

## Technical Writing Getting Started Guide

RoboHelp onboarding and other resources for supporting RTLS development

## Purpose

The purpose of this document is to provide introductory guidance for technical writers. This document contains information on RoboHelp project setup, using SharePoint for source control, and resources specific to Midmark technical writing.

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## Resources

Use the following documentation as reference to policies and procedures outside of this document. These documents are stored in the SharePoint site, Asset Tracking Platform.

- Documents > RoboHelpProjectFiles - See [Download a Project](#) for instructions on using these files.
- Other RoboHelp Files – A collection of glossaries containing acronyms and other corporate terminology.
- Software Documentation – Several flow charts illustrating various processes used by project developers.
- Technical Writer – Corporate policies related to documentation, as well as style guides and useful reference material.

## RoboHelp Project Setup

Currently, RoboHelp does not support the use of project templates. Since Midmark projects have standard requirements for fonts, colors and formatting, a blank project has been created and is available for download from SharePoint at Asset Tracking Platform > Documents > RoboHelpProjectFiles > RoboHelpProjectTemplate. See [Download a Project](#) for instructions.

Once downloaded, open the project and go to Collaborate > Remove Connection. This prevents you from overwriting the template in SharePoint with your new project. Next, go to **File > Project Settings** to change the Project Title on the General page. You can now add the project to SharePoint.

## SharePoint Source Control

### Add a Connection

The first step in setting up SharePoint as your source control is to create a connection to the SharePoint site, Asset Tracking Platform. Use the following procedure to create the connection.

1. On the RoboHelp (any project) menu bar, go to **Collaborate > New Connection**. The *Connection Profiles* dialog opens.
2. For **Name**, type *AssetTrackingPlatform*.

3. For **Version Control**, select *SharePoint Online*.
4. For **SharePoint Site URL**, type *https://midmark.sharepoint.com/teams/Carina*.
5. Click **Login**. A progress dialog opens to show your SharePoint login.
6. Click **Save**. The dialog closes to complete the procedure.

### Add a Project

All RoboHelp projects must be added to the SharePoint site, Asset Tracking Platform, unless the project is downloaded from the site. Use the following procedure to add a project.

1. In SharePoint, go to **Asset Tracking Platform > Documents > RoboHelpProjectFiles**. A list of projects opens.
2. On the content toolbar, click **New**. The *Create a new file* dialog opens.
3. Click **New folder**. The *Create a folder* dialog opens.
4. For **Name**, type the project name, and click **Create**. The dialog closes and the new folder is added to the projects list.
5. On the RoboHelp (any project) menu bar, go to **Collaborate > Add Project > AssetTrackingPlatform**. The connection dialog opens. See *Add a Connection* for additional information on the AssetTrackingPlatform connection.
6. In the left pane, select **RoboHelpProjectFiles**. The center pane populates with the project folders in SharePoint. Be aware that the RoboHelpProjectFiles folder may appear to be selected with the center pane showing different folders. You must select the RoboHelpProjectFiles folder to populate the center pane with the correct project folders.
7. In the center pane, select the new project folder. The right pane refreshes to show no files. **NOTE:** The new project folder must be empty.
8. Click **Select**. The *Version Control - SharePoint* progress dialog opens, followed by the *Check-in* dialog.
9. For **Change List Description**, type brief narrative (e.g., *setup*) and click **Check-in**. The *Version Control - SharePoint* progress dialog opens. For larger projects, this may take several minutes.

When dialog closes, verify project uploaded to SharePoint. These project files are read-only in Robo unless you check them out in SharePoint first. You can avoid this by setting RoboHelp to

automatically check the files out when you save. See [Set Automatic Checkout](#) for additional information.

## Set Automatic Checkout

1. On the RoboHelp (any project) menu bar, go to **Edit > Preferences**. The *Application Preferences* dialog opens.
2. In **Version Control**, select *Automatically check out file on save*.
3. Click **Done**. The dialog closes to complete the procedure.

## Download a Project

1. In RoboHelp (any project), go to **Collaborate > Open Connection > AssetTrackingPlatform**. The connection dialog opens. See [Add a Connection](#) for additional information on the AssetTrackingPlatform connection.
2. In the left pane, select **RoboHelpProjectFiles** (even if it appears to be highlighted). The center pane populates with the project folders in SharePoint.
3. In the center pane, select the project folder to download. The right pane refreshes to show project files and subfolders.
4. Click **Select**. The *Repository Details* dialog opens.
5. For **Local Path**, click the browse icon and navigate to the desired location. It is recommended to keep all projects in the My RoboHelp Projects folder.
6. Click **Open**. The *Version Control - SharePoint* progress dialog opens. For larger projects, this may take several minutes.

When the download completes, the project is open in RoboHelp. These project files are read-only in RoboHelp unless you check them out in SharePoint first. You can avoid this by setting RoboHelp to automatically check the files out when you save. See [Set Automatic Checkout](#) for additional information.

## Zendesk Publishing

Zendesk organizes articles by category and then section. The category is assigned by a Zendesk Administrator. Some examples of a category are Announcements, Release Notes and Troubleshooting. For our purposes, the section is the name of the document, such as User

Guide or Operations Guide. The articles, or topics, must then be on one level in the RoboHelp table of contents (TOC).

When a project requires multiple output versions, each version must have its own parent TOC and Content Only Output Preset in RoboHelp. The parent TOC is constructed as follows:

- Category
  - Document Name
    - Content.toc

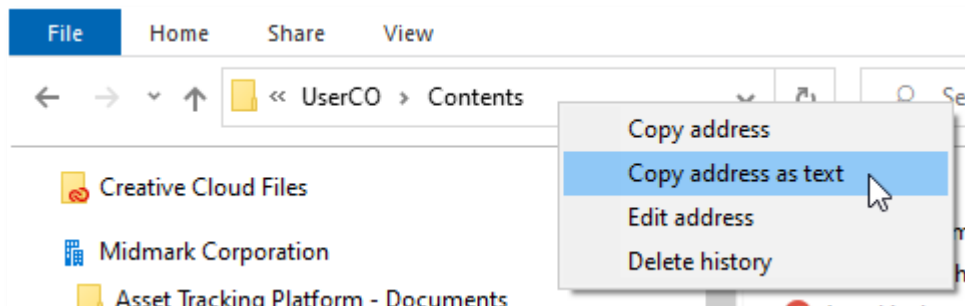
A second, child, TOC consisting of all topics on one level is added to the parent TOC, such as the Content.toc in the previous example.

Set the Conditional Tags for each version in the Output Preset.

## Post Generation Script

A Post Generation Script, written in Visual Basic Script, must be executed before publication to replace some style sheet classes with inline styling. However, RoboHelp only supports JavaScript and the script must be executed manually:

1. Download the `replaceBefore.vbs` to your C: drive.
2. You must have the complete output folder location to paste into the dialog that opens at the start of the script. To obtain this, open Windows Explorer and navigate to the folder containing the topics.
3. Right-click the directory menu and select **Copy address as text**. This adds the directory to the Windows Clipboard.



4. Double-click the **replaceBefore.vbs** file to execute.

## Publishing

When publishing completes, the Publish Report dialog opens. To view the Status and Remarks columns, scroll to the bottom, or last record and scroll right. It is common for the first publishing attempt to result in 404 and/or 503 errors for some topics. You may need to publish three, four, even five times to have all topics published successfully.

## Known Issues

The following list consists of issues, or complications, that you may encounter:

- Font changed in Word output –The font may change to Times Roman in Word output for links within snippets. Try to avoid using links in snippet files. This may also occur for text within a span.
- A link following a variable results in no space between the two in Word outputs.
- Condition Expressions – Do not use Include as it may result in content being excluded, even though you have it set in the expression to be included. RoboHelp includes everything by default, so there's no reason to add it. Use only Exclude tags in Condition Expressions.
- Do not use the My RoboHelp Projects\\*project\*\images folder for inserting images. These files do not upload to Zendesk. It is recommended to use a folder outside the My RoboHelp Projects directory.
- Zendesk Publishing Errors – 404 and 503 errors often occur when publishing to Zendesk. Repeating the publishing process can reduce the number of errors until all topic files are uploaded.