

WI: Online Help Metrics

WI-TCS-024-00

|  |  |
| --- | --- |
| Supersedes: N/A  Total number of Pages: 8 | Medidata Solutions, Inc. Corporate Office 79 Fifth Avenue New York, NY 10003 +1 (212) 918-1800 |
| MEDIDATA CONFIDENTIAL – Internal Use Only  This document contains proprietary information that shall be distributed, routed, or made available only within Medidata, except with written permission from Medidata. | |

Approvals

Review and approval signatories on this quality system document are captured, via electronic signatures, within the eDMS.

Effective Date

Effective date for this quality system document is captured as a document property within the eDMS.

Medidata Solutions, Inc. Confidential – Medidata Only.  
See proprietary restrictions on title page.

Medidata, Medidata Solutions Worldwide, iMedidata, Medidata Balance, Medidata CRO Contractor, Medidata CTMS, Medidata Designer, Medidata Grants Manager, Medidata Rave, Medidata Rave Monitor, Medidata Rave Safety Gateway, Medidata Rave Targeted SDV, Medidata University, and their respective logos are trademarks, or registered trademarks, of Medidata Solutions, Inc. All other brands or product names used in this document are trademarks, or registered trademarks, for their respective owners.

© Copyright 2012 Medidata Solutions, Inc. All rights reserved.

Revision History

| Version | Date | Author / Changed By | Description of Changes |
| --- | --- | --- | --- |
| 01 | 21 Dec 2011 | Glynn Naughton | Original Version |
| 02 | 20 Jan 2012 | Glynn Naughton | Updated the reference to the Ruby version. Removed instructions relating to changing the system locale. |

1Table of Contents

[1 Introduction 3](#_Toc290383586)

[1.1 Purpose 3](#_Toc290383587)

[1.2 Scope 3](#_Toc290383588)

[1.3 Responsibility 3](#_Toc290383589)

[1.4 References 3](#_Toc290383590)

[1.5 Definitions 3](#_Toc290383591)

[2 Flow Chart 3](#_Toc290383592)

[3 Work Instructions (Outline) 3](#_Toc290383593)

[4 Appendixes 3](#_Toc290383594)

[4.1 Appendix 1: Title 3](#_Toc290383595)

[4.2 Appendix 2: Title 3](#_Toc290383596)

Table of Figures

[*Figure 2–1: Sample Caption* 3](#_Toc289857742)

# Introduction

## Purpose

The purpose of this document is to provide the procedure for adding Google Analytics tracking code and user feedback forms to WebHelp projects.

## Scope

This work instruction applies to online help projects created by Technical Communication Services (TCS).

## Responsibility

The following table lists the roles of Medidata personnel (or other Medidata authorized personnel) involved with this procedure and their responsibility.

| Role | Responsibility |
| --- | --- |
| Technical Communicator | Creates online help and adds Google Analytics tracking code and user feedback forms to WebHelp projects. |

## References

| Reference # | Title | Version |
| --- | --- | --- |
| SOP-TCS-002 | Online Help Development Lifecycle | Current |

## Definitions

| Term | Definition |
| --- | --- |
|  |  |
|  |  |

# Flow Chart

A flow chart is optional and is not included in this SOP.

# Work Instructions

1. Download Ruby
   1. Download the [rubyinstaller-1.9.3-p0.exe](http://rubyforge.org/frs/download.php/75465/rubyinstaller-1.9.3-p0.exe) file from [RubyInstaller](http://rubyinstaller.org).
   2. Save the file to your hard disk.
   3. Run the file to install Ruby on your system.
2. Download Script
   1. Download the [hpp.zip](https://docs.google.com/a/mdsol.com/viewer?a=v&pid=explorer&chrome=true&srcid=0By7Er1_HcptyMTAwZGJjOTItMjJlNC00NTJmLWI5MGItNmI3OGYzYTc4NThh&hl=en_US) file.
   2. Unzip the file to a folder on your hard disk; for example, C:\hpp.

This rest of this work instruction assumes that the script is installed in C:\hpp.

1. Verify the Script Version and Upgrade If Necessary

The latest version is 1.0.0 as of 10 Nov 2011.

The version and date display each time you run the script on a help system.

You can also view the version without processing a help system. To do so:

* 1. Launch the Ruby command window.
     1. Click **Ruby1.9.3-p0** > **Start Command Prompt with Ruby** on the main Windows menu.
  2. Type cd c:\hpp\ruby in the command window to navigate to the folder containing the script.
  3. Type ruby hpp.rb -v or ruby hpp.rb –version to display the script version.

If your script is not the current version, download and install the current version as described in [Download Script](#download_script).

|  |  |
| --- | --- |
| note | NOTE: Back up your settings files for use with the new script when you upgrade the script. |

1. Prepare WebHelp System for Processing
   1. Follow the standard workflow described in the [Online Help Development Lifecycle](https://sites.google.com/a/mdsol.com/km-team/km-process-home-page/tcs-processes/online-help-development-lifecycle) to prepare your WebHelp system for publication.
   2. Make backup copies of your WebHelp systems in case you need to re-run the script.

|  |  |
| --- | --- |
| note | NOTE: If you need to re-run the script; for example, because it failed during execution, then do so on a clean backup copy of your WebHelp system. Do not run the script twice on the same help system. |

1. Configure the Script
   1. If you are using the script for the first time, copy the ...\ruby\settings\hpp-example.yml settings file to hpp.yml in the settings folder, or to <name>.yml, where you specify <name>.

By default, the script reads the values from the hpp.yml file in the settings folder. If you specify a settings file on the command line when you run the script, the script looks for that file in the settings folder and reads its values. This allows you to run the script on multiple help systems.

* 1. Update the product key in the settings file with the name of the help system you are processing.

For example, product: Balance.

The settings file contains all the valid values for the product key. Copy and paste one of these values into the key.

* 1. Update the webhelp key with the full path and name of the root file of the WebHelp system.

For example, webhelp: C:/WebHelp/Balance.htm processes the WebHelp system in the C:\WebHelp folder whose root file is Balance.htm. The root file is the HTML file used to launch the help system.

|  |  |
| --- | --- |
| note | NOTE: Always use forward slashes (/) in paths in the settings file, even though Windows displays paths with backward slashes (\). |

* 1. If the folder containing your WebHelp content files is not the same as the name of the root file without the .htm extension, update the webhelp\_content\_folder key with the fully-qualified path of the content folder.

For example, if your root file is C:/WebHelp/Balance.htm, and your content folder is C:/WebHelp/BalanceHelpText, specify the following keys:

webhelp: C:/WebHelp/Balance.htm

webhelp\_content\_folder: C:/WebHelp/BalanceHelpText

You can include <LANG> placeholders in the path. The <LANG> placeholder is explained below.

* 1. If the folder containing your WebHelp content files is the same as the name of the root file without the .htm extension, specify "default" for the webhelp\_content\_folder key.

For example, if your root file is C:\WebHelp\Balance, and your content folder is C:\WebHelp\Balance, specify the following keys:

webhelp: C:/WebHelp/Balance.htm

webhelp\_content\_folder: default

You can include <LANG> placeholders in the path. The <LANG> placeholder is explained below.

* 1. If you are processing a legacy WebHelp system, specify “legacy” for the webhelp\_content\_folder key. For example:

webhelp: C/WebHelp/Legacy.htm

webhelp\_content\_folder: legacy

A legacy WebHelp system is a system built directly from RoboHelp rather than single-sourced from FrameMaker. Legacy systems do not contain a separate contents folder.

* 1. Update the language key with the standard three-letter code for the language of the WebHelp system you are processing.

For example, language: ENG specifies an English WebHelp system.

If you store your WebHelp system in a path that includes a language folder, you can include <LANG> placeholders in the WebHelp path to tell the script to replace <LANG> with the language specified in the language key.

For example:

webhelp: C:/WebHelp/<LANG>/Balance.htm

language: ENG

These settings tell the script to process the C:\WebHelp\ENG\Balance.htm WebHelp system.

This feature is mainly useful for processing multiple language versions of a WebHelp system at the same time. To do so, specify multiple languages separated by commas in the language key.

For example:

webhelp: C:/WebHelp/<LANG>/Balance.htm

language: ENG,JPN

These settings tell the script to process the C:\WebHelp\JPN\Balance.htm and C:\WebHelp\ENG\Balance.htm WebHelp systems.

|  |  |
| --- | --- |
| note | NOTE: You must always specify a value for the language key even if you do not use <LANG> in your paths. |

* 1. If you want to tag showme HTML wrappers with Google Analytics code when the script runs, see [Tag Show Me Wrappers](#tag_showmes). If not, go directly to [Run the Script](#run_script).

1. Tag Show Me Wrappers

Showme wrapper files are the HTML files stored on the Cloud that point to showme video files. When you launch a showme wrapper file from within your help system, it displays the showme in its HTML.

You can tag all the HTML files in a folder as showme wrapper files so that they appear as showmes in Google Analytics statistics when they are accessed.

You typically use this feature once only, when you first tag your showme wrappers. When you subsequently add showmes, it is probably easier to copy and rename existing wrappers.

* 1. Create a folder beneath the contents folder of your WebHelp system and copy your showme wrappers into it.
  2. Uncomment the showme\_wrappers\_folder key and update it with the location of this folder.

For example, the setting showme\_wrappers\_folder: C:\Balance\Showmes tells the script to tag all the files in the C:\Balance\Showmes folder as showme wrappers.

|  |  |
| --- | --- |
| note | NOTE: The script does not add feedback forms to showme wrappers even when the setting do\_feedbackforms: yes appears in the settings file. |

* 1. After you have [Run the Script](#run_script), remove the showme wrappers from the help system and move them to the folder on the Cloud where you store your showme videos.

1. Run the Script
   1. Launch the Ruby command window by clicking **Ruby1.9.3-p0** > **Start Command Prompt with Ruby** on the main Windows menu.
   2. Type **cd c:\hpp\ruby** in the command window to navigate to the folder containing the script.
   3. Type **ruby hpp.rb** to launch the script with the default settings/hpp.yml settings file, or **ruby hpp.rb <settings-file-without-extension>** to launch the script and use the settings/<settings-file-without-extension>.yml settings file.

For example, type **ruby hpp.rb balance** to launch the script and use the settings/balance.yml settings file.

Do not include the settings/ folder before the settings file when you specify a settings file. The script always looks in the settings folder by default.

Do not include the .yml extension when you specify the settings file.

|  |  |
| --- | --- |
| note | NOTES:   1. If the script ran with errors or did not run, verify the settings in your settings file closely. The current version of the script contains limited error checking, and the script will fail if your settings are not correct. 2. Once you have verified your settings, re-run the script on a clean, unprocessed version of your WebHelp system.   Always run or re-run the script on a clean copy of the help system. The script is not designed to run more than once on the same WebHelp system.  If the script runs without errors, the screen displays the following text:  File: <webhelp-file-name> Working……Done!   1. If the errors persist, send an email that describes the problem to help-metrics@mdsol.com. |

# Appendixes

Appendixes are optional and are not included in this Work Instruction.