



MADCAP DOC-TO-HELP 6

Documents, Templates, and Content

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CHAPTER 1

Introduction

As soon as you start a project, you can do any number of things with it. Technically, you could build the final output immediately. However, if it is a new project with a new Word document, building the output right away would not do your end users much good, since the output does not yet have much real substance. The project needs content, links, navigation, and all of the other elements necessary to help your end users.

This chapter discusses the following:

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- Templates 11

Source Documents and Content

You can add multiple Microsoft® Word source documents to your project, and within those you can add many kinds of elements and objects. Some features (e.g., images, lists, tables) are built into Word and therefore always available, whether the document is part of a Doc-To-Help project or not. Other features are unique to Doc-To-Help and are available in Word through the Doc-To-Help ribbon, Target ribbon, Project ribbon, and Doc-To-Help Project panel.

Project Elements and Objects

In addition to the elements and objects that you add within a Word source document, there are other features (e.g., indexes, groups, related topics, custom tables of contents) that you can add and manage in the Doc-To-Help Project panel. See the online help or *Touring the Workspace Guide* for more information.

Elements and Objects That You Can Add to a Project


Following is a list of elements and objects that you can add to your source documents or within the Doc-To-Help project. We're not listing the many elements and objects that are built in to Word. For information about adding those kinds of features, see the online Help provided with Word. Instead, we are focusing on the elements and objects that are specific to Doc-To-Help.

Some of these features can be used in online output as well as print-based output, whereas some are for online output only.

- **Documents** You can add new or existing Word documents to your project. See "Adding, Renaming, and Removing Documents" on page 14.
- **ActiveX Controls** These controls can be used to provide features in compiled HTML Help systems (CHM files). See "ActiveX Controls" on page 55.
- **Conditions** A condition is a single-sourcing feature that you can apply to files or to different areas of your content, so that some information displays in some outputs but not in others. It is a key feature when it comes to single-sourcing in Doc-To-Help. See "Conditions" on page 56.
- **Glossaries** A glossary is a list of specialized words with their definitions, accessed in online output or placed at the end of a PDF. When you create a new Doc-To-Help project, a glossary document is added automatically. However, you can delete this file or flag a different document as your glossary. Whenever you like, you can add glossary terms to the file. See "Glossaries" on page 67 and "Adding Terms to the Glossary" on page 68.

- **Image Maps** You can insert images into your source documents, using the standard options available in Word. (We recommend using the "Insert and Link" option, and placing images in your Media folder.) For online outputs, you can create hotspots from an image that link to topics, keywords, or groups. See "Images" on page 69 and "Creating Image Maps" on page 73.
- **Indexes** Index entries are also called "keywords" (or K-links). They will display in your output in an index. See "Indexes" on page 76.
- **Margin Notes** Margin notes are used to place text or images in the left margin of a manual, next to the main body of the text. Margin notes do not appear in online outputs unless you explicitly link them to the text, where they will appear as popups. See "Margin Notes" on page 81.
- **Multimedia** In the Doc-To-Help ribbon in Word, there is an option named "Multimedia" that lets you insert video files and embed online videos. See "Multimedia " on page 83.
- **Navigation Links** A navigation link is a feature that points to additional information from a specific area in a topic or document. This can include basic links, cross-references, inline text effects (expanded, drop-down, popup), expanding/collapsing sections, groups, and related topics. See "Navigation Links" on page 92.
- **Tables** You can quickly insert a table into a Word document using the Doc-To-Help Special Formatting toolbar or ribbon. The table will be pre-formatted with the correct Doc-To-Help styles, and you can specify borders, indentation, and shading of the heading row. See "Tables" on page 112.
- **Tables of Contents** Doc-To-Help automatically creates a table of contents (TOC) for you based on the structure of your documents. But you can create a custom TOC (you can even have different TOCs for different targets) if you wish. See "Tables of Contents" on page 114.
- **Variables** Variables allow you to write content once, and manage it in one place for reuse across your project. When adding a new text variable (not a rich content variable), you can now select one of three types: Text, Version, or Date/Time. See "Variables" on page 136.

 **NOTE:** Doc-To-Help supports DOC, DOCX, DOCM, and RTF files.

 **NOTE:** These features are all available through Microsoft Word.



NOTE: Doc-To-Help styles reside in individual Doc-To-Help templates (such as D2H_NORM.-dotx), so you should create your files using a predefined Doc-To-Help template and edit it to your specifications.

Templates

Word uses template files (DOTX) whenever you create a new Word document. Depending on the template you use, various styles are already available for you. Doc-To-Help provides predefined templates to determine how your content will look and work. The name of these templates all begin with a D2H prefix (e.g., D2H_NOMARGIN.dotx) and contain both Word styles and Doc-To-Help's special styles, which you apply to content in your Word source documents. Most templates are designed for print-based outputs, while a couple are available for online outputs. In Doc-To-Help projects, there are two kinds of Word templates that you will use: source and target.

Source Documents

You can add multiple Microsoft® Word source documents to your project, and within those you can add many kinds of elements and objects. Some features (e.g., images, lists, tables) are built into Word and therefore always available, whether the document is part of a Doc-To-Help project or not.

But there are other features that are unique to Doc-To-Help (e.g., conditions, image maps, inline text, variables). When you open a Word source document that is part of a Doc-To-Help project, you will notice three additional ribbons displayed for using the unique elements of Doc-To-Help: Doc-To-Help, Target, and the Project ribbons.

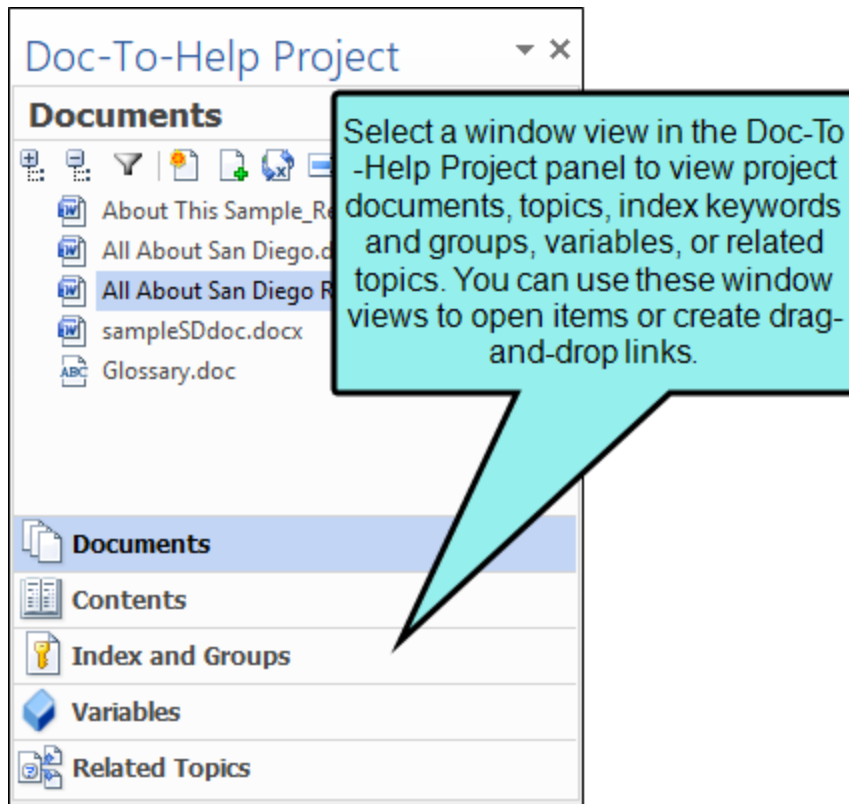
Depending on the source template you used to create the document, a ribbon called "Doc-To-Help Special Formatting" may also be available.



NOTE: If you want to use the Special Formatting ribbon in your source document, be sure to select the D2H_SMAL.dotx, D2H_SMAL_A4.dotx, D2H_NORM.dotx, or D2H_NORM_A4.-dotx template when creating a new document. If your source document is using a different template, and you switch to one of these four templates, the Special Formatting ribbon will not be available.

For documents where this ribbon is not available, use the Bullet, Numbering, and Table buttons in Word's native ribbons.

In addition to Doc-To-Help's special Word ribbons, the Doc-To-Help Project panel lets you add other unique elements to your source documents, such as links to variables, keywords, and topics.




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Adding, Renaming, and Removing Documents


You may add, rename, and remove Word documents. You can also designate a specific document to serve as a glossary.


HOW TO ADD A NEW DOCUMENT TO YOUR PROJECT

1. In Word, click on the Documents view in the Doc-To-Help Project panel.
2. Click the **Create New Document** button .
3. Choose the Word document. Enter a name and click **Save**. The document opens and is added to the Documents window view.


 **NOTE:** You can also add a new document by opening the **Project** ribbon, and clicking the **Add** button in the Documents section of this ribbon.

HOW TO ADD AN EXISTING DOCUMENT TO YOUR PROJECT


1. In Word, open the Documents window view in the Doc-To-Help Project Panel.
2. Click the **Add Existing Documents** button . The Document Import Wizard opens.
3. Choose **Local**. This option imports documents located on your computer or a network.


 **NOTE:** If you want to add documents from a SharePoint Library, choose **SharePoint** instead. For more information about SharePoint and adding documents using that method, see the online Help or the *Project Management Guide*.

4. Click **Next**.
5. Click **Add File(s)** or **Add Folder** to select your documents or a folder containing multiple documents. Then click **Open** or **OK** in the dialog when finished.

 **NOTE:** If you attempt to add a document to your project that has the same name as one that already exists in your source document folder, it will display in the wizard with a red X icon next to it. Since you cannot import a document with the same name, the Import button will be disabled.

6. (Optional) In the **Copy files to** field you can select a location other than the default (i.e., the Documents folder in your project) to store the document(s). Your original documents will remain in their original location.
7. (Optional) You can select **Leave documents at their original location** if you do not want to copy them to your project, but this is not recommended, because references to other documents in your project may be broken in your targets.
8. Click **Import**. The imported files will appear in the Documents window pane. You can use the arrow buttons in the local toolbar to rearrange the files as you wish.

 **NOTE:** You can also add a new document by opening the **Project** ribbon, and clicking the **Add** button in the Documents section of this ribbon.

 **NOTE:** You can also drag-and-drop an existing document from Windows Explorer into the Documents window pane, but you should copy it into the appropriate project folder first. By default, this folder is named "Documents." These default names can be changed using the Project Settings dialog. See the online Help or the *Project Management Guide*

HOW TO RENAME A DOCUMENT

1. In Word, in the Documents window view, right-click on the document and choose **Rename Document**.
2. Type a new name and press **Enter**.

HOW TO REMOVE A DOCUMENT

1. In Word, in the Documents window view, right-click on the document and choose **Remove Document**.
2. Click **Yes**.

HOW TO DESIGNATE A DOCUMENT AS THE PROJECT GLOSSARY

- In Word, in the Documents window view, right-click on the document and choose **Glossary**. The icon next to the document changes to reflect its purpose.

For more information on glossaries, see "Glossaries" on page 67.

After adding a new document to your project, you should build the target. This processes the document and adds its topics to the project (see "Topics" on page 118).


Converting DOC Files to DOCX

You can upgrade older Word documents (DOC files) in your project to the newer DOCX format. The DOC format is from Word 2003 and older versions of Word. The DOCX format—an open standard format based on XML—was introduced in Microsoft Office 2007.

HOW TO CONVERT DOC FILES TO DOCX

1. Open a Doc-To-Help project that contains at least one document with a DOC extension.
2. Select **File > Doc-To-Help**.
3. In the Doc-To-Help menu in Word, click the **Common Tasks** submenu option under the Project section.
4. Click the **Convert Doc to DocX** button. You will see a prompt to start the operation; click the appropriate button to begin the conversion. The prompt message depends on whether a project is shared or not. For shared (team) projects, you need to check out the project.


After a successful conversion, all documents in the project will be DOCX, and all links in all Word documents will be updated appropriately.

 **NOTE:** If any error occurs while converting documents, Doc-To-Help attempts to restore everything (documents and the project) to the initial state (before starting the conversion).

Converting Documents to HTML5

You can convert a Word document that is already part of your project to HTML5. The file extension of the converted document will be .xml. The primary reason for converting Word documents to HTML5 is to then import your Doc-To-Help project to MadCap Flare.

HOW TO CONVERT MULTIPLE DOCUMENTS TO HTML5

1. In Word, open the Documents window view in the Doc-To-Help Project panel, and click the **Convert Multiple Documents to HTML5** button .

If you want to convert just a single document, you can right-click on the document in the Documents window view and choose **Convert to HTML5**.

The Convert Documents to HTML5 dialog opens.

2. By default, the converted documents will be saved to their original location. If you would like to save them to another location, choose **Save converted files to** and click the **Browse** button).
3. The "Keep backup copy" check box is selected by default. If you want the option to revert to the original source documents, leave it selected. The files will be saved with a .backup file extension.
4. Confirm the Word Style Map (the Word to HTML5 styles map file). Click the **Browse** button to change it.
5. If you would like to convert one or more files individually, select the document name(s) on the left, then select the **Use individual conversion settings** check box.
6. Choose the desired options.
7. Click the **Convert** button. The files are converted and appear in the Documents window pane.

Setting Document Properties

The Document Properties dialog is used to view or change the properties of a document. If you would like to view or change the properties of a single topic, use the Topic Properties dialog (see "Viewing/Changing Topic Properties" on page 132).

HOW TO SET DOCUMENT PROPERTIES

1. In Word, open the Documents window pane in the Doc-To-Help Project panel and select a document.
2. Right-click on the document you wish to modify.
3. Select Properties. The Document Properties dialog opens.
4. Set any of the following:

DOCUMENT

- **Name** The read-only name of the document.
- **Type** Notes the document type (e.g., Word).
- **File size** The size of the source document.
- **File modified** The date and time of the last modification to the source document.

CONDITION

These can also be set and will appear in the Source group in the ribbon. See "Conditions" on page 56.

- **Platforms** Sets a platform-based condition for the selected document. The document will be included in all the target platform(s) selected. A platform includes all the targets that produce the output specified; Online Help, HTML Help, NetHelp, Printed Manual, etc.
- **Targets** Sets a target-based condition for the selected document. The document will be included in all the target(s) selected.
- **Attributes** Set an attribute-based condition for the selected document. The document will be included or excluded when creating conditional builds (e.g., internal or external.) Use the Attributes dialog (**Project > Attributes**) to create custom attributes.

SHARING

These fields only apply to documents that have been shared to a SharePoint Library. See the online Help or the *Project Management Guide*.

- **Document URL** The location of this document on the SharePoint Library server.
- **Auxiliary Files** The location of this document's auxiliary files (usually graphics and video) on the SharePoint Library server.
- **First Uploaded by** The name of the person who first uploaded this document to the SharePoint Library server.
- **First Upload date** The date this document was first uploaded to the SharePoint Library server.
- **Last changed by** The name of the last person to edit this document.
- **Last download date** The latest date this document was downloaded from the SharePoint Library server.
- **Checked out by** If this document is currently checked out from the SharePoint Library, the name of the person who has it checked out. If it is you, it will read "me."

ADVANCED

- **Keep outline numbers** When selected, outline numbers are included as part of topic titles and are present in targets. This setting only affects the RTF files generated from source documents; it does not affect the source documents themselves. Modifying this setting for an individual document will override the settings for that document only.
- **Adjust left indent** Controls whether paragraph indentation is adjusted to account for wide margins when building online output. By default, this check box is selected to accommodate the standard Doc-To-Help templates. Clear this check box if you are using custom templates and want to preserve the indentation used in your source documents.
- **Include in Search** If selected, search is enabled for this document in NetHelp outputs. If cleared, this document is excluded from the search.
- **Keep page breaks** When selected, retains the page break characters in the source documents during compilation of a Printed Manual target. Clear this check box to discard page break characters. Modifying this setting for an individual document will override the settings for that document only.

- **Plain text popups** If selected, generates a plain text-only version of the file for context-sensitive Help topics. Modifying this setting for an individual document will override the settings for that document only.


5. Click **OK**.


Finding Projects Containing a Source Document

Source documents sometimes belong to multiple Doc-To-Help projects. When you open a source document in Word, you can switch between these projects so you can easily make changes to each project.

HOW TO FIND PROJECTS CONTAINING A SOURCE DOCUMENT

1. In Word, select the Doc-To-Help ribbon.
2. In the **Project** section, click **Select Project**.
3. In the dialog that opens, navigate to the Doc-To-Help project that contains your source document, then click **Open**.

 **NOTE:** If you attempt to open a project that does not contain the open source document, you will receive an error.

 **NOTE:** You can also use the Find Project option if you open a source document and the Doc-To-Help Word add-in cannot locate the project file. In this instance, the Word add-in will open in Basic mode, and you can use the Find Project option to find a project associated with the source document. If you find an appropriate project, the add-in will switch to Full mode.

Templates and Styles

In addition to Word's built-in styles and those you create, there are several styles created by Doc-To-Help that you will use because they let you create features not otherwise available in Word. You can easily identify these special styles because they all begin with the prefix C1 or C1H (e.g., C1 Section Collapsed, C1H Link Tag, C1H Popup).

Word uses template files (DOTX) whenever you create a new Word document. Depending on the template you use, various styles are already available for you. Doc-To-Help provides predefined templates to determine how your content will look and work. The name of these templates all begin with a D2H prefix (e.g., D2H_NOMARGIN.dotx) and contain both Word styles and Doc-To-Help's special styles, which you apply to content in your Word source documents. Most templates are designed for print-based outputs, while a couple are available for online outputs. In Doc-To-Help projects, there are two kinds of Word templates that you will use: source and target.

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Location of Template Files

Doc-To-Help's custom templates are stored in the same location as your regular Microsoft templates:

C:\Users\\AppData\Roaming\Microsoft\Templates

The path may be slightly different depending on your operating system.

 **NOTE:** If you uninstall Doc-To-Help and reinstall a newer version, the templates will remain in that folder. However, if one of your customized templates uses the same name as one of Doc-To-Help's default templates, and there is a newer version of that template in the installation, Doc-To-Help will save your version of the template to the following folder:

\\Users\\AppData\Roaming\Microsoft\Templates\Backup

The Application Data or App Data folder is a hidden folder. To show hidden folders, open the Folder Options dialog in your operating system (**Control Panel > Folder Options**). Click the **View** tab, under **Advanced Settings > Files and folders > Hidden files and folders**, select the **Show hidden files and folders** radio button. Click **OK**.

Source and Target Templates

In Doc-To-Help projects, there are two kinds of Word templates that you will use: source and target.

Why two kinds of templates? It has to do with function; each has a unique purpose and is associated with different parts of the user interface.

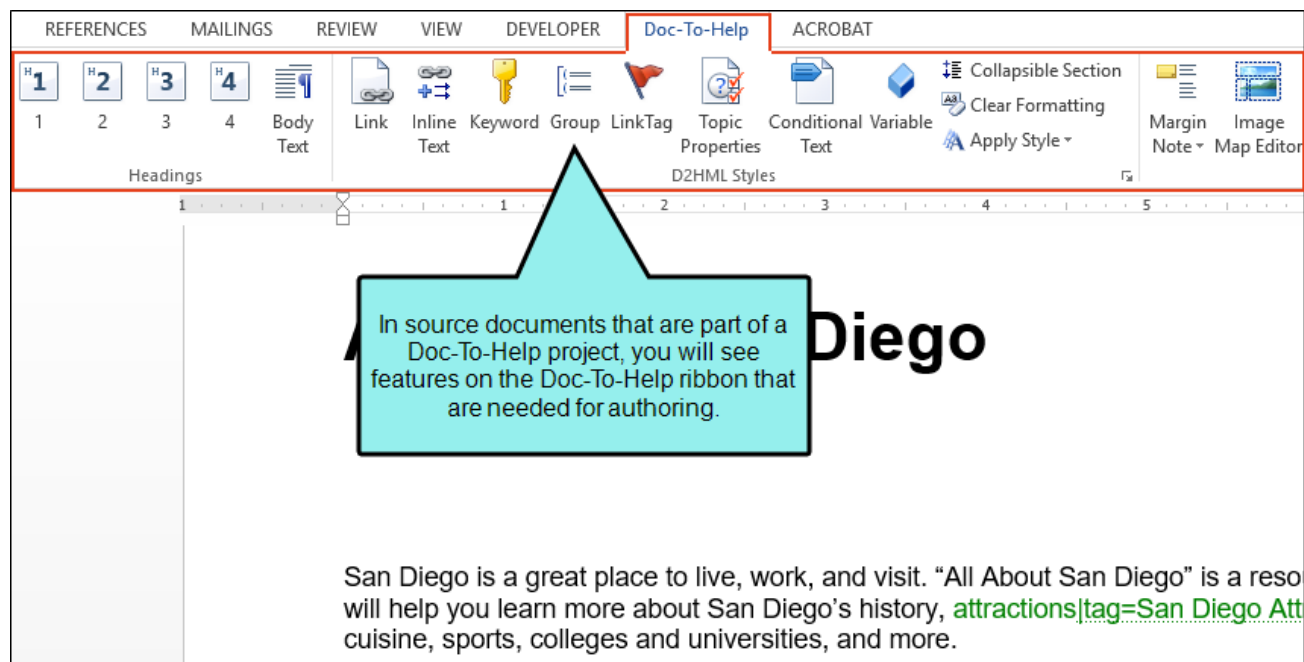
SOURCE TEMPLATES

A source template is used when you create a new Word source document (see "Adding, Renaming, and Removing Documents" on page 14) and author in it (see "Source Documents" on page 12). You should always create your documents with the source templates provided by Doc-To-Help and edit the source document as desired; this will guarantee full Doc-To-Help functionality.

☆ EXAMPLE

If you select `D2H_NOMARGIN.dotx` as your source template, that is the template that will be used when you create a new source document in the project.

When you open a source document that is part of a Doc-To-Help project, you will notice that there are more options available in Word's Doc-To-Help ribbon. Many of these options are only available in source documents; you will not see them in final output or templates.



❗ **IMPORTANT:** If you want to create new styles, you can do so in both your source and target template. (By creating a new style in the source template, it becomes available in your source document so that you can apply it to content.) However, it is not necessary to edit the formatting in a source template; *it is best to leave the formatting in a source template as it is*. The source template is for your eyes only, and it would be a wasted effort to make a lot of formatting changes in it since your end users will not see it. You should make formatting changes on styles in your target template.

The exception to this rule is if you are creating a custom template, because any text you add in the source template is used to create new projects. You may want to add some formatting in the template to provide structure in new projects (e.g., adding headings). However, you should not extensively format the template, because formatting is added when you build your output.

❗ **IMPORTANT:** You can create your own custom source templates. If you do this, it is recommended that you make copies of an existing Doc-To-Help template to edit rather than creating a template from scratch. This is because Doc-To-Help templates use several proprietary styles and bookmarks to ensure that your output builds correctly.

TARGET TEMPLATES

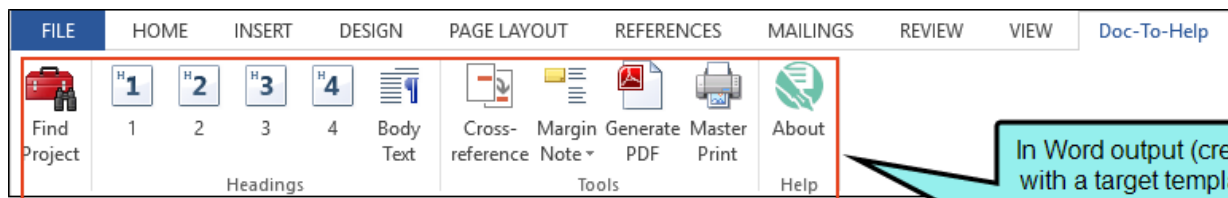
A target template is used when you build the selected target. See the online Help or the *Targets Guide*.

☆ EXAMPLE

If you select `D2H_PRNOMARGIN.dotx` as your target template, that is the template that will be used when you generate output for the selected target.

Also, when you select a particular target in the Target ribbon (from the Active Target drop-down), Doc-To-Help automatically changes the Target Template drop-down to select the default template associated with that target.

When you open Word output generated from a target template, you will notice that there are fewer options available in Word's Doc-To-Help ribbon than if you had opened a source document. A couple of options (i.e., Generate PDF and Master Print) are only available in the ribbon when you view output because they are necessary for output but not for the source document.



NOTE: When you open a source or target template in Word, you will not see the Doc-To-Help ribbon. This is because you do not need Doc-To-Help functionality to edit a template, so the Doc-To-Help Word add-in opens in No Features mode. However, you can still use Doc-To-Help's styles and variables to edit the template.

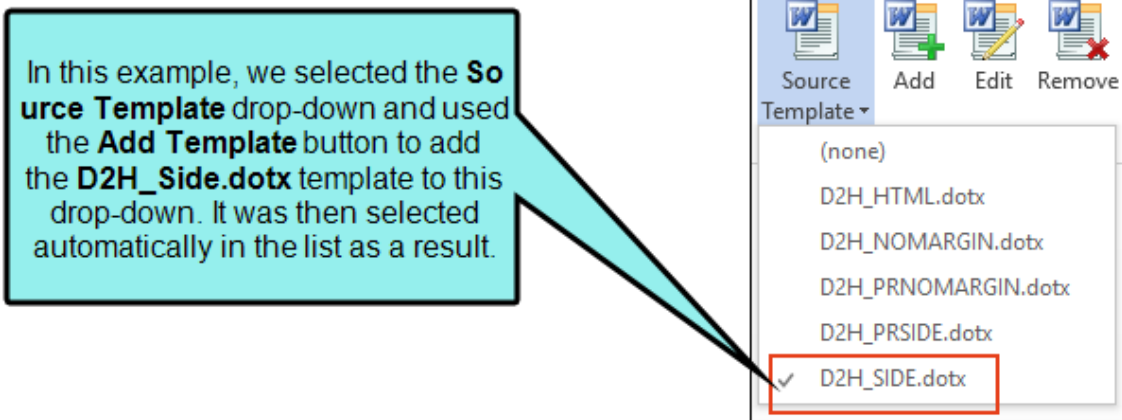
Print-based Templates

The following table lists the various Word template files that can be used in Doc-To-Help projects when creating print-based output.

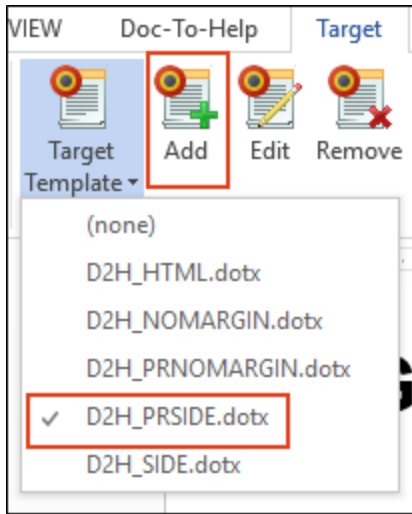
Notice that each source template has a complementary target template that has a similar page layout. Therefore, if you select a particular source template, it is a best practice to also select its complementary target template.

☆ EXAMPLE

Let's say you add and select D2H_SIDE.dotx as your source template.



☆ Therefore, according to the following table, it's best to add and select **D2H_PRSIDE.-dotx** as the target template.



Print-based templates often contain front matter and back matter content (e.g., title page, table of contents, index). You can make changes to this content (e.g., title, cover image, byline, contents heading) in the Help Targets dialog. See the online Help or the *Targets Guide*.

Source Templates	Complementary Target Templates
<p>D2H_FANCY.DOTX This source template has a page layout similar to D2H_NOMARGIN.DOTX, but it has a fancier styles that use color and a different font. When used with the complimentary target template, it will have a fancy design.</p> <p>In the New Project Wizard, this template is called Fancy 8.5" x 11" Template.</p>	<p>D2H_PRFANCY.DOTX This is the target template that is intended to accompany the D2H_FANCY.DOTX source template. It includes a page layout similar to D2H_PRNOMARGIN.DOTX, but it has a fancier design. This includes color, an image placed behind the text on the title page, an image placed behind the text in the headers, and a decorative image in the footers.</p>
<p>D2H_FANCY_A4.DOTX This is the source template for A4-sized paper.</p> <p>In the New Project Wizard, this template is called Fancy A4 Template.</p>	<p>D2H_PRFANCY_A4.DOTX This is the target template used to format the printed manual target (A4-sized paper).</p>

Source Templates	Complementary Target Templates
<p>D2H_NOMARGIN.DOTX This is the Doc-To-Help default source template. It will be used unless you use your own or choose an alternate from this list.</p> <p>In the New Project Wizard, this template is called Normal 8.5" x 11" Template (no left indent).</p>	<p>D2H_PRNOMARGIN.DOTX This is the target template used to format the printed manual target. It differs from D2H_PRNORM.DOTX in that it does not have the wide 2-inch left margin.</p>
<p>D2H_NOMARGIN_A4.DOTX This is the source template for A4-sized paper.</p> <p>In the New Project Wizard, this template is called Normal A4 Template (no left indent).</p>	<p>D2H_PRNOMARGIN_A4.DOTX This is the target template used to format the printed manual target (A4-sized paper).</p>
<p>D2H_NORM.DOTX This is Doc-To-Help's default source template for versions prior to Doc-To-Help 2007. This matches D2H_NOMARGIN.DOTX, but it has a 2-inch left margin.</p> <p>In the New Project Wizard, this template is called Normal 8.5" x 11" Template.</p>	<p>D2H_PRNORM.DOTX This is the target template used to format the printed manual target. It differs from D2H_PRNOMARGIN.DOTX in that it has a 2-inch left margin.</p>
<p>D2H_NORM_A4.DOTX This is the source template for A4-sized paper with a 2-inch left margin.</p> <p>In the New Project Wizard, this template is called Normal A4 Template.</p>	<p>D2H_PRNORM_A4.DOTX This is the target template used to format the printed manual target (A4-sized paper).</p>

Source Templates	Complementary Target Templates
<p>D2H_FANCY_POLICIES.DOTX This source template is used to create policies & procedures documents. It has sample text and headings that you can use as a starting point for these manuals. It is based on D2H_FANCY.DOTX and uses the same styles and page layout as in that template.</p> <p>By default, the headers in this template are numbered.</p> <p>In the New Project Wizard, this template is called Policies & Procedures 8.5" x 11" Fancy Template.</p>	<p>D2H_PRFANCY_POLICIES.DOTX This is the target template that is intended to accompany the D2H_FANCY_POLICIES.DOTX source template. Like the PR_FANCY.DOTX target template, this template includes color, an image placed behind the text on the title page, an image placed behind the text in the headers, and a decorative image in the footers.</p>
<p>D2H_FANCY_POLICIES_A4.DOTX This is the source template for A4-sized paper.</p> <p>In the New Project Wizard, this template is called Policies & Procedures A4 Fancy Template.</p>	<p>D2H_PRFANCY_POLICIES_A4.DOTX This is the target template used to format the printed manual target (A4-sized paper).</p>
<p>D2H_NOMARGIN_POLICIES.DOTX This source template is used to create policies & procedures documents. It has sample text and headings that you can use as a starting point for these manuals. It is based on D2H_NOMARGIN.DOTX and uses the same styles and page layout as in that template.</p> <p>By default, the headers in this template are numbered.</p> <p>In the New Project Wizard, this template is called Policies & Procedures 8.5" x 11" Plain Template.</p>	<p>D2H_PRNOMARGIN_POLICIES.DOTX This is the target template used to format the printed manual target for a policies & procedures manual.</p>


Source Templates	Complementary Target Templates
<p>D2H_NOMARGIN_POLICIES_A4.DOTX This is the source template for A4-sized paper.</p> <p>In the New Project Wizard, this template is called Policies & Procedures A4 Plain Template.</p>	<p>D2H_PRNOMARGIN_POLICIES_A4.DOTX This is the target template used to format the printed manual target (A4-sized paper).</p>
<p>D2H_SIDE.DOTX This is the source template for sidehead source documents.</p> <p>In the New Project Wizard, this template is called Sidehead 8.5" x 11" Template.</p>	<p>D2H_PRSIDE.DOTX This is the target template used to format the standard sidehead printed manual.</p>
<p>D2H_SIDE_A4.DOTX This is the source template for sidehead source documents on A4-sized paper.</p> <p>In the New Project Wizard, this template is called Sidehead A4 Template.</p>	<p>D2H_PRSIDE_A4.DOTX This is the target template used to format the standard sidehead printed manual (A4-sized paper).</p>
<p>D2H_SMAL.DOTX This is the source template used to format small-sized manuals on 8.5" x 11" paper.</p> <p>In the New Project Wizard, this template is called Small 8.5" x 11" Crop-Marked Template.</p>	<p>D2H_PRSMAL.DOTX This is the target template used to format the standard small printed manual.</p>
<p>D2H_SMAL_A4.DOTX This is the source template used to format small-sized manuals on A4-sized paper.</p> <p>In the New Project Wizard, this template is called Small A4 Crop-Marked Template.</p>	<p>D2H_PRSMAL_A4.DOTX This is the target template used to format the standard small printed manual (A4-sized paper).</p>


Online Templates

If you are generating online output from Doc-To-Help, you will normally use the primary online template: D2H_HTML.dotx.

Selecting None as a Template

When selecting source and target templates, you also have the option of selecting **(none)**. If you do this, Doc-To-Help will use the same template that is used if you were to create a new blank document in Word.

 **NOTE:** If you have existing Word documents that use custom styles, you can copy all of those styles from your templates over to Doc-To-Help's custom templates using Word's Organizer. And you can use the Project Styles dialog in Doc-To-Help to map your existing styles to Doc-To-Help styles.

 **NOTE:** If you have old projects from previous versions of Doc-To-Help, you should upgrade those projects to the new version. Upgrading your old project is necessary if you want to use the new version of Doc-To-Help because doing so makes changes to removed target settings. Keep in mind that there is also a change in templates from previous versions, which used the C1H prefix instead of the current D2H prefix, and the DOT or DOTM extension instead of the DOTX extension. See the online Help or the *Upgrading Old Projects Guide*.

Editing a Template

There may be times that you need to edit Doc-To-Help's templates to suit your own needs. You can do this by editing styles in the templates or by creating custom templates.

Editing Template Styles

If necessary, you can create new styles in both your source and target templates (DOTX file). However, if you need to make modifications to the formatting of *styles* (e.g., change the font color for a style from black to red), you should do so in your target template instead of the source template or document. Keep in mind that style changes in the source template affect only the look of the source documents, which are for your eyes only. Editing the target template changes the look of your final output.

☆ EXAMPLE

Let's say you change the Heading 1 style in the template to be blue. But in the source document you create based on that template, you change the color for the style to red. When you generate the target, Doc-To-Help ignores the formatting that you did in the source document, and you end up with blue headings.

If you've selected a source template that includes a particular style that is not available in a target template that you select, the source style passes through to the target.

☆ EXAMPLE

Let's say you are using D2H_NOMARGIN.dotx as your source template. Within that template, you create a custom style called "BigText" that has a 48-point font.

You then create a source document based on that template, and you apply the "BigText" style to some content.


With D2H_PRNOMARGIN.dotx selected as your target template, you build the output. The "BigText" style is not part of that template, but it passes through and you see it anyway in the output.

✔ **TIP:** It is good practice to back up your original templates so that you can restore them if needed.

HOW TO OPEN A SOURCE OR TARGET TEMPLATE

1. In Word, open the Project ribbon to open a source template. Or, open the Target ribbon to open the target template.
2. To open source templates for editing:
 - a. Click the **Edit** button in the template area of the **Project** ribbon.
3. To open target templates for editing:
 - a. Click the **Edit** button in the template section of the **Target** ribbon.

HOW TO MODIFY THE FORMATTING OF A STYLE IN A TEMPLATE

1. After the Word template is open, select the **Home** ribbon, and at the bottom of the **Styles** group click . The Styles window opens.
2. Click the style you would like to edit from the list and click the drop-down next to it. Choose **Modify**. The Modify Style dialog opens.
3. Select the **Format** drop-down, then select the attribute you want to modify and make the desired changes.
4. When you are done, choose **New documents based on this template**.
5. Click **OK**.
6. Save the template file.

This will only affect the look of a style.

HOW TO ADD OR REMOVE A TEMPLATE IN DOC-TO-HELP

To add a Source Template, select the Project ribbon and click the **Add** button in the template section. To add a Target Template, select the Target ribbon and click the **Add** button in the template section.

To remove a Source Template, select the Project ribbon and click the **Remove** button in the template section. To remove a Target Template, select the Target ribbon and click the **Remove** button in the template section.

 **NOTE:** Templates are stored at:

\\Users\<>user name>\AppData\Roaming\Microsoft\Templates

If you uninstall Doc-To-Help and reinstall a newer version, the templates will remain in that folder. However, if one of your customized templates uses the same name as one of Doc-To-Help's default templates, and there is a newer version of that template in the installation, Doc-To-Help will save your version of the template to the following folder:

\\Users\<>user name>\AppData\Roaming\Microsoft\Templates\Backup


The Application Data or App Data folder is a hidden folder. To show hidden folders, open the Folder Options dialog in your operating system (**Control Panel > Folder Options**). Click the **View** tab, under **Advanced Settings > Files and folders > Hidden files and folders**, select the **Show hidden files and folders** radio button. Click **OK**.

Creating Custom Templates


If you use Doc-To-Help to create specific kinds of documents, like policies & procedures manuals or knowledge base articles, you might want to create custom templates for these documents rather than using Doc-To-Help's standard templates. Custom templates can be used every time you create a new document so writers do not need to cut-and-paste formatting or copy styles from template to template. You can also provide sample text to remind writers of the information that needs to go in each section.


HOW TO CREATE CUSTOM TEMPLATES

1. Open the Microsoft Word Templates folder, located at **C:\Users\[user-name]\AppData\Roaming\Microsoft\Templates**. Copy the source and target templates that you want to use as a basis for your custom template, and paste them in a new location, such as your desktop or a network drive.

 **IMPORTANT:** It is recommended that you make copies of an existing Doc-To-Help template to edit rather than creating a template from scratch. This is because Doc-To-Help templates use several proprietary styles and bookmarks to ensure that your output builds correctly.


2. Open the *source* template. Make any changes to the default text. You can add sample headings and default text. Any content that appears in the source template will appear in new documents created using the template.

 **NOTE:** If you create styles in your custom templates, remember to define their authoring behaviors in Doc-To-Help using the Project Styles dialog.

 **TIP:** If you are creating custom templates and you edit the first-level heading (labeled "Chapter 1" in most templates), be sure that the ChapterHeading bookmark does not get deleted. The ChapterHeading bookmark is necessary for Doc-To-Help to know where to insert content when building output. If it is deleted, you may end up with duplicate content.


To do this in Word, select the **Insert** ribbon, then click **Bookmark**. The Bookmarks dialog opens. If the ChapterHeading bookmark is not listed in the dialog, you can add it. If it is already listed, you do not need to do anything. For more information, see the Microsoft Word online Help.

3. Save the source template. Be sure to save it as a .DOTX file and use a unique name.


 **NOTE:** It is important that you save your templates to a shared location, such as a network drive, if you are working with other authors.


If you are working alone, you can save the template to your C:\Users\[user-name]\AppData\Roaming\Microsoft\Templates folder.

4. (Optional) Open the *target* template. If you created any styles in the source template to use while creating your document, use the Word Organizer to copy those styles over to the target template.

 **NOTE:** The placeholder text in the target template dictates where your content will be added in the output. Do not change the text in the target template.

5. Save the target template. Be sure to save it as a .DOTX file and use a unique name.

 **NOTE:** Be sure to save the template as a unique file even if you did not make any changes to it.

 **NOTE:** It is important that you save your templates to a shared location, such as a network drive, if you are working with other authors.

If you are working alone, you can save the template to your C:\Users\[user-name]\AppData\Roaming\Microsoft\Templates folder.

6. Create a new Doc-To-Help project. When given the option to select a template, select **Add my own set of styles** from the drop-down, then select your custom template.
7. (Optional) When the Doc-To-Help project opens, be sure to add your target template to the project to use when building output. You will not need to do this if you are using NetHelp as your target, because the HTML template is already selected by default.

EXAMPLE

Let's say your company writes knowledge base articles. Your articles need to include five headings: a title, a summary, a description, a solution, and an attribution. You decide to create a custom template that includes headings for each of these sections. Because the articles are often written by different authors, you also want to include some sample text to guide the authors when they create a new article so each article will be written the same way and have a common voice.

To do this, you first create a copy of the source Doc-To-Help template most like the template you want to create. You decide to use D2H_NOMARGIN.dotx as a base for your new template because it is basic and you do not need any extra frills for your knowledge base articles.



This PC > Local Disk (C:) > Users > kschneider > AppData > Roaming > Microsoft > Templates

Name	Date modified	Type
D2H_FANCY		Microsoft Word Template
D2H_FANCY_A4		Microsoft Word Template
D2H_FANCY_POLICIES		Microsoft Word Template
D2H_FANCY_POLICIES_A4	8/10/2016 11:21 AM	Microsoft Word Template
D2H_HTML	8/10/2016 11:31 AM	Microsoft Word Template
D2H_NOMARGIN	8/10/2016 11:21 AM	Microsoft Word Template
D2H_NOMARGIN_A4	8/10/2016 11:21 AM	Microsoft Word Template
D2H_NOMARGIN_POLICIES	8/10/2016 11:21 AM	Microsoft Word Template
D2H_NOMARGIN_POLICIES_A4	8/10/2016 11:21 AM	Microsoft Word Template
D2H_NORM	8/10/2016 11:21 AM	Microsoft Word Template
D2H_NORM_A4	8/10/2016 11:20 AM	Microsoft Word Template
D2H_PRFANCY	8/18/2016 10:46 AM	Microsoft Word Template
D2H_PRFANCY_A4	8/18/2016 10:46 AM	Microsoft Word Template
D2H_PRFANCY_POLICIES	8/18/2016 10:46 AM	Microsoft Word Template
D2H_PRFANCY_POLICIES_A4	8/18/2016 10:46 AM	Microsoft Word Template
D2H_PRNOMARGIN	8/10/2016 11:21 AM	Microsoft Word Template
D2H_PRNOMARGIN_A4	8/10/2016 11:21 AM	Microsoft Word Template
D2H_PRNOMARGIN_POLICIES	8/10/2016 11:21 AM	Microsoft Word Template
D2H_PRNOMARGIN_POLICIES_A4		Microsoft Word Template
D2H_PRNORM		Microsoft Word Template
D2H_PRNORM_A4		Microsoft Word Template
D2H_PRSIDE		Microsoft Word Template
D2H_PRSIDE_A4	8/10/2016 11:21 AM	Microsoft Word Template
D2H_PRSMAL	8/10/2016 11:21 AM	Microsoft Word Template
D2H_PRSMAL_A4	8/10/2016 11:21 AM	Microsoft Word Template
D2H_sandcastle_src	8/10/2016 11:21 AM	Microsoft Word Template
D2H_SIDE	8/10/2016 11:21 AM	Microsoft Word Template
D2H_SIDE_A4	8/10/2016 11:21 AM	Microsoft Word Template
D2H_SMAL	8/10/2016 11:21 AM	Microsoft Word Template
D2H_SMAL_A4	8/10/2016 11:21 AM	Microsoft Word Template

Use this template to create your custom source template.

Later, you will use this template to create your custom target template.



Chapter 1

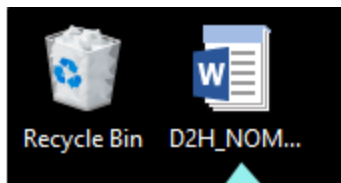
Insert your text here.

Topic 1

Insert your text here.

The stock D2H_NOMARGIN template is very basic. It looks like this.

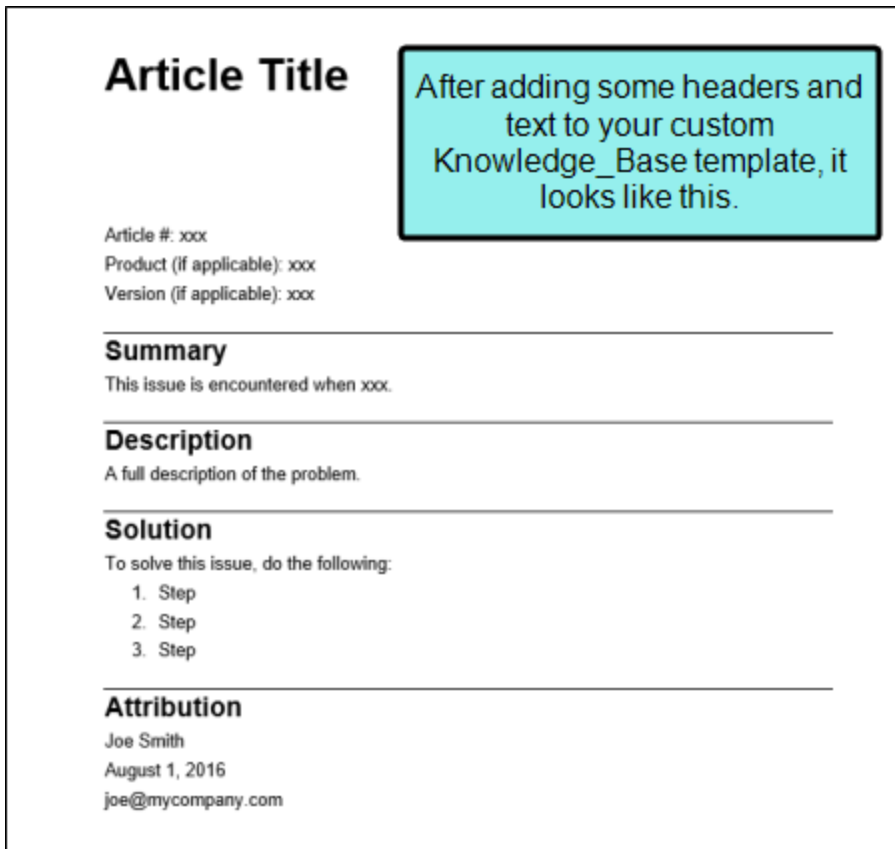
For now, you can save the copy of the D2H_NOMARGIN.dotx template to your desktop, since you will be making changes to it. It is important to save a separate copy of the template in a new location, such as your desktop, so it does not get mixed up with the original Doc-To-Help template while you are making changes.



Paste a temporary copy of the D2H template on your desktop. (You will save your custom template in its final destination—in this case a network drive—later.)

- ☆ Open the document and make your changes. You add a Title placeholder as a Heading 1, and the rest of your headings as Heading 2s. You also add some sample text in each section. You do not make any style changes.

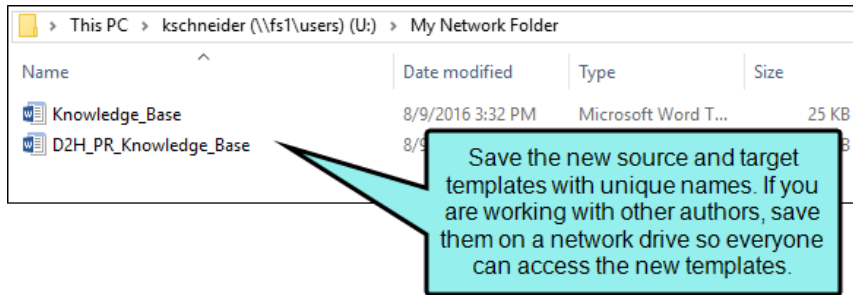
When you are done, your sample document looks like this:



Save the new source template as Knowledge_Base.dotx. Since you are working with several other authors, be sure to save it to a network drive so everyone has access to it.

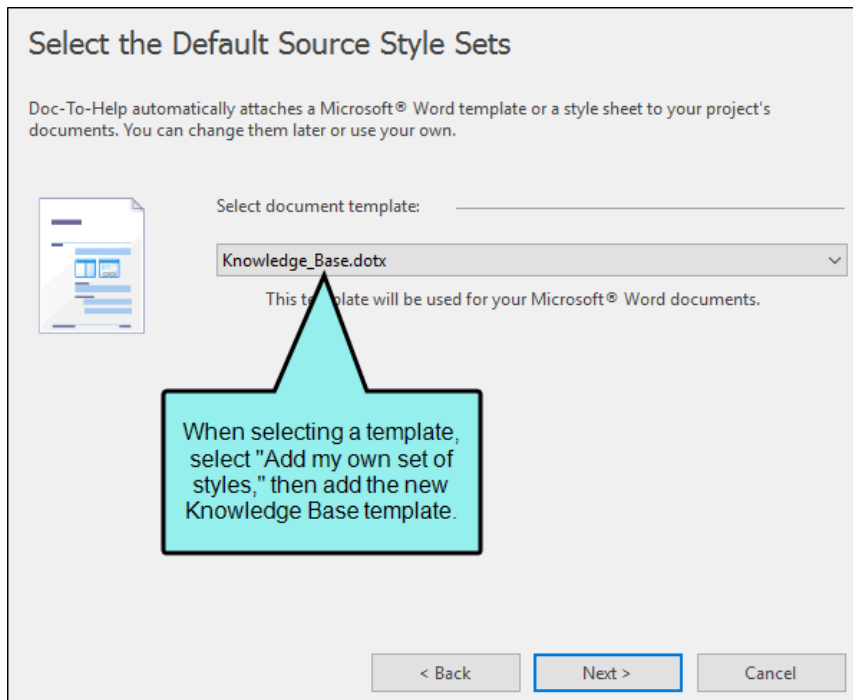
Then you copy the coordinating Doc-To-Help target template (D2H_PRNOMARGIN.-dotx) to your desktop (again, it is important to keep this copy separate from the original to prevent errors).

- ☆ Open the copy of the target template. Save it as PR_Knowledge_Base.dotx so you can distinguish it from your source template. You do not make any other changes. Be sure to save your new template to the network drive so other authors can access it.

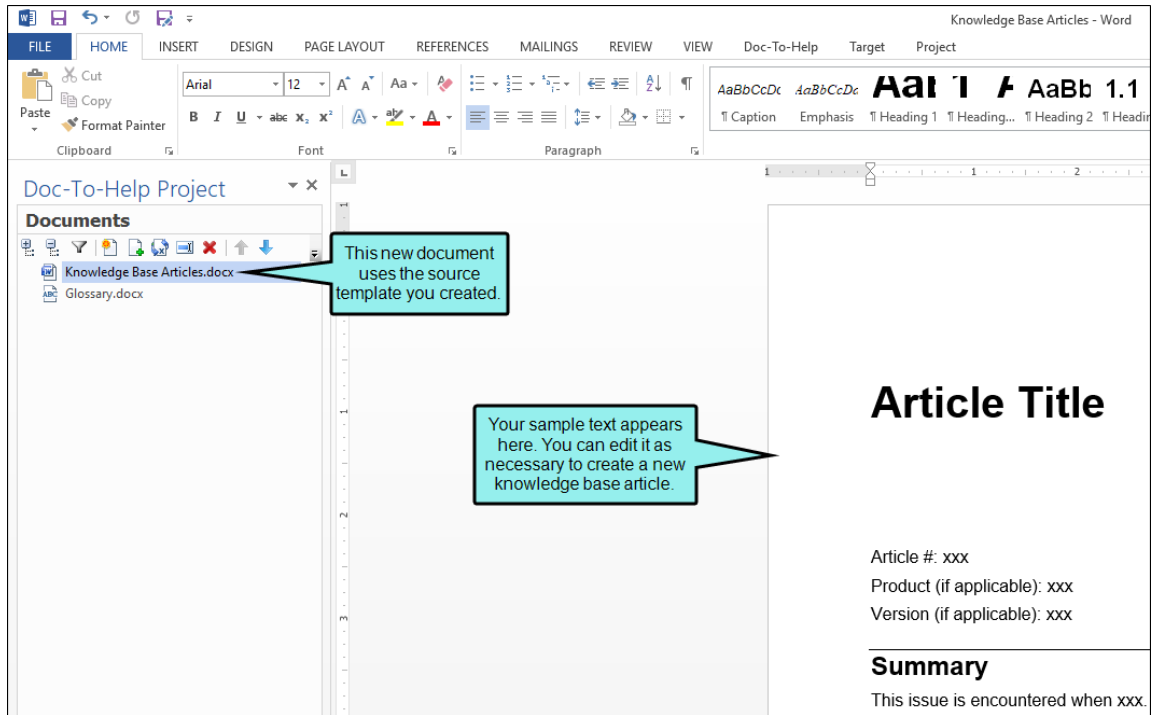


Once you have saved your copies to the network drive, you can remove the temporary copies from your desktop.

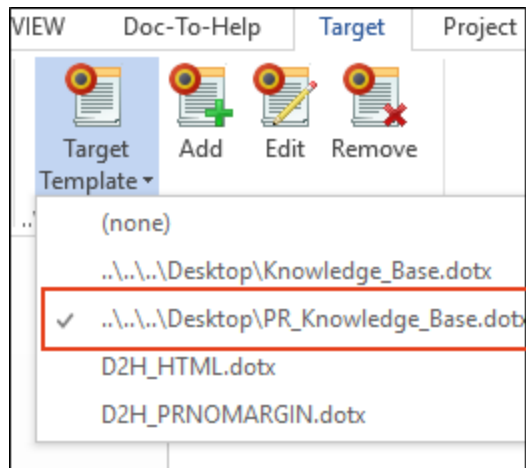
Later, your authors create a new Doc-To-Help project using the Knowledge Base source template.



- ☆ When they create a new document, they see all of the default text you added to the template. They are able to use this text as a guideline to create the knowledge base article.



- ☆ The authors also add the new Knowledge Base target template to the project, and use it when building printed output.





Knowledge Base Articles



Contents

Article Title	1
Summary	1
Description	1
Solution	1
Attribution	1
Article Title	3
Summary	3
Description	3
Solution	3
Attribution	3
Article Title	5
Summary	5
Description	5
Solution	5
Attribution	5
Glossary of Terms	7
Index	8

When you use the Knowledge Base target template, the PDF output looks something like this.

Article Title

Article # xxx
Product ID applicable xxx
Version ID applicable xxx


Summary
This issue is encountered when xxx

Description
A full description of the problem

Solution
To avoid this issue, do the following:

1. Step
2. Step
3. Step

Attribution
Jim Smith
August 1, 2018
jim@company.com

 **IMPORTANT:** It is recommended that you update your source templates when you update to ensure that your output is built the way you intended.

Selecting Templates

Predefined templates are used to determine how content will look in both the source documents and the final output.


Doc-To-Help automatically assigns the default source template (D2H_NOMARGIN.DOTX) and its complementary target template (D2H_PRNOMARGIN.DOTX) after you create a new project. However, you can select different templates if you want.


HOW TO SELECT A DEFAULT SOURCE TEMPLATE FOR NEW DOCUMENTS

The source template chosen in the Doc-To-Help interface is associated with new source documents that you create. See "Adding, Renaming, and Removing Documents" on page 14.

1. In Word, select the **Project** ribbon.
2. From the **Source Template** drop-down, select the template to be used for new documents so that a check mark is added next to it.

If you want to select a template not shown in the list, click **Add** and use the dialog to choose a template file.

 **NOTE:** This option may also be set in the Project Settings dialog (Default Template field). See the online Help or the *Project Management Guide*.

 **NOTE:** If you want to use the Special Formatting ribbon in your source document, be sure to select the D2H_SMAL.dotx, D2H_SMAL_A4.dotx, D2H_NORM.dotx, or D2H_NORM_A4.-dotx template when creating a new document. If your source document is using a different template, and you switch to one of these four templates, the Special Formatting ribbon will not be available.

HOW TO SELECT A SOURCE TEMPLATE FOR AN EXISTING DOCUMENT

If you have an existing document and want to associate it with a different template, you can do so in that Word document.


1. Open the Word source document.
2. Select **File > Options**. The Word Options dialog opens.
3. In the left pane, click **Add-Ins**.
4. From the **Manage** drop-down, choose **Templates**, then click **Go**. The Templates and Add-ins dialog opens.
5. In the **Document template** area, click **Attach**. The Attach Template dialog opens.
6. Select a template file, then click **Open**.
7. In the Templates and Add-ins dialog, click **OK**.
8. Save the document.


HOW TO SELECT A TARGET TEMPLATE

The target template affects the look of the target you build.

1. In Word, select the **Target** ribbon.
2. From the **Target Template** drop-down, select a template. A check mark appears next to the template you select.

If you want to select a template not shown in the list, click **Add**. In the dialog, select a template file, then click **Open**.

 **NOTE:** If you have a legacy Doc-To-Help project in which you were using HTML5 files and CSS, you can select the CSS in the Help Targets dialog or Project Settings dialog.

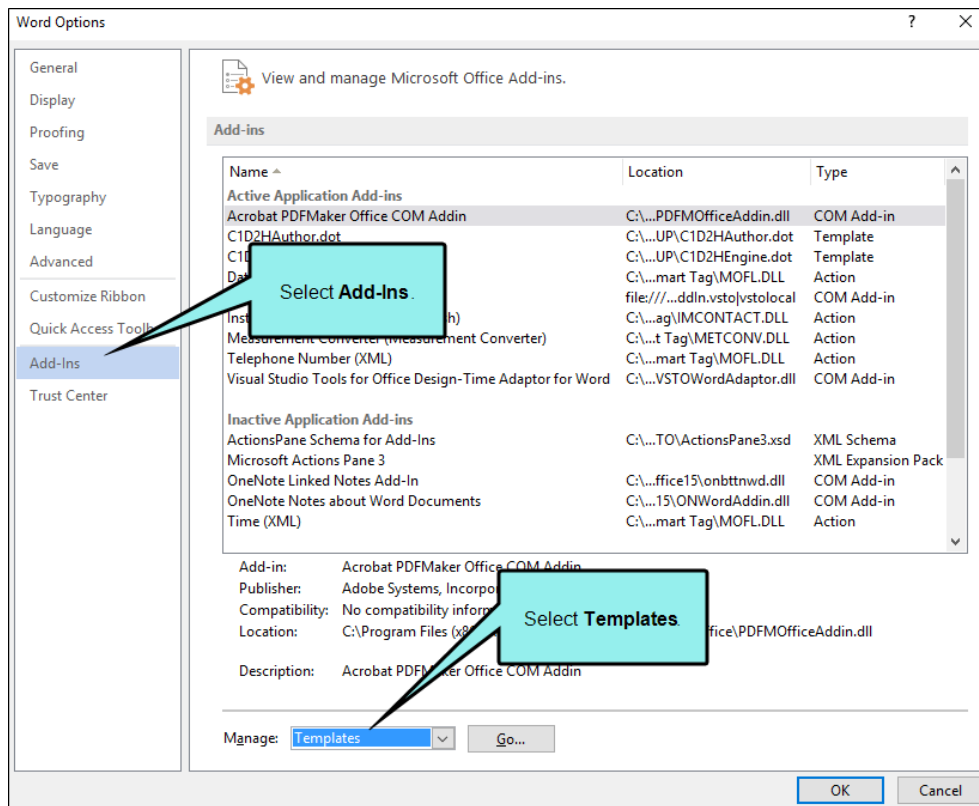
 **NOTE:** You can also create custom templates.

Copying Custom Styles to a New Template

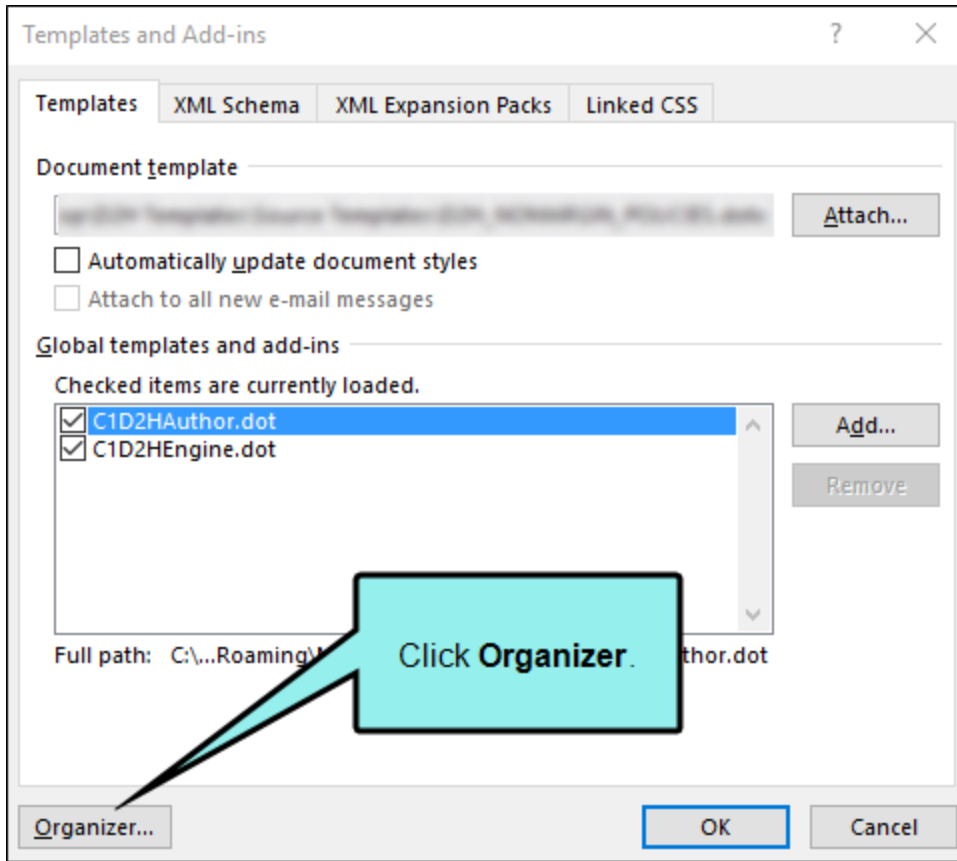
If you have existing Word documents that have a lot of custom styles, you can copy all of those styles from your templates over to Doc-To-Help's custom templates using Word's Organizer. This is also very useful if you are creating new templates to use with Doc-To-Help and want to copy over styles from existing templates.

HOW TO COPY STYLES USING THE WORD ORGANIZER

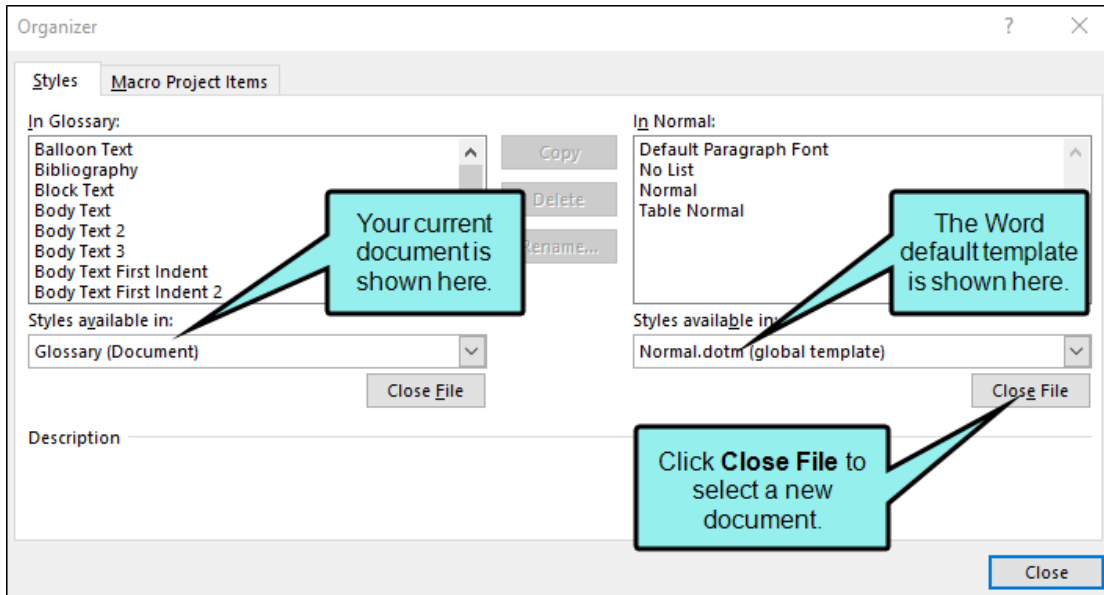
1. Open the Word template into which you want to want to copy your custom styles.
2. Select **File > Options**. The Word Options dialog opens.
3. In the left pane, click **Add-Ins**.
4. From the **Manage** drop-down, choose **Templates**, then click **Go**. The Templates and Add-ins dialog opens.



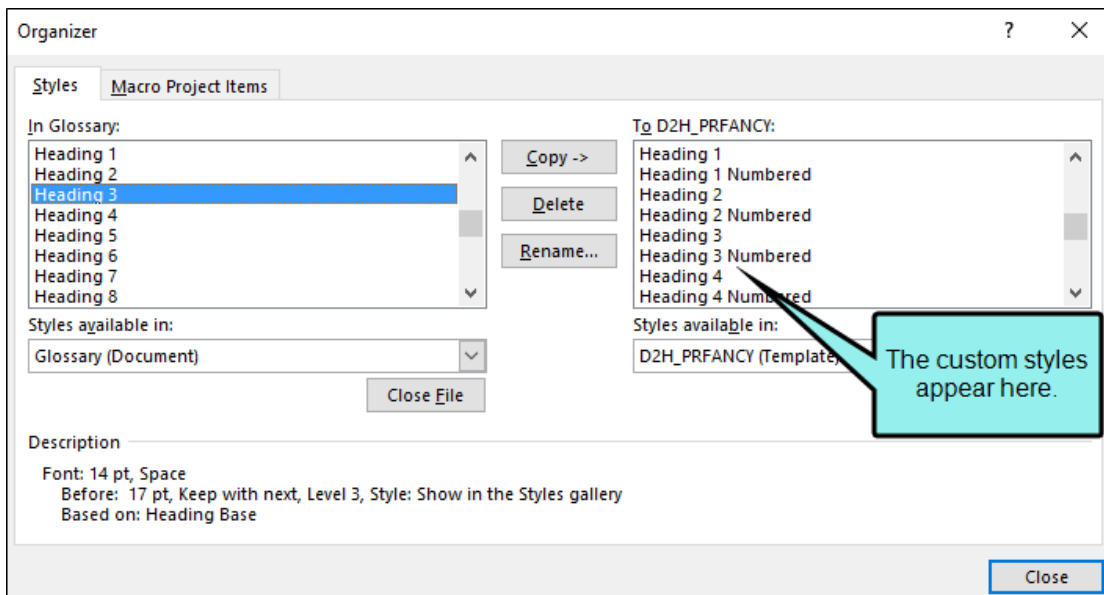
5. Click **Organizer**. The Organizer dialog opens.



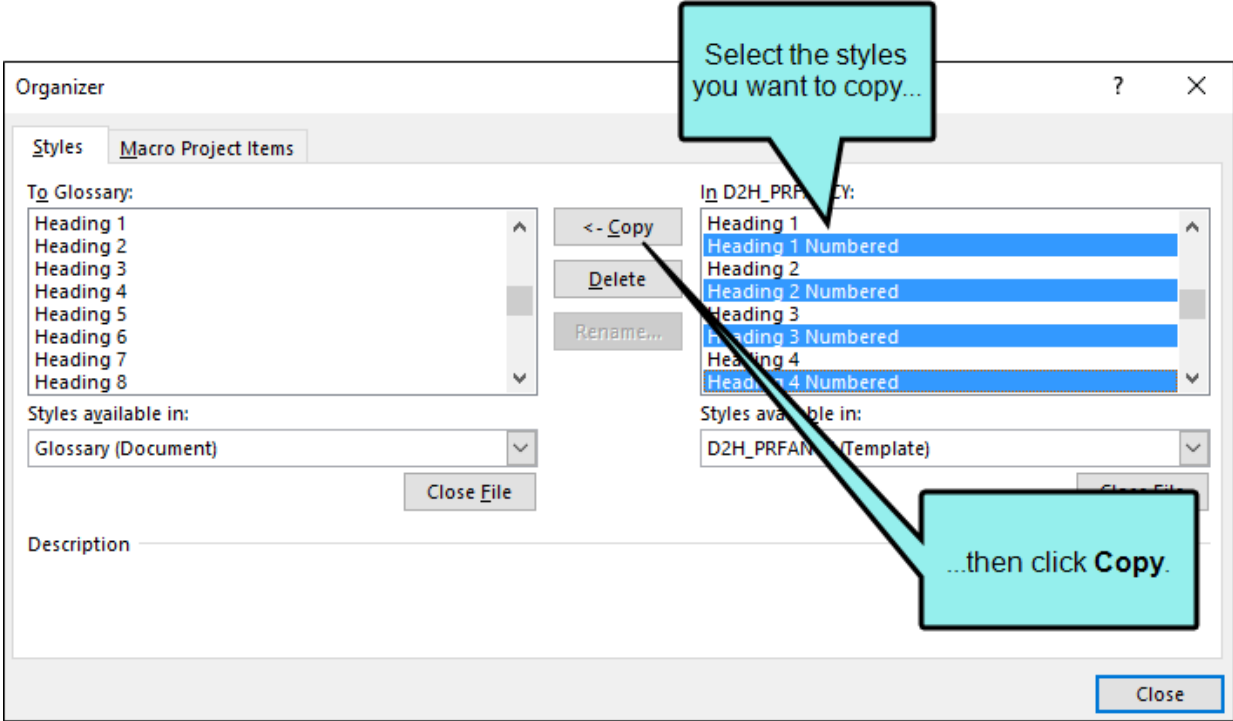
6. The left side of the dialog shows the current document, and the right side of the dialog shows a Word default template. To remove the default template from the list and replace it with your custom template or document, click **Close File**, then click **Open File**.

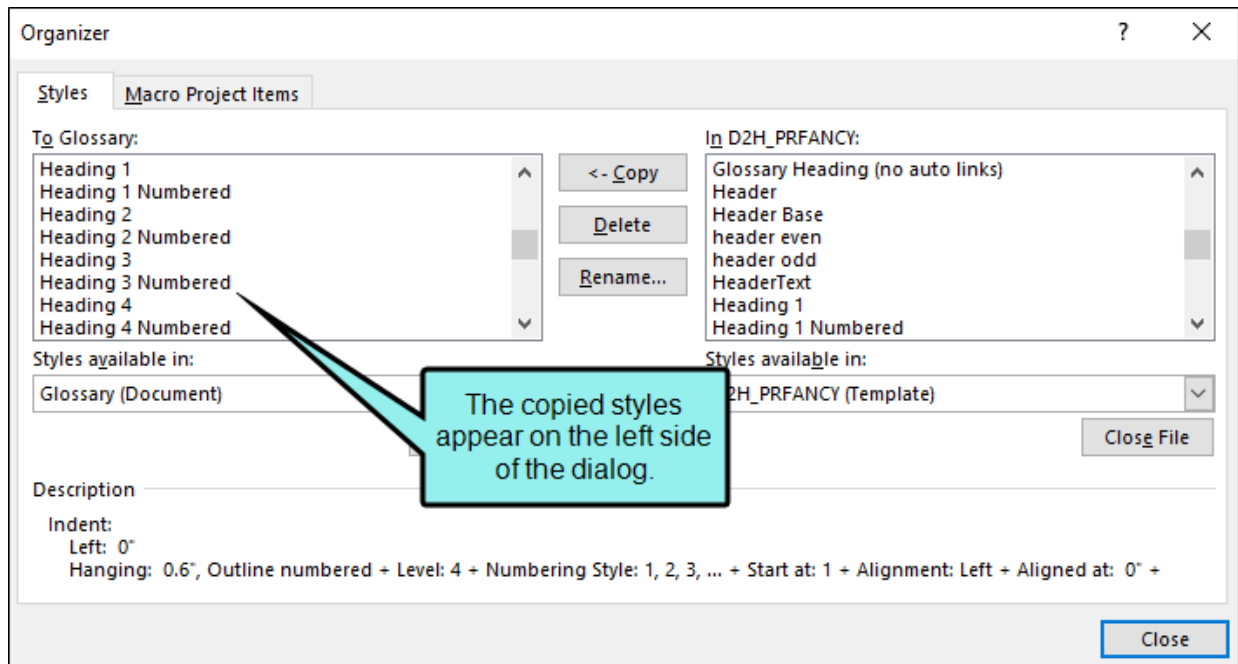



7. In the dialog that opens, navigate to the template or document that contains your custom styles, then click **Open**. Your custom styles appear on the right side of the dialog.




- 8. On the right side of the dialog, select the custom styles you want to copy to your new template. Click **Copy** to copy each style.





 **NOTE:** If a style has the same name as an existing style, you will be given the option to overwrite the existing style.

9. (Optional) If you need to delete a style, select it and click **Delete**. To rename a style, select it and click **Rename**.
10. When you are finished copying the custom styles to your new template, click **Close**.

 **TIP:** Keep a copy of your templates. If you accidentally modify or delete a style in the working copies of your templates, you can use the Organizer to restore template styles by copying them from the original template.

CHAPTER 4

ActiveX Controls

Using the HTML Help Control button in the Doc-To-Help toolbar or ribbon, you can quickly insert HTML Help ActiveX Controls into your Word documents. These controls can be used to provide features in compiled HTML Help systems (CHM files). For more information on HTML Help ActiveX controls, see the MSDN article "HTML Help ActiveX Control Overview" (<http://msdn2.microsoft.com/en-us/library/ms644670.aspx>).

HOW TO INSERT AN HTML HELP ACTIVEX CONTROL

1. In the Word source document, place your cursor at the point you'd like to insert an HTML Help ActiveX Control.
2. In the **Doc-To-Help** ribbon, click the **HTML Help Control** button. The HHCTRL: HTML Help ActiveX Control Commands wizard opens.
3. Select the command from the drop-down menu and follow the instructions as you move through the wizard.

When you have completed the wizard, Doc-To-Help inserts code into your document. However, it will be marked with the HTML Passthrough code condition, so the code will appear in the HTML Help target as a control, and will be skipped in other targets.



NOTE: This is an advanced feature and many of the options available can be performed using other Doc-To-Help functionality.

CHAPTER 5

Conditions

A condition is a single-sourcing feature that you can apply to files or to different areas of your content, so that some information displays in some outputs but not in others.

This chapter discusses the following:

What You Can Condition	57
Types of Conditions	58
Including Conditions in Your Output	61
Creating and Using Attributes	62
Marking Text as Conditional	64
Setting Topic Conditions	66

What You Can Condition

With Doc-To-Help, you can condition the following:

- **Text and Images** See "Marking Text as Conditional" on page 64.



NOTE: Text within variables can also be conditioned. See "Inserting a Variable" on page 145.

- **Topics** See "Setting Topic Conditions" on page 66.
- **Documents** See "Converting DOC Files to DOCX" on page 17.

Types of Conditions

You can use three types of conditions: platforms, targets, and attributes.

Platforms are default output types, and targets will vary by project, but attributes are created by you to meet your specific needs.

PLATFORMS

You can base conditions on an entire platform, or output type. This includes the following:

- **Eclipse Help** Conditioned text, topic, or document will be included in all Eclipse targets.
- **EPUB** Conditioned text, topic, or document will be included in all EPUB targets.
- **HTML (Any)** Conditioned text, topic, or document will be included in all HTML targets (includes JavaHelp).
- **HTML Help 1.x** Conditioned text, topic, or document will be included in compiled HTML Help targets.
- **JavaHelp** Conditioned text, topic, or document will be included in all JavaHelp targets.
- **Microsoft Help 2.0** Conditioned text, topic, or document will be included in MS Help 2.0 targets.
- **Microsoft Help Viewer** Conditioned text, topic, or document will be included in Microsoft Help Viewer targets.
- **NetHelp** Conditioned text, topic, or document will be included in NetHelp (browser-based uncompiled HTML Help) targets.
- **Online Help** Conditioned text, topic, or document will be included in all online targets (i.e., all targets except Printed Manual).
- **Printed Manual** Conditioned text, topic, or document will be included in Printed Manual targets (Word and PDF).

TARGETS

You can base conditions on a particular topic. This includes the following new project defaults. You can add additional targets and delete those you don't need.

- **<Your Project Name> Eclipse Help** Conditioned text, topic, or document will be included in this Eclipse Help target.
- **<Your Project Name> EPUB** Conditioned text, topic, or document will be included in this EPUB target.
- **<Your Project Name> HTML Help 1.x** Conditioned text, topic, or document will be included in this compiled HTML Help target.
- **<Your Project Name> JavaHelp** Conditioned text, topic, or document will be included in this JavaHelp target.
- **<Your Project Name> Microsoft Help 2.0** Conditioned text, topic, or document will be included in this MS Help 2.0 target.
- **<Your Project Name> Microsoft Help Viewer** Conditioned text, topic, or document will be included in this Microsoft Help Viewer target.
- **<Your Project Name> NetHelp** Conditioned text, topic, or document will be included in this NetHelp (browser-based uncompiled HTML Help) target.
- **<Your Project Name> Manual** Conditioned text, topic, or document will be included in this Printed Manual target (Word and PDF).

Any custom targets you create will also be included. See the online Help or the *Targets Guide*.

ATTRIBUTES

- Two default attributes are included with Doc-To-Help (Internal and Release), but you create your own. See "Creating and Using Attributes" on page 62.

☆ EXAMPLES

If you'd like specific images to appear only in your printed output, you can mark those graphics with the Platform condition named "Printed Manual."

Let's say you'd like links to related topics to be included only in your NetHelp output (and excluded from your Manual targets). In that case, mark that text with the target condition named "NetHelp."

Reminder notes to you and your team can be included in your project for reference, but can be marked with the "Internal" attribute so that they are not included with the targets delivered to customers.

Suppose you'd like to output two different manuals: one for "Pharmacists" and one for "Nurses." The nurses do not need certain administrative information. Therefore, create an attribute condition for each audience. Mark the administrative information with the "Pharmacist" attribute.

Including Conditions in Your Output

If you have applied platform or target conditions to your text, topics, and/or documents, you don't need to do anything else but build your target(s). The appropriate information will automatically be included in or excluded from your output.

If you have created and applied custom attributes in your project, you need to choose the attributes for each target in the Help Targets dialog. See "Creating and Using Attributes" on the next page.

Creating and Using Attributes

Attributes make it possible to assign user-defined build criteria to text, topics, documents, and styles, which makes it possible to single-source one project several different ways. For example, you could create both an Administrator and Manager version of a manual and/or Help system from the same project.

Doc-To-Help has two default build attributes built in: Internal and Release.

HOW TO CREATE A NEW ATTRIBUTE

1. Open the **Project** ribbon.
2. From the **Project** ribbon group, click **Attributes**. The Attributes dialog opens.
3. Click the **Add New Attribute** button. An attribute named "NewAttribute" appears in the list.
4. Provide a name for the attribute. The NewAttribute name will initially be editable. If you wish to change it later, select it, then click the **Edit** (pencil) icon.

☆ EXAMPLE


An example of an attribute name would be "Audience." The Audience attribute would then need values.

5. Click the **Add New Value** button. The new value appears in the list.
6. Replace the default text. The Value name will initially be editable. If you wish to change it later, select it, then click the **Edit** (pencil) icon.

☆ EXAMPLE

An example of attribute values for the Audience attribute would be "Pharmacist" and "Nurse."

HOW TO USE ATTRIBUTES

 **NOTE:** After creating an attribute, you can assign it as any of the following:

- **Text** See "Marking Text as Conditional" on the next page.
- **Topics** See "Setting Topic Conditions" on page 66.
- **Documents** See "Finding Projects Containing a Source Document" on page 22.

1. Select the **Target** ribbon, and click the **Target Properties** button. The Help Targets dialog opens.
2. On the left side of the dialog, select a target.
3. Click the drop-down on the **Attributes** field and choose the appropriate attribute(s) or create a custom expression.
 - Click the **Attributes** tab to assign one or more attributes to the target. Select the check box(es) next to the appropriate attributes. The attributes chosen will display in the Attributes field.
 - Click the **Expression** tab to create a custom expression using your attributes. Expressions are statements that combine attributes in more complex ways. The expression created will display in the Attributes field.

After a particular target is built, the text, topic, or document flagged with those attributes will appear in the output.

Marking Text as Conditional

Using conditional text, you can mark specific text or graphics to display only in specific instances; by platform, target, attribute, or a combination. This makes logical single-sourcing easy to accomplish.

HOW TO MARK TEXT AS CONDITIONAL

1. In the Word source document, select the text that you want to mark as conditional.
2. Select the **Doc-To-Help** ribbon.
3. In the **D2HML Styles** group, click **Conditional Text**. The Conditional Text dialog opens, with the selected text displayed at the top of the dialog.
4. In the Conditional properties area select the appropriate options. You may select more than one. After making your selection from the drop-down, click elsewhere in the dialog to close the drop-down.
 - **Platforms** Set a platform-based condition for the selected text. The text will be included in all of the target platform(s) selected. A platform includes all the targets that produce the output specified; Online Help, HTML Help, NetHelp, Printed Manual, etc.
 - **Targets** Set a target-based condition for the selected text. The text will be included in all the target(s) selected.
 - **Attributes** Set an attribute-based condition for the selected text. The text will be included or excluded when creating conditional builds (e.g., internal or external.) Use the Attributes dialog to create custom attributes.
5. (Optional) Marking text as **HTML passthrough code** is an advanced feature that lets you include HTML code in your document without Word treating that code as text. It is recommended that the rich content variables feature be used instead of the HTML passthrough code. With this feature, you can define a variable in an HTML document and insert it into a Word document.

If you insert an HTML Help ActiveX Control into your Word document (also an advanced feature), that HTML code will be marked with the HTML passthrough condition.

6. (Optional) In the Options area, you can select the following:

- **Hide properties in document** Puts the conditional text properties in the text.

OR

- **Text in comment** Puts the conditional text properties in a Word comment.

7. Click **OK**.



NOTE: If you want to remove conditional text, you can use the Clear Formatting button in the Doc-To-Help ribbon.



NOTE: You can also mark entire documents and topics as conditional.

Setting Topic Conditions

You can set specific platform, target, and/or attribute conditions for a topic.

HOW TO SET TOPIC CONDITIONS

1. In the Topics Panel, select the topic.
2. Do one of the following:
 - Right-click on the selected topic in the Topics Panel, and select **Properties**. Select the condition(s) using the drop-downs in the **Condition** section.
 - Open the **Doc-to-Help** ribbon, and click the **Topic Properties** button. Select the condition(s) using the drop-downs in the **Condition** section.

No matter which method is used to set the conditions, they will always be displayed in the **Topic Properties** dialog .



NOTE: Attributes must be specified in the Help Targets dialog to be properly included/excluded from the final output. See "Creating and Using Attributes" on page 62.

Glossaries

A glossary is a list of specialized words with their definitions, accessed in online output or placed at the end of a PDF.

When you create a new project in Doc-To-Help, a glossary document is added automatically. You can delete this document if you wish. If you'd like to flag a different document as your glossary, add it to the project, right-click on it in the Documents pane, and from the menu choose **Glossary**.

Glossary entries are formatted by default with the Glossary Heading style, followed by the definition, formatted as C1H Popup Topic Text. You can edit these styles to change this behavior. See the online Help or the *Design Guide*.

Doc-To-Help can create automatic links to each glossary item, or you can create manual links to glossary items (see "Links" on page 102). Choose the **Link Type** of **Glossary Term**. To set your project to automatically create glossary links, open the Styles dialog and for the **Glossary Heading Paragraph** style, select the **Auto Glossary Links** check box.

To add a glossary entry, you can open the glossary source document and add terms/definitions. You can also use the **Add Terms** button in the Glossary section on the Doc-To-Help ribbon when working in any Word source document. See "Adding Terms to the Glossary" on the next page.

Adding Terms to the Glossary

If your project includes a glossary, you can quickly insert a glossary term while working in any Word source document using the Doc-To-Help ribbon.

HOW TO ADD A TERM TO THE GLOSSARY

1. Open any Word source document.
2. Select the word you would like to add to the glossary. Select the **Doc-To-Help** ribbon. In the **Glossary** section, click **Add Terms**. The Add Glossary Terms dialog opens.
3. Click on the **Definition** field to add a definition for the new term. If you would like to edit a term name, choose it and click the **Rename Term** button.
4. Click the **Add New Term** button to add a new term at any time. In the Terms list, "New Term" appears; rename this and add a definition.
5. (Optional) If you would like the new term to automatically link to its glossary definition everywhere in the project, select the **Automatic links** check box. A glossary term with this designation will be tagged with the Glossary Heading style, rather than the Glossary Heading (no auto links) style.
6. Click **OK**.

To delete a term, select it from the list and click **Remove Term**.

HOW TO RE-ALPHABETIZE THE GLOSSARY

1. Open your **Glossary** document (DOC or DOCX) in Word.
2. Select the **Doc-To-Help** ribbon. In the **Glossary** section, click **Sort**. The Glossary terms are now in alphabetical order.

CHAPTER 7

Images


You can insert images into Word source documents, which are then included in your output.

This chapter discusses the following:

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Image Maps	72
Creating Image Maps	73
Splitting an Image Into Equal Hot Regions	75

Recommended Location

A folder named "Media" is automatically created for Doc-To-Help projects. It is recommended that you store your image files in that folder.

 **NOTE:** If your source documents have a .docx extension, the Media folder should be a subfolder of the Documents folder (the folder in which Doc-To-Help stores all of your source documents). This change can be made quickly using Windows Explorer.

Recommended Procedure for Inserting Images

When you insert an image in a Word source document, it is recommended that you use the following steps.

1. Select **Insert > Pictures**. The Insert Picture dialog opens.
2. Find and select your image.
3. From the **Insert** drop-down, select **Insert and Link**.



NOTE: Cutting and pasting images into your documents is not a good best practice, because it increases file size and makes your graphics hard to edit and manage.

Image Maps

For online outputs, you can create hotspots from an image that link to topics, keywords, or groups. See "Creating Image Maps" on the next page.



In addition, you can split an image (or a region you have already created) into equal hot regions. See "Splitting an Image Into Equal Hot Regions" on page 75.

Creating Image Maps

For online outputs, you can create hotspots from an image that link to topics, keywords, or groups.


Since the hotspots are only available in online outputs, you may want to add the same links under the graphic for Manual outputs, then mark that text with the Printed Manual condition so it does not appear in online output. See "Marking Text as Conditional" on page 64.

HOW TO CREATE AN IMAGE MAP

1. In the Word source document, select an image.
2. On the **Doc-To-Help** ribbon, click the **Image Map Editor** button. The Image Map Editor opens.
3. Do either of the following, depending on whether you want to draw a random region or split the entire image into equal regions.
 - **Random Region** Click the **Draw Hot Region** button  and select a region.
 - **Split Into Equal Regions** Click the **Split into Hot Regions** button . Complete the files in the dialog and click **OK** when you are finished. See "Splitting an Image Into Equal Hot Regions" on page 75.


Depending on the number of regions(s) you create, a default name for each region ("Hot Region #") appears in the box on the right. It is in this area that you will create links to topics, keywords, or groups.

 **NOTE:** To rename a region, select the region name and click the **Rename** button .

4. In the box on the right, select a numbered Hot Region to which you want to assign a link.
5. Click the **Set Hot Region Link** button . The Link dialog opens.
6. From the **Link type** field, choose the kind of element to which you want to link: **Topic title**, **Keyword**, or **Group**.
7. In the region below, choose the topic, keyword, or group.

8. Click **OK**. The specified link is displayed in the Image Map Editor, under the list of numbered Hot Regions. In the output, each region will display in a pop-up when the user hovers over that area of the image.




NOTE: If you want to delete the link later, select it in the Image Map Editor and click the **Remove Hot link** button .

9. (Optional) You can bring a region to the front or back, change the default line color for a region, and zoom in or out using the toolbar on the top left.
10. (Optional) If you would like to adjust the coordinates of a region, select it and drag it on the graphic, or for more precise adjustments use the **Layout** section on the right.
11. Click **OK**.

Splitting an Image Into Equal Hot Regions

When working with image maps, you can split an image (or a region you have already created) into equal hot regions. See "Creating Image Maps" on page 73.

HOW TO SPLIT AN IMAGE INTO EQUAL HOT REGIONS

1. In the Word source document, select an image.
2. In the **Doc-To-Help** ribbon, click the **Image Map Editor** button. The Image Map Editor opens.
3. (Optional) If you would like to split a previously created region, select that region in the graphic.
4. Click the **Split into Hot Regions** button .
5. In the Split Into Hot Regions dialog, do one of the following:
 - **Split Entire Image** Select the **Split Entire Region** radio button and enter the **Row** and **Column** dimensions.
 - **Split a Region** Select the **Split selected hot region** radio button and enter the **Row** and **Column** dimensions. If you would like the original region to be deleted, select the **Delete the region after splitting it** check box.
6. Click OK.

CHAPTER 8

Indexes

Index entries are also called "keywords" (or K-links). They will display in your output in an index.

In addition to the tasks discussed in this chapter, you can also create links to index keywords. See "Links" on page 102.

This chapter discusses the following:

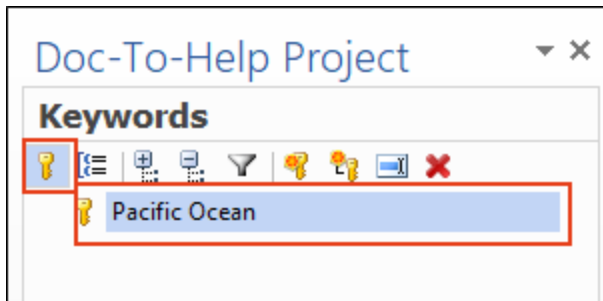
- Creating Index Keywords in a Project77
- Creating Index Keywords in a Source Document 79




Creating Index Keywords in a Project

Within your Doc-To-Help project, you can create index keywords and assign topics to them. You can also create an index automatically.

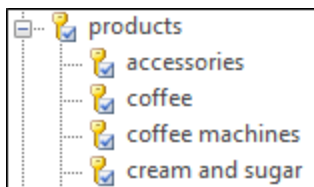
HOW TO CREATE A KEYWORD AND ASSIGN TOPICS TO THEM

1. In Word, open the Index and Groups window view.



2. Click the **Keywords** button .
3. In the Keywords pane, click the **Add New Keyword** button  in the local toolbar.
4. An editable keyword will be created, titled "New Keyword." Type the new keyword within the box.
5. (Optional) To create a secondary keyword, select a keyword and click the **Add Secondary Keyword** button  in the local toolbar.

If a secondary keyword is assigned to a keyword, the primary keyword acts as a parent.




Topics may be assigned to all keyword levels.

Secondary keywords may be created several levels deep if you wish.

6. (Optional) Keywords can be renamed or removed using the **Rename** or **Remove Keyword** buttons in the local toolbar.


HOW TO ASSIGN A TOPIC TO A KEYWORD


1. Create an index keyword.
2. In the Keywords/Groups pane, select the keyword to highlight it.
3. Drag a topic from the Topics window into the bottom half of the Keywords/Groups pane.

 **NOTE:** You may assign more than one topic to a keyword. This will open a selection dialog when the keyword is chosen from the index.

HOW TO CREATE AN INDEX AUTOMATICALLY (AUTO-INDEX)

If you'd prefer, Doc-To-Help can create an index for you automatically, based on your topic types. From the **Auto-Index** drop-down list on the **Project** ribbon, choose the topic type(s) you'd like to include in your index (you can select one topic type at a time). The next time you build your target, topics with those topic properties will be included in the index. Topic types can be edited in the Project Styles dialog. See the online Help or the *Design Guide*.

 **NOTE:** For a complete listing of options, see the Index and Groups Window Pane topic in the online Help.

 **NOTE:** As an alternative to creating an index in the project, you can create an index by inserting keywords in your Word source document. See "Creating Index Keywords in a Source Document" on the next page.

 **NOTE:** You can also create links to index keywords. See "Links" on page 102.

Creating Index Keywords in a Source Document


You can create an index by inserting keywords in your Word source document.


HOW TO INSERT AN INDEX ENTRY

1. In the Word source document, select the text to be used as an index keyword.
2. Select the **Doc-To-Help** ribbon.
3. In the **D2HML Styles** group, click **Keyword**. The Keyword dialog opens, and the selected text is displayed at the top of the dialog.
4. (Optional) By default, keyword will be the selected text. The phrase "Keyword defined by Text" is displayed in the Keyword field. If you would prefer to use another keyword, use one of these options:
 - If you would like to assign one or more existing keywords to the text, select the appropriate check box(es).
 - If you would like to add a new keyword to the list and assign it, in the **Keywords** area, click **Add New Keyword**. An editable keyword will be created, titled "New Keyword." Type the new keyword within the box, and press **Enter**. Select the keyword check box.

To create a secondary keyword, select a keyword and click **Add Secondary Keyword**. Type the new secondary keyword within the box, and press **Enter**. Select the keyword check box.
5. (Optional) If you want to hide the tag, you can select the **Hide properties in document**. Clearing the **Visible** check box will hide the text in your source document.
6. Click **OK**.

✓ **TIP:** You can also insert keywords by dragging them from the Index and Groups window pane in the Doc-To-Help Project panel to your source document. See "Drag-and-Drop Linking" on page 106.

 **NOTE:** Any new keywords created using this method will also be added to the Index and Groups window pane in Word. You can manage keywords from this window pane. See "Creating Index Keywords in a Project" on page 77.

 **NOTE:** Links to keywords are created using the Link dialog. Links can be text or buttons; when selected, they display a dialog or popup window listing all the keyword topics. See "Links" on page 102.

Margin Notes

Margin notes are used to place text or images in the left margin of a manual, next to the main body of the text. Margin notes do not appear in online outputs unless you explicitly link them to the text, where they will appear as popups.

HOW TO CREATE A MARGIN NOTE

1. In the Word source document, place your cursor at the point you'd like to insert the margin note.
2. In the **Doc-To-Help** ribbon, click the **Margin Note** button and select **Create**.

A two-column table is placed in the document with the text of the paragraph in the right hand table cell. If table gridlines are turned on in Word, you'll see a dotted outline of the table. The gridlines do not print.

3. Type the margin note (or insert an image) in the left column of the table. The paragraph text will be in the right column.

If you would like to add another margin note for the same paragraph, click in the left column, select the **Margin Note** button and choose **Add Definition**.

HOW TO CREATE A HOTLINK TO A MARGIN NOTE

1. After following the previous steps to create a margin note, highlight the text in the right column that you want to use as a hotspot.
2. In the **Doc-To-Help** ribbon, click the **Margin Note** button and select **Set Link**.
3. A dialog confirms that you want to link the selected text with the contents of the highlighted cell (i.e., the margin note). If it is correct, click **OK**. If not, use the **Previous** and **Next** buttons to navigate to the proper cell.

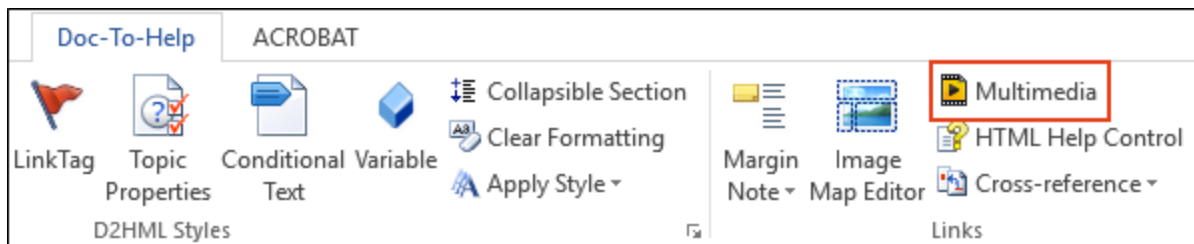
The hotspot is created and will be indicated in the Word document with a comment that notes the link information. If you would like to see this relationship more graphically, click in the right column, then in the **Doc-To-Help** ribbon click the **Margin Note** button and choose **Highlight Definition Links**.

 **NOTE:** This is supported in online outputs only.

CHAPTER 10

Multimedia

In the Doc-To-Help ribbon in Word source documents, there is an option named "Multimedia" that lets you insert various types of multimedia (video and audio files).



This chapter discusses the following:

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Supported Multimedia Types

You can insert the following types of multimedia:


- Flash Movies
- HTML5 Videos
- Windows Media Files
- QuickTime Movies
- YouTube Videos
- Vimeo Videos

Default Sizes

Following are the default sizes of videos when they are inserted:

- **YouTube/Vimeo** 560x315 pixels
- **Flash Doc-To-Help** uses size from SWF file
- **QuickTime and HTML5** Width and height not set by default

How to Insert Multimedia

1. In the Word source document, place your cursor where you want to insert the multimedia element.
2. On the **Doc-To-Help** ribbon, click the **Multimedia** button. The Insert Multimedia dialog opens.
3. In the **Source URL** field, do one of the following:
 - If you want to embed a YouTube or Vimeo video, paste the URL in the field.
 - If you want to select a multimedia file, click . Then in the Open dialog, find and select the file. If the file is located outside the project folder, there will be a message to copy the file to the project folder.
4. (Optional) In the **Alternative text** field, you can type alternate text to display when the video is not available, such as when a disabled individual is using a screen reader.
5. (Optional) Complete the rest of the options as necessary. The options shown depend on the type of movie file you are inserting.

FLASH OPTIONS

- **Size** Specify the width and/or height in pixels or percentage.
- **Movie**
 - **Quality**
 - **Low** Favors playback speed over appearance and never uses anti-aliasing.
 - **Auto Low** Emphasizes speed at first but improves appearance whenever possible. Playback begins with anti-aliasing turned off. If the Flash Player detects that the processor can handle it, anti-aliasing is turned on.
 - **Auto High** Emphasizes playback speed and appearance equally at first but sacrifices appearance for playback speed if necessary. Playback begins with anti-aliasing turned on. If the actual frame rate drops below the specified frame rate, anti-aliasing is turned off to improve playback speed. Use this setting to emulate the View > Antialias setting in Flash.
 - **Medium** Applies some anti-aliasing and does not smooth bitmaps. It produces a better quality than the Low setting, but lower quality than the High setting.

- **High** Favors appearance over playback speed and always applies anti-aliasing. If the movie does not contain animation, bitmaps are smoothed; if the movie has animation, bitmaps are not smoothed.
- **Best** Provides the best display quality and does not consider playback speed. All output is anti-aliased and all bitmaps are smoothed.
- **Scale**
 - **Default** Makes the entire movie visible in the specified area without distortion, while maintaining the original aspect ratio of the movie. Borders may appear on two sides of the movie.
 - **No border** Scales the movie to fill the specified area, without distortion but possibly with some cropping, while maintaining the original aspect ratio of the movie.
 - **Exact fit** Makes the entire movie visible in the specified area without trying to preserve the original aspect ratio. Distortion may occur.
- **Alignment** Select where you want the video to be displayed within the container area (e.g., Left, Right, Bottom, Bottom Right).
- **Playback**
 - **Auto Play** Select this option if you want the video to automatically begin playing when the topic displays. Otherwise, the user must click the Play button to start the movie.
 - **Loop** Select this option if you want the movie to play repeatedly.
 - **Show Menu** Select this option if you want to display the full menu, allowing the user a variety of options to enhance or control playback. If you do not select this option, the menu contains only the Settings option and the About Flash option.
 - **Enable SWLiveConnect** Select this option to specify whether the browser should start Java when loading the Flash Player for the first time.

WINDOWS MEDIA OPTIONS

- **Size** Specify the width and/or height in pixels or percentage.
- **Player Controls** Select an option for displaying the player controls (e.g., Play, Pause, Volume).
 - **None** Does not display any player controls.
 - **Mini** Displays only some of the player controls (Play, Pause, Stop, Mute, Volume).
 - **Full** Displays all of the available player controls.
 - **Invisible** Hides the movie entirely, while still playing the audio. If you select this option, you might want to resize the container square in your topic so that it does not take up so much space in the output. The user will simply see blank space where the container exists.
- **Playback**
 - **Auto Start** Select this option if you want the video to automatically begin playing when the topic displays. Otherwise, the user must click the Play button to start the movie.
 - **Full Screen** Select this option to display the movie using the entire screen.
 - **Stretch to Fit** Select this option to automatically resize the movie so that it exactly matches the size of the container area.
 - **Play Count** Enter the number of times you want the video to repeat.
- **Audio** Select options for the sound (mute, volume level, balance).


QUICKTIME AND HTML5 OPTIONS


- **Size** Specify the width and/or height in pixels or percentage.
- **Movie**
 - **Scale**
 - **To Fit** Automatically resizes the movie so that it exactly matches the size of the container area.
 - **Aspect** Automatically resizes the movie so that it exactly matches the size of the container area. However, the image is not stretched, but rather kept in its original proportion. For example, the width of the movie might be increased to match the width of the container area, but extra empty space might be shown above and below the movie in order to compensate for the height of the container area.
 - **Value** Enter the value that you want to increase the display of the movie. If you select 2, the movie will be twice as large as 1, and so on.
- **Player Controls**
 - **Show Controls** Select this option to show the player controls (e.g., Play, Pause).
- **Playback**
 - **Auto Play** Select this option if you want the video to automatically begin playing when the topic displays. Otherwise, the user must click the Play button to start the movie.
 - **Loop** Select this option if you want the movie to play repeatedly.
- **Audio** Select the volume level for the movie.


YOUTUBE OPTIONS

- **Size** Specify the width and/or height in pixels or percentage.
- **Playback**
 - **Auto Hide** Select this option if you want to hide the video's title and player controls bar when the movie begins playing.
 - **Auto Play** Select this option if you want the video to automatically begin playing when the topic displays. Otherwise, the user must click the Play button to start the movie.
 - **Full Screen** Select this option if you want to allow users to play the video in full-screen mode.
 - **Show Related Videos** Select this option if you want to show similar, suggested videos when the movie stops playing.
 - **Annotations** Select this option if you want to show annotations from the video owner when viewing the movie.
 - **On** Enables annotations from the video owner.
 - **Off** Disables annotations from the video owner.
- **Appearance**
 - **Modest Branding** Select this option if you want to remove the YouTube branding from the player controls.
 - **Show Info** Select this option if you want to show the title bar on the top of the video.
 - **Progress Bar Color** Select the color you want to use for the player's progress bar.
 - **White** Displays a white progress bar.
 - **Red** Displays a red progress bar.
 - **Controls** Select the display option for the player controls (i.e., play, pause, full-screen, settings).
 - **On (Always)** Displays player controls at all times.
 - **On (Only during playback)** Displays player controls only during video playback.
 - **Off** Disables player controls.


- **Theme** Select a color theme for the player controls.
 - **Light** Displays a light gray player control bar.
 - **Dark** Displays a black player control bar.


 **NOTE:** Some advanced features may not work in all web browsers.


 **NOTE:** Setting the Progress Bar option to White overrides the Modest Branding option, so you will always see the YouTube logo when you play your videos.

 **NOTE:** If you disable the player controls, users will only be able to play and pause the video. They will not be able to adjust the volume, view or adjust the progress bar, change video settings, or open the video in full-screen mode.

VIMEO OPTIONS

- **Size** Specify the width and/or height in pixels or percentage.
- **Playback**
 - **Auto Pause** Select this option if you want the video to automatically pause when another Vimeo video in the topic is played. Otherwise, the user must click the Pause button to pause the movie.
 - **Auto Play** Select this option if you want the video to automatically begin playing when the topic displays. Otherwise, the user must click the Play button to start the movie.
 - **Loop** Select this option if you want the movie to play repeatedly.
- **Appearance**
 - **Byline** Select this option if you want to display the video owner's name on the movie.
 - **Portrait** Select this option if you want display the video owner's portrait on the movie.
 - **Title** Select this option if you want display the title on the video.
 - **Controls Color** If you want change the color of the player controls, click  and select a color.

 **NOTE:** Some advanced features may not work in all web browsers.

 **NOTE:** If the owner of the video is a Vimeo Pro or Vimeo Plus member, some of these settings may be overridden by that member's preferences. For example, an owner of a video may not allow you to remove the title and byline, so you will still see this information on the video even if you chose not to display it in the Doc-To-Help output.

 **NOTE:** You cannot remove the Vimeo Staff Picks badge from a video.

6. Click **OK**. The multimedia is added to the document, represented by code that is translated into the video or audio when the output is generated.

Navigation Links

A navigation link is a feature that points to additional information from a specific area in a topic or document.

This chapter discusses the following:

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Expanded, Drop-Down, or Popup Text	94
Expanding/Collapsing Sections	96
Groups	98
Links	102
Link Tags	107
Related Topics	108

Cross-References

You can automatically add page references in printed manuals and hyperlinks in online outputs. The page numbers will not appear in online output.

HOW TO INSERT AND COMPLETE A CROSS-REFERENCE

1. In the Word source document, place your cursor where you want the cross-reference to appear.
2. In the **Doc-To-Help** ribbon, select **Cross-reference > Cross-reference**. The Cross-reference dialog opens.
3. Set the **Reference type** to **Heading**.
4. From the **Insert reference to** field, select **Heading text**.
5. From the displayed list, select the heading to which you want to link.
6. Click **Insert**. The heading text is inserted.
7. Click the **Close** button.
8. With the insertion point immediately following the cross-reference (reference field), go to the **Doc-To-Help** ribbon and select **Cross-reference > Complete Cross-reference**.
9. The page reference is inserted and the heading text is enclosed in quotes. Also, the text is set to "on page" by default. To change it, use the Project Settings dialog. See the online Help or the *Project Management Guide*.



NOTE: You can also specify that all hyperlinks in your manual output remain active when you create a PDF (links to website URLs will be live). To do this, open the Help Targets dialog, choose the Manual target and select the **Live Links** and **Create Master Document** check boxes. Please note that popups will not become live links in manual or PDF formats because those formats do not have a popup feature. See the online Help or the *Project Management Guide*.

Expanded, Drop-Down, or Popup Text

You can use three different methods to display information that is initially not displayed in your output:

- **Expanded Text** This displays content immediately after a selected link.
- **Drop-Down Text** This displays content under a selected link.
- **Popup Text** This displays content in a popup window when the link is selected.

HOW TO CREATE EXPANDED, DROP-DOWN, OR POPUP TEXT

1. In the Word source document, select the text you want to use as the link to open the hidden content.
2. In the **Doc-To-Help** ribbon, click the **Inline Text** button. The Inline text dialog opens. The link text is displayed in the Selection area.
3. In the **Text** box, enter the text to be displayed when the link is clicked in the output.
4. In the **Options** section, choose one of the following, depending on the kind of feature you want to create:
 - **Expand text inline**
 - **Dropdown text**
 - **Show text in a popup**
5. (Optional) If you would like the effect to be indicated as a comment in the source Word document, select **Text in comment**.
6. Click **OK**.
7. Doc-To-Help displays a message box informing you that this is an invisible style (meaning the expanded, drop-down, or popup text added will not be displayed in the Word source document—or in the output until the link is clicked). Since that is acceptable, click **No** to close the message box. If you'd like to make this information visible, see the online Help or the *Design Guide*.



NOTE: In EPUB outputs, expanding and drop-down text may be displayed or hidden. The option you prefer can be set in the Help Targets dialog using the **Show expanding text** and **Show dropdown text** check boxes.



NOTE: It is also possible to create expanding/collapsing sections in HTML Help, NetHelp, Microsoft Help Viewer, and Help 2.0 targets. See "Expanding/Collapsing Sections" on the next page.

Expanding/Collapsing Sections

For online output, you can create sections of content that are expanded or collapsed by default. This is an ideal way to subdivide a long topic in online documentation.


HOW TO CREATE EXPANDING/COLLAPSING SECTIONS


1. In the Word source document, select the header and the text that you would like to make into a section.

EXAMPLE

An example header could be "San Diego State University." The text could be a description of the university.

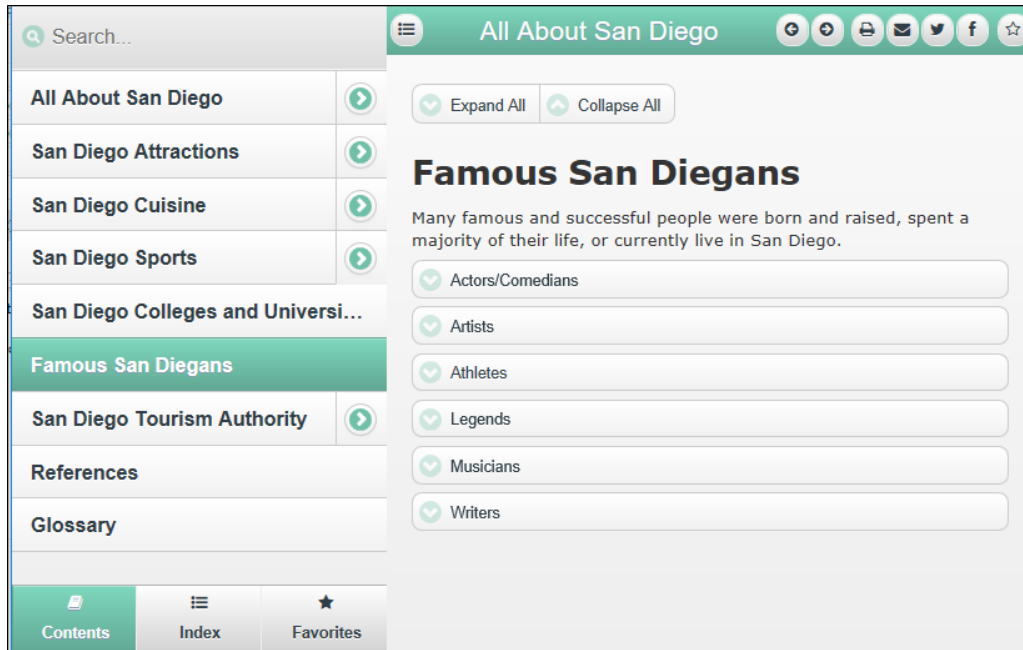
2. Select the **Doc-To-Help** ribbon.
3. In the **D2HML Styles** group, click **Collapsible Section**. The Collapsible Section dialog opens. The selected text displays in the Header and Text areas.
4. If you would like the section to be expanded by default, in the **Options** area, select **Expanded**. If you want the section to be collapsed by default, select **Collapsed**.
5. Click **OK**.
6. Continue creating sections. Note that the Heading for each section now has the C1H Section Collapsed or C1H Section Expanded style applied to it.


 **NOTE:** The heading for the section now has the C1H Section Collapsed or C1H Section Expanded style applied to it.


 **NOTE:** The header will be displayed in the online output with a + and - control next to it. When the user clicks on the control, the text will be displayed or hidden. The Expand All or Collapse All control at the top of the topic will allow the user to expand/collapse all of the text at once.

☆ EXAMPLE

This is an example of a topic with sections collapsed by default. Doc-To-Help automatically added the Expand All control at the top of the topic.



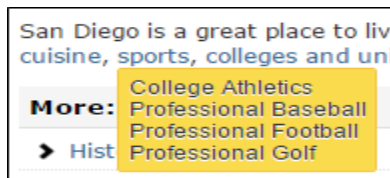
 **NOTE:** The Generate XHTML check box in the Help Targets dialog must be selected to enable expanding/collapsing sections.

 **NOTE:** In EPUB targets, all content in collapsible sections will be displayed (just as it would in manual targets).

Groups

Groups can also be referred to as "related topics" or "associative topics" (A-links). When a group of topics is related, a link can be created in your online output that displays a dialog or popup window displaying the list of topics in that group. Groups do not display in the index.

The following is an example of a popup menu displayed when a user clicks a group link. The user can then choose one topic from the menu and follow it.



Following are the main tasks you can perform when it comes to groups:

- **Create** Groups can be built quickly and easily using the Index and Groups window pane and the Topics window in Doc-To-Help. See "Creating Groups" on the next page.
- **Add Topics to Groups** After creating a group, you can add a topic to it. See "Adding a Topic to a Group" on page 101.
- **Create Links** You can create links to groups. See "Links" on page 102.



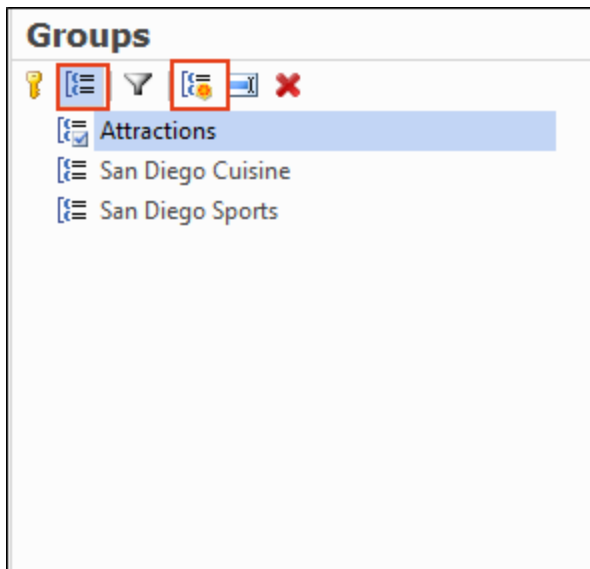
NOTE: Although groups are sometimes referred to as "related topics," they are a bit different from those that are created in the Related Topics window pane. The links created in the Related Topics window pane are subtopic links that are automatically added to the bottom of topics. See "Related Topics" on page 108.



Creating Groups

Groups can be built quickly and easily using the Index and Groups view in the Doc-To-Help Project Panel.

HOW TO CREATE A GROUP

1. In Word, open the Index and Groups view in the Doc-To-Help Project panel.



2. Click the **Groups** button .
3. In the Groups pane, click the **Add New Group** button  in the local toolbar.
4. An editable group name will be created, titled "New Group." Type the new group name within the box.
5. (Optional) Groups can be renamed or removed using the **Rename** or **Remove Group** toolbar buttons.

HOW TO ASSIGN A TOPIC TO A GROUP

1. Create a group.
2. In the Keywords/Groups view, select the group to highlight it.
3. Drag a topic from the Topics window into the bottom half of the Keywords/Groups view.



NOTE: Groups should always have more than one topic assigned to them.



NOTE: For a complete listing of options, see the Index and Groups Window View topic in the online Help.

Adding a Topic to a Group

After creating a group (see "Creating Groups" on page 99), you can add a topic to it.

HOW TO ADD A TOPIC TO A GROUP

1. In the Word source document, select text.
2. Select the **Doc-To-Help** ribbon.
3. In the **D2HML Styles** group, click the **Group** button. The Group dialog opens, and the selected text is displayed at the top of the dialog.
4. (Optional) By default, the topic will be added to a group whose name is defined by the selected text. The phrase "Group defined by Text" is displayed in the Group field. If you would prefer to add the topic to another group, use one of these options:
 - If you would like to add the topic to an existing group (or groups), select the appropriate check box(es).
 - If you would like to add a new group to the list, in the **Groups** area, click **Add New Group**. An editable group will be created, titled "New Group." Type the new group name within the box, and press **Enter**. Select the group(s) check boxes.
5. (Optional) If you want to hide the tag, you can select the **Hide properties in document**. Clearing the **Visible** check box will hide the text in your source document.
6. Click **OK**.



NOTE: You can also create and manage groups from the Index and Groups view in the Doc-To-Help Project panel in Word.

Links

You can create links to topics, bookmarks, link tags, keywords, groups, and glossary entries.

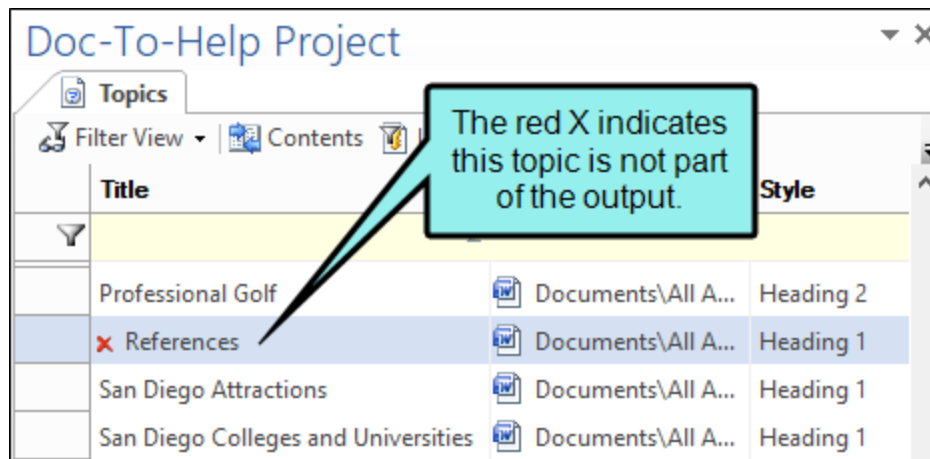
HOW TO CREATE A LINK

1. In the Word source document, select the text where you want to create a link.
2. Select the **Doc-To-Help** ribbon.
3. In the **D2HML Styles** group, click **Link**. The Link dialog opens.
4. Click the **Link type** drop-down and choose the type of link you would like to create.
 - Topic title
 - Topic in Document
 - Link tag
 - Bookmark in Document
 - Keyword
 - Group
 - Glossary term
5. In the area below, select the appropriate topic, link tag, bookmark, keyword, group, or glossary entry.

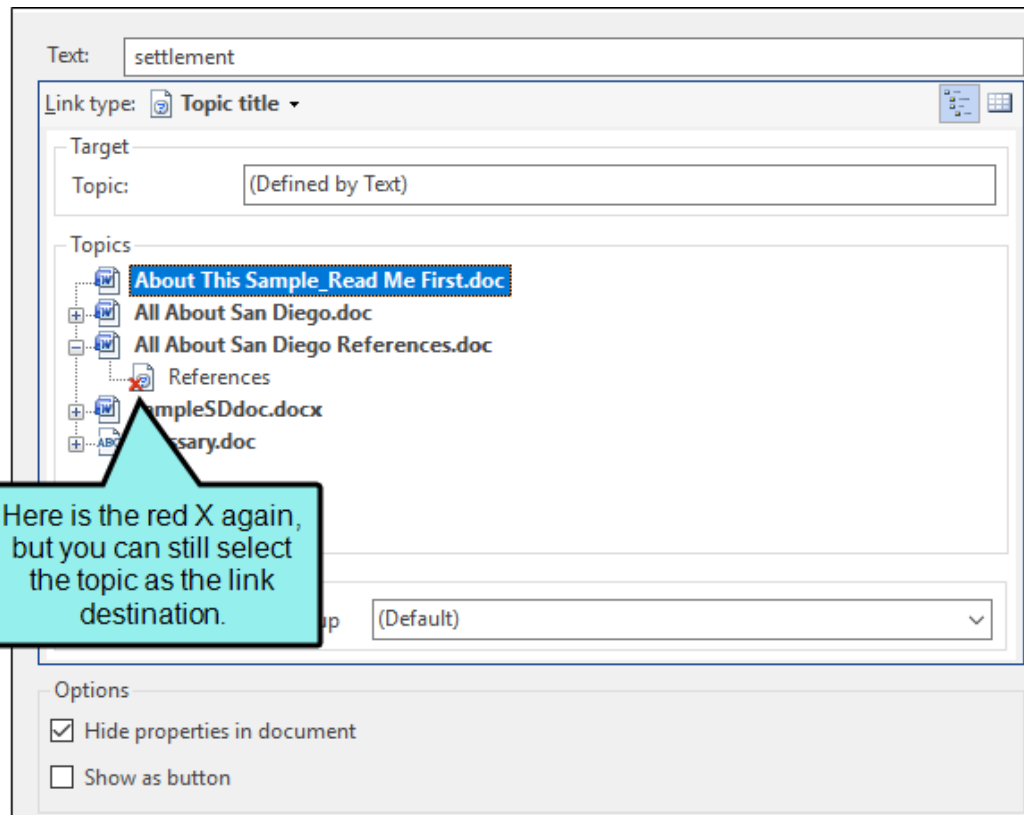
If a particular topic has been deleted as a result of the latest build (e.g., it was conditioned out of the target), it will be listed with a red X icon. But in this dialog you can create links to such a deleted topic without first rebuilding a target that is conditioned to include it.

☆ EXAMPLE

Let's say you place a condition on a topic called "References" so that it is included only in a Manual target. When you build a NetHelp target, that topic is excluded from the output, and a red X is shown next to it in the Topics window.




- ☆ Then let's say you are working in a source document and you begin to insert a link. In the Link dialog, you can see that the References topic has been removed as a result of the most recent build. But you are still able to select this topic when linking to it, in anticipation of building the Manual target in the near future (where that topic will be included).



✔ **TIP:** You can click  or  to view the "link to" information in Grid View or Tree View.


📄 **NOTE:** You may select more than one keyword or group.

 **NOTE:** For topic links, the default target topic will be identical to the selected text. The phrase "Defined by Text" is displayed in the Topic field.


6. (Optional) Depending on the link type, you can make selections in the **Link options** area.


If you would like the information to display in a popup, select the **Popup** check box (if it is available for the selected link type).

By default, the window type of the topic is chosen. If you would prefer the destination topic to display in another window type, choose one from the drop-down list.

 **NOTE:** The (Default) topic window types are set using topic types, which are one component of a paragraph style. These are set for the project in the Styles dialog. See the online Help or the *Design Guide*.

7. (Optional) In the **Options** section, you can select **Hide properties in document** to hide the tag.
8. (Optional) In the **Options** section, you can select **Show as button** if you would like the link to be a button in the online output with the selected text displayed on it.
9. Click **OK**.

 **NOTE:** Using drag-and-drop linking, you can create links in your Word source document. You can use drag-and-drop linking from the Word Doc-To-Help Project panel. See "Drag-and-Drop Linking" on the next page.



 **NOTE:** If you would like to create a new keyword, group, or link tag, see "Creating Index Keywords in a Source Document" on page 79, "Adding a Topic to a Group" on page 101, or "Link Tags" on page 107. You can also create/edit keywords and groups using the Index and Groups view in the Doc-To-Help Project panel.


Drag-and-Drop Linking

If you prefer, you don't need to use the Link button to create links to topics, keywords, groups, and documents—or the Variable button to insert text variables.

Using drag-and-drop linking, you can create links to your Word source document from the Doc-To-Help Project panel in Word.

HOW TO CREATE A DRAG-AND-DROP LINK

1. Open your Word source document.
2. Open the Doc-To-Help Project panel (**Project ribbon>Project Panel**).
3. In the Doc-To-Help Project panel, select the appropriate window pane for the type of link you want to create:
 - **Document** Select the Documents window pane.
 - **Keyword or Group** Select the Index and Groups window pane. Click  (default) in the toolbar to display the project keywords (Index); click  to display the project groups.
 - **Topic** Select the Contents window pane.
 - **Variable** Select the Variables window pane.
4. Select the topic, keyword, group, document, or variable you want to link to, and drag it into your document. The link will be created in your document.

 **NOTE:** Using drag-and-drop linking will create a direct link to the topic, keyword, group, or document selected. If you would like to choose a specific destination window or bookmark—or specify that the link should appear as a Popup—you should use the Link dialog instead.

Link Tags

A link tag is a unique identifier for a topic, and makes it possible to create a jump or popup link to a topic. If a paragraph style has the Auto Link check box selected, then Doc-To-Help will automatically create a link tag for every topic using that style. Automatic link tags are identical to the topic title, but spaces, hyphens, and periods are replaced by underscores.

Sometimes you may need to manually create a unique link tag for a topic, particularly if you have two or more topics with the same name, and therefore the same link tag. The Link Tag dialog makes this possible. A topic can have more than one link tag, and can be viewed in the Topics window (right-click and select **Columns>Link Tag** from the context menu).

HOW TO ADD A LINK TAG MANUALLY

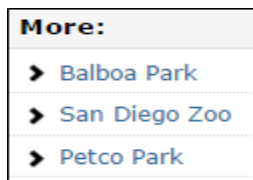
1. In the Word source document, select text where you want to add the link tag.
2. Select the **Doc-To-Help** ribbon.
3. In the **D2HML Styles** group, click the **Link Tag** button. The Link tag dialog opens. The selected text is displayed at the top of the dialog.
4. (Optional) By default, the link tag will be the selected text. The phrase "Link tag defined by Text" is displayed in the Link Tag field. If you would prefer to use another link tag, use one of these options:
 - If you would like to assign a link tag to the text, select it in the **Link tags** area.
 - If you would prefer to use another link tag, you can add a new link tag to the list. To do this, in the **Link tags** area, click **Add New Link Tag**. An editable link tag is created, titled "New Link Tag." Type the new link tag within the box and press **Enter**.
5. (Optional) If you want to hide the tag, you can select the **Hide properties in document**. Clearing the **Visible** check box will hide the text in your source document. See the online Help or the *Design Guide*.
6. Click **OK**.

✔ **TIP:** If you want to link to a topic title that will change with each build (e.g., some text is conditioned or it includes a dynamic variable), create a link tag and link to it to avoid broken links when the text changes.

Related Topics

Related topics (also known as "subtopic links") can be created/edited and viewed using the Related Topics pane and the Topics window. The related topics feature is very powerful, because it lets you customize relevant "See Also" links for any topic, without the need to create individual cross-reference links. Combined with the automatically created subtopic relations, this means your online outputs can help your users find the exact topic they need, when they need it. It can also eliminate topic "dead ends" in your online output.

By default, related topics will display at the bottom of an online topic like this:



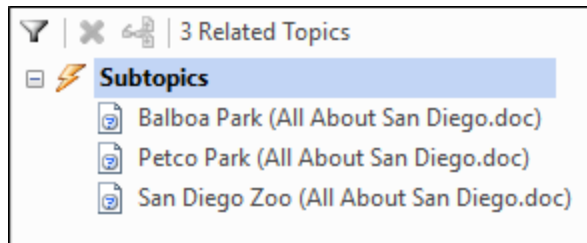
Using the Related Topics view, you can add additional subtopic links to a topic, as well as disable or hide links.

AUTOMATIC SUBTOPIC LINKS

Subtopic links are created automatically by Doc-To-Help based on heading styles. They display in online outputs at the bottom of the topic.

By default, the related subtopics are the children of the main topic (Heading 1 styles will display Heading 2 styles as subtopics; Heading 2 styles will display Heading 3 styles.) The display of subtopic links is controlled by the topic type of the heading style, and can be turned on/off in the Project Styles dialog using the Auto Subtopic Links check box. See the online Help or the *Design Guide*.

In the bottom section of the Related Topics view, these automatic relations are flagged as "Subtopics."



You can note where any topic displayed in the lower half of the Related Topics pane belongs in the topic hierarchy by selecting it and clicking the **Go to Related Topic** button in the local toolbar.



The Filter icon can be used to easily search through any of the Subtopics.

HOW TO CREATE A CUSTOM RELATION TO A TOPIC

1. Open the Related Topics window view and select a topic. This topic could already have automatic subtopics, custom related topics, or no related topics.
2. Go to the Topics window, select the desired related topic, and drag it into the lower half of the Related Topics view. The new relation will be flagged as a "Custom Related Topic."

This custom relation will display in the Related Topics list for that topic after the target is rebuilt.

HOW TO REMOVE A CUSTOM RELATION

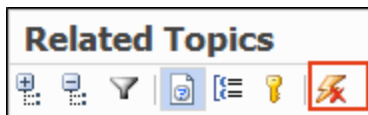
- Choose the relation and click the **Remove Relation** button.



HOW TO HIDE SUBTOPIC LINKS

If you would prefer that the entire related topics list does not display in a specific topic.

1. Open the Related Topics window view and select the topic.
2. In the local toolbar, click the **Disable Subtopic Relations** button.



In the bottom section of the Related Topics view, the message will read "Subtopic Relations Disabled by User."

HOW TO CHANGE THE RELATED TOPICS LABEL FOR ALL TOPICS

1. Select the **Target** ribbon.
2. Click the **Target Properties** button. The Help Targets dialog opens.
3. From the list on the left, choose the appropriate online target.
4. Change the **Label** field. (By default, the label is "More:").

HOW TO CHANGE THE RELATED TOPICS LABEL FOR A SINGLE TOPIC

1. Open the **Topics Panel** window and select the topic.
2. Select the **Doc-To-Help** ribbon, and click **Topic Properties**.
3. Edit the **Related Links Label** field in the **Topic Properties** window.

HOW TO CHANGE THE STYLE OF THE RELATED LINKS LABEL AND LINKS


1. Select the **Target** ribbon.
2. Click the **Target Properties** button. The Help Targets dialog opens.
3. From the list on the left, choose the appropriate online target.
4. Change the **Label style** and/or **Links style** field(s).

Tables

You can quickly insert a table into a Word document using the Special Formatting toolbar or ribbon. The table will be pre-formatted with the correct Doc-To-Help styles, and you can specify borders, indentation, and shading of the heading row.

HOW TO INSERT A STANDARD TABLE

1. In a Word source document, place your cursor at the point you'd like to insert a table.
2. In the **Special Formatting** ribbon, click the **Standard DocToHelp Table** button. The Standard Doc-To-Help Table dialog opens.
3. Specify the number of **Rows** and **Columns**.
4. Select the desired check boxes to add a border (**Create borders**), align the table with the Body Text style (**Indent table to align with Body Text**), and shade the heading row gray (**Fill heading**).
5. To make additional adjustments to your table, select it and right-click. From the menu, choose **Table Properties**.
6. Click **OK**.

 **NOTE:** The Special Formatting toolbar or ribbon will not be displayed in all templates. In those cases, use the regular table functions found in Word.



NOTE: If you want to use the Special Formatting ribbon in your source document, be sure to select the D2H_SMAL.dotx, D2H_SMAL_A4.dotx, D2H_NORM.dotx, or D2H_NORM_A4.dotx template when creating a new document. If your source document is using a different template, and you switch to one of these four templates, the Special Formatting ribbon will not be available.

Tables of Contents

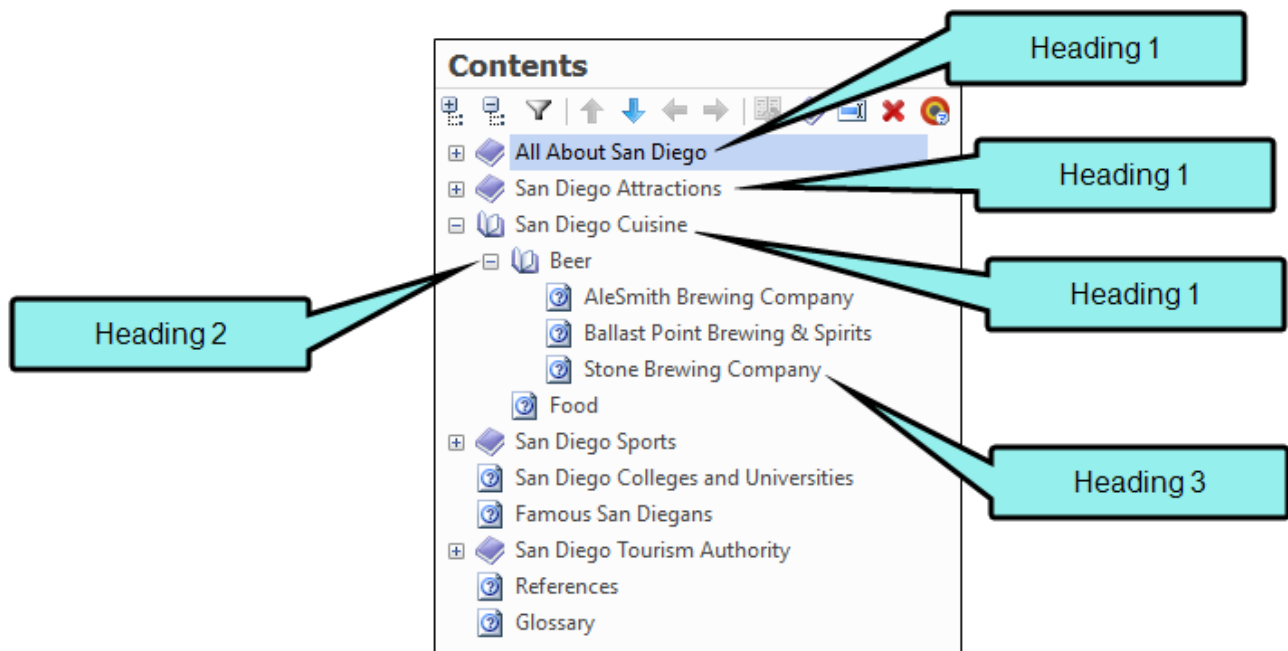
Doc-To-Help automatically creates a table of contents (TOC) for you based on the structure of your documents. But you can create a custom TOC (you can even have different TOCs for different targets) if you wish.

AUTO-GENERATED TOC STRUCTURE

An auto-generated TOC will be structured as follows:

- The order of the TOC will be determined by the order of the documents in the Documents window pane.
- Heading 1 styles with no Heading 2 styles under them will appear at the main level
- Heading 1 styles with Heading 2 styles under them will appear at the main level as "books," with the Heading 2 styles indented below them.
- If used, Heading 3 styles will be indented under Heading 2 styles; Heading 4 styles under Heading 3 styles.
- If a Heading 1 style has no Heading 2 styles under it, it will not appear as a book in the TOC. It can be changed to one, but when the project is built it will not retain the book icon, because there are no subtopics under it.

The book icon visually indicates that "more information is available" about a topic.








By default, Heading styles 1-4 will be included in an auto-generated TOC. If you would like to add a Heading style to the TOC, open the Styles dialog and clear the **Explicit access** check box for that paragraph style. See the online Help or the *Design Guide*.

You can see which topics are included in your TOC by opening the Topics window and looking at the TOC column.

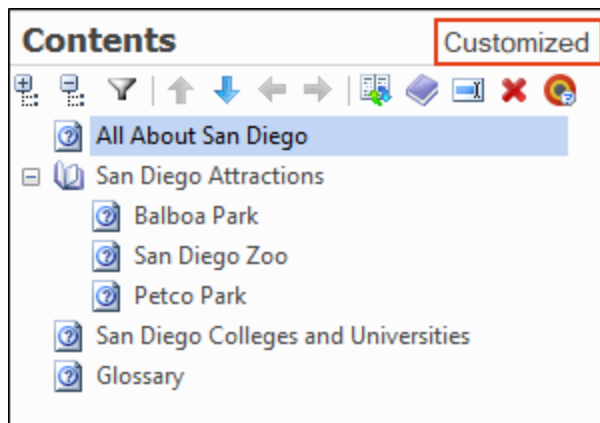
NOTE: You can also view the topics in your TOC when you are working in Word by opening the Doc-To-Help Project Panel (**Doc-To-Help > Project Panel**), and selecting the Contents window pane. If you are working with a target-specific TOC, select the target from the drop-down at the top of the panel to see the topics in a specific target.

NOTE: If your TOC is auto-generated, and you add a new topic to your project, that topic will automatically be added to the TOC the next time a target is built.

HOW TO CREATE A CUSTOM TABLE OF CONTENTS


1. In Word, open the Contents window pane.
2. Add, delete, reorder, and rename TOC items as you wish.
 - **Add a Topic to the TOC** Drag it from the Topics window into the Contents pane.
 - **Move a TOC Item Up or Down** Choose it in the Contents pane and click the **Move Up** or **Move Down** buttons .
 - **Change the Level of a TOC Item** Choose it in the Contents pane and click the **Move Out** or **Move In** buttons .
 - **Create a New, Empty Book** Choose a spot in the Contents pane and click the **Create Book** button .
 - **Convert a TOC Item to a Book (Must Have Subtopics)** Choose it in the Contents pane, right-click, and choose **Convert Topic to Book**.
 - **Rename a TOC Item** Choose it in the Contents pane and click the **Rename Topic** button .
 - **Delete a TOC Item** Choose it in the Contents pane and click the **Remove Topic** button .

As soon as you manually edit the TOC, it will be flagged as "Customized." If you would like this TOC to be exclusively used for the target selected, click the **Target-Specific Table of Contents** button.




Once you have customized a TOC, any topics added to your project must be added manually, unless you have the **Update customized table of contents in build** check box selected in Project Settings. Choosing this option will automatically add newly-created topics to your customized TOC when your

project is built, although you will want to open the Contents window pane and confirm their location. To view the new topics added after a build, open the **Topics Panel**, click the **Filter View** button, and choose **Show only topics added in the last build**. If you have deleted any topics, those will need to be deleted manually from the TOC. Target-specific TOCs will not be updated.


 **NOTE:** In a Manual target, topics in multi-topic documents will always appear in the TOC in the same order as they appear in the source document. If the order is changed in the TOC, Doc-To-Help lists an error in the build log and does not use the customization.


HOW TO CREATE A TARGET-SPECIFIC TABLE OF CONTENTS

1. In the Target ribbon, click the **Active Target** button and choose the desired target.
2. In the Doc-To-Help project panel, open the Contents view.
3. Manually edit the TOC.
4. Click the **Target-Specific Table of Contents** button .

Continue choosing targets to customize each one.

HOW TO REBUILD THE TOC BASED ON DOCUMENT STRUCTURE

1. In the Target ribbon, click the **Active Target** button and choose the desired target.
2. Open the Contents window pane.
3. Click the **Rebuild Table of Contents** button .

 **NOTE:** For a complete listing of TOC options and instructions, see the Contents Window Pane (Doc-To-Help) topic in the online Help.

Topics

To make your Word document more useful for online output, it is broken up into smaller elements called "topics," which are based on the heading styles in the document. After you create a Doc-To-Help project and build some output from it, Doc-To-Help automatically creates multiple topics as a result, structuring the content for online documentation. Heading 1 styles in your Word document automatically become parent topics, and all of the Heading 2 styles under a Heading 1 style become subtopics. Just keep in mind that these topics are not created until you build at least one target in your project.

This chapter discusses the following:

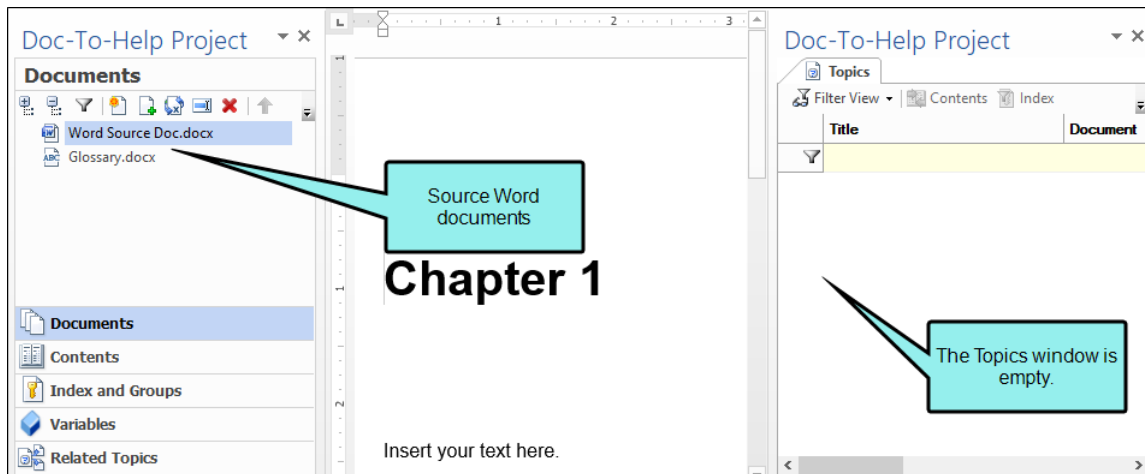
Example	119
Windows	122
Tasks Associated With Topics	123
Adding, Renaming, and Deleting Topics	124
Printing and Exporting the Topic List	126
Setting D2HML Topic Properties	129
Viewing/Changing Topic Properties	132

Example

Following is an example of topics in Doc-To-Help.

☆ EXAMPLE

The following shows a project containing two Word documents, one that contains the main content and a second being used as a glossary. No targets in this project have been generated yet. Therefore, no topics exist right now.



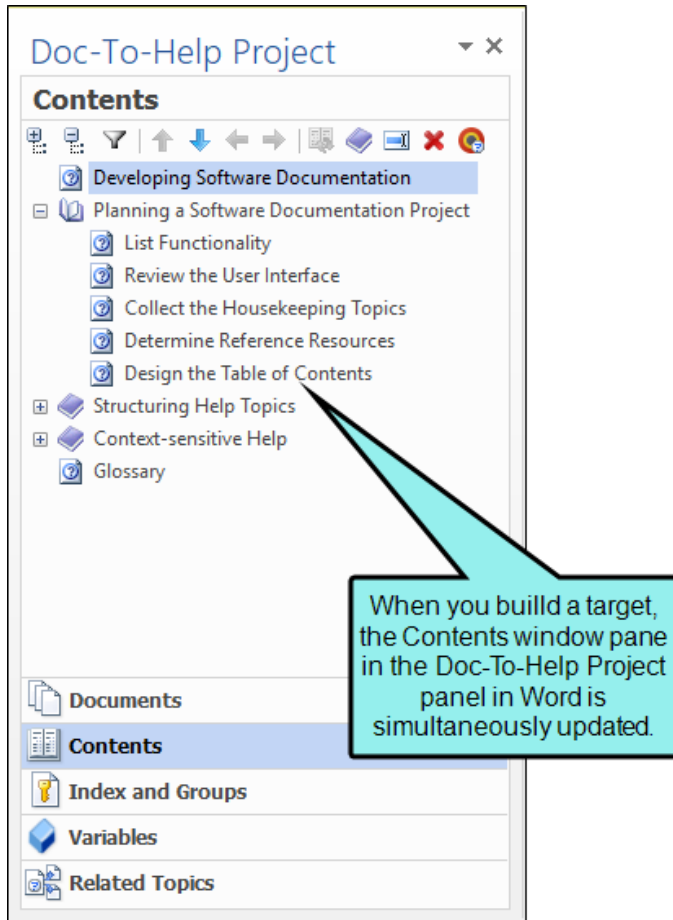
- ☆ After building a target, notice that the Topics panel is populated, based on the heading styles in the Word source document. In this case, multiple topics were created from the two source documents. It also shows the structure of the table of contents that will be created in the output.

The Contents window pane shows the structure of the topics.

The Topics window lists all of the topics that were created. Note the styles associated with each topic. This window also lists associated keywords with the topics, and the topic type.

Title	Style	Type	Context ID	Keywords	Groups	TOC
Planning a Software Documentati...	Documents\Planning a S...	Heading 1	Contents	3		Yes
List Functionality	Documents\Planning a S...	Heading 2	(Inherit from Style)	4		Yes
Review the User Interface	Documents\Planning a S...	Heading 2	Conceptual			Yes
Collect the Housekeeping Topics	Documents\Planning a S...	Heading 2	Conceptual			Yes
Determine Reference Resources	Documents\Planning a S...	Heading 2	Conceptual			Yes
Design the Table of Contents	Documents\Planning a S...	Heading 2	Conceptual			Yes
Glossary	Documents\Glossary.doc	Heading 1	Glossary of Terms			No
5 Ws and 1 H	Documents\Glossary.doc	Glossary Heading	Glossary Term Definition	80		No
Conditions	Documents\Glossary.doc	Glossary Heading	Glossary Term Definition	81		No
Context IDs	Documents\Glossary.doc	Glossary Heading	Glossary Term Definition	82		No
Dynamic help	Documents\Glossary.doc	Glossary Heading	Glossary Term Definition	83		No
Online help	Documents\Glossary.doc	Glossary Heading	Glossary Term Definition	84		No
Variables	Documents\Glossary.doc	Glossary Heading	Glossary Term Definition	85		No
Structuring Help Topics	Documents\Structuring ...	Heading 1	Contents	88	structuring help topi...	Yes
User Interface Overview Topic Type	Documents\Structuring ...	Heading 2	Conceptual	29		Yes
Functionality Introduction Topic T...	Documents\Structuring ...	Heading 2	Conceptual	95		Yes
Dialog Topic Type	Documents\Structuring ...	Heading 2	Conceptual			Yes
Writing Tips	Documents\Structuring ...	Heading 2	Conceptual	18	writing tips	Yes
Developing Software Documentati...	Documents\Developing ...	Heading 1	Contents	14	help deliverables+ Ta...	Yes
Context-sensitive Help	Documents\Context Sen...	Heading 1	Contents			Yes
Generating Context IDs Automatic...	Documents\Context Sen...	Heading 2	Conceptual			Yes
Assigning or Editing Context IDs ...	Documents\Context Sen...	Heading 2	Conceptual			Yes
Distributing Context ID Files	Documents\Context Sen...	Heading 2	Conceptual			Yes

- ☆ The Contents window view in the Doc-To-Help Project panel in Word is also populated. You can use the Contents view in the Doc-To-Help Project panel to quickly view the structure of the document, jump to locations in the source document, or create links.



Windows

Topics can be managed a number of ways in Doc-To-Help. This includes specifying topic properties and conditions, as well as creating indexes and tables of contents.

The primary location for working with topics is the Topics window.

Tasks Associated With Topics

Following are the primary tasks associated with topics:

- **Add, Rename, and Delete** Topics may be added, renamed, and deleted from a Word document using the Doc-To-Help ribbon. See "Adding, Renaming, and Deleting Topics" on the next page.
- **Assign Topics to Index Keywords** Within your Doc-To-Help project, you can create index keywords and assign topics to them. See "Creating Index Keywords in a Project" on page 77.
- **Create Custom Tables of Contents** You can create a custom table of contents (you can even have different TOCs for different targets). See "Tables of Contents" on page 114.
- **Print or Export Topic List** You may print your entire topic list, and also export it to Microsoft[®] Excel[®] or text (TXT) if you wish. See "Printing and Exporting the Topic List" on page 126.
- **Set D2HML Topic Properties** Specific topic properties may be set using D2HML. See "Setting D2HML Topic Properties" on page 129.
- **View and Change Topic Properties** The properties of specific topics—for example, the topic title and type (conceptual, procedural, etc.), and condition—may be reviewed and edited. See "Viewing/Changing Topic Properties" on page 132.

Adding, Renaming, and Deleting Topics

Topics may be added, renamed, and deleted from a Word document using the Doc-To-Help ribbon. Adding a topic using this method makes it possible to perform certain functions (e.g., creating a link to the new topic) without building the target first. The topic that is added, renamed, or deleted will automatically be updated in the table of contents (unless the TOC is customized).

You can also add a topic by entering the text and applying a heading style. Existing topics can also be renamed or deleted by editing or deleting the topic text. When using these methods, make sure to build the target to incorporate your changes.

HOW TO ADD A NEW TOPIC

1. Open your Word source document (.doc or .docx).
2. Place your cursor at the point you'd like to insert the new topic. This should be at the start of a new paragraph. (Place an empty paragraph at the end of the previous topic.)
3. Open the **Doc-To-Help** ribbon, and click the **Add** button . You will be asked to confirm the new topic location. Click **Yes**. The Add Topic dialog opens.
4. Enter the **Title** of the topic and from the drop-down list choose the **Style**. The location of the new topic displays in the topic hierarchy.
5. Click **OK**.

HOW TO RENAME A TOPIC

1. Open your Word source document (.doc or .docx).
2. Select the entire name of the topic you wish to rename.
3. Open the **Doc-To-Help** ribbon, and click the **Rename** button . The Rename Topic dialog opens. The name and location of the topic will be bolded in the topic hierarchy.
4. Change the **Title** of the topic and, if you wish, from the drop-down list choose a different **Style**. The URL, ASCII Name, Link tag, and Keyword will be changed by default to use the new title (see "Viewing/Changing Topic Properties" on page 132). If you would prefer any or all of these properties do not change, clear the check box(es).
5. Click **OK**.

HOW TO DELETE A TOPIC

1. Open your Word source document (.doc or .docx).
2. Select the entire text of the topic(s) you wish to delete.
3. Open the **Doc-To-Help** ribbon, and click the **Delete** button . The Delete Topics dialog opens. The name and location of the topic(s) will be bolded in the topic hierarchy.
4. Click **OK**.

Printing and Exporting the Topic List

You may print your entire topic list, and also export it to Microsoft® Excel® or text (TXT) if you wish. Exporting your topic list is useful if you'd like to sort or filter your topics, or if you'd like to provide a list of topics and context IDs to your software development team for the implementation of context-sensitive Help. See the online Help or the *Context-sensitive Help Guide*.

- "Exporting the Topic List" below
- "Printing the Topic List" on the next page

Exporting the Topic List

Exporting your topic list is useful if you'd like to sort or filter your topics, or if you'd like to provide a list of topics and context IDs to your software development team for the implementation of context-sensitive Help. See the online Help or the *Context-sensitive Help Guide*.

HOW TO EXPORT THE TOPIC LIST

1. Open the **Project** ribbon, and click the **Topics Panel** button.
2. Click the **Print and Export** drop-down on the Topics Panel.
3. From the **Export to...** list, choose **Excel** or **Text**.
4. The Save As dialog opens.
5. Choose the file location and name.
6. Click **OK**.

Printing the Topic List

Before printing the topic list, you may preview it, change the page settings, and/or choose from three print options.

HOW TO PRINT THE TOPIC LIST

1. Open the **Project** ribbon and click the **Topics Panel** button.
2. Click the **Print and Export** button.
3. On the **Topics Panel**, click the drop-down for the **Print and Export** button.
4. From the list of options, choose **Print**. The Print dialog opens.
5. Select the options you'd prefer and click **OK**.

HOW TO PREVIEW THE TOPIC LIST

1. Open the **Project** ribbon and click the **Topics Panel** button.
2. On the **Topics Panel**, click the drop-down for the **Print and Export** button.
3. From the list of options, choose **Preview**. The Print Preview dialog opens.
4. In the upper-left, click the **Print** button, or click the **Close** button to close the Print Preview dialog.

HOW TO CHANGE THE TOPIC LIST PAGE SETTINGS

1. Open the **Project** ribbon and click the **Topics Panel** button.
2. On the **Topics Panel**, click the drop-down for the **Print and Export** button.
3. From the list of options, choose **Page Settings**. The Page Setup dialog opens.
4. Choose the paper size, orientation, and margins.
5. Click **OK**.

HOW TO CHOOSE A PRINT OPTION FOR THE TOPIC LIST

1. Open the **Project** ribbon and click the **Topics Panel** button.
2. On the **Topics Panel**, click the drop-down for the **Print and Export** button.
3. From the list of options, choose **Print Options**. The Print Options dialog opens.
4. Select the check box next to the appropriate option
 - **Fit to page width** The list will scale so that it is only one page wide.
 - **Fit to entire page** The list will scale so that it all fits on a single page.
 - **Extend last column** The last column of the list will be extended on the printed page.
5. Click **OK**.

Setting D2HML Topic Properties

Topic properties may be set using D2HML (Doc-To-Help Markup Language).

HOW TO SET D2HML TOPIC PROPERTIES

1. Select the **Doc-To-Help** ribbon and click **Topic Properties**. The D2HML Topic Properties dialog opens.
2. Make changes in the different sections of the dialog.

GENERAL

- **ASCII Name** Specifies the ASCII-only string used to identify the topic in situations where non-ASCII characters are not allowed. This property is important for authoring in languages that have non-ASCII alphabets, such as Cyrillic and Asian languages. In some instances, names generated by Doc-To-Help must be ASCII. Such instances include identifiers in *.h and *.bas map files that are used for context-sensitive Help in C and Visual Basic programming language.
- **URL** Specifies the name of the generated HTM file for this topic. You can edit the name manually, or you can set a rule for it in the Project Settings dialog ("URL mode" field). You can also limit the character length of this URL using the "Truncate file name length" field in the Project Settings. Another way to edit the URL is to double-click in the URL cell in the Topics Panel and type it there.
- **Context ID** The unique numeric identifier assigned to the topic during compilation (read-only). This allows the topic to be used in context-sensitive Help. Context ID settings are managed in the Project Properties dialog. See the online Help or the *Context-sensitive Help Guide*.
- **Comments** An editable text box for comments by the author. These comments are not accessible by the end user.
- **Default Topic** If selected, this will be the topic displayed when online output is opened (the "home page"). The default topic can also be set by selecting a topic in the Topics window, right-clicking, and choosing **Default Topic**.


APPEARANCE

- **Contents Title** This field lets you change the topic title in the table of contents (Contents pane) without changing the actual topic title in the source document. See "Tables of Contents" on page 114.
- **Display Title** This field allows for modification of a topic title with respect to searches without changing the actual topic title in the source document. Use this property to add qualifying text to like-named topics. For example, a search for "intro" may yield several topics named Introduction, but by modifying the Display Title, you can force results such as Introduction (Help Authoring) and Introduction (HTML), without adding the text in parentheses to the source documents. This is the equivalent of adding a <Title> in HTML.
- **Related Links Label** Specifies the text that precedes the subtopic buttons for this topic. If you clear this field, there will be no text above the buttons. If you would like to change the label text for a specific target, change it in the Help Targets dialog. The default label is More: See "Related Topics" on page 108.
- **Include in Search** If selected, search is enabled for this topic in NetHelp targets. If cleared, this topic is excluded from the search.
- **Disable Comments** If checked, DISQUS commenting will be disabled for this topic. See the online Help or the *Targets Guide*.

CONDITION

- **Platforms** Sets a platform-based condition for the selected topic. The topic will be included in all the target platform(s) selected. A platform includes all the targets that produce the output specified; Online Help, HTML Help, NetHelp, Printed Manual, etc. See "Conditions" on page 56.
- **Targets** Sets a target-based condition for the selected topic. The topic will be included in all the target(s) selected. See "Conditions" on page 56.
- **Attributes** Set an attribute-based condition for the selected topic. The topic will be included or excluded when creating conditional builds (e.g., internal or external.) Use the Attributes dialog (**Project > Attributes**) to create custom attributes. See "Conditions" on page 56 and "Creating and Using Attributes" on page 62.
- **Disable Comments** If checked, DISQUS commenting will be disabled for this topic. See the online Help or the *Targets Guide*.

3. Click OK.

 **NOTE:** For information about making adjustments to other topic properties, see "Viewing/Changing Topic Properties" on the next page.

 **NOTE:** Topic properties will be hidden by default.

Viewing/Changing Topic Properties

The properties of specific topics—for example, the topic title and type (conceptual, procedural, etc.), and condition—may be reviewed and edited in the Topic Properties dialog.

Certain topic properties can be edited in the Topics window itself (e.g., type, context ID, keywords, and groups). Simply click in the grid at the appropriate spot to open a drop-down or activate the field. (To see the columns available for display, right click in the window and choose **Columns**.)

If you would like to view or change the properties of an entire document, use the Document Properties dialog. See "Setting Document Properties" on page 19.

HOW TO VIEW AND CHANGE TOPIC PROPERTIES

1. Open the Topics window, right-click the desired topic, and choose **Properties**. The Topic Properties dialog opens.



NOTE: If you would like to edit multiple topics, choose them in the Topics window using **SHIFT+Click** or **CTRL+Click**. Right-click and choose **Properties**.

2. Make any necessary changes in the dialog.

GENERAL

- **Title** The name of the topic, taken directly from the source document. This field is read-only. To change a topic title in a Word source document, use the **Rename** button on the Doc-To-Help ribbon.
- **Topic type** Specifies a named set of display, navigation, and indexing characteristics to be associated with this topic (such as what window the topic appears in, how the topic is accessed, and whether it gets a map number).
- **ASCII Name** Specifies the ASCII-only string used to identify the topic in situations where non-ASCII characters are not allowed. This property is important for authoring in languages that have non-ASCII alphabets, such as Cyrillic and Asian languages. In some instances, names generated by Doc-To-Help must be ASCII. Such instances include identifiers in *.h and *.bas map files that are used for context-sensitive Help in C and Visual Basic programming language.
- **URL** Specifies the name of the generated HTM file for this topic. You can edit the name manually, or you can set a rule for it in the Project Settings dialog ("URL mode" field). You can also limit the character length of this URL using the "Truncate file name length"

field in the Project Settings. Another way to edit the URL is to double-click in the URL cell in the Topics Panel and type it there.

- **Context ID** The unique numeric identifier assigned to the topic during compilation (read-only). This allows the topic to be used in context-sensitive Help. Context ID settings are managed in the Project Properties dialog. See the online Help or the *Context-sensitive Help Guide*.
- **Context string** When using context-sensitive (F1) and dynamic Help with Microsoft Help 2.0, this option specifies the context string for the topic. Each topic can have one or more context strings, or none. The context strings must be separated by a semicolon. Topic context strings form a hierarchical tree structure. A context string consists of dot-separated context names for each hierarchy level. See the online Help or the *Context-sensitive Help Guide*.

☆ **EXAMPLE**

A topic "Property MyProperty" can have the following:

- Context string = "MyCompany.MyProduct.MyProperty"

Topic "Properties MyProperty1 and MyProperty2" can have the following:

- Context string = "MyCompany.MyProduct.MyProperty1;MyCompany.MyProduct.MyProperty2"

- **Comments** An editable text box for comments by the author. These comments are not accessible by the end user.
- **Default Topic** If selected, this will be the topic displayed when online output is opened (the "home page"). The default topic can also be set by selecting a topic in the Topics window, right-clicking, and choosing **Default Topic**.

APPEARANCE

- **Contents Title** This field lets you change the topic title in the table of contents (Contents pane) without changing the actual topic title in the source document. See "Tables of Contents" on page 114.
- **Display Title** This field allows for modification of a topic title with respect to searches without changing the actual topic title in the source document. Use this property to add qualifying text to like-named topics. For example, a search for "intro" may yield several topics named Introduction, but by modifying the Display Title, you can force results such as Introduction (Help Authoring) and Introduction (HTML), without adding the text in parentheses to the source documents. This is the equivalent of adding a<Title> in HTML.
- **Related Links Label** Specifies the text that precedes the subtopic buttons for this topic. If you clear this field, there will be no text above the buttons. If you would like to change the label text for a specific target, change it in the Help Targets dialog. The default label is More: See "Related Topics" on page 108.
- **Hide Subtopic Links** If selected, the subtopic links will be hidden for this topic.
- **Include in Search** If selected, search is enabled for this topic in NetHelp targets. If cleared, this topic is excluded from the search.
- **Disable comments** If checked, DISQUS commenting will be disabled for this topic. See the online Help or the *Targets Guide*.

CONDITION

These can also be set and will appear in the Condition ribbon group. See "Conditions" on page 56.

- **Platforms** Sets a platform-based condition for the selected topic. The topic will be included in all the target platform(s) selected. A platform includes all the targets that produce the output specified; Online Help, HTML Help, NetHelp, Printed Manual, etc.
- **Targets** Sets a target-based condition for the selected topic. The topic will be included in all the target(s) selected.
- **Attributes** Set an attribute-based condition for the selected topic. The topic will be included or excluded when creating conditional builds (e.g., internal or external.) Use the Attributes dialog (**Project > Attributes**) to create custom attributes. See "Creating and Using Attributes" on page 62.

MODULE LINK

For more about modular output, see the online Help or the *Project Management Guide*.

- **Target menu** Before setting your module link properties, choose the appropriate modular target from the drop-down.
- **Module file** For a placeholder topic in a modular hub project, specifies the platform-dependent Help file to be loaded dynamically. (Applies only to HTML Help, NetHelp, and Microsoft Help Viewer 1.x modular hub projects.)
- **Contents file** For a placeholder topic in a modular hub project, specifies the platform-dependent contents file to be loaded dynamically. (Applies only to HTML Help modular hub projects.)
- **Use first topic as parent** For Microsoft Help Viewer modular hub projects, sets the first topic in the child project as the parent of the other topics in the child project.
- **Inherit Product name** For Microsoft Help Viewer modular hub projects, sets the product name for the child projects to the same value as that of the hub project. The product name value is set in the Help Targets dialog of the hub project.
- **Inherit Book name** For Microsoft Help Viewer modular hub projects, sets the book name for the child projects to the same value as that of the hub project. The book name value is set in the Help Targets dialog of the hub project.

Variables

Variables allow you to write content once, and manage it in one place for reuse across your project because variable hotspots are replaced with variable text in the final output. There are two basic kinds of variables: text and rich content. Both are created in the Variables window in Doc-To-Help—and you can create rich text variables from the Doc-To-Help Project panel in Word.

This chapter discusses the following:

Text Variables	137
Rich Content Variables	143
Variables and Conditions	144
Inserting a Variable	145

Text Variables

Text variables may be used for any amount of non-formatted text. They will use the formatting that is used at their insertion point in the document.

When adding a new text variable, you can select one of three types: Text, Version, or Date/Time.

If you want to use text variables, you need to create them first.

HOW TO CREATE A TEXT VARIABLE

1. In Word, click the **Variables** view in the Doc-To-Help Project panel.
2. Select one of the following in the **Text Variables** area:
 - **Text** A text variable is the type that has been used in previous versions of Doc-To-Help. This lets you enter simple text.
 - **Version** This lets you enter a version in one of four available formats:
 - 1
 - 1.0
 - 1.0.0
 - 1.0.0.0

If you click the **Build** button, unchanged documents won't be processed, so variables *won't* be updated in those unchanged documents when you view the output, although they *will* be incremented in the Variables window where you created them.

If you want to force variables to update in all documents, you need to click **Rebuild** instead. Each time you click the Rebuild button for a target that has the variable, the version values are incremented automatically—whether the documents have changed or not—in both the output and the Variables window.

When version variables are updated, only the last part of the number is incremented automatically.


☆ EXAMPLE


Let's say you create a version variable with the 1.0.0 format, insert it into a document, and build a target.

If you rebuild the target, the variable changes in the output to 1.0.1.

If you rebuild again, it changes to 1.0.2.

If the variable value reaches 1.0.9 and you rebuild, it changes to 1.0.10, then 1.0.11, then 1.0.12, and so on.


 **NOTE:** You can open the Variables window and change the variable value manually at any time.

 **NOTE:** The variable value is incremented only if this variable was used in building the current target, so all variables that were excluded from the build process due to their condition won't be changed.

- **Date/Time** These variables get their values either from current system date/time, or from file date/time attributes. This means that you cannot set its value manually (for this purpose, you can use simple "text" type variables).
3. An editable field named "New Variable" displays in the Name cell. In the **Name** cell, enter a name for the variable.

4. Depending on the variable type you selected, the Definition cell is populated with either simple text, 1.0.0.0, or a date/time format. Double-click in the **Definition** cell and provide the value for the variable.

- **Text** If you double-clicked on a cell for a text variable, simply type text.
- **Version** If you double-clicked on a cell for a version variable, enter the starting version number.
- **Date/Time** If you double-clicked on a cell for a date/time variable, a popup displays. Complete the fields in it:
 - **Format Specifiers** This is the date/time format. You can select a format from the drop-down, or you can type a format manually. Specifiers are based on Microsoft's custom date and time format strings. For details of the specifiers available, see <http://msdn.microsoft.com/en-us/library/8kb3ddd4.aspx>.

 **NOTE:** You can make a word part of the definition. For example, you might want the word Date with a colon and a space before a date string (e.g., Date: October 25, 2014). The issue is that certain characters are translated automatically as specifiers. So just typing the word Date wouldn't work. The easiest solution is to put the non-specifier characters within quotation marks. Therefore, you might enter "Date:" MMMM dd, yyyy.

- **Update** Select how you want the variable to display the date and time. You can choose any of the following:
 - **On Document Creation** The variable displays the date and time that you created the document.
 - **On Document Save** The variable displays the date and time that you last saved the document.
 - **On Build** The variable displays the date and time of the most recent project build.

5. (Optional) If want to associate a condition with the variable, double-click in the **Condition** column and choose a **Platform**, **Target**, or **Attribute** condition for the variable.
 - **Platforms** Set a platform-based condition for the variable. The text will be included in all of the target platform(s) selected. A platform includes all the targets that produce the output specified (Online Help, HTML Help, NetHelp, Printed Manual).
 - **Targets** Set a target-based condition for the variable. The text will be included in all the targets selected.
 - **Attributes** Set an attribute-based condition for the variable. The text will be included or excluded when creating conditional builds (e.g., internal or external). Use the Attributes dialog (**Project ribbon > Attributes**) to create custom attributes.

If you would like to assign more than one condition to a variable, select the variable's name and click the **Add Definition with Condition** toolbar button. An additional definition row will be created. Enter the appropriate definition, then double-click in the **Condition** column to set a condition. One text variable can have multiple unique outputs.

✔ **TIP:** It is recommended that you make a different version variable for each target and then assign conditions to those variables. This is quite useful because the version numbers are then incremented separately for each target. On the other hand, if you create only one version variable and use it in several targets, the version number will increment after each rebuild of any of those targets.

☆ EXAMPLE

Let's say you have a NetHelp target and a Manual target.

In the Variables window, you create a version variable named "NetHelp" with a starting value of 1.0. Then you create another version variable named "Manual" with a starting value of 1.26. Finally, you create a third version variable named "Shared" with a starting value of 3.9.

Next, for the NetHelp variable, you double-click the **Condition** cell. In the **Targets** field (in the popup), you select **NetHelp** (or whatever your target is called).

Then, for the Manual variable, you double-click the **Condition** cell. In the **Targets** field (in the popup), you select **Manual** (or whatever your target is called).

Next, you insert all three variables in a source Word document.

You build the NetHelp target for the first time. In the output, the variable numbers are as follows:

- **NetHelp** 1.0
- **Shared** 3.9
- **Manual** Not shown because it was conditioned out

Now you build the Manual target for the first time. In the output, the variable numbers are as follows:

- **Manual** 1.26
- **Shared** 3.10
- **NetHelp** Not shown because it was conditioned out


Next, you *rebuild* the NetHelp target. In the output, the variable numbers are as follows:

- **NetHelp** 1.1
- **Shared** 3.11
- **Manual** Not shown because it was conditioned out

☆ Finally, you *rebuild* the Manual target. In the output, the variable numbers are as follows:

- Manual 1.27
- Shared 3.12
- NetHelp Not shown because it was conditioned out

 **NOTE:** After creating a variable you cannot change its type.

 **NOTE:** Although you cannot create text variables while you are working in Word, you can hover over any text variable in the Variables window pane (**Doc-To-Help > Project Panel**) to view its definition.

Rich Content Variables

Rich content variables may be used for blocks of formatted content. They are stored in source documents and will use the formatting applied to the variable itself.


☆ EXAMPLES

- Tables
- Images or other media
- Formatted company names
- Entire topics

If you want to use rich content variables, you need to create them first. You can create a rich content variables document in Word, and add new variables to it .

HOW TO ADD NEW RICH CONTENT VARIABLES

1. Open your Word source document.
2. Open the Doc-To-Help Project panel (**Doc-To-Help > Project Panel**).
3. Select the **Variables** window pane.
4. In the **Variables** area, double-click the rich content variable document to open it. The rich content variable document will have a table with two columns in it.

 **NOTE:** You need to create a rich variables document in Doc-To-Help before a document will appear in the Variables window pane.

5. In the left column, enter a variable name (without spaces in it).
6. In the right column, enter the variable content.
7. Apply styles to the variable content as desired, including conditional text.
8. Save the document.

Variables and Conditions

You can assign conditions to text variables, providing even more flexibility for their use. If you'd like, you can create a single variable, and assign multiple text values and conditions for it. This lets you insert a variable once, and have different text be used in each of your conditions.

Conditions can be especially useful if you have multiple targets and want version numbering to be incremented separately for each target. After creating multiple version variables, you can associate target conditions with each one. On the other hand, if you create only one version variable and use it in several targets, the version number will increment after each rebuild of any of those targets.


Rich content variables can include text that has been conditioned.


Inserting a Variable

After you create a variable, you can insert it into your Word source document.

HOW TO INSERT A VARIABLE

1. In the Word source document, place your cursor where you want to insert a variable.
2. Select the **Doc-To-Help** ribbon.
3. In the **D2HML Styles** section, click **Variable**. The Variable dialog opens.
4. Select the appropriate variable from the grid.
5. (Optional) In the **Options** section, select the **Hide properties in document** check box to hide the tag.
6. Click **OK**.

 **TIP:** You can also insert variables by dragging them from the Variables window pane in the Doc-To-Help Project panel to your source document. See "Drag-and-Drop Linking" on page 106.

 **NOTE:** When your target is built, the value of the variable(s) used is automatically inserted in the output. For text variables, the value will have the same formatting (font, etc.) as its insertion point. For rich content variables, the variable will retain the formatting applied to the variable when it was created.

APPENDIX

PDFs

The following PDFs are available for download from the online Help.

On the Doc-To-Help Start Page, click the **PDF Guides** icon to access them.

Context-sensitive Help Guide

Design Guide

Documents, Templates, and Content Guide

Getting Started Guide

Getting Started Tutorial

Project Management Guide

Shortcuts Cheat Sheet

Targets Guide

Touring the Workspace Guide

Upgrading Old Projects Guide

What's New Guide