

# Accelerating RoboHelp Project Development

By Lin Laurie

# About Lin Laurie

- Have been using RoboHelp since 1993
- In the first class of trainers to be certified by eHelp
- Also do Captivate training
- Stopped training in 2005 to go in house at Intuit as an instructional designer/learning and development program manger
- Specialize in doing large projects in RoboHelp and doing conversion work
- Master's in Educational Technology from University of Washington
- Returned to Seattle last year to reopen my consulting practice at [www.linlaurie.com](http://www.linlaurie.com)



# Premise

RoboHelp has a powerful Import tool. You can either spend a lot of time inside RoboHelp configuring and tweaking your project, OR you can spend time upfront in Word, using some of its tools to set up your project and then convert it in RoboHelp and it will automate the structure of your project, making it:

- Faster to do project setup
- Create your project structure for you
- Automate some of the features that you'd otherwise have to build by hand
- And reduce your overall project development time by about 30%.

# Premise Contd

In addition to the conversion tool, we'll use a couple of other RoboHelp tools to automate some of the additional things you'd have to create inside of RoboHelp using some of RoboHelp's automated tools in a way that is helpful and won't require cleanup later.



# In Word

1. Create an outline of the topics you will want in your help system but think of them as if they were in a document instead of a help system.
2. Format each line with heading styles 1-3.

You can use more than 3 levels of headings but you won't want more than 3 levels to be broken into separate HTML topics.

RoboHelp will use those styles when it converts your Word document to create help topics and it will also be helpful in generating your table of contents.

The What and Why of Email Marketing

What is Email Marketing?

Why Email Marketing?

What Is Inbound Marketing?

The Lead to Prospect to Convert to Nurture Process

What You Should Know About Mail Campaigns

The Biggest Obstacles to a Successful Campaign

## The What and Why of Email Marketing

What is Email Marketing?

Why Email Marketing?

What Is Inbound Marketing?

The Lead to Prospect to Convert to Nurture Process

What You Should Know About Mail Campaigns

The Biggest Obstacles to a Successful Campaign

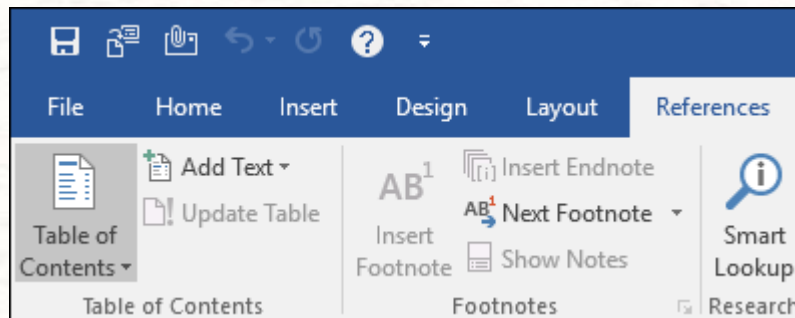
Qualifying Leads

Getting Leads

# In Word

3. Generate a table of contents for your outline.

This is what RoboHelp will use to auto-generate a Table of Contents when it imports your Word document into a RoboHelp project.



## Contents

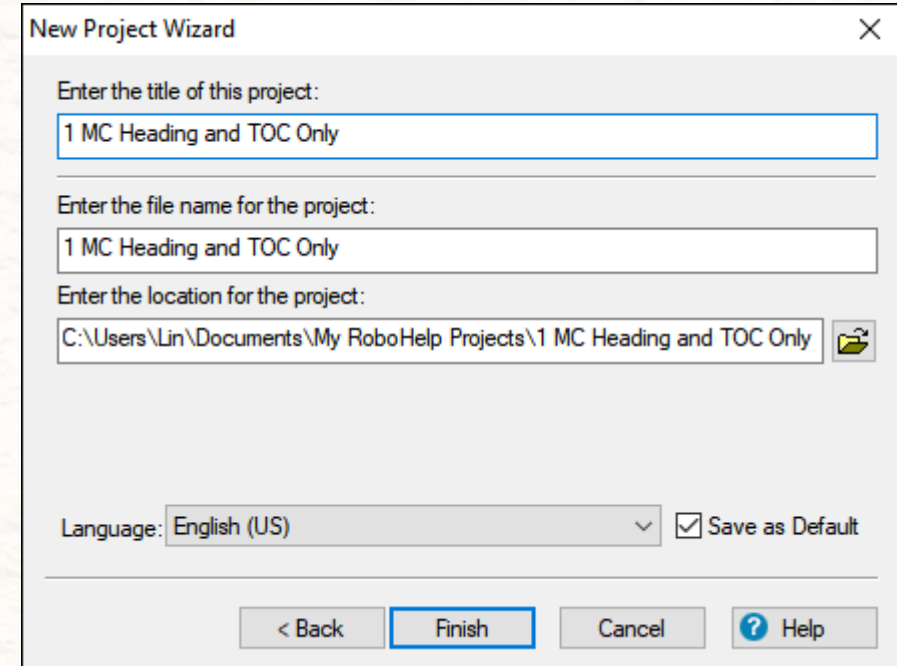
The What and Why of Email Marketing.....	
What is Email Marketing? .....	
Why Email Marketing? .....	
What Is Inbound Marketing? .....	
The Lead to Prospect to Convert to Nurture Process .....	
What You Should Know About Mail Campaigns .....	
The Biggest Obstacles to a Successful Campaign.....	
Qualifying Leads.....	
Getting Leads .....	
Tips for Finding Leads .....	



# RoboHelp

You could convert your document into RoboHelp at this point, and you'd have your document structure taken care of but RoboHelp is capable of doing so much more for you if you know how to help it help you.

1. Open RoboHelp.
2. Click Import.
3. Select Word Doc.
4. Name your project and click Finish.



The screenshot shows the 'New Project Wizard' dialog box with the following fields and options:

- Enter the title of this project:** 1 MC Heading and TOC Only
- Enter the file name for the project:** 1 MC Heading and TOC Only
- Enter the location for the project:** C:\Users\Lin\Documents\My RoboHelp Projects\1 MC Heading and TOC Only
- Language:** English (US) (dropdown menu)
- ☒ Save as Default
- Buttons:** < Back, Finish, Cancel, ? Help

# RoboHelp

5. Click Edit under the Word Document Edit Conversion Settings.

The screenshot shows the 'Import' dialog box in RoboHelp. The 'Load Settings from:' field is set to '[Custom]' with a 'Browse...' button next to it. Below this, the 'CSS for Style Mapping:' is set to 'RHStyleMapping.css' with an 'Edit With' dropdown button. The 'FrameMaker Document' section contains an unchecked checkbox for 'Apply FrameMaker Template', an empty text field with a 'Browse...' button, and an 'Edit...' button for 'Edit conversion settings for FrameMaker documents:'. The 'Word Document' section contains an 'Edit...' button for 'Edit conversion settings for Word documents:' and an unchecked checkbox for 'Import Max' with a dropdown set to '3' and the text 'Header/Footer Masterpages'. At the bottom, there is an 'Export...' button for 'Save Settings to:'. The bottom navigation bar includes '< Back', 'Next >', 'Cancel', and '? Help' buttons.

Import

Load Settings from: [Custom] Browse...

CSS for Style Mapping: RHStyleMapping.css Edit With

FrameMaker Document

☐ Apply FrameMaker Template

Browse...

Edit conversion settings for FrameMaker documents: Edit...

Word Document

Edit conversion settings for Word documents: Edit...

☐ Import Max 3 Header/Footer Masterpages

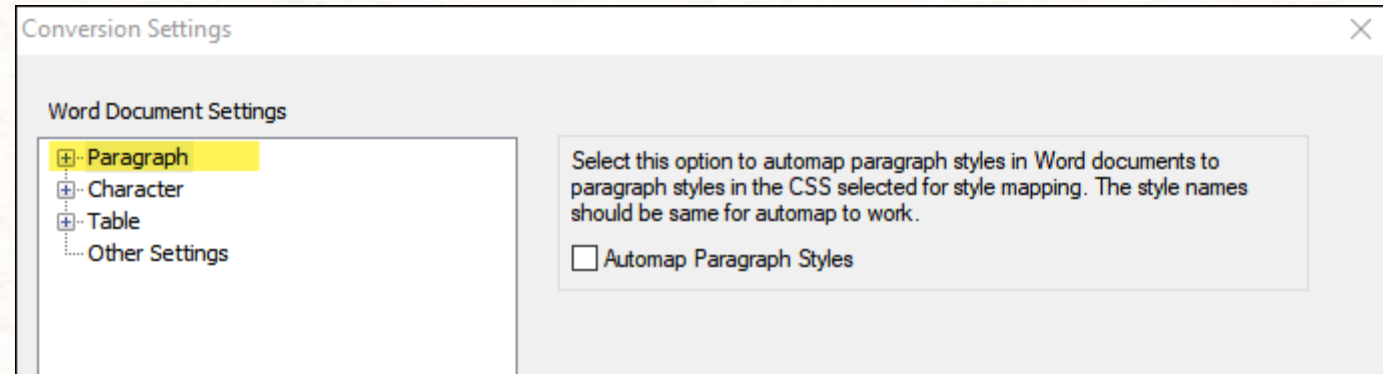
Save Settings to: Export...

< Back Next > Cancel ? Help



# RoboHelp

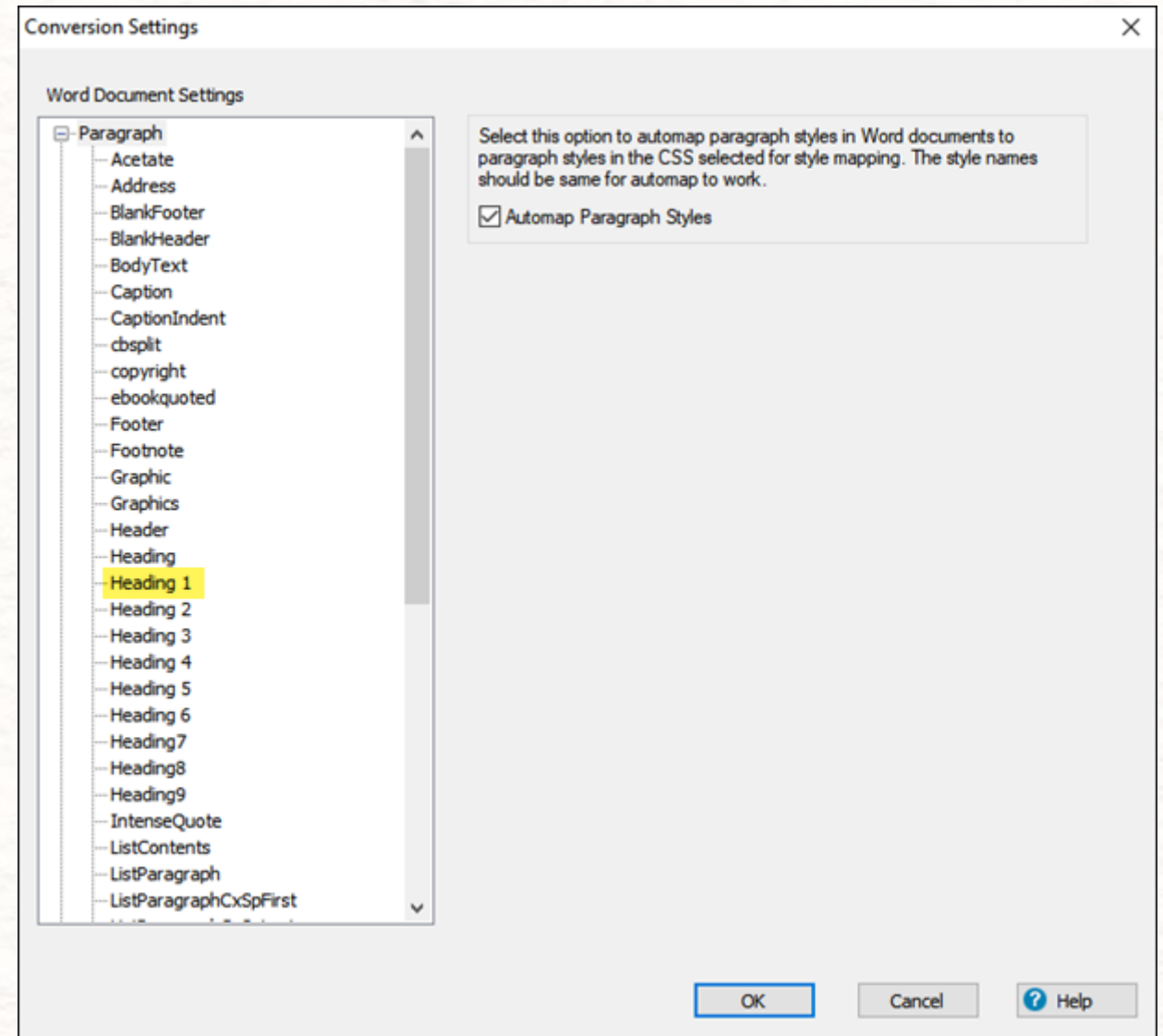
6. Click on Paragraph.



# RoboHelp

6. Click on Heading 1 to begin selecting the Headings that you want to use to generate separate topic files in RoboHelp.

This is called pagination and it tells RoboHelp which styles to use to generate new HTML topic files for during the import.



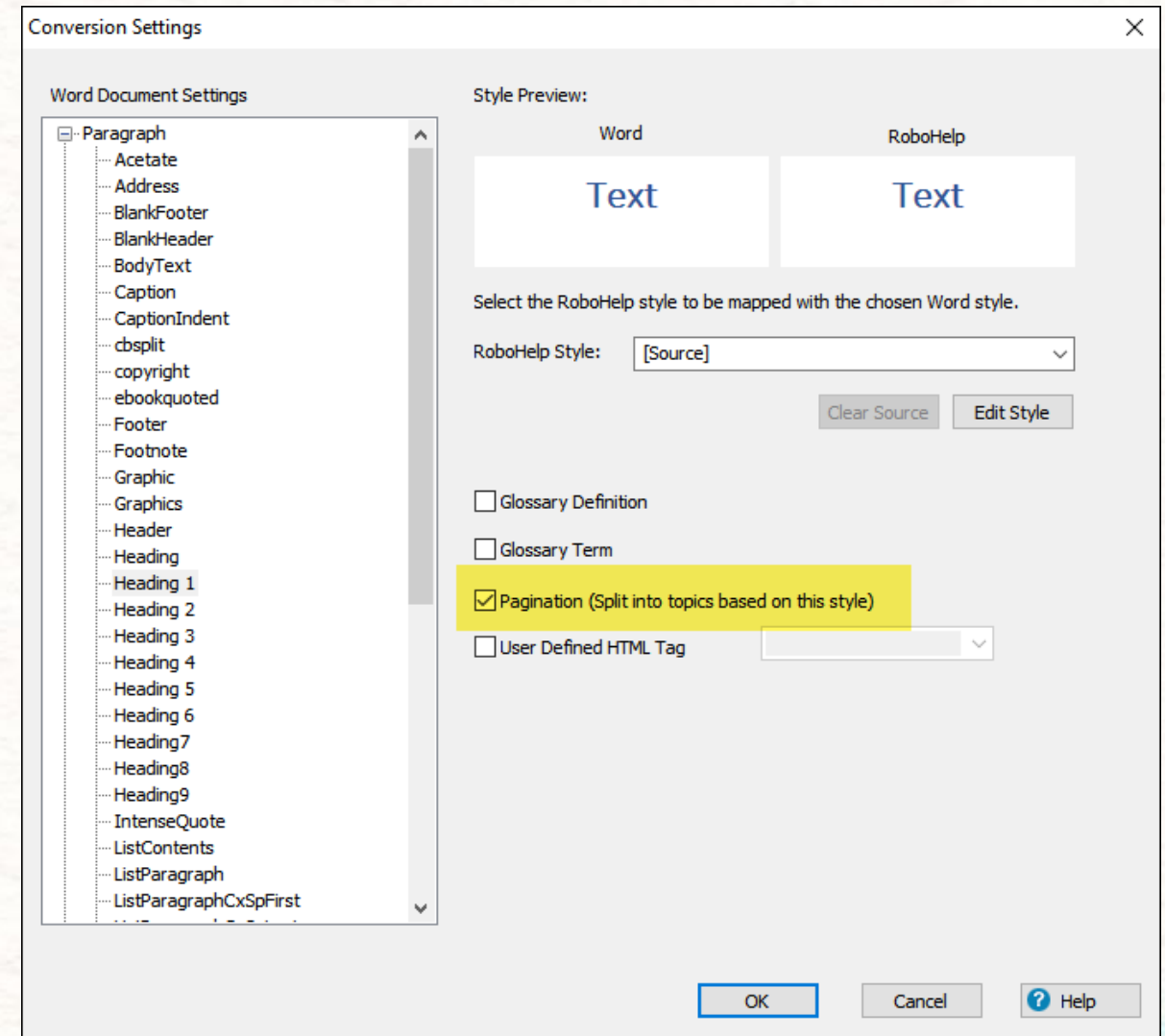


# RoboHelp

7. With Heading 1 selected, click Pagination.

Repeat this process for each Heading level that you want to split into separate topics in your help file.

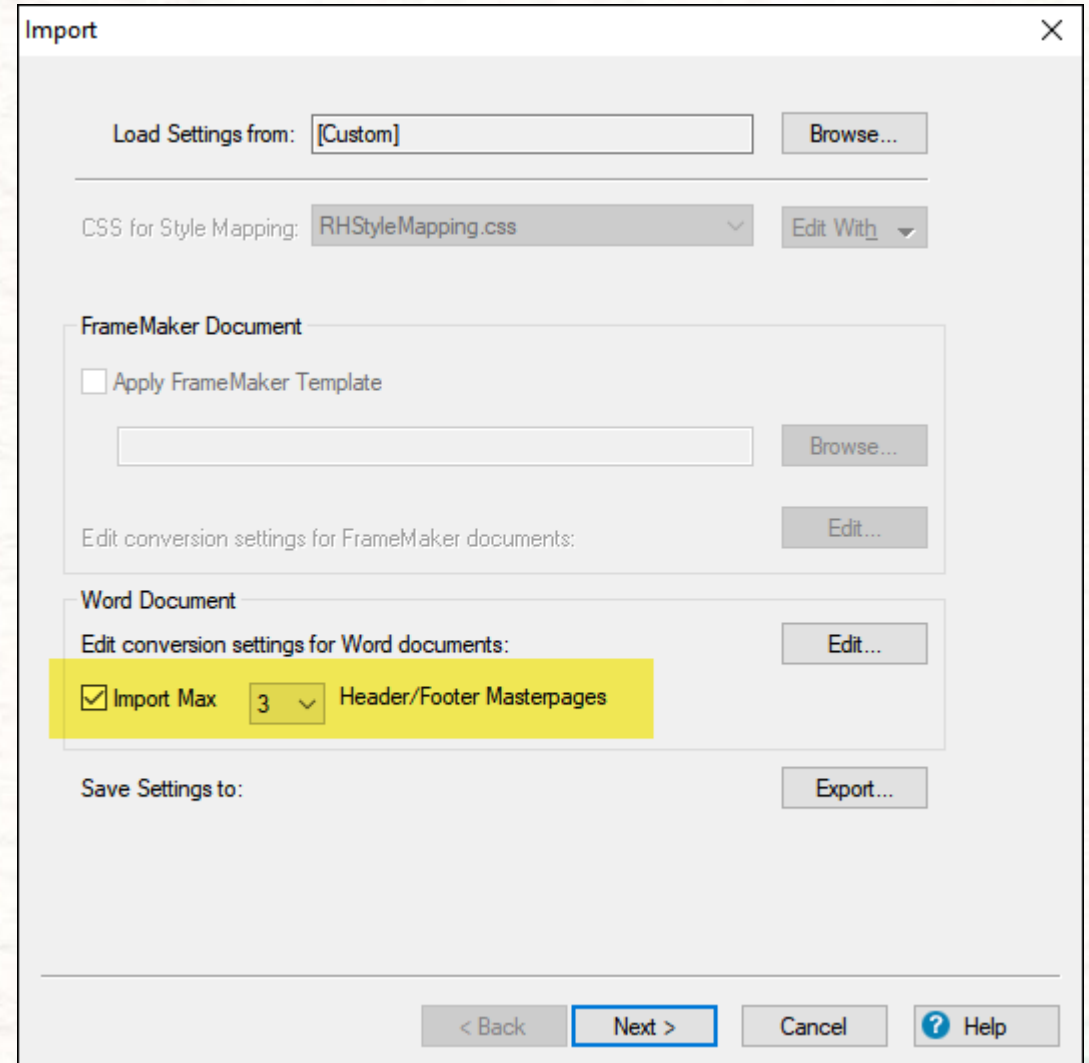
8. Click OK when you're done.



# RoboHelp

10. Check the Import Max option and leave it at 3.

You usually don't want more than 3 heading levels of topics to generate new topics in RoboHelp. But you can change it here if you do intentionally want to generate more separate topics.



The image shows the 'Import' dialog box in RoboHelp. The 'Load Settings from:' field is set to '[Custom]' with a 'Browse...' button. The 'CSS for Style Mapping:' dropdown is set to 'RHStyleMapping.css' with an 'Edit With...' button. The 'FrameMaker Document' section has an unchecked 'Apply FrameMaker Template' checkbox, an empty text field, a 'Browse...' button, and an 'Edit...' button for conversion settings. The 'Word Document' section has an 'Edit...' button for conversion settings. The 'Import Max' checkbox is checked, and the value '3' is selected in the dropdown, with 'Header/Footer Masterpages' text to the right. The 'Save Settings to:' field is empty, with an 'Export...' button. At the bottom are '< Back', 'Next >', 'Cancel', and '? Help' buttons.

Import

Load Settings from: [Custom] Browse...

CSS for Style Mapping: RHStyleMapping.css Edit With...

FrameMaker Document

☐ Apply FrameMaker Template

Browse...

Edit conversion settings for FrameMaker documents: Edit...

Word Document

Edit conversion settings for Word documents: Edit...

☒ Import Max 3 Header/Footer Masterpages

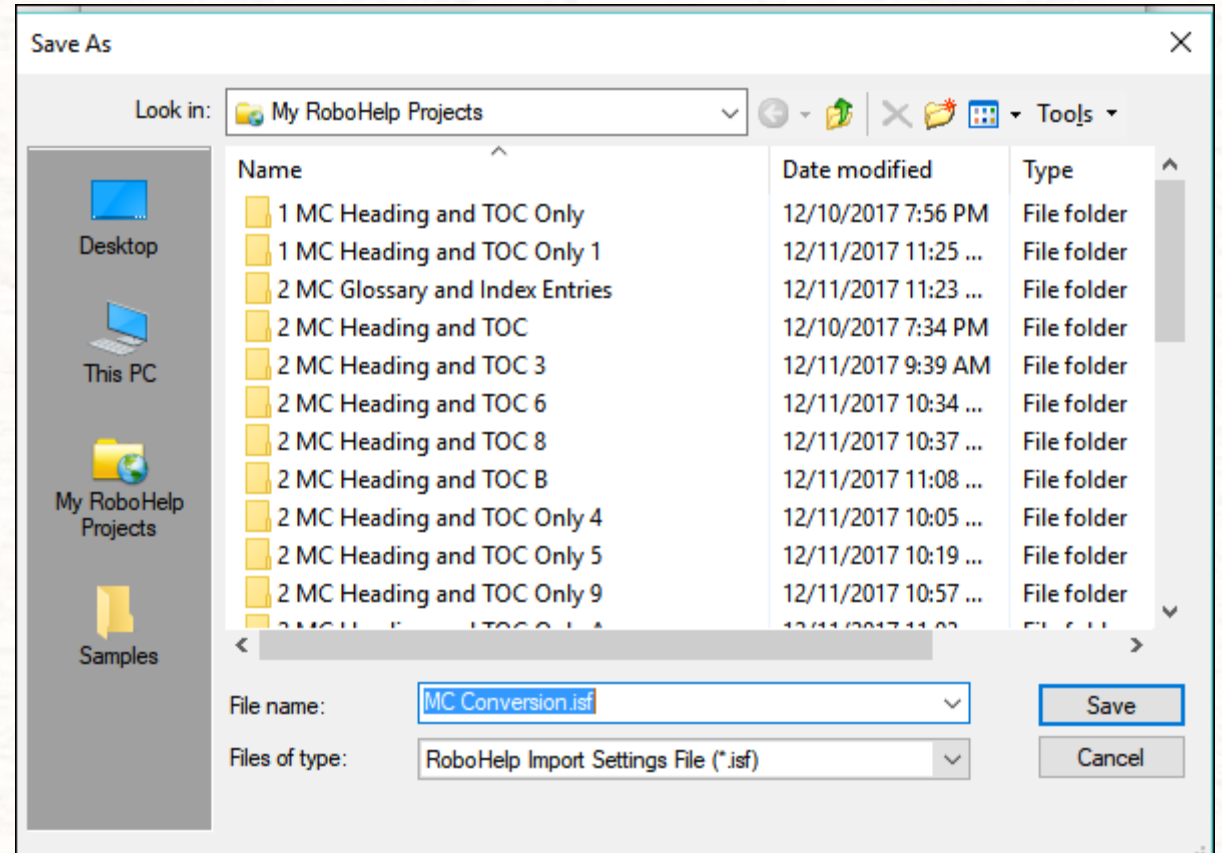
Save Settings to: Export...

< Back Next > Cancel ? Help



# RoboHelp

11. Click Export and save your settings as we'll be using these settings a few times.
12. Click Next.

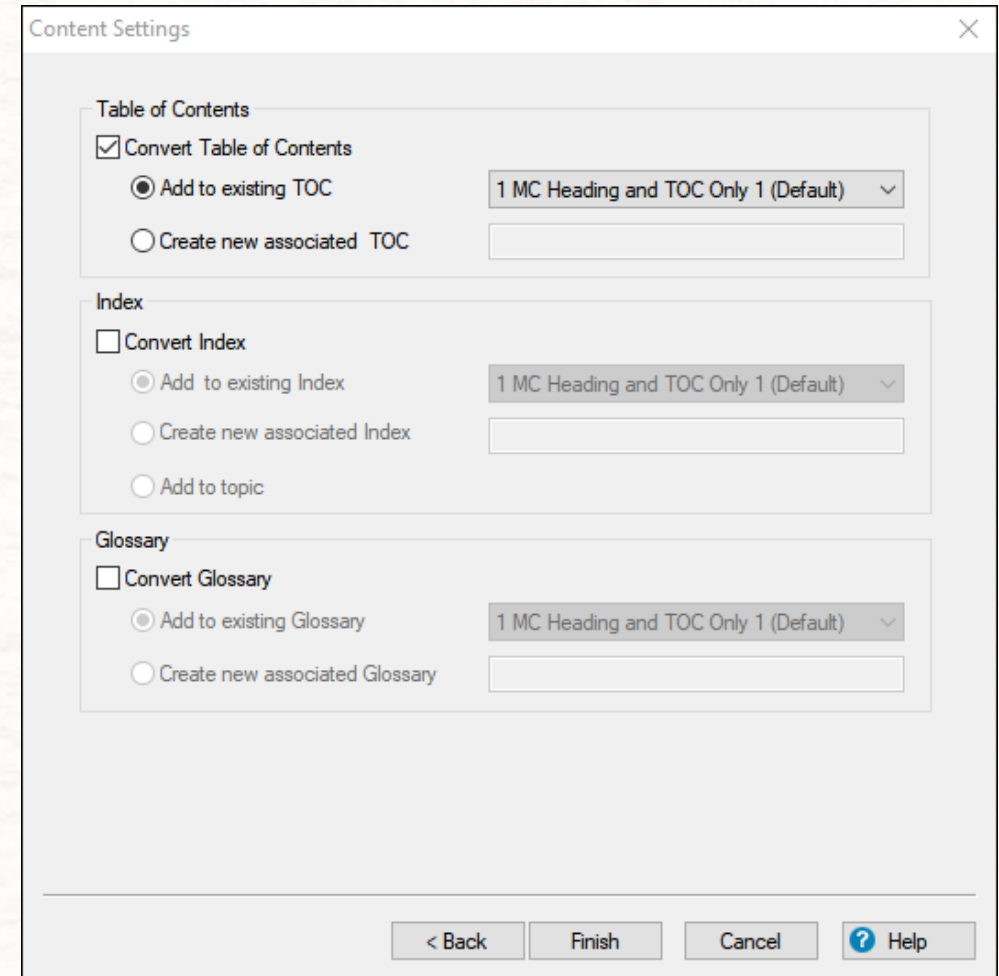


# RoboHelp

13. Click the check box to convert the Table of Contents and also check the Create new associated TOC.

Notice that you can convert an Index and Glossary. We'll be doing that later.

14. Click Finish and review the results.



The image shows a 'Content Settings' dialog box with three sections: 'Table of Contents', 'Index', and 'Glossary'. Each section has a 'Convert' checkbox and two options: 'Add to existing' and 'Create new associated'. The 'Table of Contents' section has the 'Convert Table of Contents' checkbox checked, and the 'Add to existing TOC' option selected. The 'Index' and 'Glossary' sections have their 'Convert' checkboxes unchecked. All 'Add to existing' options are selected. Each section also has a dropdown menu showing '1 MC Heading and TOC Only 1 (Default)'. At the bottom, there are buttons for '< Back', 'Finish', 'Cancel', and '? Help'.

Section	Convert	Option	Dropdown
Table of Contents	<input checked="" type="checkbox"/>	<input checked="" type="radio"/> Add to existing TOC	1 MC Heading and TOC Only 1 (Default)
		<input type="radio"/> Create new associated TOC	
Index	<input type="checkbox"/>	<input checked="" type="radio"/> Add to existing Index	1 MC Heading and TOC Only 1 (Default)
		<input type="radio"/> Create new associated Index	
		<input type="radio"/> Add to topic	
Glossary	<input type="checkbox"/>	<input checked="" type="radio"/> Add to existing Glossary	1 MC Heading and TOC Only 1 (Default)
		<input type="radio"/> Create new associated Glossary	



# RoboHelp – Reviewing What RoboHelp Created

You have an electronic page that is a Table of Contents (called Contents) if you create a web-based online help system.

However, if you add new topics to your help system, you will have to update this manually, so likely it won't be useful and you will want to delete this topic.

## Contents

[The What and Why of Email Marketing](#)

[What is Email Marketing?](#)

[Why Email Marketing?](#)

[What Is Inbound Marketing?](#)

[The Lead to Prospect to Convert to Nurture Process](#)

[What You Should Know About Mail Campaigns](#)

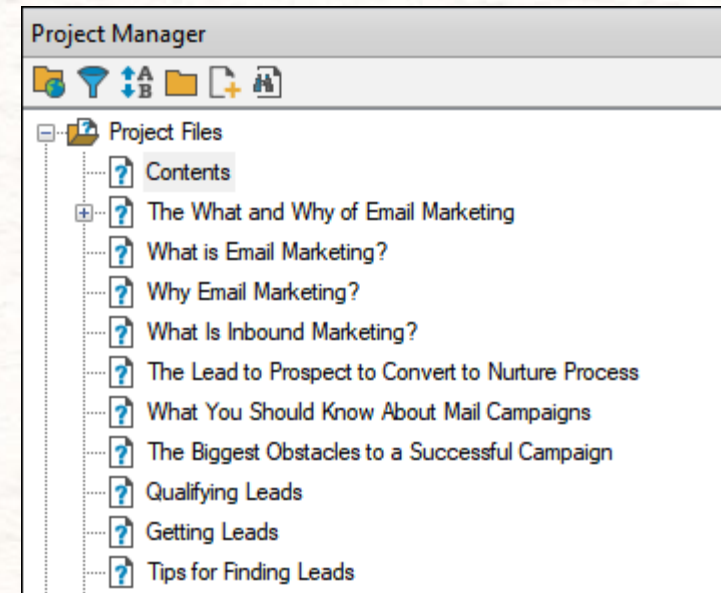
[The Biggest Obstacles to a Successful Campaign](#)

[Qualifying Leads](#)

[Getting Leads](#)

# RoboHelp – Reviewing What RoboHelp Created

You have a list of HTML pages in order they were listed in your document that are now individual project files.

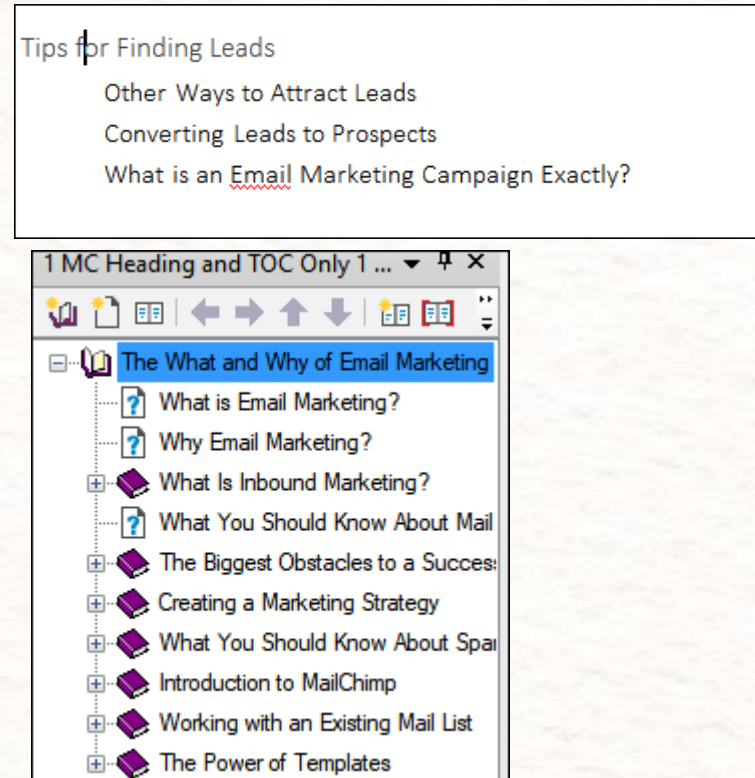




# RoboHelp – Reviewing What RoboHelp Created

In the topic files for your Heading 3 documents, you have your Heading 4s included.

You also have an auto-generated Table of Contents without having to build one inside of RoboHelp.



## This is a good start but we can do so much better!

# Word

Back in our Word document, let's do some more work.

1. Create Index entries in your document.
2. Add a Glossary and use styles that are also in the conversion list of paragraph styles shown earlier. You can't create styles as they don't appear in the list unless you want to edit the RHStyleMapping.CSS file. (Beyond the scope of this session.)

## The What and Why of Email Marketing¶

### What is Email Marketing?¶

{XE "Email marketing: what is it" }

{XE "Marketing: email" }

### Why Email Marketing?¶

{XE "Email Marketing: why use it" }

{XE "Marketing: email" }

## Glossary¶

### CSV file¶

A comma-separated values file stores data in a table-like structure. It consists of one or more fields, separated by commas.

### Email marketing¶

A way of marketing to people who sign up to receive information about a product or service.

### Strategy¶

Ideas for different campaigns to reach a target audience. A strategy can begin to contact and sell a product or service.

### Template¶

A preset format for a document or file used so that the same document is used.

I gave the definition a style called Glossary Term. In RoboHelp this will show up in the RHStyleMapping.css list.

I gave the used the style called Glossary Definition, which I created for the definition text. RoboHelp will use these to differentiate the two items during the import.

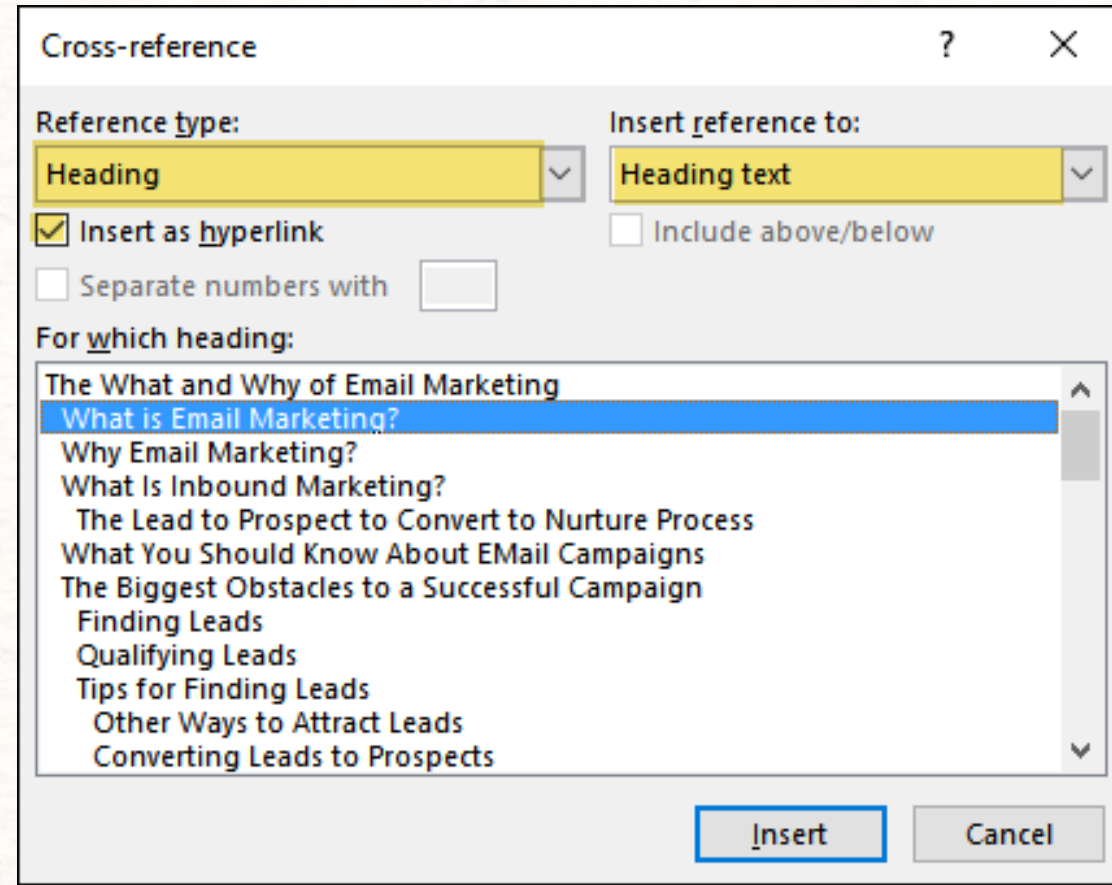


# Word

## 3. Add cross references between topics.

For instance, you know Heading 1, 2, and 3s will be broken into separate files, so link to them using cross references and those will be used to generate each See Also in RoboHelp.

Make sure you click Insert as Hyperlink.



The screenshot shows the 'Cross-reference' dialog box with the following settings:

- Reference type:** Heading
- Insert reference to:** Heading text
- ☒ Insert as hyperlink
- ☐ Separate numbers with
- For which heading:**
  - The What and Why of Email Marketing
  - What is Email Marketing?** (selected)
  - Why Email Marketing?
  - What Is Inbound Marketing?
  - The Lead to Prospect to Convert to Nurture Process
  - What You Should Know About EMail Campaigns
  - The Biggest Obstacles to a Successful Campaign
  - Finding Leads
  - Qualifying Leads
  - Tips for Finding Leads
  - Other Ways to Attract Leads
  - Converting Leads to Prospects

Buttons at the bottom: **Insert** and **Cancel**.

Using this method bypasses RH's  
See Also tool and controls.

# Word

Your document should look like the example to the right.

If you do this in Word, you can copy and paste the links between topics.

You want to have links between your Heading 1-4s. After the Heading level 4, you'll likely start to connect the topics between the next Heading levels 1-4s.

You might want to connect one topic group to another topic group as well, which you can more easily do in Word where you can see the more global view of your project.

▪ <b>The-What-and-Why-of-Email-Marketing¶</b>
▪ <b>What-is-Email-Marketing?¶</b>
¶:XE:"Email-marketing:what-is-it":¶¶
Why-Email-Marketing?¶¶
What-Is-Inbound-Marketing?¶¶
▪ <b>Why-Email-Marketing?¶</b>
¶:XE:"Email-Marketing:why-use-it":¶¶
The-What-and-Why-of-Email-Marketing¶¶
What-is-Email-Marketing?¶¶
What-Is-Inbound-Marketing?¶¶
▪ <b>What-Is-Inbound-Marketing?¶</b>
¶:XE:"Marketing:inbound":¶¶
What-is-Email-Marketing?¶¶
Why-Email-Marketing?¶¶
The-What-and-Why-of-Email-Marketing¶¶
▪ <b>The-Lead-to-Prospect-to-Convert-to-Nurture-Process¶</b>
The-What-and-Why-of-Email-Marketing¶¶
What-Is-Inbound-Marketing?¶¶
What-is-Email-Marketing?¶¶



# Word

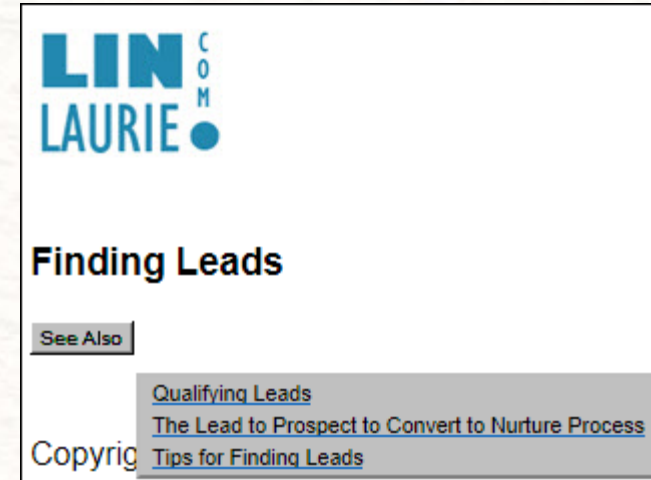
What bypassing RoboHelp's See Also Control means is that you can choose if you want to have the output in your help file look like one of the two options to the right.

The top option has the RoboHelp generated See Also control.

The bottom option has the See Also created using my method.

The formatting can be changed in the bottom version according to taste.

One way takes less work than the other to generate.



# Word

4. Generate an Index.
5. Regenerate your Table of Contents so it includes the Glossary and Index.
6. Save your work in Word and close your document.

[Glossary](#)

[Index](#)

## Index

### Campaigns

biggest obstacles, 1

Conversion process, 1

### Email marketing

what is it, 1

### Email Marketing

5 keys of a good strategy, 1

biggest obstacles, 1

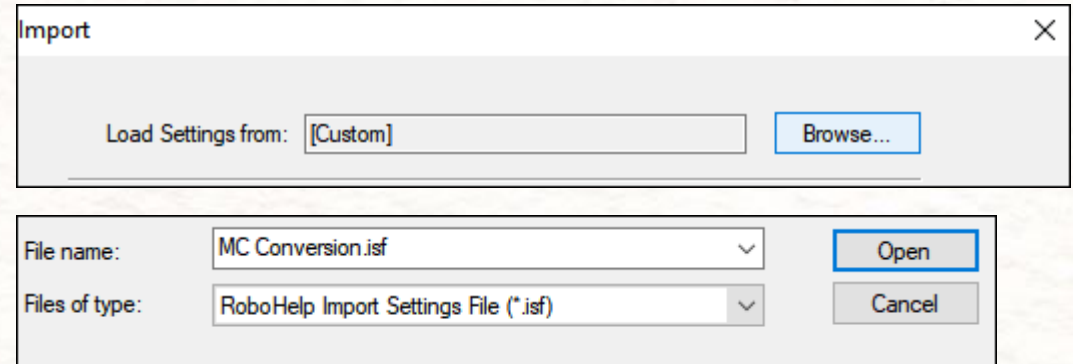
creating a strategy, 1

general information, 1



# RoboHelp

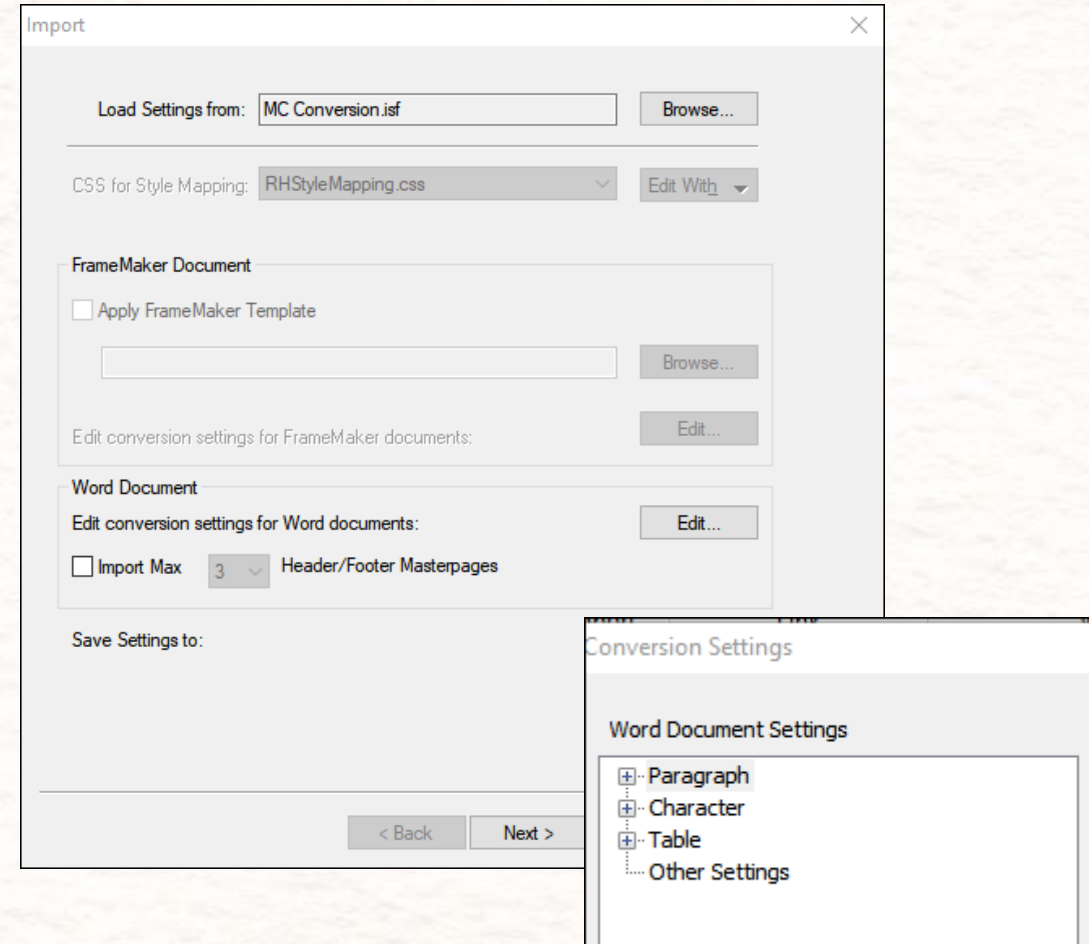
1. We'll create a new project in RoboHelp and RH Starter Pod, click Import.
2. Select Word and then navigate to the document you want to import.
3. Create your new project.
4. Click Browse and find the settings we saved from the last project.
5. Click Open to load the file.



# RoboHelp

1. Click Edit.
2. Open the Paragraph settings.

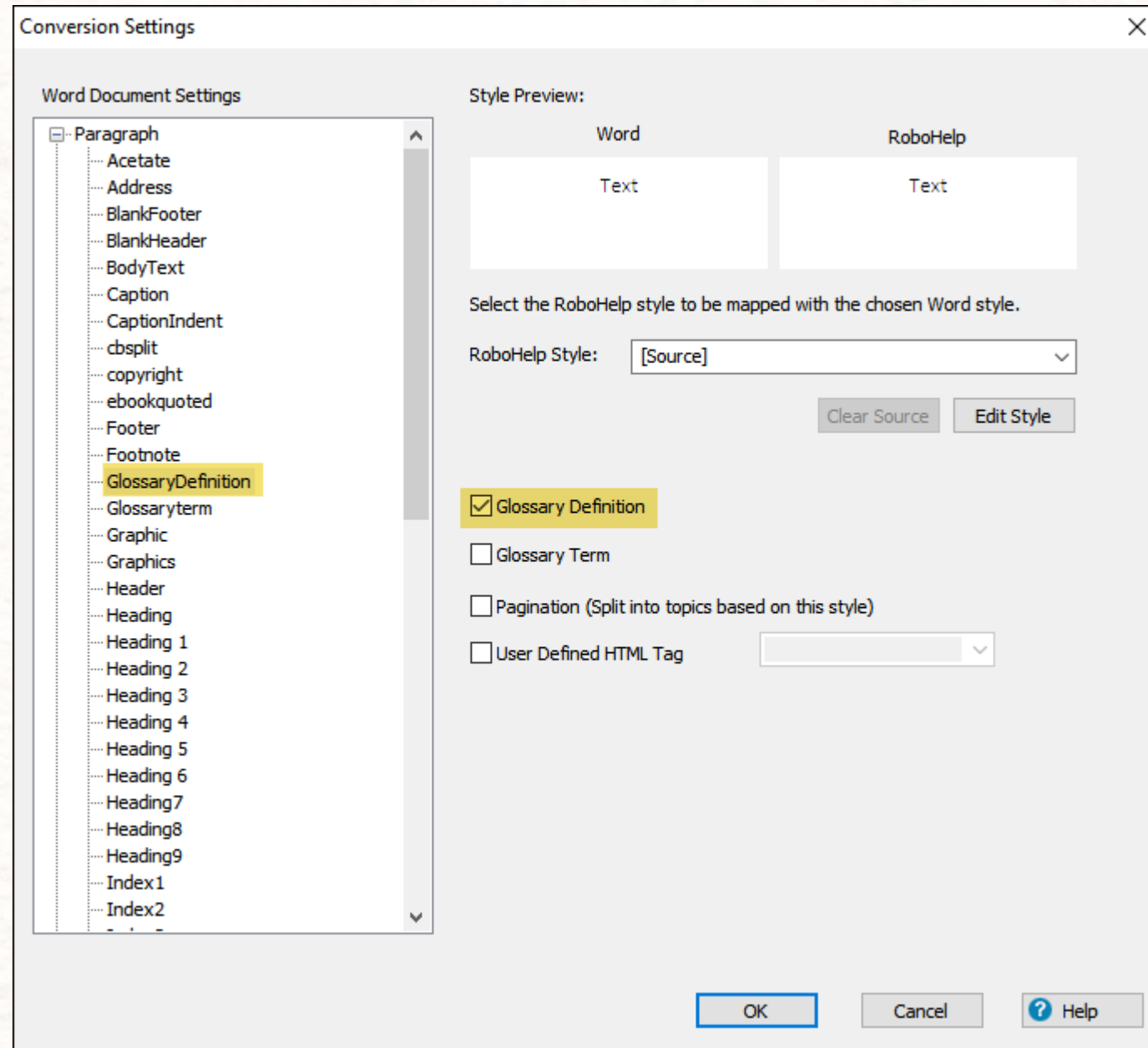
Since we already set our headings for pagination last time, we don't have to do those this time.





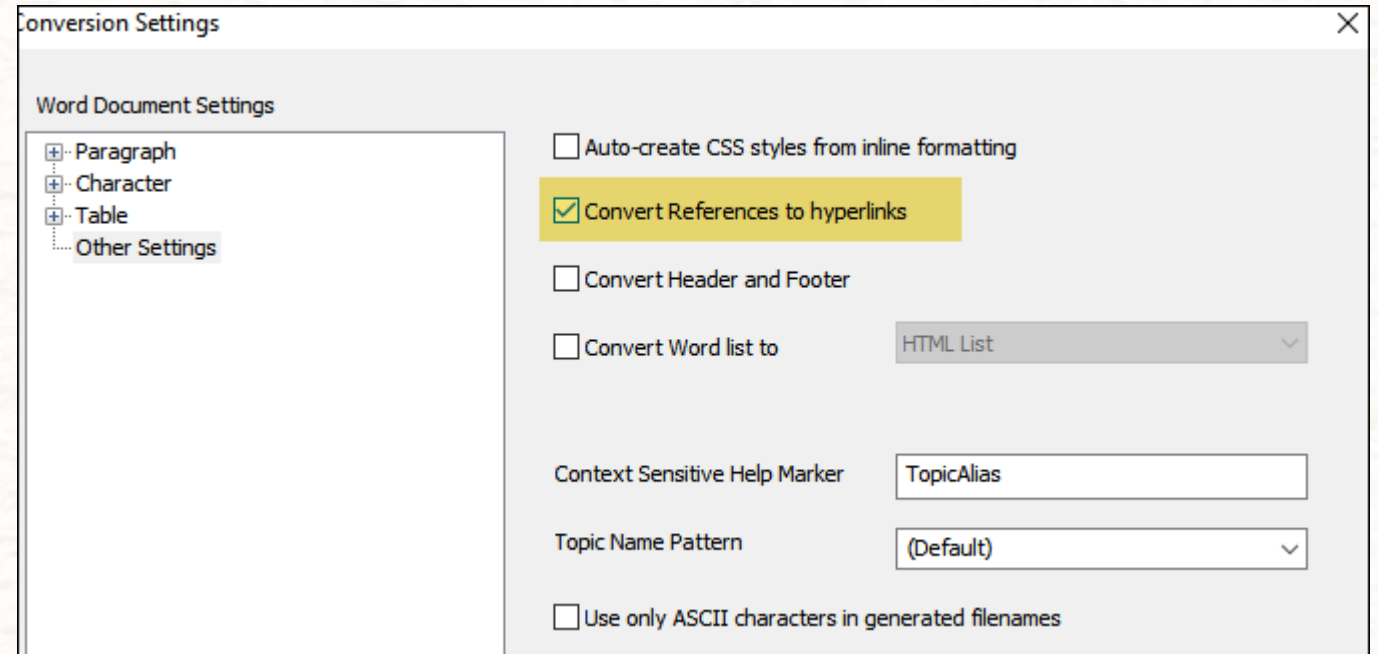
# RoboHelp

3. Select the Glossary Definition from the Paragraph list.
4. Check the Glossary Definition.
5. Repeat the same steps to define the Glossary Term, and then close the Paragraph settings.



# RoboHelp

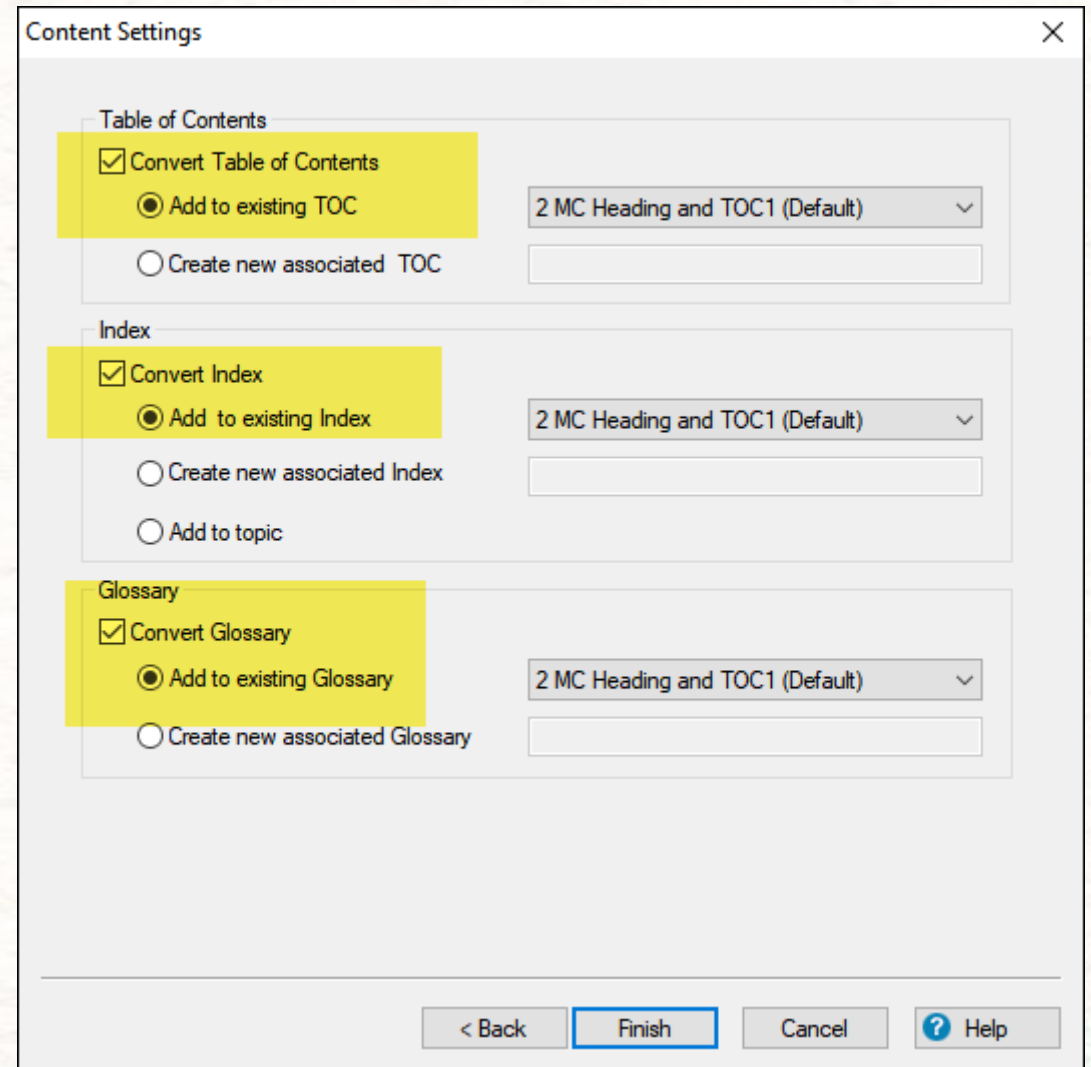
6. Open the Other settings and make sure that the Convert References to Hyperlinks box is checked.
7. Click Next.





# RoboHelp

8. Click on Convert the Table of Contents.
9. Click Convert the Index.
10. Click Convert the Glossary.
11. Click Finish and let's see what RoboHelp creates for us this time.



The image shows a 'Content Settings' dialog box with three sections: 'Table of Contents', 'Index', and 'Glossary'. Each section has a 'Convert' checkbox and two radio button options. The 'Convert' checkboxes are all checked. The radio button 'Add to existing' is selected in each section. To the right of each section is a dropdown menu set to '2 MC Heading and TOC1 (Default)' and an empty text input field. At the bottom are buttons for '< Back', 'Finish' (highlighted with a blue border), 'Cancel', and '? Help'.

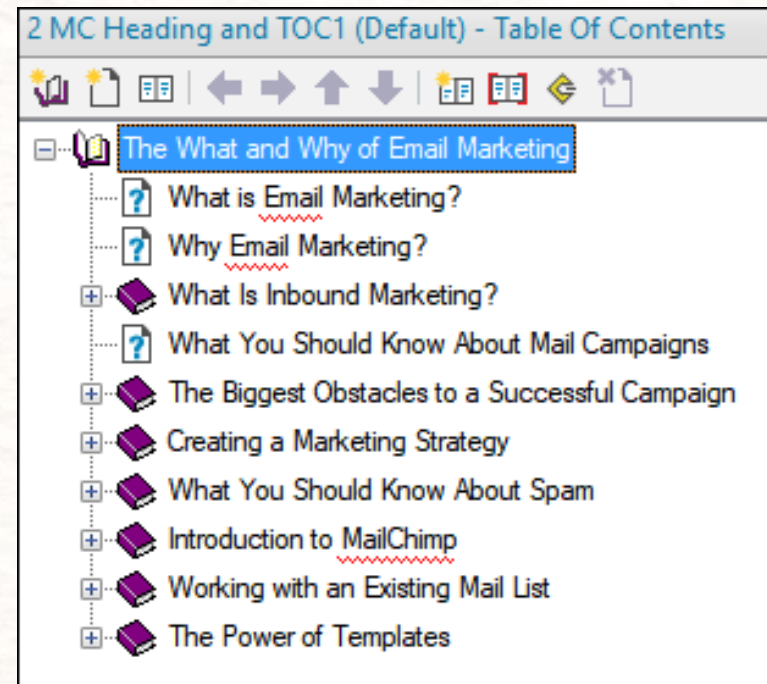
Section	Convert	Radio Selection	Dropdown	Text Field
Table of Contents	<input checked="" type="checkbox"/>	<input checked="" type="radio"/> Add to existing TOC	2 MC Heading and TOC1 (Default)	
Index	<input checked="" type="checkbox"/>	<input checked="" type="radio"/> Add to existing Index	2 MC Heading and TOC1 (Default)	
Glossary	<input checked="" type="checkbox"/>	<input checked="" type="radio"/> Add to existing Glossary	2 MC Heading and TOC1 (Default)	

< Back   Finish   Cancel   ? Help

# RoboHelp

1. Let's start by looking at the Table of Contents pod.
2. Click on the book and let's see what it auto-generated.

You may want to make changes but the basic structure is generated for you.

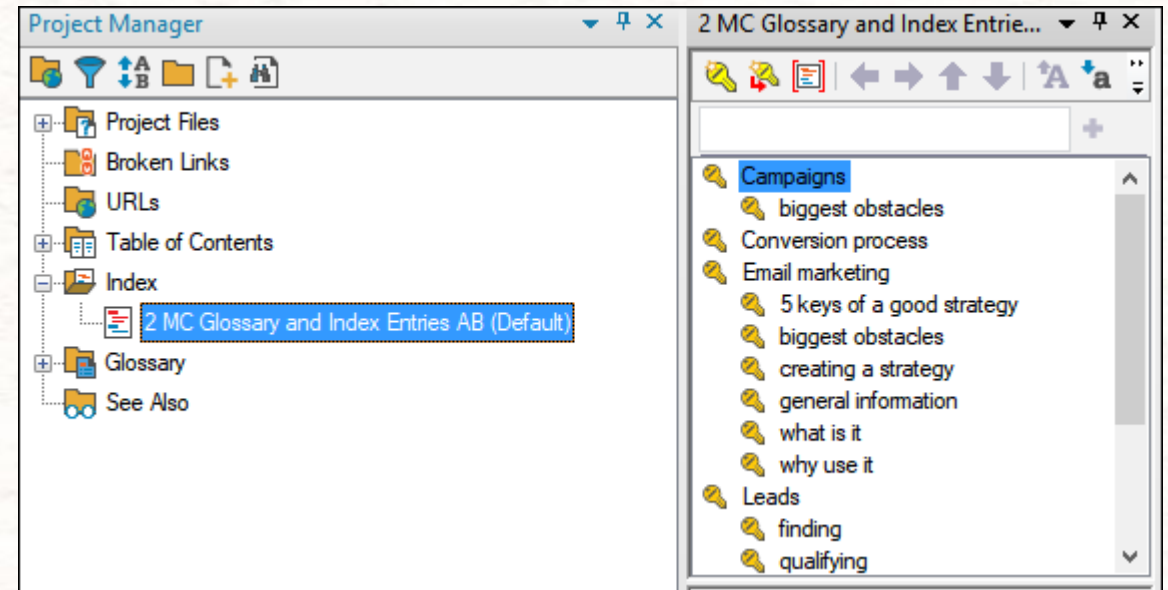




# RoboHelp

2. In the Project Manager pod, click on Index to see what was created.

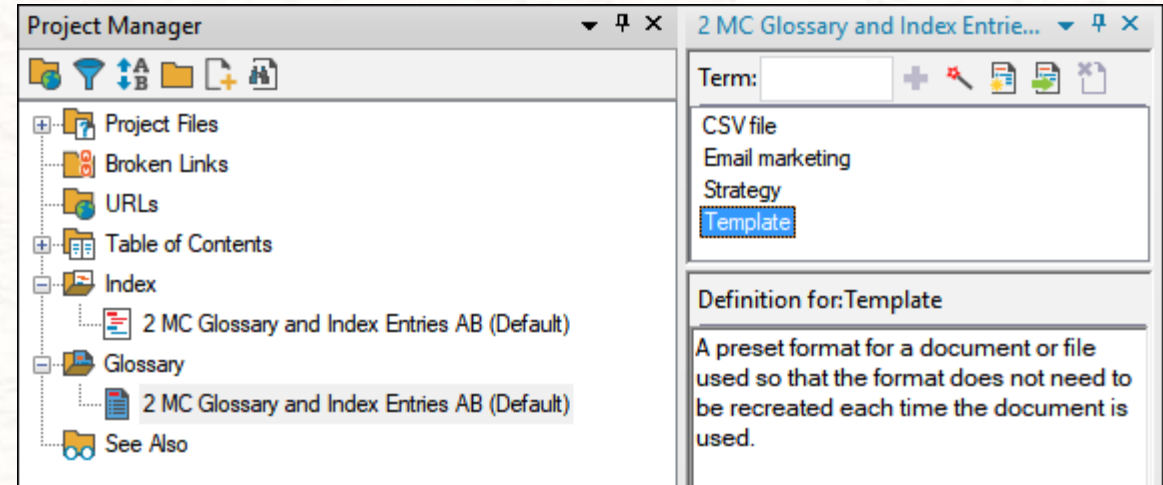
Notice that all the Index entries generated in Word are now Keywords in RoboHelp.



# RoboHelp

3. In the Project Manager pod, click on Glossary to see what was created.

Notice that the four Glossary terms we created in our document are now listed in the Glossary along with their definitions.





# RoboHelp

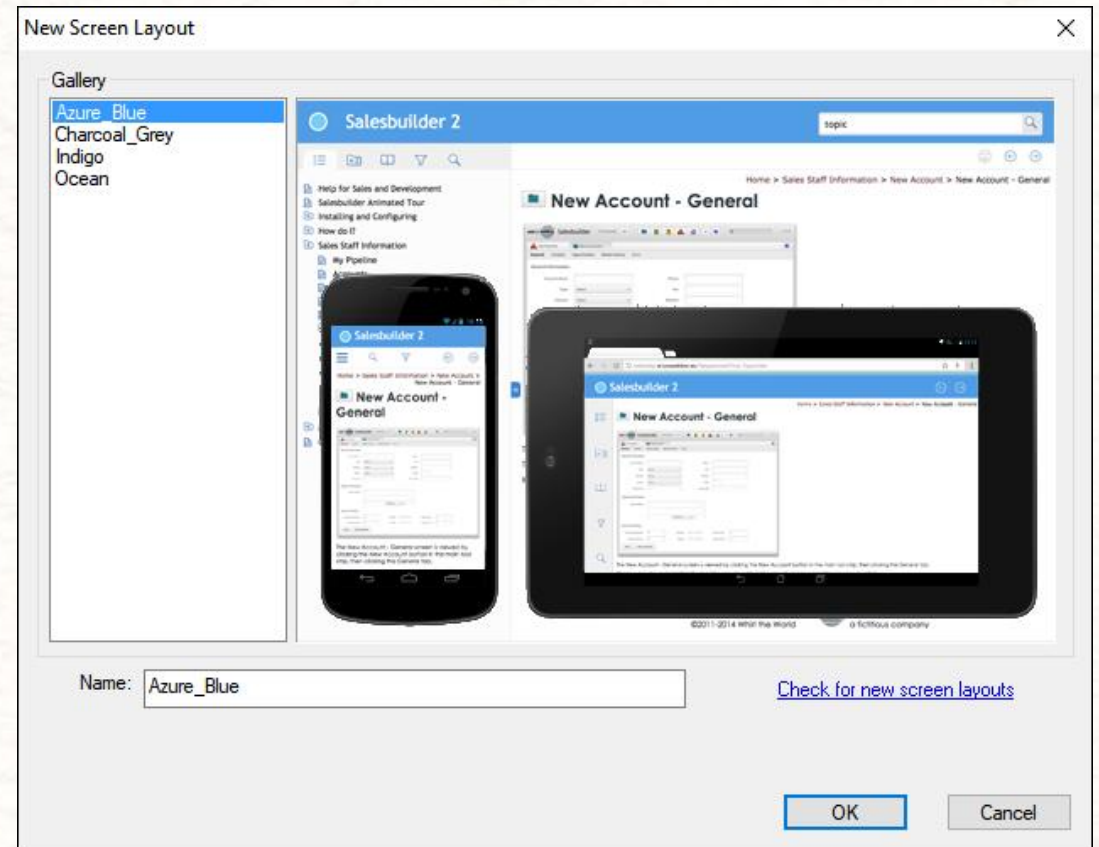
4. Open a topic that contained links we created in Word.

Notice that the hyperlinks are in your document. You can create a See Also heading and you've got the links to your other topics.



# RoboHelp

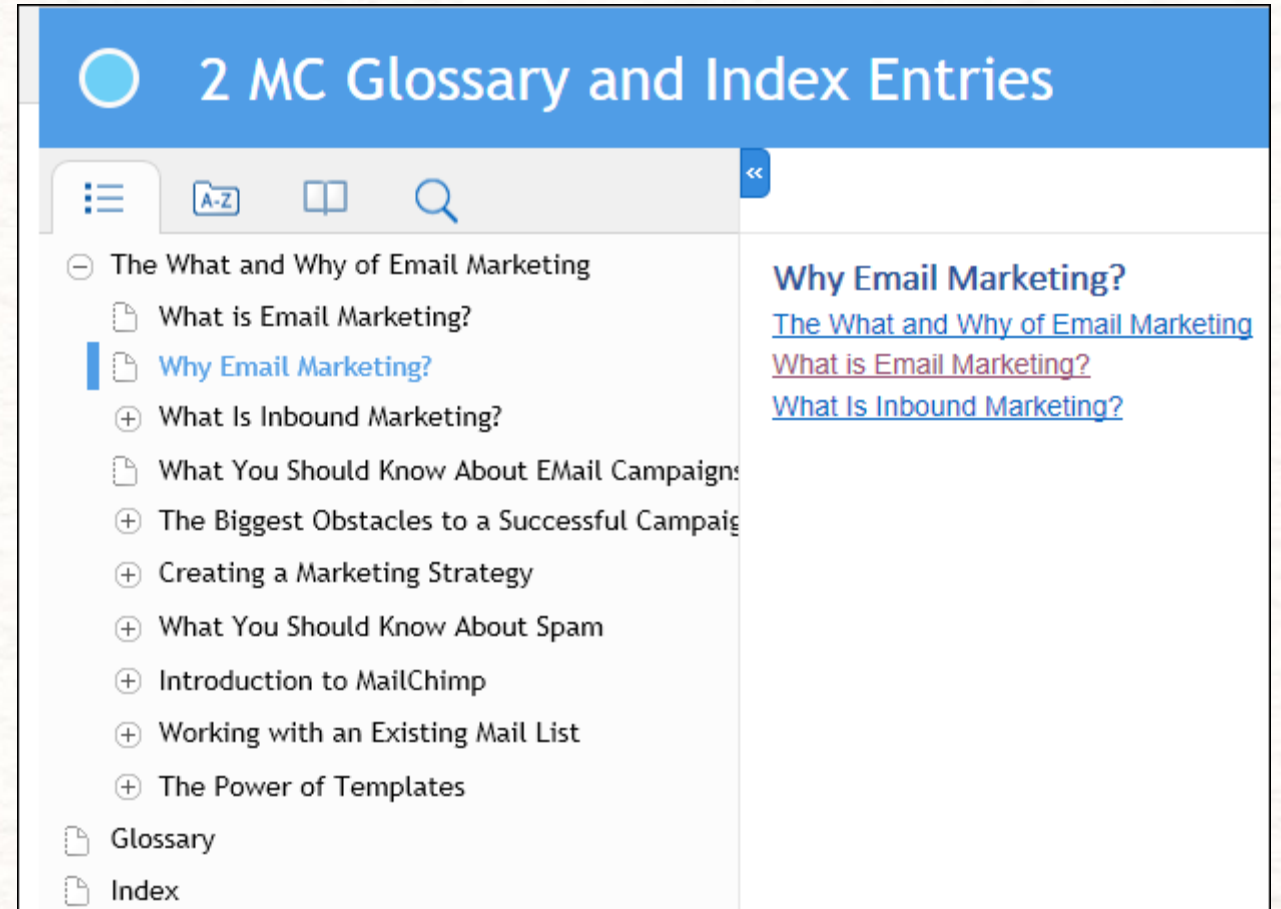
5. In the Outputs (SSL) Pod, we'll select Responsive HTML 5 Settings choose Azure Blue. All our other output choices will use the defaults.





# RoboHelp

Here is an example of the Responsive layout with Azure Blue selected from the Gallery as the layout option. You can play with other layouts or click on the various items to see what got generated, like the TOC and the Glossary.



# What's Next?

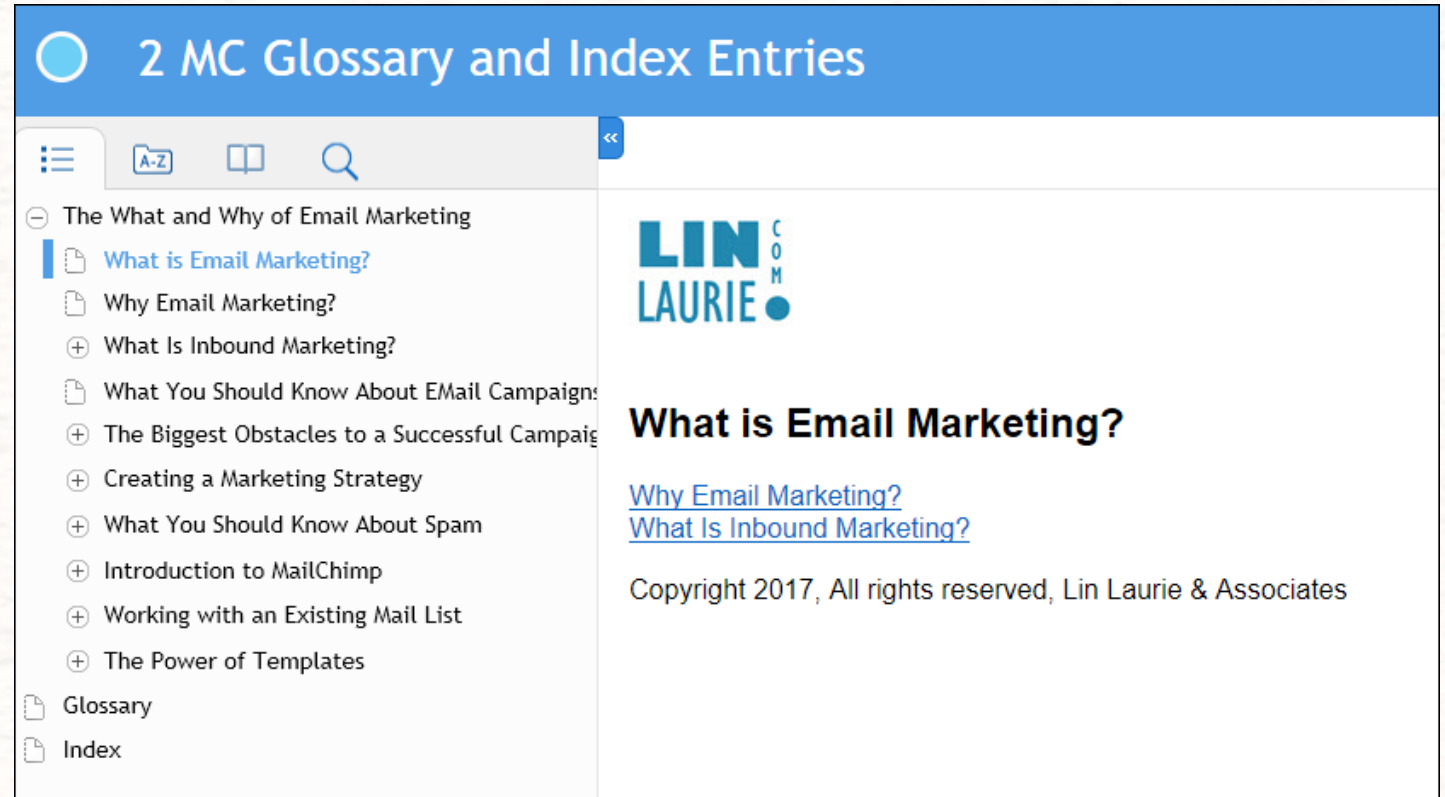
Now that I have my basic project structure, I'd do the next steps in the following order.

1. Create any windows if I wanted custom window sizes.
2. Create master pages for my different project pages; Heading 1s might have a different look from 2's or 3's.
3. Use the TOC from Word as a guide to apply the master pages to my topics in RoboHelp if I have different ones for each Heading style.
4. Make any style changes to my project before I have a lot of topics so I won't have to make changes to the topic files.
5. Begin writing my topics.



# What's Next?

Here's what my project looks like after adding master page and applying it to all the pages in my project.



# Q&A

Questions?

For additional information, you can contact me at

[lin@linlaurie.com](mailto:lin@linlaurie.com)

[www.linlaurie.com](http://www.linlaurie.com)

206.900.1861