Help Production Guide

These instructions are for anyone who creates content for the MAP Help Center, CAP Help Center, and state-specific documents.

> **Note:** We keep the source files of this guide within the MAP_Suite Flare project, under the **InternalNotes** folder.

Repository File Setup

To begin working with help center content, complete the following tasks.

Request Access

Create help tickets to request access for the following systems.

- Bitbucket* (repository--need read/write permission):
  http://stash.americas.nwea.pvt/
- Git stash (source control repository--need read/write permission):
  http://stash.americas.nwea.pvt/projects/PM/repos/documentation-help/
- Jenkins (build system):
  http://webmap.americas.nwea.pvt
- Kraken (deployment system):
  https://kraken.mgmt.nweacolo.pvt/
- Confluence (wiki for Product Engineering):
  https://confluence.americas.nwea.pvt

*You need read/write access to the following repos:

- flare-source
- documentation-help
- flaretranslation
- state-source
- templates
- training-source

To request, create a ticket in Jira: http://jira.americas.nwea.pvt/login.jsp. Here are the recommended settings:

- **Project**: DevOps Engineering
- **Issue Type**: Access Request
- **Requested Resource**: Bitbucket Server (Stash)
- **Start Date**: today's date
- **End Date**: Leave empty
- **Platform**: MAP Growth

- **Impacted Team**: your team
- **Summary**: Read/write access to Stash repositories for NAME
- **Approver**: Your direct manager
- **Access Request Accounts** = [REMOVE ANY UNNECESSARY REPOSITORIES]
  Please grant Read+Write permission for [NAME] to access the following repositories:
  http://stash.americas.nwea.pvt/projects/PM/repos/documentation-help/
  https://stash.americas.nwea.pvt/projects/PM/repos/flare-source/
  https://stash.americas.nwea.pvt/projects/PM/repos/flaretranslation/
  https://stash.americas.nwea.pvt/projects/PM/repos/state-source/
  https://stash.americas.nwea.pvt/projects/PM/repos/templates/
  https://stash.americas.nwea.pvt/projects/PM/repos/training-source/
- **Description**: Leave blank
- **Access Request Roles**: Read/write
- **Account Type**: User

Requests for Developer Assistance

- Jira ticket to System Engineers (SE)
- Tom VanDeGrift

Install Git for Windows

Complete the download and installation for the following tools, using default settings:

- www.gitforwindows.org/
- www.tortoisegit.org/
- www.puttygen.com/ (if not part of previous Tortoisegit install)

Set Up Authentication Keys

Do these steps so you can continue with cloning the repository files.

1. Open PuttyGen (you might need to type it in the Windows search).
2. Use Type = **RSA**.
3. Click **Generate** and follow the prompts.
4. Click both **Save public key** and **Save private key**.
5. Copy the key string at the top.

6. In a browser, open the source control repository:

   https://stash.americas.nwea.pvt/projects/PM

   Note: If you encounter errors, consider this tip from Denise Riffle—"Once I logged in Captive Portal with the Secret Server password, I was able to log in to Bitbucket successfully using my NWEA login."

7. Under profile icon, click **Manage Account**.
8. In the account settings, choose **SSH keys > Add key**.
9. Paste the key string.

Clone Flare Repository

1. Open the source control repository:

   https://stash.americas.nwea.pvt/projects/PM

2. Select the **Flare-source** repository.
3. On the left sidebar, click **Clone**.
4. In the clone window, click the drop-down, and change from SSH to **HTTP**.
5. Copy the URL (ctrl+c).
6. In Flare, choose **File > New Project > Import Project**.
7. In the import wizard, choose **Git** as the source control.
8. In the **Remote** entry, paste the URL. For example:

   ssh://git@stash.americas.nwea.pvt/pm/flare-source.git

9. When prompted, select the Flare project file: map_suite.

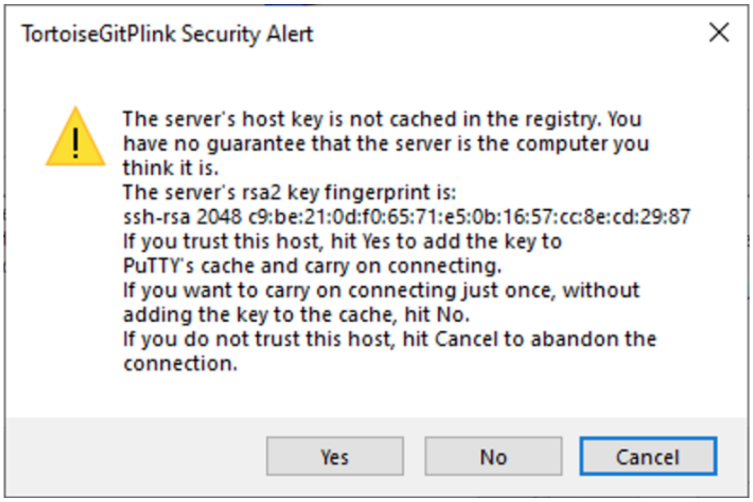
Clone Help Build and Other Repositories

1. Open the source control repository:

   https://stash.americas.nwea.pvt/projects/PM

2. Select the documentation-help repository or other repository you wish to download; see [Repositories Defined] for a list of repositories you may need to download.
3. On the left sidebar, click **Clone**.
4. In the clone window, keep the **SSH** setting (not HTTP).
5. Copy the URL (ctrl+c).
6. In your local File Explorer, create a directory called "Git".
7. With the Git directory open, right click, select **Git Clone**.

8. In the **URL** field, paste the URL just copied.
9. Confirm **Load Putty Key** is checked.
10. Click the **...** button next to the **Load Putty Key** field and select the Private authentication key file you saved earlier.
11. TortoiseGit clones the repo. There is a good chance you will receive the TortoiseGitPlink Security Alert (below). If you do, click **Yes**.



12. Repeat these steps for any other repositories you may need to work from.

Repositories Defined

Location Under Git	Definition
../documentation-help/	All content to be deployed to all help center websites, for all products
../flare-source/	Source files for most help center content, both MAP Suite and Summative
../flaretranslation/	Translated excerpts of the MAP help source files
../state-source/	Source files for Summative, state-specific manuals (TAMs)
../templates/	Roster templates
../training-source/	Source files for elearning, all products

Deployment Timeline

This section describes the timeline involved with deploying help center content to the live production environment.

Tip: Open this file in a browser to follow the links. The file is InternalNotes/DeploymentTimeline.htm.

Release with Product

Product deployments have two critical dates around which all Help Center work revolves: the release date, and the release go/no-go date.

- **Release date:** The day on which DevOps releases all changes to production, including from development teams. Release date is normally the third Friday of the month, though it can vary. Additionally, there are usually no releases in January, May, and September due to the large number of users signed in during those times. (This is called "concurrency" among developers and DevOps.) Visit the Product Development Release Calendar to confirm exact release dates.

- **Release go/no-go date:** The day on which DevOps confirms which teams are ready for the production release. This is always the Tuesday before the release date. You should aim to have all Help Center work written, reviewed, edited, and deployed into INT03 by this date. It is possible to have some flexibility around this date by communicating with DevOps; however, this is not advised.

> **Note:** These dates are fixed several months in advance and Partner Experience has no power to change them. If you miss these dates, you must do a CAB release (discussed below).

Using the release date as the fixed, final day for a writing cycle, we find that for any given release, there is either 20 or 25 weekdays in a "release month." (The variability comes from releases generally being pinned to the third Friday of the calendar month. Because of the variability of days in a given month and where those days are located within the week, there can be variance between the number of total days between two third Fridays.) However, to reduce variability in the writing month and to make space for cleanup and side projects, the writing month is pinned to 20 days.

Visit the Help Center Release Calendar to confirm exact release dates.

Using weekdays, the milestones for each writing month is as follows:

- Days 1-8: Write for current release
- Days 9-12: Content review
- Day 13: Incorporate content review feedback
- Days 14-16: Copy edit
- Day 17: Incorporate copy editor's feedback, release go/no-go
- Days 18-20: Write for next release
- Day 20: Release

Note the overlap of release work on days 18-20. This is due to the fact that very little work is required for a current release once its go-no-go date has passed.

Deployment

This section describes the tasks involved with deploying help center content to the live production environment.

Tip: Open this file in a browser to follow the links. The file is InternalNotes/Deployment.htm.

Use Trello to Track Deployment Steps

> **Recorded training:** For more information about Help Center Requests Trello board and the release calendar, check out the Trello and Release Calendar Video on SharePoint.

The Help Center Requests Trello board includes templates to help you track your deployment tasks. These templates are stored at the bottom of the *To Do - Must/Should* list. It provides space in the Description to capture the Jenkins RPM build numbers and Kraken deploy numbers. There are also to-do lists to capture information such as which TOCs and targets needs to be updated prior to release, which targets need to be built, which PDFs should be added to *impl* versus *assist*, and other important release considerations.

Move Output to Deployment Folder

> **Recorded training:** For more information about the structure of the deployment folders, jump to timestamp 13:48 of the General End-to-End Deploy video on SharePoint.

> **Recorded training:** For more information about moving help builds to the deployment folder, jump to timestamp 26:06 of the General End-to-End Deploy video on SharePoint.

After building output from Flare or eLearning software, use the Windows file explorer to copy output to the appropriate location under your Git deployment folder (`git/documentation-help/war/src/main/webapp/`). Choose from the following locations, and accept the Merge prompt.

Copy From	Copy To
Under `git/flare-source/output/<name>/`	
../MapHelpCenter/	../assist/help_map/
../MapHelpCenterOpen/	../impl/maphelp/
../Summative/SummativeHelpCenter/	../impl/caphelp/
PDFs for MAP Suite that are public	../impl/
PDFs for MAP Suite that are secured, Data Export Field Descriptions file	../assist/doc/

Copy From	Copy To
PDFs for MAP Growth that are state-specific	Not applicable—email to Program Manager
PDFs for Summative (CAP)	../impl/cap/
Under `git/flaretranslation/NWEA_ProctorQuickStart_AR/` and `../NWEA_ProctorQuickStart_ES-LA/`	
PDFs for ProctorQuickStart and ProctorTestingTips	../impl/
Under `git/state-source/`	
PDFs for Summative, state-specific manuals	Not applicable—email to Program Manager
Under `git/templates/`	
Excel files for preparing roster	Not applicable—edit in place
Under `git/training-source/`	
Videos for MAP Growth	../impl/maptraining/
Videos for Summative (CAP)	../impl/captraining/
Videos for all other products (Skills, Reading Fluency, etc)	../impl/training/

Important! If there were changes to the rostering template files, or the Comprehensive and/or Combined Data Exports, there is a possibility that there were also changes to the Data Export Field Descriptions file. Confirm with your stakeholders whether this file also needs to be updated. This file is stored in ../assist/doc/. If updates are required, be sure to do the following:

- Update all required tabs
- Update the first tab with a brief description of the update and the date of update
- Clear the color-coding from previously updated columns and add color-coding to the columns you updated

Files Copied to Professional Learning

Some eLearning is also used within the Professional Learning LMS, so we need to output to SCORM format and copy the zip file to `U:ProfessionalDevelopment/lmscontent/`. For example, the following Proctor videos are all used in the OMGB course:

- Interrupt.cptx
- Makeup.cptx
- Proctor Practice.cptx
- Setup.cptx

Documents to leave in place

Several document files live only in the Git deployment folder (`git/documentation-help/war/src/main/webapp/`). Either they come from Marketing or we deploy the source file. Leave these files in place and do not change the filename when making updates.

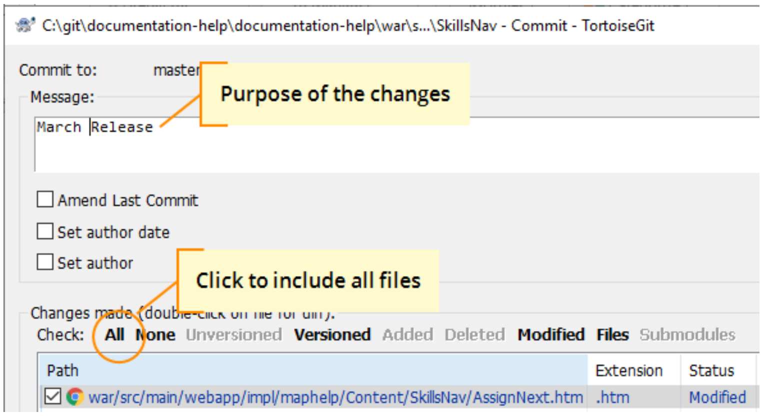
- Under ../assist/doc/
  - CSNormsStudy.pdf
  - MAP_Export_Field_Descriptions.xls
  - MAPReadingFluencyTechnicalReport.pdf
  - GradelevelTestGuidance_Evidence.pdf
- Under ../impl/
  - CSNormsOverview.pdf
  - GradelevelTestGuidance.pdf
  - RolePermission.xlsx
  - skills_navigator_parent_handout.pdf
  - TestSecurityChecklist.doc

Push Changes to Repository

Recorded training: For more information about pushing changes to the repository, jump to timestamp 33:15 of the General End-to-End Deploy video on SharePoint.

1. In the Windows file explorer, open the Git deployment folder for the repo you want to push to. Most frequently, this will be `git/documentation-help/` for Help Center or `git/templates/` for rostering templates.
2. Right click on the folder with changes you want to push. Select **TortoiseGit > Pull** to pull down any changes that have been made to the repo. (This is usually DevOps configuration changes.)
3. The Pull window appears. Make no changes and click **OK**.
4. Tortoise Git pulls down changes. Once you receive the success message, click **Close**.

5. Right click on the folder with changes you want to push and select **TortoiseGit > Check for modifications**.
6. Select the **Show Ignored Files** check box so that new files are counted (files listed as "Not Versioned").
7. Verify that the list of changed files looks correct and click **Commit**.
8. The Commit window appears. Complete the following prompts.



9. Click **Commit**.
10. When the Success message appears, click **Push** (not Close).
11. The Push window appears. Make no changes and click **OK**.
12. When the Success message appears, click **Close** (not Create pull request).
13. If this message appears: "git did not exit cleanly" –or– "updates were rejected":
    a. Click **Pull** (and accept subsequent prompts)
    b. Close the Tortoise windows.
    c. In the Git directory, right click and choose **TortoiseGit > Push**.
14. Close the Tortoise Git windows.

Optional: Check Repositories

Recorded training: For more information about checking changes have been successfully pushed to the repository, jump to timestamp 41:00 of the [General End-to-End Deploy video] on SharePoint.

If needed, verify that the files were pushed correctly into the repository.

- Help and documents:
  http://stash.americas.nwea.pvt/projects/PM/repos/documentation-help/browse
- For templates:
  http://stash.americas.nwea.pvt/projects/PM/repos/templates/browse/templates

Deployment to Test Environment

To deploy the changes made to the repository, you first build an RPM package (similar to a ZIP file) on Jenkins, and then deploy that RPM to the integration environments (INT03) on Kraken. Once you've tested the release in the integration environment, build a release RPM package in Jenkins and deploy it to the staging environment through Kraken.

What are the environments?

- **Team environments:** These are team-facing only. Development can push code to their team environment to "test drive" it at any time. (As of April 2021, Help Center doesn't have a team environment. However, this would be useful to add.)
- **Integration (INT03):** After each team is happy with how their code performs in the team environment, they push to INT03 where they can see how their work integrates with the work other teams have done. On this environment, teams can test interactions between pieces of functionality. All work has to go through this environment before it can move to higher environments.

  > **Note:** Because Help Center is wholly separate from any MAP system, problems in the code rarely affect Help Center, and problems in the Help Center cannot affect the code. However, we're required to deploy to this environment regardless.

- **Staging (STG01):** This is the environment "above" integration, where teams push their work once they're happy with how everything works together. This environment lets teams double check that nothing breaks during the deployment step and confirm that we have all the needed files accounted for before we go to production. All work has to go through staging before it can move to production.
- **Production:** This is the "highest" environment – the live environment that partners can see and use.

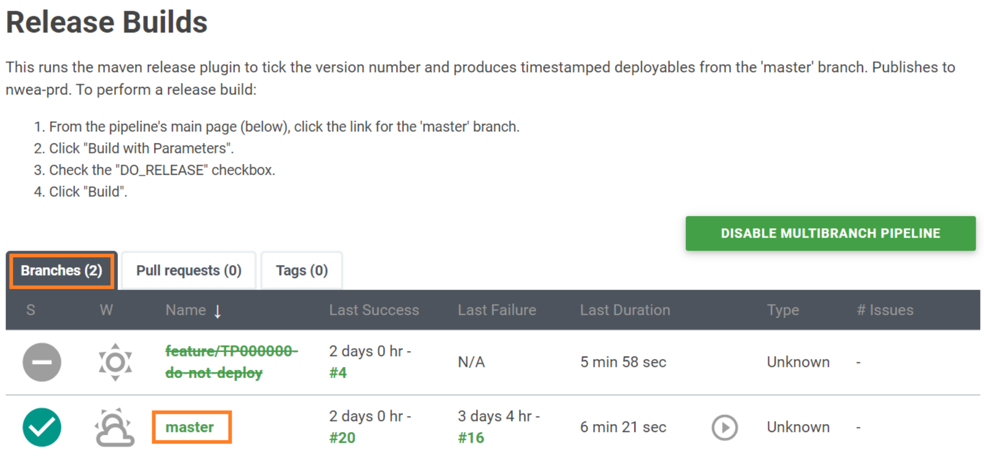
Deploy the "develop" build

The "develop" build is the package we deploy to the integration environment (INT03). It has slightly different configurations from the "master" build that we deploy to the staging environment.

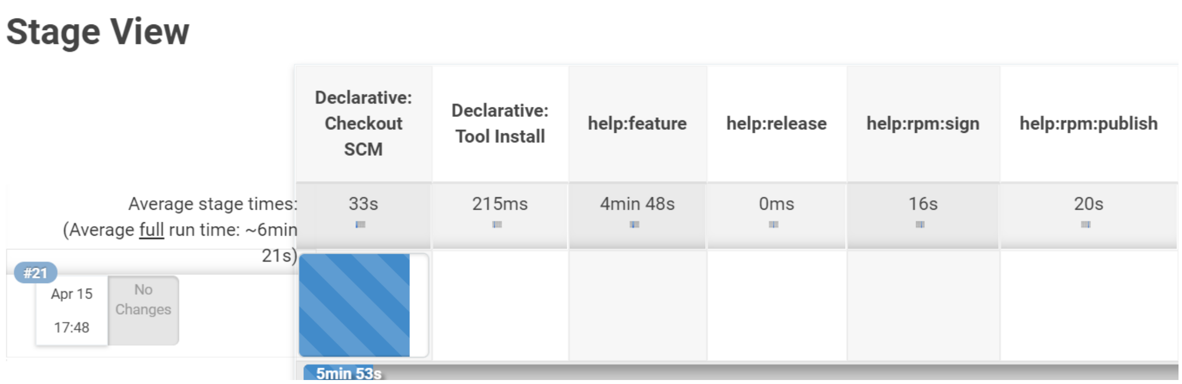
Build the Help Center RPM package on Jenkins

> **Recorded training:** For more information about packaging release files with Jenkins, jump to timestamp 43:24 of the General End-to-End Deploy video on SharePoint. (Bonus content of missing the Kraken step at 48:52!)

1. Log in to Jenkins: https://jenkins-cicd.americas.nwea.pvt/job/documentation-help/
2. Scroll down to the table. In the **Branches** tab, click **master**.



3. Confirm that Jenkins has started building the RPM. (This may take 1-2 minutes to begin.) The image below demonstrates the Jenkins build progress bar. Use the date to the left to determine when a given build began.



Example of the Jenkins progress bar.

4. If Jenkins has not started the build automatically, start it manually by clicking **Build with Parameters**. (Do not check the **Build Release** box unless you have already deployed to INT03 and now need to create the [master build](#).)
5. If you receive an error at this step, wait a few minutes and retry the build:
   a. Click **Build with parameters** on the left.
   b. Click **Build**. Do not check do_release.
   c. If the errors continue, [open a Jira ticket](#).

Deploy the RPM with Kraken

> **Recorded training:** For more information about deploying the RPM with Kraken, jump to timestamp 50:58 of the [General End-to-End Deploy video](#) on SharePoint. (Bonus content of missing the Kraken step at 48:52!)

1. Wait about 10 minutes, then log into Kraken:
   https://kraken.mgmt.nweacolo.pvt/
   If needed, see Optional: If Kraken is unavailable on page 14
2. Complete the prompts:
   a. Environment: int03
   b. Packages:
      a. Help Center: help-server
      b. Templates (only if releasing a template change): roster-templates
   c. Version: Choose the build with “develop” in the name.

   > **Note:** You can verify the recent RPM number from Jenkins. Under Build History, click the recent build and then click **Console Output**. Search (Ctrl+F) for "wrote." Example: help-server-1.20.2-1develop_20151106_2156.noarch.rpm.
3. Click **Submit**.

If you receive an error at this step, open a Jira ticket.

Optional: If Kraken is unavailable

Create a Jira ticket to restart the help server:

- Project = DevOps Engineering
- Type = Task
- Summary = Deploy help to INT03
- Priority = Minor or Major

Smoke test in the integration environment

1. Open https://int03-admin.mapnwea.org/assist/help_map/ApplicationHelp.htm.
2. Username = samplemain
3. Password = p0rtl4nd

Deploy master build

Repeat all the above deployment steps, except instead of the help-center build starting automatically, take the following steps to kick off the master build process:

1. In Jenkins, click **Build with Parameters** on the left.
2. Check the **Do Release** box.

> **Note:** In July 2021, Stacey Poole informed us that there is no need to attempt to deploy to Staging in order to release with product. The staging deployment happens at a set time before the release and is done by Stacey's team. Refer to Smoke test in the Staging environment on page 16. We will be working to find out whether releasing to Staging is something we should do for CAB releases.

Optional: Deploy roster template

> **Recorded training:** For more information about roster templates, jump to timestamp 6:34 of the General End-to-End Deploy video on SharePoint.

If updating one or more of the roster templates spreadsheets, then repeat all the above deployment steps, except use this Jenkins package:

1. Log in to Jenkins: https://jenkins-webmap.americas.nwea.pvt/job/roster-templates-master/
2. Click **Build Now** on the left. You should see the Build History table in the bottom left update.
3. Deploy the RPM to the integration environment using the steps in Deploy the RPM with Kraken on page 13
4. Smoke test the changes in int03 as described in Smoke test in the integration environment on page 14

> **Note:** Currently, there is no need to build a separate "master" build as with Help Center releases. However, we are in the process of changing the Jenkins package for roster templates, so this process will change in the future to be more like the current help center deployment process. Confirm whether SE-25967 has been successfully completed. If it has, contact the Staging Deployments RingCentral room to confirm the new Jenkins package. It should be captured in the multibranch Templates package.

Helpful RingCentral Engineering and Deployment Groups

If you have trouble with any of these steps, the first recommendation is to reach out to Todd Jollo. If after contacting Todd you're still having issues, and especially if you need to get information on a Jira ticket, raise your concern in one of the following RingCentral deployment groups:

- **Build Engineering:** This group is largely SEs who can provide feedback on problems happening in Jenkins and Kraken.
- **DevOps:** This group is made up of DevOps engineers who can help should you have trouble raising someone in the Build Engineering group.
- **Change Advisory Board:** This group is dedicated to CAB releases.
- **Git:** This group is dedicated to Git and can often help with Git-related issues.

- **Colo Production Deployments:** This group is dedicated to the applications and services used in the colo servers, such as those used to deploy MAP Growth (and, by extension, the Help Center).
- **Staging Deployments:** This group is dedicated to the staging deployments ahead of the production release.
- **AWS Cloud Production Deployments:** This group is dedicated to the applications and services sued in AWS cloud servers. *The Help Center does not use the cloud servers, so it is not common to need to contact this group.*

Release with Product

Perform these steps when updating as part of a product release.

1. Edit the deployment plan stored in Confluence (choose applicable the deployment date): https://confluence.americas.nwea.pvt/display/nwea/MAP+Deployments
2. Under the Applications table, add the master deployment package. Examples:

Name	Version	Release Notes
Help	1.20.114	help-server-1.20.114-4master_20191220_ 0442.noarch.rpm
Roster templates	1.1.71	roster-templates-1.1.71-1.noarch.rpm

3. Add the package to Compass (the official list of packages in a release):
   a. Log in: https://compass-ui.mgmt.nweacolo.pvt
   b. Select the applicable Release.
   c. Click **Add New Release Step**.
   d. Name the release step "Help" and skip the other entries.
   e. Click **Submit**.
   f. Expand the Help step.
   g. Click **Add Package**.
   h. Specify the same package name and version as recorded in the Confluence deployment plan.

Smoke test in the Staging environment

After the Go/No-Go meeting (usually the Tuesday before release), engineers will release to the Staging environment for final check:

1. Open https://admin.stg01.map2.nweacolo.pvt/assist/help_map/ApplicationHelp.htm.
2. Username = samplemain
3. Password = p0rtl4nd

Release through CAB

> **Recorded training:** For more information about creating a CAB release ticket, check out the CAB Ticket video General End-to-End Deploy video on SharePoint.

Perform these steps when updating between product releases, as part of the Change Advisory Board (CAB).

1. Log in to the request system Jira: http://jira.americas.nwea.pvt/login.jsp
2. Create a CAB ticket with these settings:
   - Project = Change Advisory Board
   - Priority = Minor or Major
   - Risks of Implementing = None
   - Proposed Time = Usually around 3pm
   - Deployment Plan = Insert the RPM package number
   - Test Plan = “<YourName> to smoke test”
   - Rollback Plan = “Restore prior RPM”
3. Attend the next CAB meeting to answer any questions:
   - Time = Mon/Wed/Fri at 10:30
   - Room = 5th - Brooklyn
   - Remote = https://meetings.ringcentral.com/j/1488060170
4. Work with the assigned engineer to check the release.

Open a Jira ticket to solve deployment issues

> **Recorded training:** For more information about creating a Jira ticket for deployment issues, jump to timestamp 53:47 of the General End-to-End Deploy video on SharePoint.

Formatting Notes

<table>
<tr><th>Formatting</th><th>Do This</th><th>Example</th></tr>
<tr><td>Cross-reference</td><td>In general, use cross-references instead of hyperlinks.
When you insert a cross-reference, scroll through the XRef Class list and choose a legitimate format:
For headings, pick NWEAHeading.
For page references, pick NWEAPageOnly.
For figures, use NWEAFigure or NWEAFigureCaption (includes caption text).
For tables, use NWEATable or NWEATableCaption (includes caption text).
To see the difference in cross-reference formats between print and online help, you need to do two things:
Change the medium you are viewing
Choose Tools > Update Cross-References</td><td>Formatting Notes on page 18</td></tr>
<tr><td>Headings</td><td>Always start with Heading1, followed by Heading2, and so on.
Use title case for Headings 1 and 2.
Use sentence case for Headings 3 to 6.</td><td></td></tr>
<tr><td>Indented paragraph</td><td>Press Tab and, from the pop-up window, choose div.indented.</td><td>Paragraph
Indented</td></tr>
<tr><td>Left/right page footers</td><td>For Nebraska, we apply a page layout with opposing page footers. For instructions, see the file Resources/UAHowto_PageLayout.htm under the state-source Flare project.</td><td></td></tr>
<tr><td>Links</td><td>Use a link instead of a cross-reference when the target is a PDF or a Website outside the help center. Also, if you know the link will only appear in HTML output, you could use a link around a word or phrase.
Analytics for PDF links: To help track clicks on PDF links, add Google analytics code. For an example, see the topic QuickReferences.htm under AboutMAP. See also:
https://support.google.com/analytics/answer/1136920?hl=en</td><td>Guide</td></tr>
<tr><td>Lists</td><td>Use bullets for non-sequential options, and use numbered lists for step-by-step instructions.
Strive for one line per list item. Move detailed explanations to a sub-paragraph below. To create a sub-paragraph:
Move to the end of the line.
Type the keyboard shortcut Ctrl + ;</td><td>Bullet
Sub
Number<ol type="a">
Sub
Number</td></tr>
</table>

Formatting	Do This	Example
	3. Press Enter. The paragraph appears like this. 4. To continue the list, create an empty line and then click the yellow square. **Tip:** Merge lists by right-clicking the ol or ul tag bar, and then choosing **Merge with Previous/Next List**.	Details...
Note or Tip	Use bold style on the initial word, such as **Note:** or **Tip:** Press **Tab** and, from the pop-up window, choose **div.tip**	**Note:** ...
Page breaks	**Use div.keeptogether to avoid a break.** You must manually edit the XML code and add <div class="keeptogether"> ... </div> surrounding two or more paragraphs. The div or its end tag must not interrupt an HTML element, so, for example, you cannot place them around a few items in a bulleted list; the whole list must be enclosed. This is one of the best strategies for controlling page breaks, because it can affect multiple deliverables, usually without negative side effects. **In tables:** You can use div.keeptogether inside a table row (inside the <td> tags) if the row is breaking. Do not use div.keeptogether around rows (outside the <tr> tags) because the row may disappear from the output. **In lists:** You can add blank sub-paragraphs to push a list item to the next page. Also add a condition so the break only affects a specific deliverable. **Change the TOC properties:** If you want the break before the topic in a specific deliverable, right-click the topic in the TOC, and select Properties. On the Printed Output tab, select Chapter break. **Explicit page breaks:** If you use an explicit page break (from the Insert ribbon), also add a condition so the break only affects a specific deliverable.	This row won't break because the middle column has div.keeptogether around it (view the XML code for this example)
role required	In help, the task-specific topics should indicate the MAP roles required to complete the task. • Place paragraph below the introductory text • Assign the RequiredRole paragraph class • Use the phrase "Required MAP role:" • Role names in bold and capitalized	Required MAP role: **System Administrator or Assessment Coordinator**
Superscript	Apply the sup tag within the Flare editor. If you encounter a symbol that is high, but not reduced in size, it may have been tagged with a span that includes "super". Replace the whole span with ^{..}	Super$^{\text{script}}$
Table styles	• PatternedRows = For complex tables that could use alternating shading on rows • Simple = For layout purposes (no borders)	

Formatting	Do This	Example
	• SimpleDefinitions = For descriptions of the columns in reports • Standard = For simple tables with the same format for all rows	
Table width	If needed, adjust the table properties to a smaller percentage. Never resize it directly, such as dragging the edge. To fit tables at the beginning of a topic, you might need to remove these attributes from the <table> tag: `margin-left: 0;margin-right: auto;`	

Graphic Tips

These notes will help you optimize graphics used in Flare for print and online output. Our standard formats are:

- PNG (in Madcap Capture) — Use for most screen captures
- SVG (in Adobe Illustrator) —Use for diagrams and screen mock-ups

Also included are Video Embed Codes on page 21 and Miscellaneous Reference for Graphics on page 23.

General File Guidelines

- Place image files under the appropriate sub-directory:
  - Images — not here
    - ScreenCaptures— not here
      - <AreaOfProduct> — here
- Do not use spaces in the filename, because it could fail to render in a browser

PNG Image Resolution

General recommendations:

- When taking the screen captures of Web pages, try increasing the zoom to 125%. The image will be larger, but you can control the scale in Madcap Capture.
- If needed, crop images to compensate for the zoom:
  - Eliminate empty space using Photoshop
  - Keep enough of the capture so the reader can identify the location on screen

Scaling in Madcap Capture

You can scale images to fit both print and online output. In Madcap Capture, double-click on the image to open the properties. Under the Format tab, experiment with the Web medium and the Print medium, checking the resulting width that appears in the settings:

Medium = Web (Max width = 820px)	Medium = Print (Max width = 6.25in)	Applicable Callout Font
Scale = .5 or .66	Print DPI = 200	OpenSans SemiBold 18pt
Scale = .75	Print DPI = 200 or 190	OpenSans SemiBold 16pt
Scale = 1	Print DPI = 125 or 150	OpenSans SemiBold 12pt or 14pt

SVG Image Tips

- Font = Calibri works well in PDF output (especially words with “ll”)
- Save the original in standard format (.ai)
- Export a copy to SVG format
    - In the SVG Options, choose **Font = Convert to Outlines** and leave **Responsive** unselected
    - For complex images, you might choose the **Use Artboards** option
- In Flare, embed the SVG version

Video Embed Codes

After placing video output in the appropriate deployment folder, use the <iframe> tag to embed in the HTML—for example:

```
src=../../../../../impl/training/FrameOver/index.html" width="720"
height="540" frameborder="0"
```

If the video resides on another Website, such as Vimeo:

```
src="https://player.vimeo.com/video/360365598" width="640"
height="360" frameborder="1" allow="fullscreen"
```

Frame settings:

- Width should be under 800px
- Height should match the video ratio (16:9 or 4:3)
    - For Captivate videos, increase by 35px to allow for the playbar
- Frame border should be 0 if the video has a full background, and 1 if the video background is white.

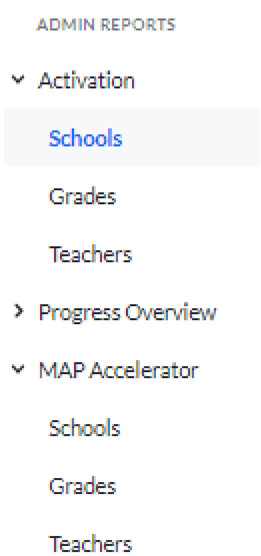
- Fullscreen is optional

Graphic Styling in Flare

Text wrapping

- To have an image on the left and text wrap to its right, select the paragraph <p> the image is in (not the image itself) and apply the style **p.GraphicWrapL**
- To have the image on the right, apply the style **p.GraphicWrapR**
- To prevent any subsequent text from wrapping around the image, apply the style **GraphicWrapEnd**

Example:



The image displays on the left, and this text is wrapping on the right hand side of the image. This is because the paragraph containing the image has the style p.GraphicWrapL. This text paragraph has no special styling, however.

This new paragraph also displays next to the image.

This new paragraph is below the image because it has the style **GraphicWrapEnd** applied. If it didn't, it would also be to the right of the image since the image is tall.

Large graphics in print

- To prevent large graphics from spilling out into the page margin in print mediums, select the image and apply the style **img.PrintLarge**.
- This is in addition to making sure the print output is scaled in Capture, as seen in Scaling in Madcap Capture.
- Be careful of using this in tables, as it can cause other table cells to overlap the image.

Miscellaneous Reference for Graphics

- Screen resolution statistics: Most laptops have 1366 or more pixels (see https://www.w3schools.com/browsers/browsers_display.asp)
- 970px = help center width
- 820px wide = safe for sidebar menu
- Maximum width for proctor tips PDF is 4.75 in
- TBD: For a large, full-page image, apply **p.graphic**.

Conditional Text

These notes will help you to apply the correct conditions for your target.

Conditions for Products

These conditions are still in flux, but here's the latest approach:

If Related to...	...Not Related to...	...Include Condition	...Exclude Conditions	Template Effect
MAP suite, all products	Summative State	NonState*	StateGeneric + Web-basedMAP	Gray bar
Summative state (NE)	MAP suite (all products)	StateGeneric‡	NonState + Web-basedMAP + StateAR	Purple bar
MAP Growth	Other MAP products + Summative + Interim State	Web-basedMAP	StateGeneric + NonState	Green bar
MAP Growth, AR contract	Summative + other states + other products	StateAR	To be determined	—
MAP Growth, NV contract	Summative + other states + other products	To be determined	To be determined	—
MAP Growth, NE contract	Summative + other states + other products	StateNE	To be determined	—
MAP Growth, any Interim-testing state contract	Summative + other products	TBD...for now, use StateAR and either Web-basedMAP or NonState	To be determined	—

*NonState really means non-state-specific.

‡StateGeneric really means Summative.

Combining Conditions

When you have multiple conditions, things get complicated. The important thing to remember is that the target includes conditionalized text if **any one** of the conditions you applied matches. For example:

Text Conditions	Target Conditions	Resulting Output
Product = EarlyLearn + Output = Guide	Exclude: Product = EarlyLearn + Include: Output = Guide	Text included (although EarlyLearn is excluded, the Guide condition is included)

Note: For more precision, use the Guide.Specific condition in the target instead of an Output condition, such as Guide.Specific = ProctorGuide.

Accessible Content

By request, we can provide an accessible version of a PDF. Because our standard PDFs fail to meet some of the accessibility tests from our Accessibility Team, we need to use a special Flare target and then adjust the output.

Set up an Accessible Flare Target

Follow these guidelines:

- Add a target under Targets > Accessible
    - In the target name, match the regular PDF target, but add “AX”
    - General settings:
        - Output Type = Word
        - Master Page Layout = GuideBasicNoTitle
    - Conditional Text settings:
        - General > StandardOther = Exclude
        - Output Type > Accessible = Include
    - Advanced settings:
        - Medium = Accessible
- In the content, apply the condition “Output Type > Accessible” as needed.
    - For example, tables with merged rows or columns do not work with text readers.
    - For the standard content, apply “General > StandardOther.”

- As a convenient way to indicate the document beginning, consider adding this opening topic to the TOC:

  Overview > AccessibleBegin.htm

Adjust Word Output for Accessibility

Complete these steps as a final preparation before publication.

Save a Copy

Use File > Save As to create a copy that you will edit:

- Keep the same filename, but save it in the Accessible folder (one folder above the default folder name).
- Change the file type from .DOC to .DOCX for optimal performance with screen readers.

Move Trademark Blurb

If this appears at the beginning, move it below the Table of Contents or at the end of the document.

Replace Heading Styles

You need to convert the Flare heading styles to Word styles.

1. Open Search and Replace (Ctrl + H) and click More.
2. Click the **Find What** box and choose the Format menu (near the bottom), select Style, and then select H1 from the list of styles.
3. Click the **Replace With** box and again choose Format > Style, but change from H1 to Heading 1.
4. Click **Replace All**.
5. Repeat the search/replace for headings H2 (to Heading 2), H3 (to Heading 3), and so on.

   Note: If H2_1 or similar styles appear, replace them as well.
6. Modify the Heading styles according to the following table:

   Note: To set the Space Before, open the Format > Paragraph settings in the Modify Style window.

Level	Font	Space Before
Heading 1	18pt, bold	24pt
Heading 2	16pt, bold	18pt

Level	Font	Space Before
Heading 3	14pt, bold	12pt
Heading 4	12pt, bold	6pt
Heading 5	10pt, bold	none

Change Heading Levels

Modify paragraph styles in places where a heading level was skipped (typically Heading 4).

Recreate Cross References

With the heading styles fixed, you can now rebuild the cross-references to those headings.

1. Open Search and Replace (Ctrl + H) and click **More**.
2. Click the **Find What** box, and then click **No Formatting** (near the bottom) to clear any prior search setting.
3. Choose the **Format** menu, select **Style**, and then select "u" from the list of styles.
4. Click **Find Next**.

   The next cross-reference will be selected.
5. Click on the document and type Ctrl + K.

   The hyperlink settings open.
6. Under the **Place in This Document** category, select the heading that matches the selected cross-reference text.
7. Repeat the steps for all other cross-references.
8. If needed, repeat the steps for the Style "u_1."

Remove Hidden Tables

Flare creates "hidden" tables for text that appears within the Div tag in Flare, such as <div class=”tip”>. Follow these steps to remove the hidden tables.

1. Press F5 to open the Go To feature.
2. From the Go to what choices, select **Table**.
3. Click **Next** until you find a hidden table, such as a Note.
4. Select the table.
5. From the **Layout** ribbon, choose **Convert to Text**.

6. From the options that appear, choose Paragraphs marks. And turn off the Convert nested tables option.

   Note: You may need to adjust the style or re-arrange lines of the converted text. For example, if the last item of a list goes astray, then place your cursor at the beginning of that line and use Backspace and then Enter to restore formatting.

7. Repeat these steps for all other hidden tables.

Adjust Table Widths

Follow these steps to ensure tables will reflow when the zoom is increased to 400%.

1. Press F5 to open the Go To feature.
2. From the **Go to what** choices, select **Table**.
3. Click **Next** until you find an actual table, with columns and borders.
4. Select the table.
5. Right-click over the table and choose **Table Properties**.
6. In the properties window, under the Table tab, turn off **Preferred width**.
7. Open the **Column** tab and again turn off Preferred width.

   Note: Click **Next Column** until you turn off Preferred width for all columns in the table.
8. Click **OK** to close the Table Properties.
9. Repeat these steps for all other actual tables.
10. Optional: Also set the first row as the Header row.

Other Adjustments

- Remove Keywords that were created in Flare
- Remove Section breaks (to find these breaks, press F5 and choose Section)
- Add "End of Document" at the end of the document

Set Document Restrictions

To prevent people from editing the Word document, use the Restrict Editing feature in Word.

1. Choose File > Protect Document > **Restrict Editing**.
2. Under **Editing Restrictions**, select the option: Allow only this type of editing.
   Leave the default choice: No changes (read only).
3. Click **Yes, Start Enforcing Protection**.
4. Use the following password:
   PW = !QAZxsw2

Translations

Use these instructions to produce translated versions of documents.

Product Management approves the documents that we translate and covers the cost (we pay the MadTranslations service from Madcap). Currently, only the Proctor Quick Start and Testing Tips are translated. The current languages are Spanish and Arabic. For a description of the overall translation process, see the PL team resources under Sharepoint.

Translation Steps

Here are the high-level steps:

A. For each target, export a separate project (Project > Zip Project) into a temporary location:
   - ProctorQuickStart
   - ProctorTestingTips

B. If both targets will be translated at the same time, then copy the Content and Project folders from one of the exported projects into the other exported project.
   By copying the files, you will have both targets in one project for easier transmission.

C. Create a zip file of the entire project (Project > Zip Project).

D. Contact MadTranslations to arrange for a quote:
   - Email: Mike McDermott (mmcdermott@madcapsoftware.com)
   - Copy NWEA Procurement: Angel Nelsen (angel.nelsen@nwea.org)
   - Upload zip file to their site: https://madtranslations.sharefile.com/share/upload/red26387f3ab41839

E. Because they cannot open any Adobe Illustrator graphics, also provide the following spreadsheet with captions that need translation:

flaretranslation/captions_svgfiles.xlsx

F. When they return the translated projects (one for Arabic and one for Spanish), place it under git/flaretranslation.

G. As needed, edit the Illustrator graphics and adjust the page breaks.

