

# Contents

Project-specific Documentation .....	2
<b>1 How to Link Project-specific Documentation .....</b>	<b>4</b>
<b>2 Quick and Easy Linking .....</b>	<b>5</b>
<b>3 Linking With Additional Customization .....</b>	<b>6</b>
<b>4 Context Sensitive Custom Content .....</b>	<b>9</b>
Index .....	10

# PROJECT-SPECIFIC DOCUMENTATION

---

This brief manual describes how to link project-specific documentation to standard Valuation html help. The need for project-specific documentation will often arise when standard Valuation business functionality is extensively customized to fit the needs of a particular customer project. Project documentation assignment can also be used to link relevant internal company documents, guidelines and other sources of information.

---

This **Project-specific Documentation** manual supplements the complete set of standard Valuation documents:

- **Valuation Essentials**

Document describing the basics of using the application: main GUI elements, navigation and menus, main working areas and basic settings. Special attention is given to editors and catalogs - the two most important tools for working with Valuation data.

- **Valuation Core**

Topics covering Valuation customization and administration tools (Business Process Manager, Customizers and Settings, Workflows, API, etc.) as well as other aspects of the application common to all Valuation Modules (Printing, Import/Export, Escalation etc.)

- **Valuation Managers**

Documents devoted to individual areas of Valuation business functionality - the Managers. Standard customization is described. Customer-specific implementations may require additional documentation.

- **Valuation Installation**

A manual describing the process of Valuation rich client, web client and database installation. Contains also information on related issues such as session configuration, authentication and single sign on.

- **Glossary of Basic Terms**

A list of the most important Valuation-related terms and their brief explanations.

# 1 HOW TO LINK PROJECT-SPECIFIC DOCUMENTATION

Project-specific documentation can be linked to this Valuation html help. The custom documents can then be opened from within the help structure, either inside the currently opened browser or in a new browser window.

To demonstrate the functionality, default example documents have been linked. These are meant to be replaced by project-specific documentation (see description below).

**The following default links are provided:**

- **Project-specific Documentation 1, 2**

Links to custom pdf files. Pdf's open inside the help system.

- **Project-specific Documentation 3**

Link to custom html help. The help opens in a new browser window.

- **Helpful Webpage**

Link to an Internet page. The page opens inside the help system.

Project-specific documentation linking can be edited to various extent, ranging from simple replacing of provided example documents to adding new links and changing link behaviour.

## 2 QUICK AND EASY LINKING

You can simply replace the provided example documents with your own project-specific documentation in suitable formats.

- Locate the 'doc' subdirectory in your Valuation installation directory. Dig deeper by opening its 'help' subdirectory and then subdirectory denoting the language of the help to be customized. Here, go to the 'ProjectDocu' subdirectory.

### Linking your own pdf files

1. Copy your project-specific pdf document to the 'ProjectDocu' folder
2. Delete or rename the default 'ProjectDocu01.pdf'
3. Change the name of your own document to 'ProjectDocu01.pdf'.
4. A second pdf can be linked by repeating the procedure using 'ProjectDocu02.pdf'.

The 'Project-specific Documentation 1' and 'Project-specific Documentation 2' links on the 'Project-specific Documentation' help page should now open your own pdf document(s). The documents will be opened inside the currently opened help.

### Linking your own html help

1. Delete or rename the 'HTML' subdirectory found in the 'ProjectDocu' directory.
2. Copy a directory containing your own html help to the 'ProjectDocu' directory.
3. Rename your html help directory to 'HTML'.
4. Make sure your help system contains and is started by 'index.htm'

The 'Project-specific Documentation 3' link on the 'Project-specific Documentation' help page should now open your own html documentation. It will be opened in a new browser window.

### 3 LINKING WITH ADDITIONAL CUSTOMIZATION

You may want to change some aspects of the provided linking. For this, you will have to edit the '14851.htm' file found in the directory denoting the language of the help to be customized. (Regardless of directory names, remember that the '16137.htm' file is on the same level as the 'ProjectDocu' directory mentioned above.)

- Carry out steps outlined in 'Quick and Easy Linking'
- Locate the '16137.htm' file and open it for editing.

#### Changing Link Names

1. In the '16137.htm' file, locate the below captured part
2. replace the underlined code with you own text

```
<td colspan="2" width="294"><p class="frontpageheadblue36x">The following links are available:</p>
</td>
<td width="168"><p class="frontpagebody36x">&nbsp;</p>
</td>
</tr>
<tr align="left" valign="top">
<td width="12"><p class="frontpagebody36x">&nbsp;</p>
</td>
<td width="282"><ul class="frontpagelist36x"><li class="frontpagelist36x"><a class="" title=""
href="ProjectDocu/ProjectDocu01.pdf" target="_self">Project-specific Documentation 1</a></li><li
class="frontpagelist36x"><a class="" title="" href="ProjectDocu/ProjectDocu02.pdf"
target="_self">Project-specific Documentation 2</a></li><li class="frontpagelist36x"><a class=""
title="" href="ProjectDocu/HTML/index.htm" target="_blank">Project-specific Documentation
3</a></li></ul><ul class="frontpagelistlast36x"><li class="frontpagelistlast36x"><a class=""
title="" href="http://www.valuation.com/en" target="_self">Helpful webpage</a></li></ul></td>
<td width="168"><p class="frontpagebody36x">&nbsp;</p>
</td>
</tr>
```

Example: Suppose you have linked your own pdf file to the 'Project-specific Documentation 1' link. You may now replace the 'Project-specific Documentation 1' part of the code above with a more descriptive name, e.g. 'Scrooge Bank Processes'.

#### Adding / Removing Links

If you are not going to use all of the provided hyperlinks or, conversely, want to provide links to more documents, do the following:

##### Remove

1. In the '16137.htm' file, locate the below captured part
2. Delete the part of code pertaining to the specific link, such as the one underlined red in the image below.

##### Add

1. Copy and paste a part of code pertaining to one of the links
2. Edit the copied code:

- Edit the href= part of the copied code so that it reflects the name of your new linked file
- Edit the 'Project-specific Documentation x' part to give your new link a descriptive name

For an example, see the highlighted part in the image below.

```
<td colspan="2" width="294"><p class="frontpageheadblue36x">The following links are available:</p>
</td>
<td width="168"><p class="frontpagebody36x">&nbsp;</p>
</td>
</tr>
<tr align="left" valign="top">
<td width="12"><p class="frontpagebody36x">&nbsp;</p>
</td>
<td width="282"><ul class="frontpagelist36x"><li class="frontpagelist36x"><a class="" title=""
href="ProjectDocu/ProjectDocu01.pdf" target="_self">Project-specific Documentation 1</a></li><li
class="frontpagelist36x"><a class="" title="" href="ProjectDocu/ProjectDocu02.pdf"
target="_self">Project-specific Documentation 2</a></li><li class="frontpagelist36x"><a class=""
title="" href="ProjectDocu/HTML/index.htm" target="_blank">Project-specific Documentation
3</a></li></ul><ul class="frontpagelistlast36x"><li class="frontpagelistlast36x"><a class=""
title="" href="http://www.valuation.com/en" target="_self">Helpful webpage</a></li></ul></td>
<td width="168"><p class="frontpagebody36x">&nbsp;</p>
</td>
</tr>
```

The same code with underlined part copied and edited:

```
<td colspan="2" width="294"><p class="frontpageheadblue36x">The following links are available:</p>
</td>
<td width="168"><p class="frontpagebody36x">&nbsp;</p>
</td>
</tr>
<tr align="left" valign="top">
<td width="12"><p class="frontpagebody36x">&nbsp;</p>
</td>
<td width="282"><ul class="frontpagelist36x"><li class="frontpagelist36x"><a class="" title=""
href="ProjectDocu/ProjectDocu01.pdf" target="_self">Project-specific Documentation 1</a></li><li
class="frontpagelist36x"><a class="" title="" href="ProjectDocu/ProjectDocu02.pdf"
target="_self">sales guidelines</a></li><li class="frontpagelist36x"><a class="" title=""
href="ProjectDocu/HTML/index.htm" target="_blank">Project-specific Documentation 3</a></li></ul><ul
class="frontpagelistlast36x"><li class="frontpagelistlast36x"><a class="" title=""
href="http://www.valuation.com/en" target="_self">Helpful webpage</a></li></ul></td>
<td width="168"><p class="frontpagebody36x">&nbsp;</p>
</td>
</tr>
```

### Linking a File of Different Type (other than pdf and html)

When linking project-specific documents, you are not limited to pdf and html files. Let's suppose you want to link an MS Excel sheet to have it opened inside the Valuation help system. Do the following:

1. Put the xls file in the 'ProjectDocu' directory.
2. Locate the '16137.htm.htm' file and open it for editing.
3. Locate the part of code used in previous examples
4. Choose one of the provided default links or create a new one, as described above
5. Edit the href= part to reflect the name and extension of your linked xls file
6. Edit the 'Project-specific Documentation x' part to give your new link a descriptive name

## Linking a Webpage

By default, the 'Helpful Webpage' link opens USU Software-Valuation home page. This can be changed by editing the following part of '16137.htm' file (underlined):

```
<td colspan="2" width="294"><p class="frontpageheadblue36x">The following links are available:</p>
</td>
<td width="168"><p class="frontpagebody36x">&nbsp;</p>
</td>
</tr>
<tr align="left" valign="top">
<td width="12"><p class="frontpagebody36x">&nbsp;</p>
</td>
<td width="282"><ul class="frontpagelist36x"><li class="frontpagelist36x"><a class="" title=""
href="ProjectDocu/ProjectDocu01.pdf" target="_self">Project-specific Documentation 1</a></li><li
class="frontpagelist36x"><a class="" title="" href="ProjectDocu/ProjectDocu02.pdf"
target="_self">Project-specific Documentation 2</a></li><li class="frontpagelist36x"><a class=""
title="" href="ProjectDocu/HTML/index.htm" target="_blank">Project-specific Documentation
3</a></li></ul><ul class="frontpagelistlast36x"><li class="frontpagelistlast36x"><a class=""
title="" href="http://www.valuation.com/en" target="_self">Helpful webpage</a></li></ul></td>
<td width="168"><p class="frontpagebody36x">&nbsp;</p>
</td>
</tr>
```

1. Edit the href= part (underlined red) to point to the Internet page of your choice
2. Edit the 'Helpful Webpage' part to give your link a descriptive name



## 4 CONTEXT SENSITIVE CUSTOM CONTENT

The help system contains 12 dummy html files which can be filled with project-specific content and made context sensitive using standard Valuation help assignment functionality.

**The topics can be used in several ways:**

- **Quick and dirty**

Create your own independent html files with custom content, name the files to match the file names of topics 'Context Sensitive Custom 01 - 12' (e.g. 'Context Sensitive Custom 01' is '21036.htm'), replace the original html files and edit the standard toc.htm file to reflect the headings of your custom topics. Then use standard Valuation help assignment process to make the topics context sensitive.

**Result:** When F1 is pressed, the context sensitive topic is displayed as a separate html page, i.e. outside the context of standard Valuation help. This separate topic can also be called from the Valuation help TOC.

- **More involved**

Create your own html content and merge it with the original Author-it created dummy files. Then edit the standard toc.htm file to reflect the new headings and use standard Valuation help assignment process to make the topics context sensitive.

**Result:** When F1 is pressed, the context sensitive topic is displayed within standard Valuation help.

Topics available for project-specific context sensitivity are html files '21036.htm' through '21047.htm'.

# INDEX

## **C**

CONTEXT SENSITIVE CUSTOM CONTENT • 9

## **H**

HOW TO LINK PROJECT-SPECIFIC  
DOCUMENTATION • 4

## **L**

LINKING WITH ADDITIONAL CUSTOMIZATION  
• 6

## **P**

Project-specific Documentation • 2

## **Q**

QUICK AND EASY LINKING • 5