0">
```

4 Enter the expandable text

5 After the text enter:

```
</span>
```

Note

Add a space before the `</span>` otherwise the expanded text will be flushed up against the clickable word when it is expanded.

4.9 Example Topics

An example can often help the user understand procedural or conceptual information.

Elements of Example Topics

An example topic includes the following:

Title/Heading 1	<Example + a procedure type heading>, for example: "**Example - Posting XYZ**"
Text	Follow the standards that have been followed in the manuals.

Format

The heading for an example should be formatted with H3.Example - not H1. The body of the example should be Normal.Example.

Links

Example topics should not contain any links.

Index and Table of Contents

Example topics are not in the table of contents or index - they can only be accessed from a related overview or task. (A link stating "Example" will appear in the appropriate topic.)

Chapter 5

Using GATE, Compiling and Testing

This chapter guides you through postprocessing and compilation of online Help. It includes information about how to extract an object file by using the translate.exe tool, how to translate Gate.txt and how to use GATE. It also includes information on the LinkChecker and the HH tools.

The chapter contains the following sections:

- Extracting an Object File
- Translating feedback.js
- Translating Gate.txt
- Using GATE
- Compiling Your Project
- Test of the Online Help

5.1 Extracting an Object File

GATE uses a file called object.txt. This file consists of all the context strings and the corresponding names for objects, controls and fields in Microsoft Dynamics NAV. GATE uses object.txt to insert the correct names in the Help texts where there is a GATE code (see page 11).

To create the object.txt file, you need to extract the objects from Microsoft Dynamics NAV and process them with translate.exe tool.

Exporting the Application Texts

To export the application text to a .txt file:

1 In Microsoft Dynamics NAV, choose Object Designer.

2 In the window that opens, click the All button, and then choose Edit, Select All.

3 Choose Tools, Compile on the menu bar.

Note

It is important that all objects can be compiled without any errors. If there are any errors, a message about this will appear.

4 Choose Tools, Translate, Export. Now a window will appear in which you should name the file and choose the folder in which it should be saved. Name your file *W1.txt* and save it in the *HTML Help\w1w1\[your Help project]\application* folder.

Using translate.exe Tool

The GATE tool requires the object file to have a certain format. You use the translate.exe tool to convert the W1.txt file into the object.txt file.

Follow this syntax:

```
translate.exe W1.txt object.txt
```

The translate.exe tool and W1.txt file must be in the same folder. The files that the translate.exe tool creates are saved in the same folder as the W1.txt file.

5.2 Translating feedback.js

This section is not relevant to core development technical writers. If you are a partner adding help or modifying W1 help, then you must read through this section.

All W1 topics include a documentation feedback link whereby any comments pertaining to core development are sent to the relevant writers in Microsoft. However, the translated source files from PartnerSource have a 'dummy' alias included in the feedback script pointing to 'someone@example.com'. This alias needs to be updated to the partner's email address so that they receive comments pertaining to their local and/or modified topics.

To change this alias, follow these steps:

1. Download the Documentation Toolkit from PartnerSource.
2. Browse to the Shared folder of your language. For example, ..\NAV50 Translated help source files\DADK\Shared\
3. Open the feedback.js file in a text editor.
4. Search for the 'someone@example.com' alias and replace with the alias you wish to have comments sent to.
5. Save the file and compile your help projects to include the new alias in all topics.

5.3 Translating Gate.txt

This chapter is not relevant for core development technical writers.

Before you compile the files in RoboHelp for the first time, Gate.txt must be translated. During postprocessing, GATE uses an object file from the \[your Help project]\ application folder to insert object, control and field names in the Help texts. You must therefore create an object file as described on page 86.

GATE also uses the Gate.txt file. Gate.txt contains texts that are used to create the various jumps that GATE inserts at the top of each topic. It contains texts that are used in the topic headings and titles. Gate.txt also contains the titles of the various Help projects. The texts and titles must be translated.

The Gate.txt File

You should use a text editor, such as Notepad, to edit the Gate.txt file. The file contains various types of information. You must update each of these sections:

- Project Titles
- Project Settings
- Window Titles
- Standard Texts

Remember to test Gate.txt after you update it (See page 90).

Project Titles

This section contains the titles for each of the Help projects in the base application Help. It can be applied to any other project if you change the titles to fit your project or add new ones. The title appears in the **Location** field in the ***Topics Found*** window. The ***Topics Found*** window appears when you click the List of All Fields in the Table hyperlink, for example.

You must translate the titles. Only translate the text that is in quotation marks.

Project Settings

This section contains your language code, for example 0x409 English (United States). To determine the code for your language, you can use HTML Help Workshop. To change the language code in the master Help project, follow this procedure:

1 Open HTML Help Workshop.

2 Open your project file (*.hhp) in HTML Help Workshop.

3 Click the ***Change Project Options*** button, which is the uppermost button on the left side of the window.

4 On the ***General*** tab, in International Settings in the **Language** field, select your language.

5 Click OK.

6 Save the project and close HTML Help Workshop.

7 Open the (*.hhp) file in a text editor, for example Notepad.

8 In the Options section, select the line with the language option and press Ctrl C.

9 Open Gate.txt in the text editor. In the Project Settings section, select the line with the language and press Ctrl V.

Window Titles

GATE inserts the name of the Help System in each window title. You should insert the localized version of the title here.

Standard Texts

Standard texts are inserted by GATE and used for titles, headings, links and index entries in help topics about tables, fields, reports, and so on. The title is inserted in the head section of each file and is not normally visible to the user. The heading is the first line of text in each topic. The link is inserted below the heading. Index entries are inserted in the head section of topic files.

GATE inserts certain standard texts from the Gate.txt file into the various topics.

Example

The table below gives examples of which standard texts are inserted where:

Standard text...	**Inserted in...**
Title="<Table> (table)"	Table titles
Heading="<Table> Table"	Table headings
Link="List of Fields in the Table"	Links in table topics
Index="<table> (table)"	Head section of topics
Title="<Field>, <Table> (table)"	Table field titles
Heading="<Field> Field"	Table field headings
Link=" The <Table> Table"	Table field links

An example of Title="<Table> (table)" is Customer (table). Heading="<Table> Table" can be Customer Table. Title="<Field>, <Table> (table)" can be Name, Customer (table). An example of Heading="<batch job> Batch job" can be Export Consolidation Batch Job.

To change the text that GATE inserts, simply edit the text within the quotation marks. Text delimited with angle brackets shows where the name of an object will be inserted. You can insert text on either side of the angle brackets. Do not delete the angle brackets or change the text within them. Although GATE uses fixed rules to insert text and will insert an object name even if it is deleted from the setting, the format of the text will not be correct.

Example

To translate the following text: Title="<Field>, <Table> (table)", you should only translate (table) to your language. GATE will replace <Field> and <Table> with the names of the relevant field and table, for example Name, Customer (table).

Testing the Gate.txt document

It is important that you test the translated Gate.txt document before you make the final version of your files. You should test all the sections of Gate.txt. This can be done by running GATE with Gate.txt on your files and, subsequently, compiling your files using HTML Help Workshop. It is a good idea to check at least one title, one heading and one link in each type of topic such as a table, a report, a batch job, and so on, to make sure that they are correct. For further information on testing, see page 97.

5.4 Using GATE

The name GATE is short for Get Application Text Entry. This refers to the GATE macro's most important task; namely, to replace GATE object codes with text fetched in the file Object.txt. In addition to this, GATE makes a number of other changes to your files. For example, GATE builds new topic titles and headings based on entries in the file Gate.txt, automatically inserts index keywords for objects such as tables, reports and batch jobs, inserts alink keywords in the head section of topics, inserts the List of all Fields hyperlink and inserts links from fields to tables, reports and batch jobs. For a full description of what GATE does, see page 104.

You should run GATE in the following situations:

- you need to prepare and compile your Help project for final release.
- you want to check that your Help project is progressing satisfactorily.
- you are experimenting with your Help project and want to check the result.

If you are a writer at core development, you do not need to run GATE. You can get a copy of your compiled project from the daily build.

If you are getting ready to compile your files for the last time before release, remember to:

- Run a final spelling check.
- Delete any comments or questions that you have written to yourself. You can use the Search function to find these if you have marked them with symbols, such as ***.
- Save and compile your project in RoboHelp.
- Get latest version of object.txt and place it in the application folder of your project.

HTML Help				
HTML Help	\Tools			
	\W1W1	\Base	\Application	
			cm_a	\Source
			cm_m	\Source
		\Cfront	\Application	
			\Source	
		\Shared		

Updating the .Html Source Folders

1 Open gate.doc

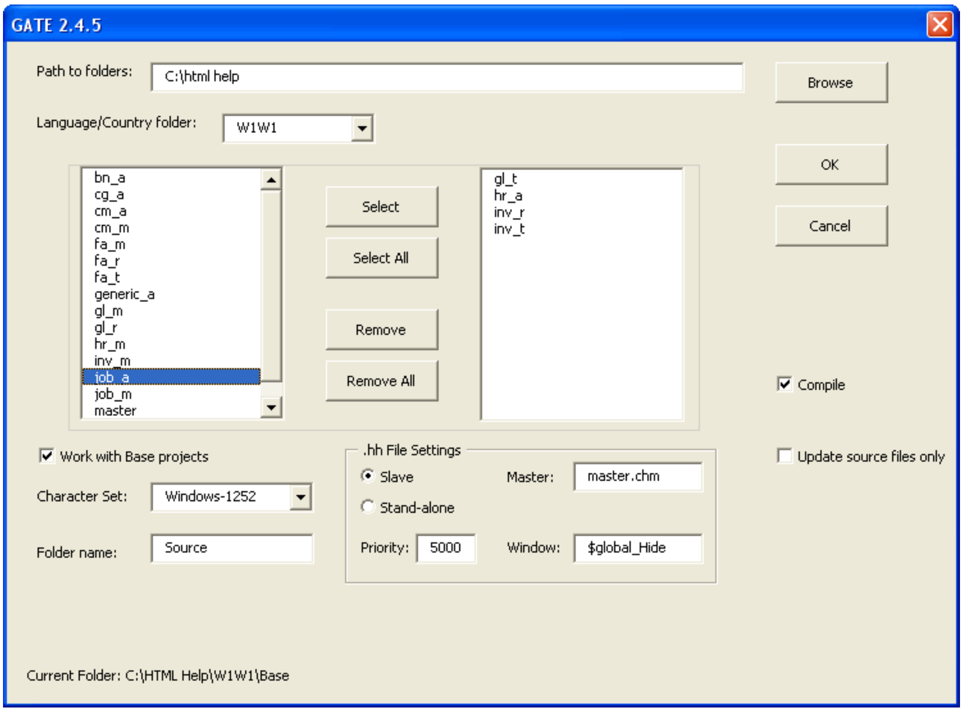
2 if s security warning dialog appears, do the following:

a. Select Always trust macros from this publisher

b. Click Enable macros

3 Browse to the folder containing the projects to be updated.

4 If you work with Base Projects, insert a check mark in the **Work with Base Projects** field. If your settings are correct, you have your project files in the large left window, and your language code in the **Language/Country folder** field.



5 Select the projects to be updated. If you want only to prepare one project, double-click on that project. If you want to select all projects, click Select All. The projects move over to the right-hand window when you have selected them. If you want to remove one of the files you have selected, double-click on that file. If you want to remove all files, click Remove All.

6 Enter the settings to use for the .hh file. If you are processing subordinate projects in a modular help system - that is projects that are part of the base Help - click Slave and enter the name of the master project in the Master text box.

If you are processing a stand-alone project, click Stand-alone.

Then type in the priority - this is used to determine which Help project C/SIDE should display in case of duplicate topics. Add-on projects should therefore have the absolute highest priority. For topics in the base Help, the priority must follow the application's version number multiplied by 1000. For add-on projects, enter a higher number, for example 10,000.

Finally, enter the name of the window to use when the application calls the Help. For slave projects in the base Help, the window name is $global_Hide. If you have created another window definition in your Help project, type the name of that window.

7 If you want to compile your project, insert a checkmark in the **Compile** field.

8 You can change the name of the subfolder in each project that GATE will process. The default folder name is **Source**, but if you change the value in the **Folder name** field, GATE will process files in folders with that name instead. An example could be after translation, where the translated files may be located in a folder called **Target**.

9 Click OK.

10 GATE.doc updates your source files and places them in processed folders.

Note

If you want to make further changes to your files, you should do it in the source files not the processed files.

In the field Update Source Files Only you can update files in the Source folder with information from Object.txt. It searches for ($ X_xx yyy $) and replaces yyy with text from Object.txt. You can for example replace all occurrences of ($ T_18 Customer $) with ($ T_18 Kunde $). At the same time, the title of each topic is replaced with the heading text.

5.5 Compiling Your Project

When you compile your project using GATE, a .chm file is generated in the Processed folder of each project. This is the file you distribute along with the .hh file.

You can compile your project by inserting a check mark in the **Compile** field in GATE.

You need to have HTML Help Workshop installed to make it work. HTML Help

Workshop can be installed from MSDN or PartnerSource.

5.6 Test of the Online Help

When all of the .htm files in the Help project have been run through GATE, it is time to test the online Help. There are currently three tests that should all be performed:

- LinkChecker
- HH Tool
- Visual test

This chapter will describe the three tests.

How to Install LinkChecker and HH Tool

Copy all the files in the folder DISK_1 on VSS or on PartnerSource to your hard disk. Then on your hard disk:

1 Double-click setup.exe

2 The setup wizard for Microsoft Dynamics NAV HTML Help Tools is now starting. In the first dialog box, click I Agree and then Next.

3 The wizard will suggest that you install the tools in \Program files\Microsoft Dynamics NAV HTML Help Tools. Click Next and follow the instructions from the wizard.

When finished, you will find both the LinkChecker Tool and the HH Tool under the Start Menu, Programs, Microsoft Dynamics NAV HTML Help Tools.

Using the LinkChecker Tool

The LinkChecker tool must be used after your documents have been through GATE. The tool does the following:

- It checks a number of .chm files for broken links between internal and external links.
- It checks that the link text corresponds to the heading of the destination file. This means that if the destination topic has another name than mentioned in the link, the LinkChecker tool will notice it.
- It generates a report containing this information.

In order to run the LinkChecker tool, you must have all .chm files in the same folder. Then follow the instructions below:

1 In the Start Menu, select Programs, Microsoft Dynamics NAV HTML Tools, LinkChecker Tool.

2 Browse to the folder holding your .chm files in the **CHM Directory** field, and the .chm files from the folder appear in the large left window.

3 Select the files to be checked. If you only want to check one file, click Add, and if you want to check all files, click Add All. The files will move over to the right-hand window when you have selected them. If you want to remove one of the files you have selected, click Remove. If you want to remove all files, click Remove All.

4 Type the destination folder for the Report File, such as C:\Destination Folder\report.xml, in the **Report File** field. The Report File does not need to exist already.

5 Click Menu, Options, and the **Options** dialog box appears. In this dialog box, enter the path for Gate.txt in the field named Gate.txt path.

6 Close the **Options** dialog box.

7 Click Start.

Attention

The process can be canceled anytime by clicking Cancel. When the tool has finished, it asks if it should show the report. If the user chooses not to see the report, it can be shown at a later time by clicking Show Report. The Show Report Button is always enabled if the path specified in the Report File is valid. The error report is overwritten every time you run the LinkChecker tool.

After you have finished using the tool, you can print the Report File and check your links. All errors reported in the Report File should be corrected. They are all serious and if unresolved they will cause the end user to experience a broken link or inconsistency between the Link text and the destination topic title.

Using the HHTool

The HH tool must be used after your documents have been through GATE. Normally, it will not be necessary to run HH Tool until a couple of weeks before a release. The HH Tool should be run by an HTML administrator, because errors discovered by the HH Tool can be located in all Help projects.

The tool does the following:

- It checks for the format of each of the selected HH files to verify that they conform to the defined XML schema.
- It checks the files for duplicate IDs.
- It generates a report containing information on these findings.

In order to run the HH tool, follow the instructions below:

1 Make sure all your .hh files are in the same folder.

2 In the Start Menu, select Programs, Microsoft Dynamics NAV HTML Help Tools, HH tool.

3 Browse to the folder holding your .hh files in the **HHDirectory** field, and the HH files from the folder appear in the large left window.

4 Select the files to be checked. If you only want to check one file, click Add, and if you want to check all files, click Add All. The selected files will move over to the right-hand window. If you want to remove one of the files, you have selected, click Remove. If you want to remove all files, click Remove All.

5 In the **Destination HH** file field, enter the name of a new combined HH file.

6 Type the destination folder for the Report File such as C:\Destination Folder\report.xml in the **Report File** Field. The Report File does not need to exist already.

Note

If the specified report file already exists the Show Report button is enabled, making it possible to open the report from this form. The error report is overwritten every time you run the HH tool.

7 Click Start.

Attention

The process can be canceled anytime by clicking Cancel. When the tool has finished, it prompts the user with the result and asks if it should show the report. If the user chooses not to see the report, they can see it later by clicking Show Report. The Show Report Button is always enabled if the path specified in the Report File is valid.

After you have finished using the tool, you can print the Report File.

All errors reported in the Report File must be corrected. The typical error will be that a Help topic could exist in two places. You must therefore decide which Help project is the correct one and which Help topic text is the newest one.

Performing a Visual Test

When the online Help project has been through GATE and all errors from LinkChecker Tool and HH Tool are corrected, you should perform a visual test.

You need to test whether the context sensitive Help is working. For example, does the correct Help topic appear in the help window when F1 or Help is clicked? If not, you can conclude that either the Help topic does not exist (it has been deleted or has never been described) or the wrong context string (ID) has been inserted. All errors related to the context sensitive Help must be corrected, otherwise the end user will not find the Help intended.

The Visual test can also reveal errors in the GUI. For example, maybe some text has the wrong formatting, a table cannot be resized, and so on.

Limiting the Visual Test

The Visual test is a very time consuming test, because it involves people and the Help projects for Microsoft Dynamics NAV generally are fairly large. Therefore, a Help project normally cannot be tested 100 %. This will simply take too much time and resources. Instead, you will have to decide in how much of the application you can test the context sensitive Help.

In general, you should test:

- new or edited topics (tables, fields, procedures, batch jobs, reports).
- table of contents.
- list of all tables, reports, and so on.
- the index and search facilities.
- a selection of windows, tables, fields, procedures, batch jobs and reports.
- search for $, _ , () to find any GATE codes that might not have been processed correctly.

The testers should only test the context sensitive Help and all links that are one click from the relevant context sensitive topic. Otherwise, they will lose track jumping from link to link inside the online Help project.

Chapter 6

Administrating Online Help Projects

This chapter explains how to maintain the Master Project, including how to merge subordinate projects into the Master Project, how to add entries to the Table of Contents and how to include the index and search function in the Master Project.

The chapter consists of the following section:

- Maintaining the Master Project

6.1 Maintaining the Master Project

The Microsoft Dynamics NAV Help project is divided into a master (primary) project and a number of subordinate projects. The Master Project controls a number of functions in the subordinate projects, such as the table of contents, the projects that are included and the window settings of the subordinate projects.

You can include you own project in the Master Project table of contents and index, when you have run it through GATE and compiled it, so that you have a .chm file. Your project will still remain a project on its own, and its .chm file should be added separately.

When you have updated the table of contents and included your project in the Master Project, the Master Project should be compiled in HTML Help Workshop and the Master.chm should be copied to the Compiled folder, which also contains all the subordinate project .chm files.

In order to update the Master Project, you should install HTML Help Workshop 1.31. This is a free Microsoft program that can be found on MSDN.

Adding subordinate Projects to the Master Project

To add subordinate projects to the Master Project, do the following:

1 In Notepad or another editing tool, open the Master.hhp file.

2 In the section Merge Files, type the name of your project.chm file.

3 Save the Master.hhp

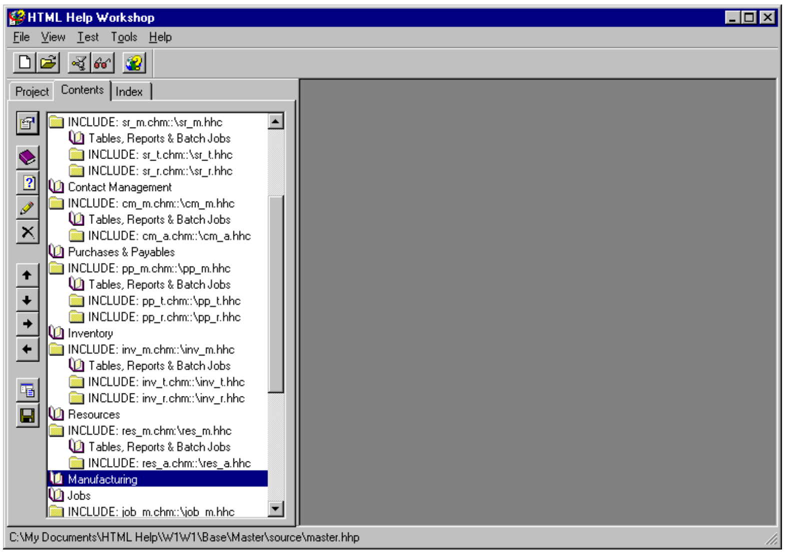
Maintaining the Master Table of Contents

In order to update the Master Project table of contents to include a number of subordinate projects (.chm files), follow this:

1 Open the Master.hhp file in HTML Help Workshop.

2 Click the ***Contents*** tab.

3 Select where you want to add your project and click the Insert a Heading icon to the left.



4 Right-click on the heading, and then click Insert File.

5 In the File to include dialog box, type the following:

```
file name.chm::/contents.hhc
```

Example

If your project name is fdg_a, you should type fdg_a.chm::/fdg_a.hhc.

6 Click OK.

Adding Index Files and Search to the Master Project

The index files are combined when your project .chm is in the same folder as the Master.chm file, included in the Merge File section of the Master.chm and all the files are run through GATE. GATE merges the indexes of all subordinate projects and makes them appear as one index.

Search is also automatically included.

Getting Your Project to Work

When you have updated the Table of Contents, and included your project in the Master Project, the Master Project should be compiled in HTML Help Workshop and the Master.chm should be copied to the Compiled folder which also contains all the slave project .chm files included in your modular project.

Appendix A
The Technical Details

This chapter provides a detailed technical description of some aspects of the online Help.

The chapter is divided into the following sections:

- What GATE Does
- How C/SIDE Looks Things up in Help Projects

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A.1 What GATE Does

This section gives a detailed technical description of what the GATE macro does. It explains which files are changed and why, but does not go into programmatic details of how the macro is constructed. The section is intended primarily to help administrators who require more background knowledge of the mechanics of the system.

General

GATE makes a number of changes to the files that make up a Help project. These changes are made automatically, partly to ensure consistency across projects and partly to relieve the Help writers from trivial and repetitive tasks.

Project File

To run GATE, you need to have a number of different files on your system. First, GATE needs an HTML Help project file with the file extension .hhp. The project file must have the same name as the project folder and must be located in the Source folder. The path is as follows:

```
...\MyProject\Source\MyProject.hhp
```

GATE checks for a folder named Processed in the project folder. If the folder exists, GATE deletes all files in the folder. If the folder does not exist, it is created. GATE then reads the project file for information on what files make up the Help project and copies all files to the Processed folder. GATE then modifies the files in the Processed folder, so that no changes are made to files in the Source folder.

GATE reads information about files from the [FILES], [ALIAS] and [MAP] sections and the contents and index files from the [OPTIONS] section. The HTML Help compiler does not require that you explicitly list all files in the project. Instead it parses each file for references to other files and automatically includes these in the compiled file. Because GATE copies files to the Processed folder based on the project file, you must make sure that all files are listed here, for example graphics files. If a file is not listed,

Note

GATE cannot copy the file, and the compiler will produce an error message. You cannot use subfolders in the [FILES] section.

Project Settings File

The project settings file, ProjectSettings.txt, contains settings for the project file, window definitions and settings for the table of contents file. When you run GATE, these settings are copied to the relevant files. The settings are located in one file to ensure consistency among projects. It should not be necessary for country or regional offices or others to change the file in any way. In other words, the file should only be updated at core development. The file does not need to be localized.

Window Definitions

If you need to add a new window definition to your projects, you can put the window definition in the [WINDOWS] section of the file. GATE then copies the window definition to each project file. If the window title needs to be localized, you can put the title in Gate.txt.

GATE File

Text strings that need localization are collected in Gate.txt. The file contains project titles, window titles, the language setting for each compiled file and text that is automatically inserted in topic files. For topics that have an object code in the heading (tables, reports, batch jobs, and so on), GATE automatically builds a new heading and title, based on entries in Gate.txt. Depending on the topic type, GATE inserts a link to fields in a table/report/batch job or a link from a field to the table/report/batch job.

Object File

GATE requires that you have an object file in the Application folder. When you run GATE, GATE searches for object codes in the topic files and replaces the codes with values from the object file. The name of the file must be Object.txt. For projects that use the Base folder, the path is as follows:

```
...[Language/Country]\Base\Application\Object.txt
```

For add-on projects that do not use the Base folder, the path is as follows:

```
...[Language/Country]\[Add-on]\Application\Object.txt
```

The file format is unchanged from earlier versions of Microsoft Dynamics NAV. Specifically, Object.txt is an unformatted ANSI text file where each line contains an object code and the corresponding object text. The format is as follows:

```
T_18: "Customer"
```

If you do not have an object file, or do not need one, you can simply create an empty text file named Object.txt in the Application folder. It is necessary to create this folder, as GATE cannot run without it.

How GATE Replaces Object Codes

The first time you run GATE, it creates an MS Access database named ~Object.mdb in the Shared folder. GATE then reads Object.txt and stores the object codes and texts in the database. GATE also stores the file size and date of Object.txt in the system registry. When GATE needs the text for a given object code, it gets the text from the database, not the object file.

When you subsequently run GATE, GATE compares the file size and date of your object file with the values stored in the registry. If they are different, the object database is deleted and a new database created.

When replacing object codes, GATE searches for the following patterns:

```
($ [object code] $)
```

```
($ [object code] [object text] $)
```

The object code must begin with a left bracket, a dollar sign and at least one space. There must be at least one space following the object code. There can be zero or more spaces following the object text. The object code must close with a dollar sign and a right bracket.

When GATE replaces object codes, it uses a sequence. First, GATE gets the object code from the string and looks in the object database for the corresponding object text. If GATE finds an object text, it replaces the string with the text. Otherwise GATE looks for an object text in the string and replaces the string with this text. If GATE doesn't find an object text, it replaces the string with the object code. When getting the object code and text, GATE checks the string for errors. If it finds any errors, the string is left unchanged.

Project file (.hhp)

GATE uses the project file to get information about the Help project. The file is copied to the Processed folder and then modified based on information in the files ProjectSettings.txt and Gate.txt. Changes to the different sections are explained below.

[OPTIONS] Section

For consistency across projects, GATE sets a number of settings in the [OPTIONS] section based on information in the ProjectSettings.txt file. Another reason for automatically applying settings is that RoboHelp and Microsoft's HTML Help Workshop interpret some settings differently. For example, RoboHelp explicitly writes Binary Index=Yes when you choose to use a binary index. If you then open the project file using HTML Help Workshop, this line is removed, because it is the default setting. Reopening the project with RoboHelp then sets binary index to "No", because RoboHelp interprets the missing line as a no.

The following settings are set automatically:

```
Auto Index=Yes
Binary Index=Yes
Compatibility=1.1 or later
Compiled File=[project].chm
Default Window=$global_Main
Error log file=Error.log
Display compile progress=No
Display compile notes=No
Full-text search=Yes
Language=[language setting]
Title=[project title]
```

GATE sets the name of the compiled file to the name of the project. Additionally, GATE looks for a project title in Gate.txt. If no title is found, the setting is left unchanged. Finally, GATE gets the language setting from Gate.txt and GATE does not change the default file setting.

[WINDOWS] Section

GATE takes all window definitions from the ProjectSetttings.txt file and copies them to the [WINDOWS] section. Existing definitions with the same name are replaced. GATE looks for a window title in Gate.txt and inserts the title in the window definition (the window title appears on the window bar when the compiled file is opened). GATE also gets the filenames of the contents and index files from the current project and inserts them in the window definition. This lets you open individual (slave) projects for review under development without having to use the master project.

You can also create your own window definitions for specific purposes; GATE leaves them unchanged.

Other Sections in the Project File

The following sections explain how the other sections of the project file are used.

[FILES] Section

GATE reads the [FILES] section and copies all listed files to the Processed folder. If GATE cannot find a file in the Source folder, GATE writes an error message to the report log.

You must list all files in your project here, including graphics files, for example. If you fail to list a file, GATE cannot copy the file to the Processed folder, and you will get an error message when compiling.

[ALIAS] and [MAP] Sections

GATE copies all files listed in these sections to the Processed folder. GATE uses the alias file (.ali) when creating the .hh file. The map file (.h) is copied to avoid a missing file error when compiling.

[MERGE FILES]

The master project, Master.chm, lists all compiled files that are part of the modular help system, including add-on projects. GATE does not change this section in any way. Slave projects do not have this section.

Table of Contents File (.hhc)

GATE searches for and replaces any object codes in the table of contents file. GATE also searches for the <OBJECT...> statement that contains the parameters Window Styles and ExWindowStyles and replaces the parameters with values from ProjectSettings.txt. These parameters govern the behavior of the table of contents.

Index file (.hhk)

GATE searches for and replaces any object codes in the index file.

Topic files (.htm)

Most of the files in a help project are topic (.htm) files. GATE copies topic files to the Processed folder based on the [FILES] section of the project file. GATE then in turn opens each topic file and makes a number of changes, as described below.

The Topic Heading

The topic heading (the first line of text in the <BODY> section) is central to how GATE processes a topic file. If GATE finds and recognizes an object code in the heading, the topic is treated as an *object topic*; otherwise it is treated as a *non-object topic*. For object topics, Microsoft Dynamics NAV guidelines specify that the topic filename be the same as the object code.

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Recognizing the Heading

GATE expects the heading to be formatted with the Heading 1 tag, and searches for the string <H1>*</H1>. Text between the opening and closing tags is regarded as the heading text. Note that if the <H1> tag contains any formatting, it will not be recognized. GATE will write to the report log and not make any changes to the topic.

GATE searches the heading text for an object code. If GATE finds an object code, the topic is treated as an object topic; otherwise it is treated as a non-object topic. Any text before an object code will cause GATE to treat the topic as a non-object topic. Any text after an object code is ignored (deleted). Note that object topics will not be recognized correctly if the heading text contains any formatting.

Building a new heading

For object topics, GATE builds a new heading based on information in Gate.txt. GATE checks also for an object text in the object database. For a table, this could be "The [object text] Table." For non-object topics, the heading is left unchanged.

The Head Section

GATE makes a number of changes to the head section, as described below.

The Topic Title

GATE always replaces the title text. For object topics, GATE builds the title based on information from Gate.txt. For a table, this could be "[object text] (table)." For non-object topics, the title is simply replaced with the topic heading.

The Character Set Statement

GATE searches for a character set statement in the head section, and replaces the statement based on a value from the form. By default, RoboHelp 2000 doesn’t insert the statement, so for most topics the statement will simply be added. For Western Europe, where the correct character set is Windows-1252, GATE inserts the following statement:

```
<META HTTP-EQUIV="Content-Type" CONTENT="text/html; charset=Windows-
1252">
```

The Stylesheet Statement

GATE searches for a stylesheet statement in the head section, and replaces or inserts the following:

```
<LINK REL="StyleSheet" HREF="master.css">
```

Index Keywords

GATE automatically adds index keywords for a number of object topics. Keywords are added for tables, reports, batch jobs and dataports, as well as for object topics where the object code begins with S, DA, P, A and U. GATE automatically adds tables, reports and batch jobs, and so on, to the keywords. Keywords are not added for fields in tables, reports and batch jobs. GATE adds the following to the head section:

```
<META NAME="MS-HKWD" CONTENT="[object text]">
```

Index Stop List

You can prevent GATE from automatically adding an index keyword to a topic by adding the object code to the index stop list file. GATE compares the current object code to codes in the stop list file before adding a keyword. The index stop list file must be named IndexStopList.txt, must be in the Source folder and must be added to the [FILES] section of the project file. IndexStopList.txt must be an unformatted ANSI text file, with one object code per line, as shown below:

```
T_18
```

The above line prevents GATE from adding the keyword Customer to the customer topic.

Alink Targets

GATE adds an alink target to the head section of all object topics. The alink target, or name, is the same as the object code. Adding an alink target lets you link to a topic without knowing the exact location of the topic. Additionally, the link will still work if a topic is moved from one project to another. This feature is primarily intended for add-on projects where Help authors don't have up-to-date information on topic locations. GATE adds the following line to the customer topic:

```
<META NAME="MS-HAID" CONTENT="T_18">
```

For fields in tables, GATE inserts an additional alink target made up of the object code for the table plus "_FIELDS". This is used for the "List of all Fields" hyperlink on table topics. For a field in the Customer table, GATE inserts the following:

```
<META NAME="MS-HAID" CONTENT="T_18_FIELDS">
```

Other Changes to the Head Section

To tidy up the head section, GATE removes a number of unnecessary statements. GATE removes the reference to RoboHelp's script file (BSSCDHTM.js), all "generator" statements, plus any comments (RoboHelp's comments in the head section have been known to cause problems).

Body Section

When you create a new topic file with RoboHelp, or edit an existing topic, RoboHelp places a number of function calls in the opening <BODY> tag. (The functions are located in the BSSCDHTM.js script file.) Other HTML editors can modify the tag by for example adding background and foreground colors. For consistency, and because we are not planning to use the RoboHelp script file, GATE selects the body tag and replaces it with <BODY>.

GATE searches for object codes and replaces them with the object text.

Automatically Inserted Hyperlinks

In tables, GATE inserts the "List of all Fields" hyperlink. The hyperlink text is taken from Gate.txt. The hyperlink itself uses an alink search to get a list of fields, which means that the list is dynamically updated, and that fields can be placed anywhere in the Help system. The alink search text is `[object code]_FIELDS`.

The hyperlink is as shown below:

```
<A HREF="JavaScript:ALink.Click()">List of Fields in the Table</A>
```

The hyperlink refers to the object shown below:

```
<OBJECT CLASSID="clsid:ADB880A6-D8FF-11CF-9377-00AA003B7A11"
ID="ALink">
    <PARAM NAME="Command" VALUE="ALink">
    <PARAM NAME="Item1" VALUE="">
    <PARAM NAME="Item2" VALUE="[object code]_FIELDS">
</OBJECT>
```

GATE also inserts hyperlinks for fields to their respective tables, reports and batch jobs. The hyperlink text is taken from Gate.txt. These hyperlinks use alinks and use the same structure as shown above.

The .hh File

When you run GATE, it creates an .hh file in the Processed folder containing a list of all object topics in the project. Additionally, GATE reads the alias (.ali) file and adds an entry for each line in the file. C/SIDE uses .hh files to check if Help is available for objects in the application.

The .hh file is built up as an XML file. The sample text below contains an entry for the Customer table.

```
<Event Source="sr_t.hhp">
    <ID>T_18</ID>
    <Master>master.chm</Master>
    <Slave>sr_t.chm</Slave>
    <Topic>T_18.htm</Topic>
    <Priority>300</Priority>
    <Window>$global_Hide</Window>
</Event>
```

The Source attribute contains information about where the entry originated. Possible values are the project file or the alias file. When checking for available topics, C/SIDE reads the ID element. The master and slave elements are used in modular help systems, such as the Base application Help. When calling the Help, C/SIDE constructs a string using the master, slave, topic and window elements. For stand-alone Help projects, such as the C/SIDE Help, the .hh file doesn’t contain the slave element. The topic element is the filename in the compiled Help containing Help. For object topics, the ID and topic elements are the same. For aliased topics, the ID and topic elements are different. The Priority tag is intended for add-on Help projects and old WinHelp projects. By giving a topic a high priority, you instruct C/SIDE to call your add-on Help rather than a topic in the base Help. Finally, the window element tells C/SIDE which window definition to use.

Stylesheet files (.css)

GATE first looks in the Shared folder for the master stylesheet Master.css. If GATE finds the stylesheet, it is copied to the Processed folder. Then, GATE looks for any stylesheets in the Source folder. If GATE finds the master stylesheet, it checks if the file has already been copied to the Processed folder. If not, it is copied to the Processed folder. All other stylesheets in the Source folder are copied to the Processed folder.

Other Issues

Registry Settings

GATE saves each user's settings to the system registry. Settings are per user, so different users sharing a common PC can each save their own settings. When you run GATE, your settings are restored. When you close GATE with the Cancel button, GATE checks if your settings are changed, and prompts you to save the new settings.

Compiling the Help

GATE prepares your HTML Help project for compilation. To compile the Help, you need Microsoft's HTML Help Workshop, available from Microsoft's Internet site. When you have installed the Help Workshop, you can instruct GATE to call the compiler automatically by checking the Compile box on the form.

A.2 How C/SIDE Looks Things up in Help Projects

Help has not been written for all objects, controls and table fields in Microsoft Dynamics NAV because many of them display the same information. For example, the ***Chart of Accounts*** window displays information from the ***G/L Account*** table, so Help has not been written for the window. Instead, the Help for the ***G/L Account*** table is used.

C/SIDE searches for Help for the various object types in a specific order. The order depends at first on how the Help is activated (using the Help button or F1/the Help cursor). If Help is activated using F1 or the Help cursor, the order is also determined by where the cursor is when the Help is accessed.

Attention

The Table and Report object types can be seen on the screen only by using a form, and fields can be seen only by using controls. Therefore, according to C/SIDE, Help is always accessed from a form or a control.

The order that C/SIDE follows when Help is retrieved from the C/SIDE and Application Help projects is outlined in the following. First we will describe the order used when Help is activated on ordinary forms, that is, all forms except for Request Forms and Flow, Field and Table Filter Subforms. Then we will describe the slightly different order used for Request Forms and Flow, Field and Table Filter Subforms.

Both descriptions are illustrated with drawings that show the order for both the Help button and the F1 key or Help cursor. The Help button is of course a control, but C/SIDE uses a special order because the Help here must always display a general Help – never a control or field Help.

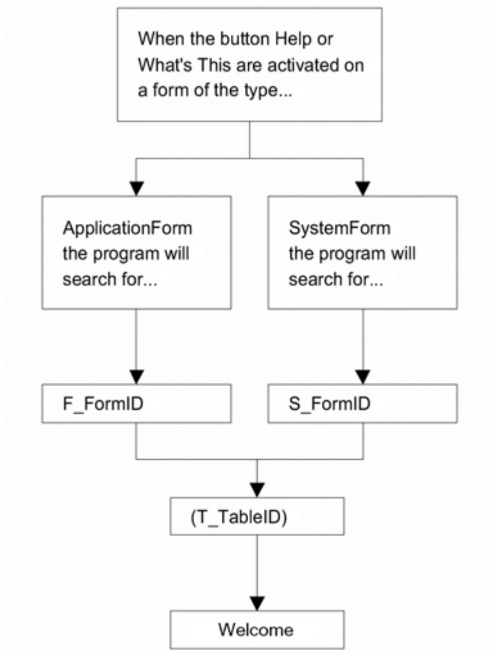
You should note two things when you read the descriptions:

1 The description distinguishes between an Application Form and a System Form. All Application Forms belong to the application, while System Forms belong to the C/SIDE development environment.

2 For all four drawings, the search for Help for T_TableID and T_TableID_FieldID is omitted if the relevant form or control is not associated with a table.

The Help button on an ordinary form

When you click the Help button, a general Help is always displayed. This Help concerns the form from which the Help button was activated. You can also activate this Help with the Help cursor on the form. The order looks like this:



C/SIDE's search for Help when the Help button is activated on an ordinary form.

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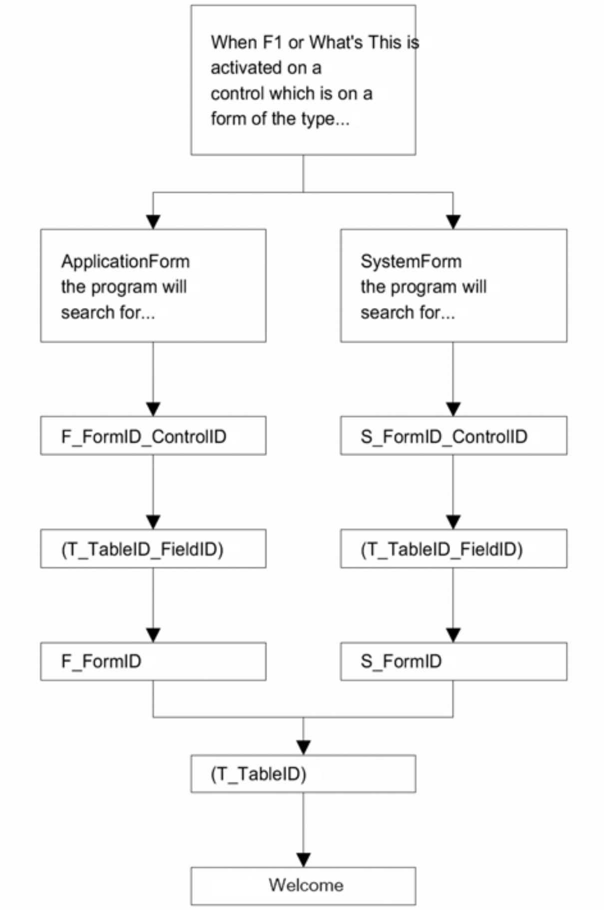
F1/Help cursor on an ordinary form

When you activate the Help on an ordinary form by using F1 or the Help cursor, the cursor location determines which Help is displayed. If the cursor is on the form – not on a control – you will get the same Help as described above. If the cursor is on a control, the Help topic that is displayed is one associated with the cursor location.

The order looks like this:



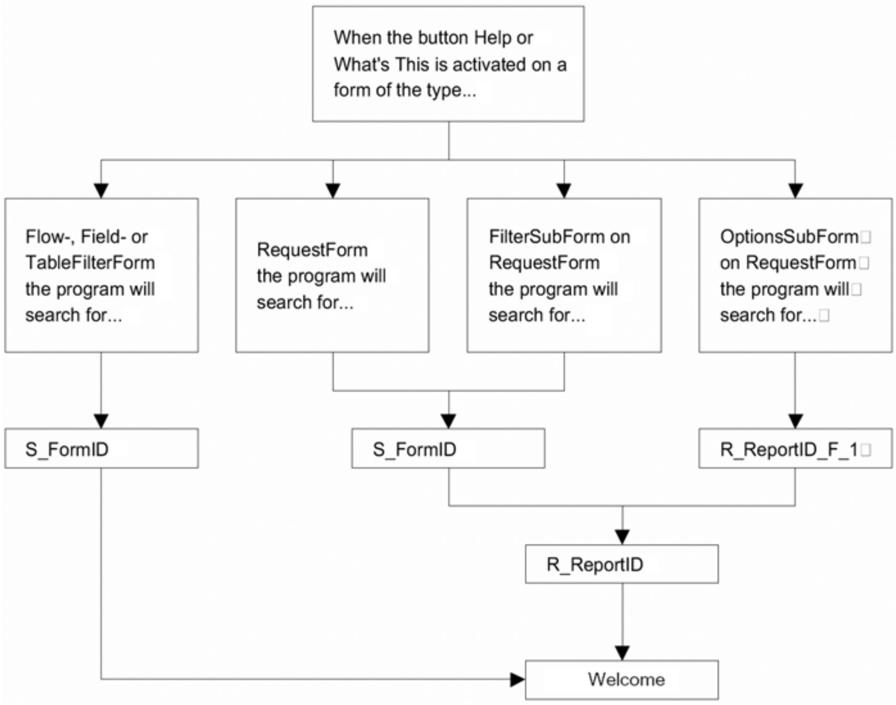
C/SIDE's search for Help when F1 or the Help cursor is activated on a control on an ordinary form.

The Help button on Request Forms and Flow, Field, and Table Filter Subforms

On Request Forms and Flow½, Field and Table Filter Subforms, the search order is unique because these forms are made up of several other forms.

When you activate the Help button on a Request Form, the order in which C/SIDE searches for Help also depends on the tab you are on – whether it is a tab that displays fields from a table (Filter Subform) or an Options tab, where the conditions for the report/batch job (Options Subform) have to be defined.

The order looks like this:



C/SIDE’s search for Help when the Help button is activated on a Request Form or on Flow, Field and Table Filter Subforms.

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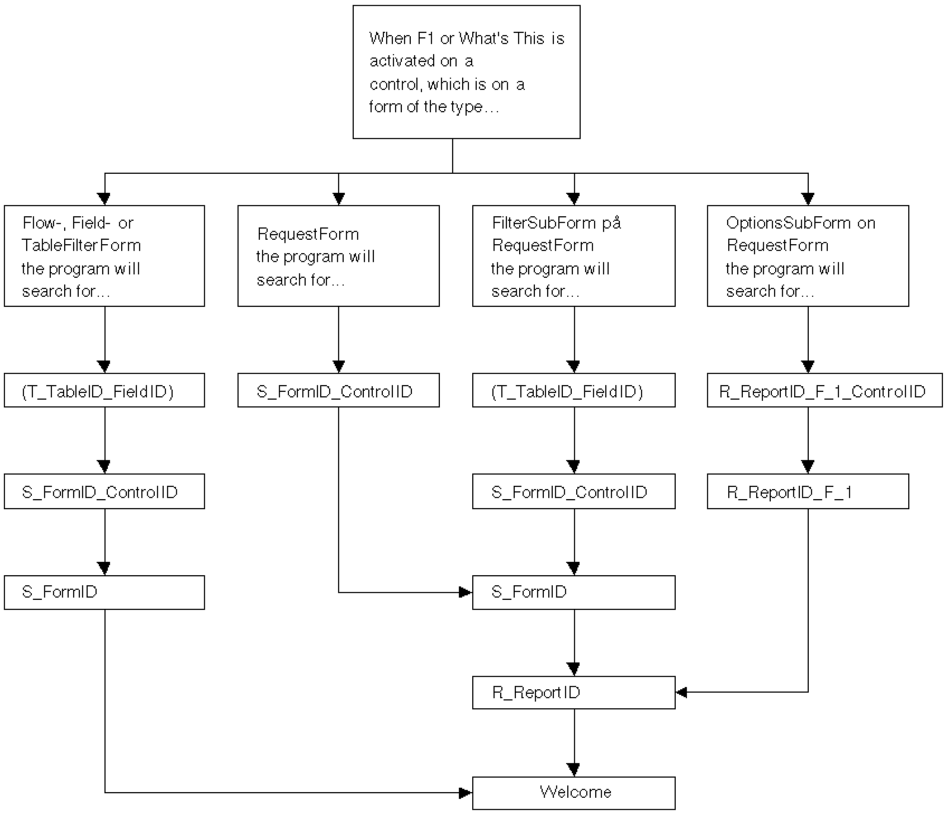
F1/Help cursor on a Request Form or on Flow, Field and Table Filter Subforms

When you activate the Help cursor on a Request Form or on Flow, Field and Table Filter Subforms, it is again the location of the cursor that determines which Help is shown. If the cursor is on the form, the same Help as described above is displayed. If the cursor is on a control, Help for the specific control on the current form is displayed.

The order looks like this:



C/SIDE's search for Help, when F1 or the Help cursor is activated on a control on a Request Form or Form or on Flow, Field, and Table Filter Subforms.

INDEX