Creating Content with the HP Adoption Readiness Tool™

Version 4.4

User Manual

Your HP Adoption Readiness Tool (HP ART™) is built on a tool called ANCILE uPerform™, which is developed by ANCILE Solutions. Throughout your Adoption Readiness Tool Author product, you will see the term “Powered by ANCILE Solutions” and, throughout your documentation, you will see references to both ANCILE and uPerform. You may also see screen shots that include uPerform in the graphic rather than as it displays on your screen as ART. The terms ART and uPerform are, for the case of this documentation only, interchangeable. Any time you see uPerform or uPerform Author, you can substitute ART or ART Author. For example, if you see a direction to “Open the uPerform Content” you should instead “Open the ART Content” .

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Chapter 1: Introduction

ANCILE uPerform Express provides authors with a robust content development environment to expedite your development and delivery of training materials.

What is the HP Adoption Readiness Tool™?

The HP Adpotion Readiness Tool (HP ART™) is a new solution from HPSE that accelerates user adoption of HP software by enabling continuous learning, empowering implementations, and reducing risk throughout the application lifecycle.

HP ART provides simulation-based learning content that customers can use straight out of the box, either through a hosted subscription model or through a license purchase that they then deploy onsite via their learning management system (LMS) or learning portal.

Content is designed to be used throughout the application lifecycle, beginning with configuration decisions and extending into performance support for users once live.

Users can learn by taking the full course, or by accessing short simulations that teach a specific task.

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About This Manual

This manual provides details regarding the authoring of content and the creation of a glossary and a performance support website.

Who Should Read This Manual

This manual includes overview information and step-by-step procedures for content authors who develop documentation for end users. Authors have the following rights and responsibilities:

- Create and edit documents, simulations, eLearning courses, course packages, and student guides.

Organization Of This Manual

This manual contains information intended for content authors. This manual also contains a glossary with terms and definitions relevant to the concepts discussed within this manual.

Conventions Used In This Manual

The following conventions are used in this manual:

Style	Description
Bold	Indicates a field name, button name, or an option. Example: Click **General** on the left pane.
Italic	Indicates a screen or window title. Example: The *Step Properties* window is displayed.
SMALL CAPS AND GREATER THAN SYMBOL (>)	Indicates a menu path. Example: Select **START > PROGRAMS > HP ADOPTION READINESS TOOL**.
	Indicates an important concept or a caution.
	Indicates a helpful hint or amplifying information.

Available Technical Support

In addition to the online help delivered with uPerform Express, several additional support mechanisms are available:

- The HP Product Support Center is available at http://www.hp.com/go/hpsoftwaresupport.
- Optional instructor-led training. For additional information about our training services, contact your sales representative.

Chapter 2: Getting Started

The editor has several hardware and software requirements for installation and operation.

After installation, you can access features via a *Quick Start* panel and obtain online help via the editor.

Confirming the Required Hardware and Software

To install and operate ANCILE uPerform Express, your environment must meet minimum hardware and software specifications. A complete set of hardware and software requirements for uPerform Express can be found in the *ANCILE uPerform Express Technical Specifications,* available on the HP Product Support Center.

Installation

Overview of the Client Installation

The uPerform Express client installation is delivered as a single file wrapper or, in the Microsoft terminology, bootstrapper executable. The installation contains the uPerform Express client Microsoft Installer package (the .msi file) and the redistributable packages for various prerequisites. When the install is executed, a check is performed to ensure that the following prerequisites are installed on the computer:

- Microsoft .NET Framework v3.5 SP1. An Internet connection is required for the .NET installation. If an Internet connection is not available, install .NET prior to installing uPerform. A full install of .NET is available from Microsoft at: http://download.microsoft.com/download/2/0/e/20e90413-712f-438c-988e-fdaa79a8ac3d/dotnetfx35.exe (http://download.microsoft.com/download/2/0/e/20e90413-712f-438c-988e-fdaa79a8ac3d/dotnetfx35.exe)
- Microsoft Visual J# Redistributable v2.0.50727
- Microsoft Visual C++ 2005 Redistributable v8.0.50727
- Windows Installer 3.0.0

If a prerequisite is not present on the target computer, the installation extracts the pertinent Microsoft redistributable package to a local source folder and executes the package automatically.

After all prerequisite conditions are met, the uPerform Express client Microsoft Installer package is extracted to a temporary folder and executed.

Installation Parameters and Properties

The parameters described in the following table can be used when running the delivered installation executable. Some of these properties exist in the .msi file and their defined value is used when the .msi file is run. Others are parameters that are passed to the Windows Installer service to control whether a log file is created or how much of the user interface is displayed.

Property Name	Possible Value(s)	Usage Example/Description
COMPANY NAME	The value for this field is provided by ANCILE and is the company name under which ANCILE uPerform was licensed.	COMPANYNAME="ANCILE Solutions" When passed on the command line to the setup package, the value should be wrapped in quotation marks if it contains spaces. This property populates the "Company Name" field on the Customer Information dialog.
PRODUCT_ID	The value for this field is provided by ANCILE.	PRODUCT_ID=XXXXXX-XXXXXX-XXXXXX-XXXXXX-XXXXXX-XXXXXX This property populates the "Product Key" field on the Customer Information dialog.
UPERFORM_ DESKTOP_ SHORTCUT	0 or 1	A value of 1 will set the option to create a desktop shortcut for the ANCILE uPerform application. The default value of this property is 0.
INSTALLDIR		INSTALLDIR=C:\Program Files\HP Adoption Readiness Tool\ Defines the folder path where HP ART will be installed. A trailing backslash should be included. When passed on the command line to the setup package, the value should be wrapped in quotation marks if the path contains spaces.

Property Name	Possible Value(s)	Usage Example/Description
INSTALL_ LANGUAGE	ISO Codes are case-sensitive. Bulgarian (bg-BG) Catalan (ca-ES) Chinese (zh-CN) Chinese - Taiwan (zh-TW) Croatian (hr-HR) Czech (cs-CZ) Danish (da-DK) Dutch - Netherlands (nl-NL) Dutch - Belgium (nl-BE) English - US (en-US) English - UK (en-GB) Finnish (fi-FI) French - Canada (fr-CA) French - France (fr-FR) German (de-DE) Greek (el-GR) Hungarian (hu-HU) Indonesian (id-ID) Italian (it-IT) Japanese (ja-JP) Korean (ko-KR) Norwegian (nb-NO) Polish (pl-PL) Portuguese - Portugal (pt-PT) Portuguese - Brazil (pt-BR) Romanian (ro-RO) Russian (ru-RU) Spanish - Spain (es-ES) Swedish (sv-SE) Thai (th-TH) Turkish (tr-TR)	INSTALL_LANGUAGE=en-US This property sets the default user interface language for the ANCILE uPerform client application. Note: This selection does not change the user interface for the setup program.

Parameter Name	Usage Example/Description
/s : silent mode	Setup.exe/s Running the insteall executable in silent mode suopresses the initialization dialog and launches any needed pre-requisites in silent mode. To run the full install silently, use Setup.exe/s/v"/qn"

Parameter Name	Usage Example/Description
/v : pass arguments to Msiexec	setup.exe /v"/l*v c:\test.log MYPROPERTY1=\"value1\" /qb" Use the /v option to pass command-line options and values of public properties through to Msiexec.exe. Note that as shown above, when you want to specify that a double quote character is not a delimiter for the command line but a delimiter for the property, use
/a : administrative installation	The /a option causes the installation executable to perform an administrative installation. An administrative installation copies (and uncompresses) your data files to a directory specified by the user, but it does not create shortcuts, register COM servers, or create an uninstallation log. If you want to extract the pre-requisites from setup.exe, add a path after the /a parameter to extract the prerequisites to that location. Do not use a trailing backslash. A sample command is: setup.exe /a"C:\temp"
/b: cache installation locally	With the /b option, the user can specify the directory in which to cache the installation files. If you want to extract the MSI from setup.exe, specify the path after the /b parameter to extract the prerequisites to that location. Do not use a trailing backslash. A sample command is: setup.exe /b"C:\temp"
/w : wait	setup.exe /w The /w option forces the installation executable to wait until the installation is complete before exiting.
/x : uninstall mode	The /x option causes the installation executable to uninstall a previously installed product.
/L	/L*v C:\test\install.log "/L" is the standard Windows Installer parameter used to ensure a log is created. This set of parameters would create a verbose log file with all available information using the filename install.log in the C:\test folder. Possible values include: i - Status messages w - Nonfatal warnings e - All error messages a - Start up of actions r - Action-specific records u - User requests c - Initial UI parameters m - Out-of-memory or fatal exit information o - Out-of-disk-space messages p - Terminal properties v - Verbose output

Parameter Name	Usage Example/Description
	x - Extra debugging information + - Append to existing log file ! - Flush each line to the log * - Log all information, except for v and x options
/q [n|b|r|f][+|-][!]	Use any of the standard Windows Installer display option values. Windows Installer runs in full UI mode (/qf) by default. If you use any of the values other than "full UI" you must define values for the properties listed above in order for the install to succeed. Possible values include: /qn - no UI /qb - basic UI /qr - reduced UI /qf - full UI /qb+ basic UI with modal dialog at the end /qb- basic UI without a modal dialog at the end Use the ! parameter to suppress the Cancel button

For more information about Windows Installer command line parameters, refer to the Microsoft Website at http://msdn2.microsoft.com/en-us/library/Aa367988.aspx.

These parameters can be used either in a setup.ini file or passed via the command line. When used in a setup.ini file, each parameter should be on a separate line in the file.

The proper format for the file data is **VariableName=value**. Do not include a space before or after the '=' sign.

Running the Install with a setup.ini File

If you are using a setup.ini file, you must run the installation with a special command line switch - /m=setup.ini. For example:

setup.exe /m=setup.ini

The installation (the uPerform Express.exe file) has only two user interface elements: an initial splash screen and a possible error message as described previously. The .msi file has a full user interface typically seen in an installation package. The QUIET parameter defined previously controls the user interface level of the .msi file. To set the .exe file to have no user interface (that is, hide the splash screen and any error messages), the .exe file must be run with a "/s" command line switch. For example:

setup.exe /s

To set the .msi to have no user interface when run from within the .exe file, the QUIET parameter must be used. All properties must be defined because the .msi will run without a user interface.

The parameters also may be used from the command line directly. In general, spaces are used to separate the parameters on the command line. Since some values may contain spaces, those particular values should be wrapped in double-quote marks. The preceding table identifies to which parameters this applies.

If you use the /S or /M switches that pertain to the .exe file, they must precede any of the other parameters on the command line.

Running the .msi File Directly

There are other parameters that can be used when using Windows Installer. These parameters are not covered here and are not supported by the installation package (the uPerform Express .exe file). To use these parameters, or if you would prefer to run the .msi file directly, the .msi file and the prerequisite redistributables can be extracted to a local folder with the "-EXTRACT" command line. For example:

setup.exe -EXTRACT

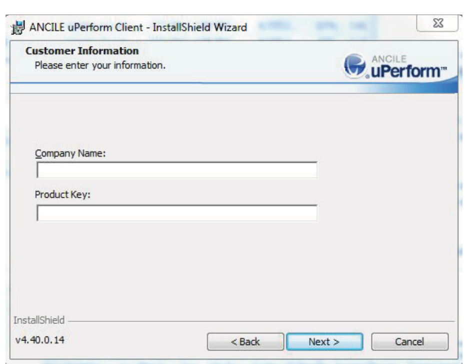
You will be prompted to select a folder to which to extract the files. If you choose to run the .msi file directly, all prerequisites should be installed prior to the ANCILE uPerform Express client application.

Installing the uPerform Express Client Software

1. Insert the ANCILE uPerform Express CD or navigate to the location of the setup.exe file.

2. If necessary, double-click on the .exe file to begin the installation.

3. Click **Next**.

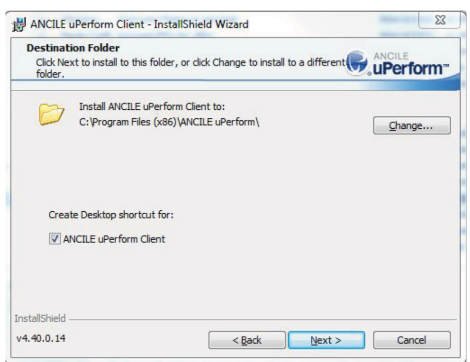


4. Complete the following information:

Field	Description
Company Name	Enter your company or organization name delivered with the software. This value should be entered exactly as provided.
Product Key	Enter the product key delivered with the software. This value should be entered exactly as provided. You can enter the product key during install or during a user's first use of the software. If multiple users will be using the computer, you may find it more convenient to enter the product key once during install.

5. Select the appropriate radio button to specify **Anyone who uses this computer** or **Only for me**.

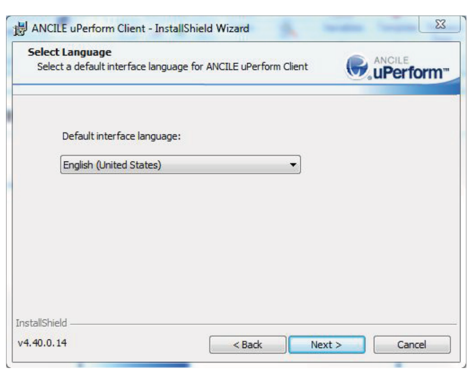
6. Click **Next**.



7. Optionally, select **Browse** to specify a destination folder other than the default.

8. Optionally, select the **ANCILE uPerform Client** checkbox to create a desktop shortcut for the application.

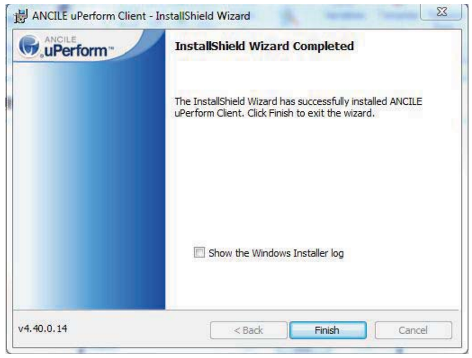
9. Click **Next**.



10. Select the desired interface language from the drop-down list.

11. Click **Next**.

12. Click **Next.**



13. Click **Finish**.

Implementing uPerform with Citrix

If you are planning to use uPerform in a Citrix environment, perform the following procedure to ensure a smooth implementation:

1. Close the uPerform client software.

2. Locate your current uPerform resources directory. (example: **Start > Programs > HP Adoption Readiness Tool > HP Adoption Readiness Tool Resources**).

3. Note the location of your templates directory. The default location is: **C:\Documents and Settings\[user name]\Application Data\ANCILE\uPerform\versionX.xx\templates**.

4. Navigate to the uPerform client program files. The default location is: **C:\Program Files\HP Adoption Readiness Tool\client**.

5. Create a backup copy of the **install.config** file.

6. Edit the **install.config** file to add the new location you would like to create. The area to be edited is displayed in bold below:

   (i.e., D:
   <?xml version="1.0"?>
   <InstallConfig xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema">
   <Language>de-DE</Language>
   <CompanyName>ANCILE Demo test for Greg Smith</CompanyName>
   <ProductId>BVS85J-A2L8F3-MWWSLW-TWBMSM-XM4WKH-CUW3LS</ProductId>

```
  <BaseAppData>D:\Resources\</BaseAppData>
</InstallConfig>
```

In Windows 7 environments, you must have Administrator rights in order to edit **install.config**.

7. Save and close the **install.config** file.

8. Start the uPerform client software.

9. The new resources directory will display similar to **C:\[username]\ANCILE\uPerform\version X.xx**.

10. On the *Shortcut* tab, update the **Target** field to reflect the location you noted in Step 6.

11. Copy the templates from the directory you noted in Step 3 into the new directory created in Step 9.

Starting the uPerform Express Editor

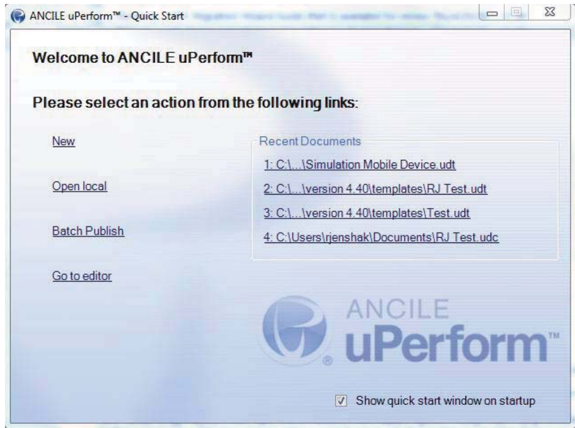
The uPerform Express editor operates in a standalone mode; the server delivered with the full ANCILE uPerform Express product suite is not available with the product. Consequently, options related to server functionality are disabled in the uPerform Express editor.

Starting uPerform Express

Select **START > PROGRAMS > HP ADOPTION READINESS TOOL > HP ADOPTION READINESS TOOL.**

Using the Quick Start Panel

Upon startup of the uPerform editor, the *Quick Start* panel is displayed.



The *Quick Start* panel provides easy access to the basic authoring functions, including recording and editing. You can enable or disable the display of the *Quick Start* panel.

Using the Quick Start Options

The following options are available from the *Quick Start* panel:

Option	Description
New	Starts the editor to create new uPerform Express content. For more information, refer to Creating Content.
Open local	Opens existing uPerform Express content from the local computer. For more information, refer to Opening Content.
Batch Publish	Publishes one or more files locally on your computer. For more information, refer to Previewing and Publishing Content.
Go to editor	Launches the editing application to provide access to all author functionality.

Disabling the Quick Start Panel

From the *Quick Start* panel, deselect the **SHOW QUICK START WINDOW ON STARTUP** checkbox to disable display of the panel. You can also disable the display of the *Quick Start* panel from the **TOOLS > OPTIONS...** menu within the editor.

Enabling the Quick Start Panel

1. Open the editor.
2. Select **TOOLS > OPTIONS...** .
3. Click **General** on the left pane.
4. Select the **Show quick start window on startup** checkbox.
5. Click **OK**.

Managing Your Editor Configuration Settings

The following basic configuration settings can be specified in the editor from the **TOOLS > OPTIONS...** menu. Prior to using uPerform Express to create content, you should review these settings and determine the best options for your needs:

- Appearance: Enable or disable the *Quick Start* panel and specify the language of the uPerform Express interface. The following languages are supported in uPerform Express: Bulgarian, Catalan, Chinese (Traditional), Chinese (Simplified), Czech, Danish, Dutch (Belgium), Dutch (Netherlands), English (US), English (UK), Finnish, French (Canada), French (France), German, Greek, Hungarian, Indonesian, Italian, Japanese, Korean, Norwegian, Polish, Portuguese (Brazil), Portuguese (Portugal), Romanian, Russian, Spanish, Swedish, Thai, and Turkish.
- Audio: Specify recording device and quality for audio files created with uPerform. For details, refer to Specifying Course and Simulation Audio Options (on page 43).
- Recorder: Elect to capture actions in a selected target application only (ignoring applications other than the selected application), or elect to capture actions across multiple applications. When capturing a target application, child processes of the selected target application are recorded.
- Logging: Specify the level of logging you want uPerform Express to record. The higher the log level, the more information the application will log. For details on setting log levels, refer to Specifying Logs (on page 27).
- Document editor: Set the maximum screen size. For details on configuring the document editor, refer to Specifying Document Options (on page 43).
- Simulation editor: Set options to control the display of simulation editor features. For details on configuring the simulation editor, refer to Editing and Formatting: Procedural Content (on page 103).
- Course editor: Set options to control the display of course editor features. For details on using the course editor, refer to Editing and Formatting: Courses (on page 163).

Selecting the Interface Language

After specifying the interface language, you must restart the editor for the changes to take effect.

1. Open the editor.
2. Select **TOOLS > OPTIONS...** .

3. Click **General** on the left pane.

4. Select your desired language from the **Interface language** drop-down list.

5. Click **OK**.

Specifying Recording and HTML Capture Modes

1. Open the editor.

2. Select **TOOLS > OPTIONS...** .

3. Click **Recorder** on the left pane.

4. In the Recording mode drop-down list, choose from the following options:

If you want to	Then
Capture only the target application during recording	Select **Application** from the **Recording mode** drop-down list
Capture only the window for the active application(s)	Select **Active Window** from the **Recording mode** drop-down lis

5. In the Recorder Html Capture Mode drop-down list, choose from the following options:

If you want to	Then
Capture only the active frame when recording in an Internet browser	Select **Active Frame**.
Capture only the top-most fram when recording in an Internet browser	Select **Top-most Frame**.
Capture the entire browser window when recording in an Internet browser	Select **Entire Browser Window**.

6. Click **OK**.

Specifying Editor Options

For more information on specifying document and simulation editor options, refer to Specify Document and Simulation Editor Options (on page 43).

For more information on specifying course editor options, refer to Specify Course Editor Options (on page 48).

Specifying Logs

1. Open the editor.
2. Select **TOOLS > OPTIONS...** .
3. Click **General** on the left pane.
4. Select one of the following options from the **Log Level** and/or **Publishing Log Level** drop-down lists:

Field	Description
Off	Turns logging off.
Low	Logs critical and fatal alerts.
Medium	Logs critical and warning alerts.
High	Logs critical, warning, and information alerts.
Debug	Logs critical, warning, information, and debug errors.

5. Click **OK**.

These logs are stored in C:\Documents and Settings\[username]\Application Data\ANCILE\uPerform Express\version X.xx\configuration\logs for Windows XP and C:\Users\[username]\AppData\Roaming\ANCILE\uPerform Expressversion X.xx\configuration for Windows Vista and Windows 7.

Getting Help on the uPerform Express Editor

The HP ART **Help** menu provides access to online help and the HP Product Support Center. From the **Help** menu, you can also quickly identify your HP ART version.

Accessing Help Files for the Editor

Select **HELP > CONTENTS...** from the uPerform Express editor.

Accessing the Product Support Center

Select **HELP > ONLINE SUPPORT** from the uPerform Express editor to access the HP Product Support Center.

Viewing the uPerform Express Editor Version

1. Select **HELP > ABOUT...** from the uPerform Express editor.
2. Optionally, select one or more of the following checkboxes to capture detailed trouble-shooting information in a .zip file to send to HP Product Support for troubleshooting:
   - ❒ Application configuration files
   - ❒ Computer configuration
   - ❒ Application logs
   - ❒ Version information
   - ❒ Include active file and/or Template
3. Click **Create File** to create the zip file. The filename is prefaced with 'SysInfo_', and the file is stored on the computer desktop.
4. Click **OK**.

Exiting

If you attempt to exit the uPerform Express editor without saving your content, you will receive a prompt confirming you want to exit prior to saving.

Exiting the uPerform Editor

Select **FILE > EXIT** from the uPerform editor.

Uninstalling

The uPerform Express editor application can be uninstalled from your computer using standard Microsoft Windows Installer uninstall functionality.

Uninstalling the uPerform Express Client Software

1. Select **START > SETTINGS > CONTROL PANEL > ADD OR REMOVE PROGRAMS**.
2. Select **HP Adoption Readiness Tool** from the **Currently installed programs** list.
3. Click **Remove**.
4. Click **Yes** at the prompt to confirm.
5. Close the *Add or Remove Programs* window.

uPerform Express information for individual users is stored in the *Documents and Settings* or *Users* folders on the computer. The uninstall does not remove this content.

Upgrading from a Previous Version

The client upgrade is designed to allow you to install a new version on top of your current version. Refer to the ANCILE uPerform Express *Release Notes* and *Technical Specifications* prior to upgrading.

Upgrading Content and Templates

Your uPerform Express content and custom templates are automatically upgraded during the following activities:

- Content is upgraded when it is opened for editing.
- Content and templates are temporarily upgraded during publishing. The temporary upgrades are deleted upon completion of publishing.
- Existing uPerform Express templates are upgraded and placed in the current version's *Documents and Settings* or *Users* folder the first time the uPerform Express client is launched.

To take advantage of template features in the latest uPerform Express version, you must create new content with the most current standard author template; new template features are not available in upgraded documents. For more information, refer to Creating a New Author Template.

Chapter 3: Exploring the Editor Workspace

The editor workspace uses standard features such as a menu bar and toolbars. The interface provides two main working areas: the content area and the task pane. These areas provide access to your content and the ability to edit your content.

Introduction to the Editor Workspace

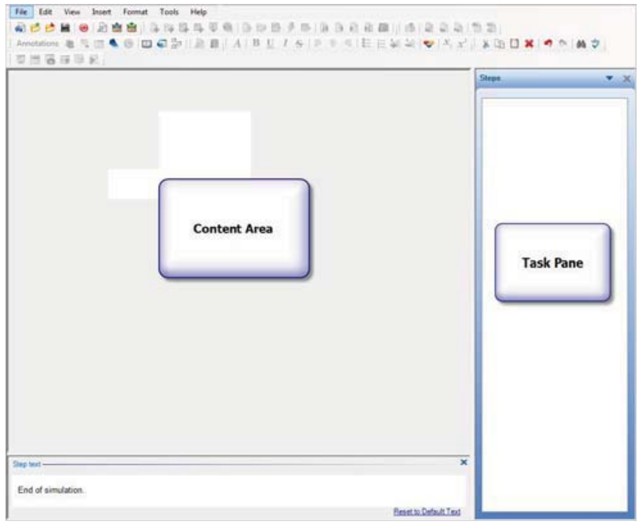
The editor workspace provides access to all authoring functions and the tools to help you maintain consistency and manage your content. Specifically, the editor workspace includes the following functionality:

- Create and edit documents, simulations, and courses
- Insert steps, actions, notes, links, and tooltips into documents and simulations
- Insert hotspots and weblinks into courses
- Specify formatting options, such as font and paragraph style
- Use spellcheck, glossary, and annotation functionality
- Create and update your website

Overview of the Content Area and Task Pane

In addition to standard application features such as menus and toolbars, the editor includes the following main areas:

- The procedural content area contains the document, simulation, and screenflow views. The course content area contains the course, audio, and preview views. The content area also displays the functions to manage glossary terms and definitions and create a website.
- The task pane view is customizable and can include such information as an outline view of the content, and a list of annotation sets for the current content.



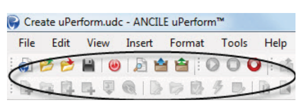
Using the Menu

The menu provides access to all author functionality.

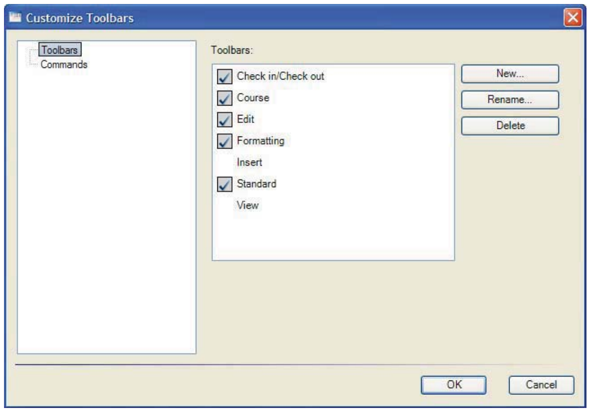
The options available on a menu are dependent upon the content you are displaying. Based on what type of content you are viewing, the available options within a menu will differ.

Using the Toolbars

The toolbar options displayed below the menu bar are customizable and are dependent upon your toolbar display selections and the content you are displaying. Based on what type of content you are viewing, the available toolbar options will differ.



1. To toggle the display of a toolbar, select **VIEW > TOOLBARS...** .

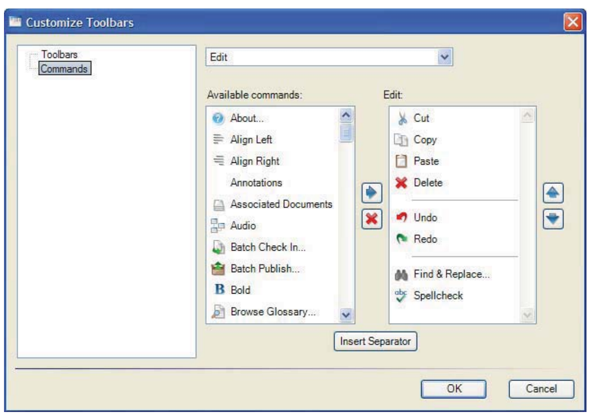


2. Double-click on a toolbar in the list to toggle the toolbar display.

Customizing a Toolbar

1. Select **VIEW > TOOLBARS...** .

2. Click **Commands** on the left pane.



3. Select the toolbar to be customized from the drop-down list.

4. Use the right arrow to add a command to the toolbar.

5. Use the up and down arrows to sequence commands on the toolbar.

6. Use the **X** to remove a command from the toolbar.

7. Click **OK**.

Creating a Toolbar

1. Select **VIEW > TOOLBARS...** .
2. Select **Toolbars** on the left pane.
3. Click **New...** .
4. Enter a name, and click **OK**.
5. Select the new toolbar in the **Toolbars** list.
6. Click **Commands** on the left pane.
7. Click the right arrow to move the highlighted command onto the toolbar.
8. Use the up and down arrows to sequence commands on the toolbar. Optionally, click **Insert Separator** to insert a line below the currently-highlighted command.
9. Click **OK**.

Renaming a Toolbar

1. Select **VIEW > TOOLBARS...** .
2. Select **Toolbars** on the left pane.
3. Select the toolbar name.
4. Click **Rename...** .
5. Enter a new name for the toolbar.
6. Click **OK**.

Deleting a Toolbar

1. Select **VIEW > TOOLBARS...** .
2. Select **Toolbars** on the left pane.
3. Select the toolbar name.
4. Click **Delete**.

5. Click **OK** at the confirmation prompt.

Using Right-Click Menus

Right-click menus are available throughout the editor workspace to provide shortcut methods of performing a variety of tasks. The menu options differ depending upon the type of field or object that is selected when the right-click action is performed.

Some of the right-click menu options available include:

- Cut
- Copy
- Paste
- Delete
- Undo/Redo
- Edit steps, actions, notes, and callouts
- Edit tooltips, screens, and images
- Various character and paragraph format options
- Various insertion and editing options

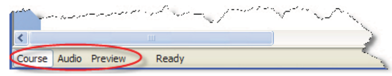
Using the Content Area

The content area displays a WYSIWYG (what you see is what you get) view of the underlying extensible markup language (XML) structure of the document and simulation.

Changing Content Views

Tabs in the lower left allow you to select the desired view of procedural content: document, simulation, or screenflow. Additionally, you can right click on an item in the task pane and select "Edit in document view" or "Edit in simulation view". If you are in course mode, you can select the desired view of course content: course, audio, or preview. If you are in website mode, you can select the page or content view.

To display a particular view in the content area, select the desired tab or select **VIEW > [CONTENT VIEW]** .



You may encounter a slight time delay when switching between views. This is due to the processing necessary to reformat the data for display.

It is good practice to save your file before switching the views.

Viewing the Status Bar

The status bar at the bottom of the editor window provides information on processing status and the glossary terms or page links remaining within the system limit.

Using the Task Pane

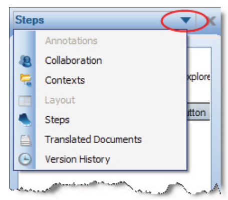
The following task panes are available in the editor. Selection availability is dependent on the file type that is open, and the view displayed, and the connection to the server.

- Annotations: Displays the annotation sets available for the displayed document.
- Translated Documents: Displays links to similar content available on the uPerform Express server (not applicable for   product).
- Collaboration: Displays discussions available on the uPerform Express server (not applicable for   product).
- Contexts: Displays document context information stored in the uPerform Express server (not applicable for   product).
- Course: Displays the lessons and pages in the course.
- Layout: Displays an outline view of the sections and the steps in the document.
- Steps: Displays the steps in the simulation.
- Version History: Displays version information stored in the uPerform Express server (not applicable for   product).

- Pages: Displays page hierarchy information for the website.

- Glossary: Displays the list of terms.

When you click on an element in the task pane, the content area refreshes to display the corresponding information in the content area. To change the displayed task pane, select the desired pane from the **VIEW** menu, or click the down arrow in the upper right of the task pane.



Chapter 4: Creating and Opening Content

In addition to recording a target application to produce a document and simulation, the editor can be used to create and open ANCILE uPerform Express content independent of the recorder.

Introduction to Creating and Opening Content

In addition to recording a task to create procedural content, you can use the editor to:

- Create a file into which recorded steps and amplifying information can be added. When you create content, the document, simulation, and screenflow views are generated.
- Rapidly create eLearning courses. When you create course content, the course, audio, and preview views are generated.
- Combine concepts, procedures, and exercises related to a series of tasks or a process into a student guide.
- Combine multiple uPerform eLearning courses and documents into a single SCORM package for use with an LMS.

Lastly, the editor is used to create a project-wide glossary of terms and definitions and a website to provide end users with access to content.

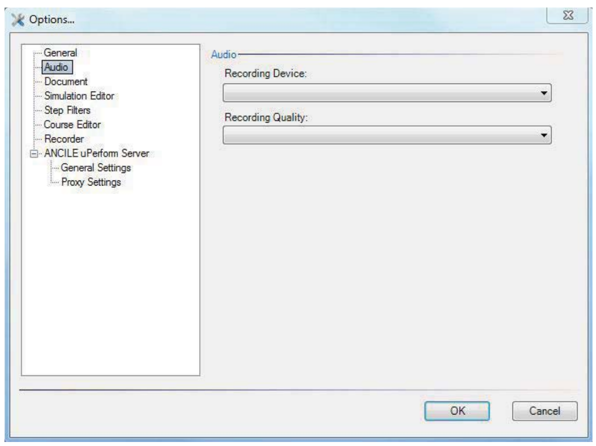
Specify Document and Simulation Editor Options

You have several options to control the display of features within the document and simulation editor.

Specifying Course and Simulation Audio Options

1. Select **TOOLS> OPTIONS...** on the main window.

2. Click **Audio** on the left pane.



3. Complete the following fields:

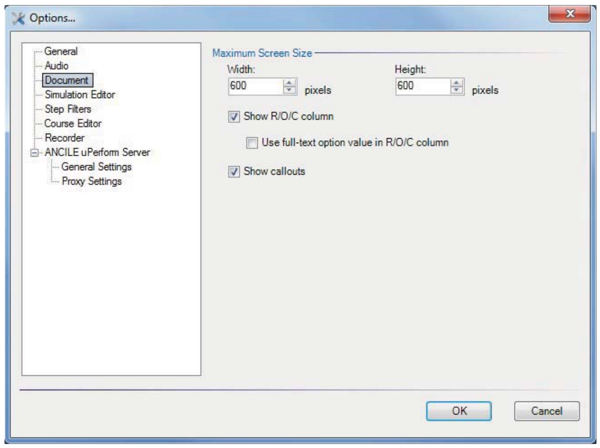
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Recording Device</td><td>Specify the input recording device. This selection is machine specific.</td></tr>
<tr><td>Recording Quality</td><td>Specify the audio quality setting.
<table><tr><th>Setting</th><th>MP3</th><th>WAV</th></tr><tr><td>High</td><td>320kbps</td><td>16-bit</td></tr><tr><td>Medium</td><td>128kbps</td><td>8-bit</td></tr><tr><td>Low</td><td>64kbps</td><td>8-bit</td></tr></table></td></tr>
</table>

4. Click **OK** to save your changes and close the window.

Specifying Document Options

1. Select **TOOLS > OPTIONS...** on the main window.

2. Click **Document** on the left pane.



3. Complete the following fields:

Field	Description
Width	Specify the maximum pixel width for the displayed document.
Height	Specify the maximum pixel height for the displayed document.

4. Select **Show R/O/C column** to display the Required, Optional, Conditional columns in the document editor.

5. Optionally, select **Use full-text option value in R/O/C column**.

6. Select the **Show callouts** checkbox to enable the display of callouts in the document editor.

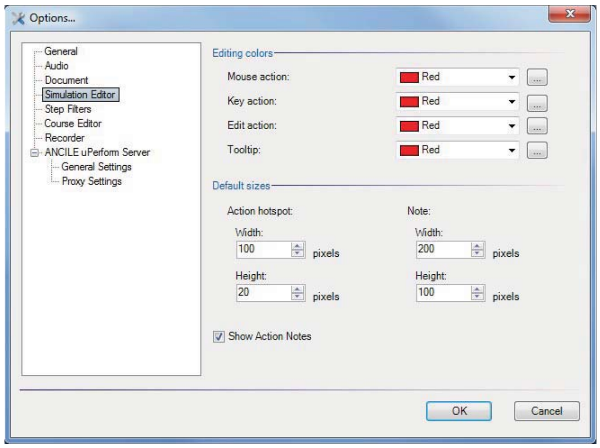
   Enabling this option does not affect published output.

7. Click **OK** to save your changes and close the window.

Specifying Simulation Editor Options

1. Select **TOOLS > OPTIONS...** on the main window.

2. Click **Simulation Editor** on the left pane.



3. Complete the following fields:

Field	Description
Mouse action	Specify the color of the mouse action displayed in the editor.
Key action	Specify the color of the key action displayed in the editor.
Edit action	Specify the color of the text action displayed in the editor.
Tooltip	Specify the color of the tooltip displayed in the editor.
Action hotspot: Width	Specify the initial width of the hotspot.
Action hotspot: Height	Specify the initial height of the hotspot.
Note: Width	Specify the initial width of the note.
Note: Height	Specify the initial hieght of the note.

4. Optionally, choose custom colors by clicking to the right of the color drop-down list.

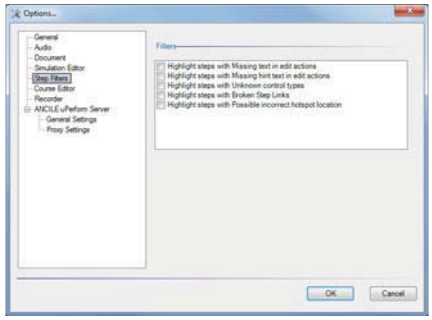
5. Select **Show action notes** to display action notes in the simulation editor.

6. Click **OK** to save your changes and close the window.

Specifying Step Filter Options

1. Select **TOOLS > OPTIONS...** on the main window.

2. Select the **Step Filters** menu on the left pane.



3. Choose from the following options:

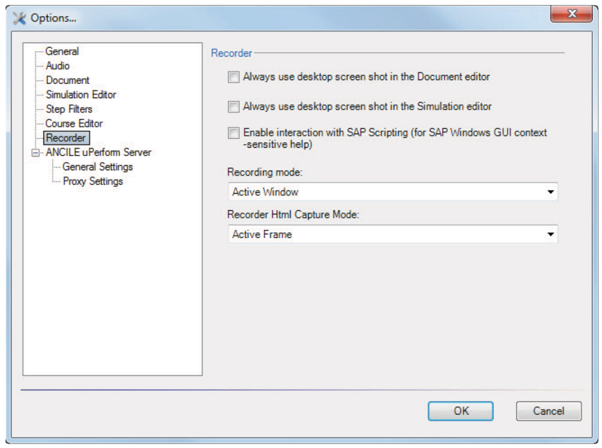
Field	Description
Highlight steps with missing text in edit actions	This option will highlight edit steps in the task pane that are missing text in an edit action.
Highlight steps with missing hint text in edit actions	This option will highlight edit steps in the task pane that are missing hint text.
Highlight steps with unknown control types	This option will highlight steps in the task pane that contain unknown control types. For more information on control types, refer to Editing an Action: Advanced (on page 131).
Highlight steps with broken step links	This option will highlight steps in the task pane that contain broken step links.
Highlight steps with possible incorrect hotspot location	This option will highlight steps in the task pane that might contain incorrect hotspot locations.

Highlighting displays in the task pane as a warning icon. When you hover the mouse over the step, a tooltip will display containing more details in regard to the missing information.

Specifying Screenshot and Scripting Options for the Recorder

1. Select **TOOLS > OPTIONS...** on the main window.

2. Click **Recorder** on the left pane.



3. Select **Always use desktop screen shot in the Document editor** to display the entire desktop screenshot in your document.

4. Select **Always use desktop screen shot in the Simulation editor** to display the entire desktop screenshot in your simulation.

5. Select **Enable interaction with SAP Scripting (for SAP Windows GUI context-sensitive help)** to capture screen information for context-sensitive help.

6. Click **OK**.

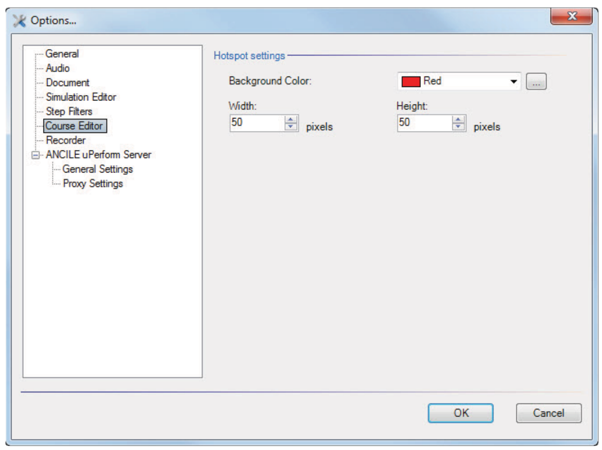
Specify Course Editor Options

You have several options to control the display of hotspots within the course editor. For more information, refer to Inserting a Hotspot on an Image (on page 187).

Specifying Course Editor Options

1. Select **TOOLS > OPTIONS...** on the main window.

2. Click **Course Editor** on the left pane.



3. Complete the following fields:

Field	Description
Background color	Specify the color of the hotspot background.
Width	Specify the initial width of the hotspot.
Height	Specify the initial height of the hotspot.

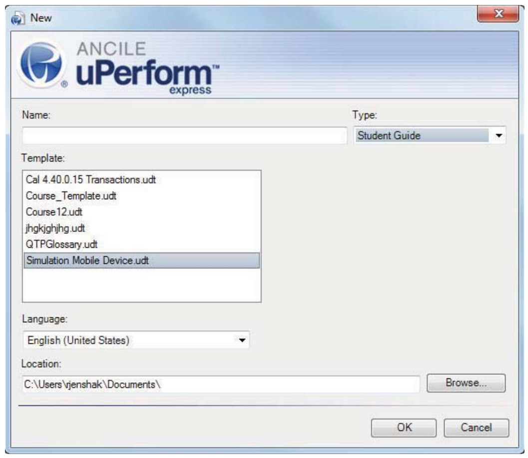
4. Optionally, choose custom colors by clicking to the right of the color drop-down list.

5. Click **OK** to save your changes and close the window.

Creating uPerform Content

Creating Content

1. From the editor, select **FILE > NEW**.



2. Enter a name in the **Name** field.

   While there is no limit to the amount of characters in the name, the uPerform Express server will display only the first 60 characters.

3. In the **Type** drop-down list, select one of the following options:

If You Want To	Then
Create and record a new document	Select **Recording**.
Create a blank document	Select **Document**.
Create a course	Select **Course**.
Create a student guide	Select **Student Guide**.
Create a course package	Select **Course Package**.
Create a template	For more information, refer to Using Author Templates (on page 267).
Create a glossary	Refer to Creating a Glossary (on page 227).
Create a website	Refer to Creating a Website (on page 339).

4. Select a template from the **Template** listbox.

5. Select a language from the **Language** drop-down list.

   This option is not available for course packages.

6. Click **Browse ...** to select a location in which to store your uPerform Express content.

   The default location for Windows XP is C:\Documents and Settings\[username]\My Documents. The default location for Windows Vista and Windows 7 is C:\Users\[username]\Documents.

7. Click **OK**.

   Selecting **Recording** displays the *Recorder* window. Selecting **Document** creates a blank document. Selecting **Course** displays the root course page in the editor window.

8. If you selected **Course**, choose one of the following stencils:

Field	Description
Standard - Flash	This stencil creates a standard content page containing a single Flash file.
Standard - Full	This stencil creates a standard content page with text.
Standard - Half - Bottom	This stencil creates a standard content page with text on the bottom of the page. An optional image can be placed on top.
Standard - Half - Left	This stencil creates a standard content page with text on the left of the page. An optional image can be placed to the right.
Standard - Half - Right	This stencil creates a standard content page with text on the right of the page. An optional image can be placed to the left.
Standard - Half - Two Image - Bottom	This stencil creates a standard content page with text on the bottom of the page. An optional two images can be placed on top.
Standard - Half - Two Image - Left	This stencil creates a standard content page with text on the left of the page. An optional two images can be placed to the right.
Standard - Image	This stencil creates a standard content page containing an image.
Standard - Image - Diagonal - Left	This stencil creates a standard content page with text on the top left and bottom right of the page. An optional two images can be placed diagonally within the stencil.
Standard - Image - Diagonal - Right	This stencil creates a standard content page with text on the top right and bottom left of the page. An optional two images can be placed diagonally within the stencil.
Simulation	This stencil creates a standard content page that allows you to insert a uPerform Express simulation file.

9. Click **OK**.

For more information on editing and formatting procedural content, refer to Editing and Formatting: Procedural Content (on page 103).

For more information on editing and formatting course content, refer to Editing and Formatting: Courses (on page 163).

For more information on editing and formatting student guides, refer to Editing and Formatting: Student Guides (see "Editing and Formatting: Student Guides and Course Packages" on page 209).

Open uPerform Express Content

Only one content item can be open in the editor at a time (for example, one course).

Opening Express Content

1. From the editor, select **FILE > OPEN > OPEN LOCAL...** .

2. In the *Open* window, browse to the location of your uPerform Express document, simulation, course, glossary, or website, and click **Open** to display the content in the editor.

   uPerform Express document and simulation files have a .udc extension. uPerform Express courses have a .ulc extension. uPerform Express student guide files have a .usg extensionuPerform Express glossary files have a .upg extension. uPerform Express website files have a .uws extension. You can also use Windows Explorer to browse to the file, and double-click to open the file in the editor.

Chapter 5: Recording Procedural Content

ANCILE uPerform Express records your actions in Microsoft Windows, web-based, and enterprise applications, and outputs a professionally formatted document and simulation. You can capture screens, buttons, edit fields, and more in the target application.

The recording process captures information to simultaneously produce both a simulation view and a document view of procedural content.

Introduction to Recording Procedural Content

ANCILE uPerform Express reduces procedural content development time and cost by automatically capturing each screen, step, field entry, and button in the target application. ANCILE uPerform Express watches your actions in the application, captures each step in the task, and converts the result to professionally formatted documents and simulations. You simply start the recorder, perform the actions that you would like to document, turn the recorder off, and then make edits to the resulting content.

ANCILE uPerform Express captures actions in the following target applications:

- Standard Microsoft Windows and web browser applications: Support for these applications is provided in the uPerform Express base recorder. Application adherence to World Wide Web Consortium (W3C) and Microsoft Windows standards will determine the consistency and quality of recording. Due to the technology involved in recording, the DOS command window cannot be recorded.
- HP: Support for HP applications is provided in the uPerform Express HP recorder plug-in.
- SAP: Support for SAP applications is provided in the uPerform Express SAP recorder plug-in.
- Oracle: Support for this application is provided in the uPerform Express Oracle recorder plug-in.
- PeopleSoft: Support for this application is provided in the uPerform Express PeopleSoft recorder plug-in.
- Citrix: Support for applications in the Citrix Presentation Server 4.5 environment is also available.
- Siebel: Support for this application is provided in the uPerform Express Siebel recorder plug-in.

For detailed information on enterprise applications supported by the uPerform Express recorder, refer to the *ANCILE uPerform Express Technical Specifications*.

In addition, control recognition recording is available for non-accessible applications such as Adobe forms. Control recognition recording uses image processing to capture screens and entered information. For more information, refer to Specifying Recorder Tuning Options (on page 62).

Preparing to Record

Before you begin recording the target application, prepare your computer and the data you will need to complete a task in the application. In addition, you should perform several test recordings using your target application. You may find it helpful to prepare a quick reference that outlines for authors the standards you are using for recording and provides any helpful tips to use during the recording and editing processes.

If you are planning to use the guided Re-Record functionality, refer to Managing Content Languages (on page 69) before you begin the recording process.

Preparing Your Computer

To create a consistent recording environment, the following are several suggestions for ensuring standardization among all authors:

- Ensure all authors are using the same windows and buttons scheme or theme (for example, in Windows XP, Windows XP style.
- Ensure all authors are using the same Microsoft Windows color scheme (for example, in Windows XP, Default [blue].
- Ensure all authors are using the same Microsoft Windows color palette settings (for example, Highest [32 bit]).
- Standardize the Desktop area setting for all authors to maintain consistency for screen captures. A setting of 1024 by 768 pixels is suggested.
- Ensure all authors are using the same Microsoft Windows font size (for example, "Normal").
- Ensure all authors are using the same HP GUI version and have specified consistent font and color settings in the HP GUI.
- If you are recording Adobe forms in Adobe Reader, ensure all authors turn off the Adobe Reader "protected mode" setting.

Preparing Your Data

Before recording a task, you should identify data that will allow you to navigate through the task and will also serve as example data in the procedure. This will ensure you can proceed through the task easily and without errors.

You may find it helpful to sketch a screen flow to capture usable data and provide you with a map to use while recording the task. A rough sketch can be helpful while recording and can serve as a reference later during editing to verify the recorded data.

Starting the Recorder

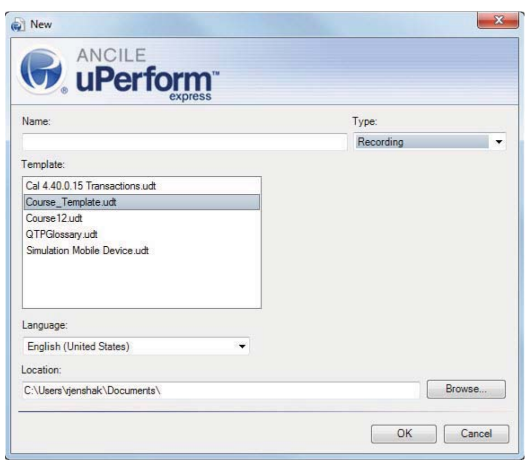
ANCILE uPerform Express does not support recording on secondary monitors. If you use dual monitors, ensure that the application you want to record is displayed on the primary monitor.

Start Recording

1. Select **START > PROGRAMS > HP ADOPTION READINESS TOOL > HP ADOPTION READINESS TOOL**.

2. Use one of the following two methods to start the recorder:

If	Then
You are starting the recorder from the *Quick Start* panel	Select the **New** option.
You are starting the recorder from the editor application	Select **FILE > NEW.**



3. Select **Recording** from the **Type** drop-down list.

4. Complete the following fields:

Field	Description
Name	Enter the filename. Do not use special characters in the filename.

Template	Select the template from the listbox.
Language	Select the language for the document from the drop-down list.
Location	Enter, or browse to, the location where the file will be saved. The default save locations are Windows XP: C:\Documents and Settings\[username]\My Documents Windows Vista and Windows 7: C:\Users\Documents

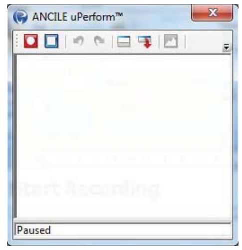
5. Click **OK**.

6. Select one of the following options:

If You Want To	Then
Record across a series of applications.	Go to Step 9.
Record a single target application If you have specified to record a single target application, you must specify the application after entering the project and template information. For information on specifying a recording mode, refer to Specifying a Recording Mode (see "Specifying Recording and HTML Capture Modes" on page 26).	Go to Step 7.
Record the active window for the application(s).	Go to Step 9.

7. From the *Select Application* window, select the target application.

8. Click **OK** to display the *Recorder* window.



9. Click  to start recording.

For detailed information on capturing various controls, refer to Capturing Controls in the Target Application (see "Capturing Controls" on page 60).

Displaying the Recorder Preview Pane

During recording, a real-time preview of the recorded actions is displayed in a preview pane in the *Recorder* window. The preview pane allows you to view data as it is captured by uPerform Express. The preview pane and window are not captured during recording.

You can hide or display the recorder preview pane.

Click  to toggle the display of the preview pane during recording.

Capturing Controls

The uPerform Express recorder captures a variety of interface objects, including screens, buttons, tabs, checkboxes, drag-and-drop actions, menu paths, edit fields, grids, trees, radio buttons, match codes, list items, and combo boxes.

⚠ uPerform Express does not support recording on secondary monitors. If you use dual monitors, ensure that the application you want to record is displayed on the primary monitor.

The following table provides an overview of recorder capabilities, limitations, and the steps you must take to capture specific objects.

Object	Description	Required Steps
Edit Fields	The recorder captures field labels and data. The field name, a generic placeholder description, and the data that was entered will be captured.	1. Click or tab in the field. 2. Type in the field. 3. Exit the field. To capture default data, click or tab into the field containing the default data and exit the field. The default data and field name will be captured. In the document view, data is inserted into a Field/Description table. If a value exists in the field on exit, the recorder will capture this value. If the field is empty, the recorder captures a step without a value in the field.
Menu Paths	uPerform Express automatically records menu paths. The recorder captures menu text when you click on the text.	Simply execute the menu path, and the recorder will capture the first initial click as a step and then display the full menu path as a single step.
Grids	When entering data into a table, the field labels are typically located at the top of the column. The recorder will capture both the row and the column label.	1. Click in the grid cell. 2. Enter data. 3. Click out of the cell.

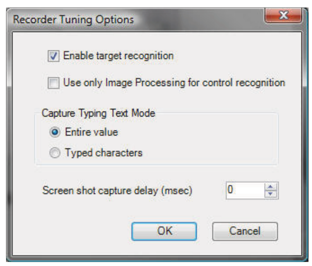
Object	Description	Required Steps
Screens	New screens are captured automatically as you progress through a task.	The following types of actions will trigger a new screenshot to be captured. The order that the criteria are applied is as follows: 1. When you take an action on a screen, the recorder checks if the screen title is different than on the last screen captured. If yes, a new screen image is captured. 2. If the screen title did not change, the recorder checks if the dimensions of the active region are different than on the last screen captured. If yes, a new screen image is captured on your next action. 3. If the action is performed on a tab within a dialog box, a new screen image is captured for the menu item before the next step. The recorder also captures the last screen upon stopping the recording process.
Match Codes, Buttons, Checkboxes, Combo Boxes, Tree Items, Tab Controls, Labels, Links, Radio Buttons, and Images	The recorder captures match codes, the button image, the checkbox or radio button and the associated label, and any other images on which you click.	Click on the button, checkbox, radio button, or image. If you are planning to Re-Record and are selecting a combo box, be sure to click a selection in a combo box, even if the default value in the combo box is the one desired.
Combination Keystrokes	Keystrokes are captured and recorded as new steps.	Type combinations keystrokes Ctrl+N and Alt+F are supported. Command combination keystrokes ALT+TAB, CTRL+ALT+DEL, and ALT+ESC are not supported.
Function Keys	Function keys are captured and recorded as new steps.	Type the function keys F1-F9, F11, and F12.

Specifying Recorder Tuning Options

The recorder tuning option allows you to specify how you want the recorder to handle certain actions during the recording process. Thsese options are useful for when you want to record supported, target applications, as well as record unknown and unaccessible controls.

Selecting the Recorder Tuning Options

1. Click  on the *Recorder* window.



2. Choose from the following options:

Field	Description
Enable target recognition	Select **Enable target recognition** to enable the recorder to capture screen regions, titles, and context-sensitive help data that is specific to the target application. Go to Step 3.
Use only Image Processing for control recognition	Select **Use only Image Processing for control recognition** to capture control information in a screen shot when it is known that the target is not captured well by a plug-in. An example of such a target is an Adobe Form. For a list of available plug-ins, refer to the *ANCILE uPerform Express Technical Specifications*. Go to Step 5.

3. Choose one of the following options:

Field	Description
Entire Value	Captures characters in a text box after the user exits the text box.
Typed characters	Monitors the captured characters as they are typed based on keyboard or IME output.

4. Select the amount of delay for the screen shot capture.

5. Click **OK**.

Using the Screen Percent Differential Feature

The screen differential allows you to choose the percent of pixels that must change on a screen before a new screen shot is recorded. This is helpful if you are recording several actions on the same screen as you might not want a new screen shot for each action unless a significant portion of the screen has changed.

A higher screen differential will yield fewer screen shots; a lower screen differential will yield more screen shots.

Adjusting the Screen Percent Differential

Select, or enter, the percent of pixels in the  field on the *Recorder* window.

Using Image Mode

The image mode option allows you to capture a specific area of the screen that does not have clearly defined edges or boundaries. The resulting image is inserted into your content as a new step.

Using Image Mode During Recording

1. Open a document containing at least one recorded step.
2. Click  on the *Recorder* window to activate image mode.

   The cursor displays as a crosshair.

3. Click in the window where you want to capture an image.
4. Click and hold the left mouse button as you drag a rectangle around the image you want to capture.
5. Release the mouse button to turn off image mode and capture the selected area.

   The image will be inserted as a new step.

Using Undo and Redo

The undo and redo options allow you to remove and restore data captured during recording.

Using Undo During Recording

Click on the *Recorder* window to remove the last item recorded.

You can click more than once to remove additional items that have been recorded. The undo functionality caches up to twenty steps.

Using Redo During Recording

Click on the *Recorder* window to restore the last item that was removed with the undo function.

You can click more than once to restore additional items that were removed.

Minimizing the Recorder Window

You can minimize the *Recorder* window to the Microsoft Windows task tray.

Click  on the *Recorder* window to minimize the window during recording.

To restore the window display, right-click on the icon in the task tray and select **Show/Hide Toolbar**.

Pausing and Stopping the Recorder

You can pause the recorder during the data capture process. While the recorder is paused, you can open other applications and perform other tasks.

When you have finished recording, you must stop the recorder to complete processing and save your content.

Pausing the Recorder

Click  on the *Recorder* window to pause the recorder.

 Remember to resume recording when you are ready.

Stopping the Recorder

Click  on the *Recorder* window to stop the recorder.

Chapter 6: Managing Content Languages

ANCILE uPerform Express expedites the creation of content in other languages. In particular, guided Re-Record functionality allows you to easily repeat steps from an original document in a new document.

Introduction to Managing Content Languages

ANCILE uPerform provides several options to manage the language of your content so you can easily produce translated versions of your uPerform content. Three options are available for managing content languages:

- Create translated documents: Creates a new uPerform document with text in the new target language(s). This functionality is useful in cases where you have customized your uPerform documents and phrases and want to export content in XLIFF format for translation in order to create a new version with translated text. For more information, refer to Creating Translated Documents (on page 71).

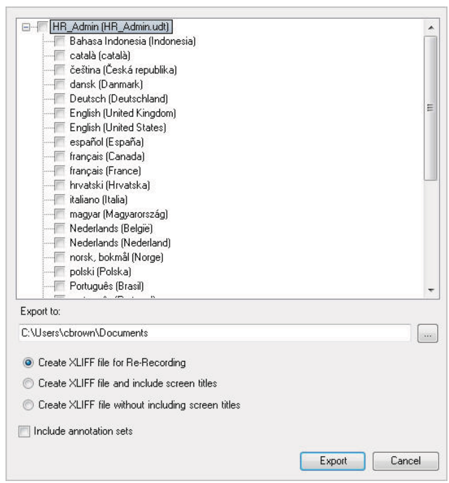
- Use Guided Re-Record to capture graphics in another language: Creates a new uPerform document with text and graphics (screens, buttons, and images) in the new target language(s.) This functionality is useful if you have customized your documents and phrases and plan to include translated graphics in your new documents. For more information, refer to Using Guided Re-Record Functionality (on page 80). This is the most robust translation option.

- Create translations of standard uPerform-provided boilerplate text: Creates a new uPerform document by morphing uPerform-provided boilerplate text into another language. This functionality is useful if you have not customized your uPerform documents and phrases. For more information, refer to Change the Language of Default Text (on page 160) for instructions on changing the document language property.

Creating Translated Documents

Exporting Content for Translation

1. Open the uPerform Express content.
2. Select **FILE > MANAGE CONTENT LANGUAGE > EXPORT [CONTENT NAME].**



3. Select the language(s) corresponding to the translated content to be created.
4. Choose from the following options:

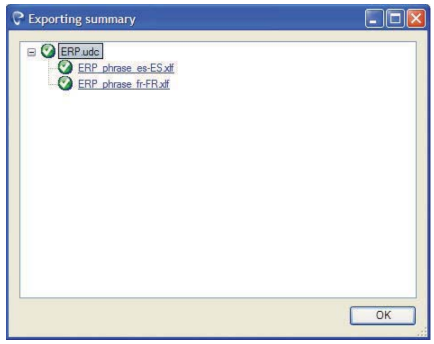
Field	Description
Create XLIFF file for Re-Recording	This option is not recommended for use with exporting content for translation because it does not include step text or screen titles. For more information on Re-Recording, refer to Using Guided Re-Record Functionality (on page 80).
Create XLIFF file and include screen titles	Select **Create XLIFF files and include screen titles** to create an XLIFF file for translation that includes step text and screen titles.
Create XLIFF file without including screen titles	Select **Create XLIFF files without including screen titles** to create an XLIFF file for translation that includes step text but does not include screen titles.
Include annotation sets	Select this option if you want to include your annotations in the XLIFF file.

5. Click  to browse to an export location.

Note the export location for later use.

6. Click **OK**.

7. Click **Export**.



8. Perform one of the following options:

If You Want To	Then
Edit the files to translate	Refer to Editing Exported Files.
Close the export summary window	Click **OK**.

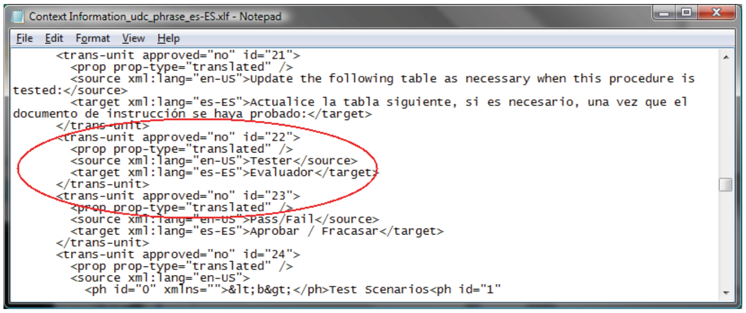
Editing Exported Files

For each exported language, one XML Localization Interchange File Format (XLIFF) file is created. The exported XLIFF file(s) contain all phrases and author-entered text in the content. Both the phrases and the author-entered text must be translated. Boilerplate text provided with the template (for example, "Use this procedure to") is automatically translated via the phrases provided in the template.

The file is formatted to facilitate translation by displaying the source (original) text co-located next to the target translated text.

1. Open the exported XLIFF file in the desired editor.

The XLIFF file can be edited in Notepad, in an HTML editor, or via a specialized XLIFF editor such as Xliff Editor or Heartsome.



2. Edit the text or data values as necessary.

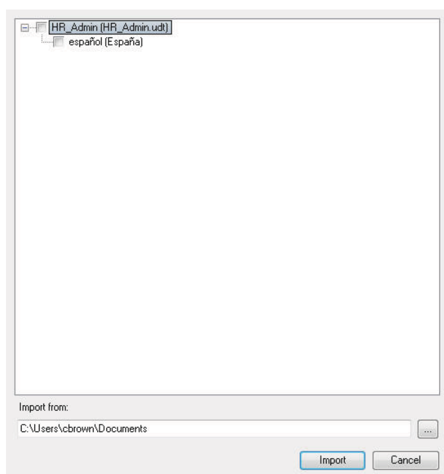
3. Save the file(s).

Importing Translated Content

You must perform an export before you can import the files. For more information, refer to Exporting Content for Translation (on page 71).

1. Open the uPerform Express content that has been exported and edited.

2. Select **FILE > MANAGE CONTENT LANGUAGE > IMPORT [CONTENT NAME].**



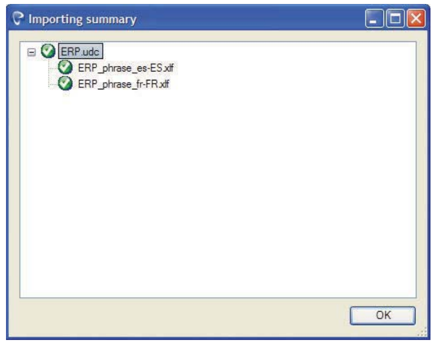
3. Click ... to select the import location.

   This location must match the **Export to** location specified in Exporting Content for Translation (on page 71).

4. Select the exported language(s) for import.

5. Click **OK**.

6. Click **Import**.

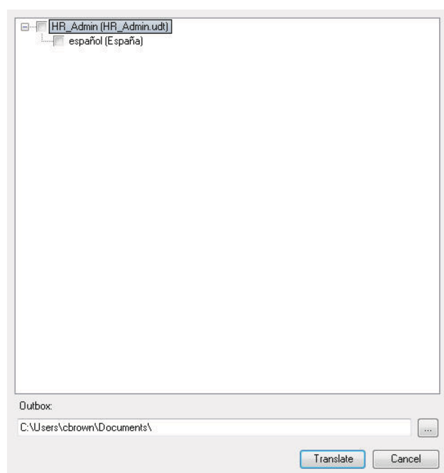


7. Click **OK**.

Create Translations for a Single Document

1. Open the uPerform content for which you want to create translated file(s).

2. Select **FILE > MANAGE CONTENT LANGUAGE > CREATE TRANSLATIONS.**



3. Expand the template used for the content.

4. Select the language(s) corresponding to the translated content files to be created.

5. Click  next to **Outbox** to select an Outbox location.

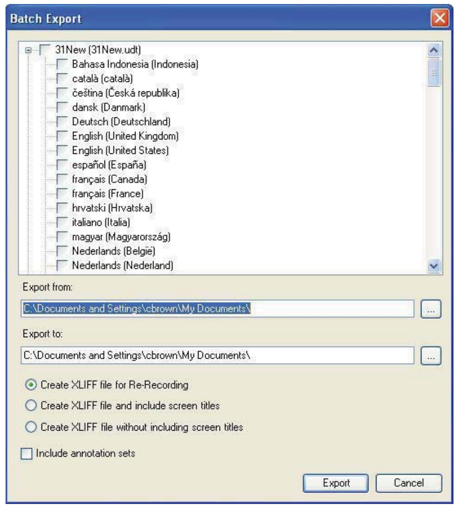
6. Click **Translate**.

7. Click **OK**.

8. On the **Translation Summary** window, click the name of the translated file to view in the uPerform editor.

Batch Exporting Content for Translation

1. Select **FILE > MANAGE CONTENT LANGUAGE > BATCH EXPORT... .**



2. Expand the template(s) used for the content.

3. Select the language(s) corresponding to the new translation content to be created.

4. Click next to **Export from** to select the folder containing the content to export.

   Note the export location for later use.

   All uPerform Express content in this location that is associated with the selected template(s) will be processed.

5. Click **OK**.

6. Click next to **Export to** to select an export location.

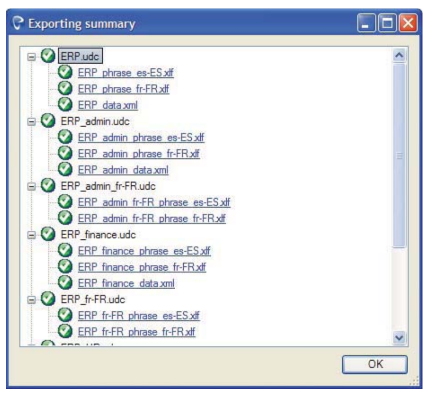
   Note the export location for later use.

7. Click **OK**.

8. Choose from the following options:

Field	Description
Create XLIFF file for Re-Recording	This option is not recommended for use with exporting content for translation because this option does not include step text. For more information on Re-Recording, refer to Using Guided Re-Record Functionality (on page 80).
Create XLIFF file and include screen titles	Select **Create XLIFF files and include screen titles** to create an XLIFF file for translation that includes screen titles.
Create XLIFF file without including screen titles	Select **Create XLIFF files without including screen titles** to create an XLIFF file for translation that does not includes screen titles.
Include annotation sets	Select this option if you want to include your annotations in the XLIFF file.

9. Click **Export**.



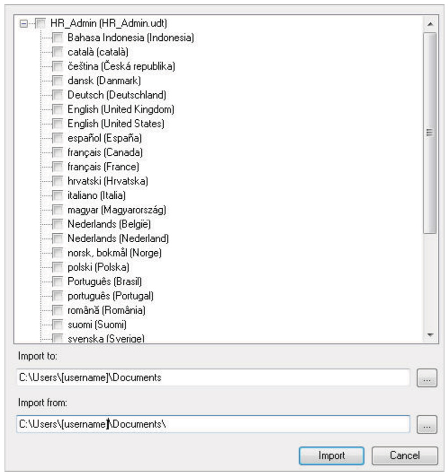
10. Perform one of the following options:

If You Want To	Then
Edit the files to translate text and values	Refer to Editing Exported Files (see "Editing Exported Content for Guided Re-Record" on page 88) for information on editing exported files.
Close the batch export summary window	Click **OK**.

Batch Importing Translated Content

You must perform an export before you can import files. For more information, refer to Batch Exporting for Translation (see "Batch Exporting Content for Translation" on page 75).

1. Select **FILE > MANAGE CONTENT LANGUAGE > BATCH IMPORT... .**



2. Expand the template(s) used for the content.

3. Select the exported language(s) for the content.

4. Click next to **Import to** to select the folder containing the content to import.

   This location must match the **Export from** location specified in Batch Exporting for Translation (see "Batch Exporting Content for Translation" on page 75).

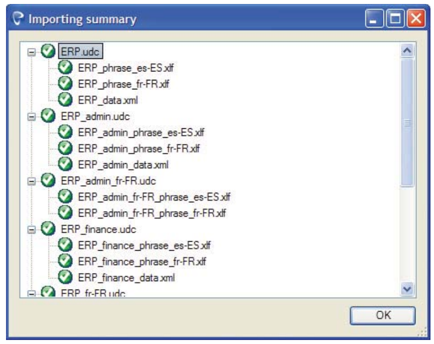
5. Click **OK**.

6. Click next to **Import from** to select the folder containing the content to import.

   This location must match the **Export to** location specified in Batch Exporting for Translation (see "Batch Exporting Content for Translation" on page 75).

7. Click **OK**.

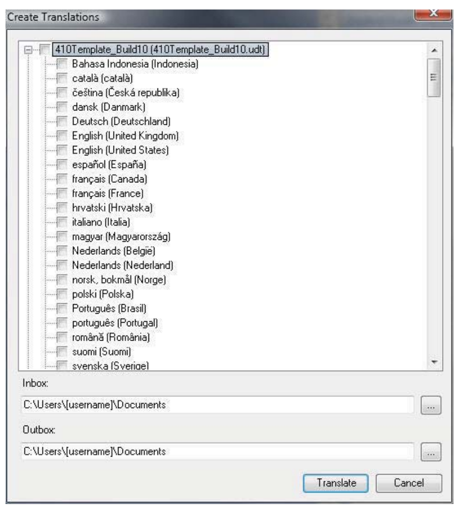
8. Click **Import**.



9. Click **OK**.

Creating Translated Files in Batch Mode

1. Select **FILE > MANAGE CONTENT LANGUAGE > BATCH CREATE TRANSLATIONS.**



2. Expand the template(s) used for the content.

3. Select the language(s) corresponding to the translated content files to be created.

4. Click  next to **Inbox** to select an Inbox location.

5. Click  next to **Outbox** to select an Outbox location.

6. Click **Translate**.

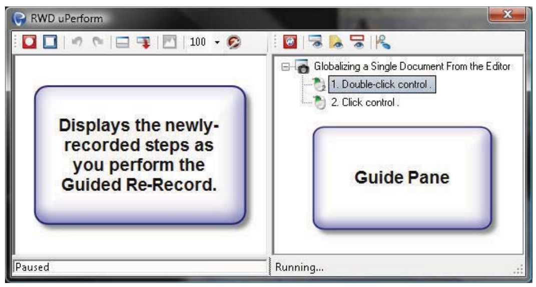
7. Click **OK**.

8. On the **Translation Summary** window, click the name of a translated file to view in the uPerform editor.

Using Guided Re-Record Functionality

Guided Re-Record functionality allows you to recreate steps from an original document into a new document, as well as capture translated screen images and graphics.

When you open an existing document and select to Re-Record, a guide pane opens in the recorder preview pane to display the guide steps. Use the guide steps to help you recreate the required actions in the target language.



Re-Record Prerequisites: Before You Get Started

Before you initially record a document that will eventually be re-recorded, you must:

- ❒ Review Capturing Controls in the Target Application (see "Capturing Controls" on page 60) for an overview of recorder capabilities, limitations, and the steps you must take to capture specific objects.
- ❒ Review recording preparation guidelines and recorder options as specified in Specify Document and Simulation Editor Options (on page 43).
- ❒ Select the desired language(s) for Re-Record within the template as specified in Specifying General Settings: Languages.

Use the following guidelines to help ensure a smooth re-recording session:

- ❒ Ensure the desired target languages are installed in the application to be recorded.
- ❒ Use the pause feature if you must take a break. Stopping the re-recording will end the session.
- ❒ Do not move action notes, simply perform the action as guided. If you think you will need to adjust the position before re-recording, perform the adjustment in the original source document before you start the re-recording session.
- ❒ Ensure you are re-recording with the same screen resolution as the original content.
- ❒ Add any additional information to the resulting document via the Insert > Steps functionality in the uPerform editor; however, if you need to pause the recorder to record additional steps into a document based on a language-related change in process, ensure you resume the guided re-record functionality before continuing.
- ❒ Do not resize or move windows during a session.
- ❒ Perform only the actions necessary to perform the tasks being documented.

Re-Record Scenarios

Guided Re-Record allows you to recreate steps in a new language document, as well as apply translations to documents after Re-Recording has been completed.

Scenario 1: Translating Before Re-Record

Pre-translation guided Re-Record is used with an exported, translated, and imported original document. Scenario 1 is the "all at once" option. The re-recorded document contains all translations, with no additional action required beyond basic editing and quality assurance. For more information on applying translations, refer to Importing Content for Guided Re-Record Using Scenario 1 (on page 88):

1. Export phrases.
2. Translate phrases.
3. Import phrases.
4. Re-record the document.

Scenario 2: Translating After Re-Record

Post-translation guided Re-Record can be used before translation is complete. This allows you to re-record your documents and create your XLIFF translation files from the re-recorded document. This is useful if you plan to add additional information to your re-recorded documents and want to ensure that information is translated. For more information on applying translations, refer to Applying XLIFF Translations for Guided Re-Record Using Scenarios 2 and 3:

1. Re-record the document
2. Export from the re-recorded document.
3. Translate phrases.
4. Apply the XLIFF translations to the re-recorded document.

Scenario 3: Using Translation and Guided Re-Record in Parallel

A parallel translation for guided Re-Record can be used before translation is complete. Since the export is from the original document, translations applied to the re-recorded document will overwrite what was captured by the Recorder during the re-record process. This allows you to retain and translate custom step text you added to the original document.

It is recommended that screen titles, button names, menu and list item values, etc. not be translated as these may appear differently in the new language. For example, if your step text reads, "Press Collect," where "Press" is the custom text and "Collect" is the button name, you will be able to retain and translate "Press." For more information on applying translations, refer to Applying XLIFF Translations for Guided Re-Record Using Scenarios 2 and 3.

1. Export from the original document.
2. Translate phrases.
3. Re-record the document.
4. When both translation and re-recording are complete, apply the XLIFF translations to the re-recorded document.

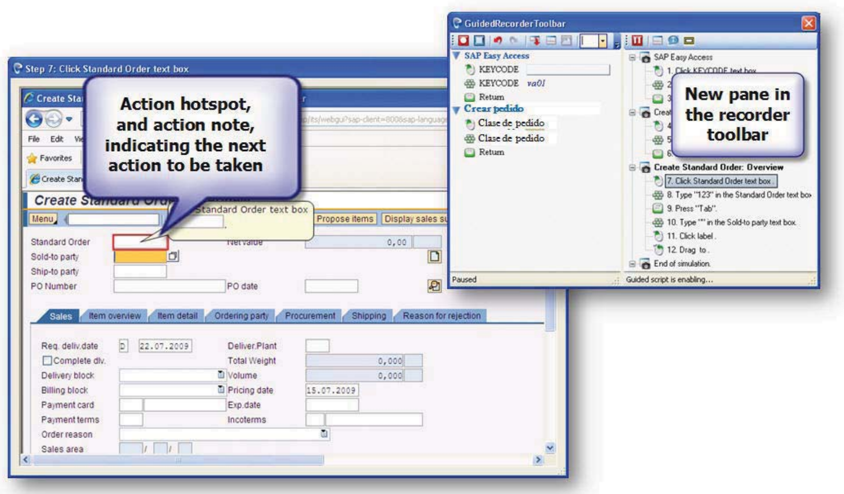
What Happens During Guided Re-Record?

Guided Re-Record is a simple, flexible way to create translated content for a wide range of applications. Guided Re-Record can be used on any .udc file.

During the guided Re-Record process, uPerform Express displays an on-screen script that you can follow while recording a new uPerform document in a different language. Guided Re-Recording displays a list of screens and steps from a previously recorded document, and prompts you with the steps to take to record the same steps again in the target application.

Guided Re-Record screen prompts display as:

- ❒ A new pane in the recorder toolbar that displays the list of steps in the original uPerform file
- ❒ An action hotspot directly on the application screen that indicates where the next action should occur
- ❒ An action note that displays the action text for the step



Using Guided Re-Record

1. Open the document to be Re-Recorded.
2. Select **FILE > MANAGE CONTENT LANGUAGE > RE-RECORD [DOCUMENT NAME]**.
3. If presented with the prompt, choose from the following options:

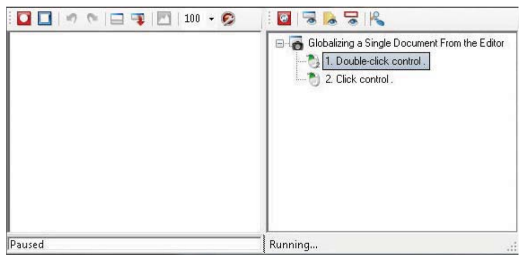
If You Want To	Then
Save the changes	Click **OK**.
Continue Re-Recording	Click **Cancel**.

4. Select one of the available language(s) from the **Languages** drop-down list.

5. Click to select an Outbox location.

6. Click **OK**.

7. Click **Re-Record**.



8. Click to begin the Re-Record process.

9. Use the guide pane as a prompt to assist in recreating the steps in the target application.

10. Optionally, perform one of the following during the Re-Record process. If the toolbar is hidden, right-click on the recorder icon in the system tray to access these functions.

If You Want To	Then
Pause the Re-Record guide script	Click . Use the guide script pause feature if you need to record an additional language-based step that is not part of the original document. Ensure you click when you are ready to resume the Re-Record guide script.
Pause the recorder	Click . Use the record pause feature if you need to take a break from recording and Re-Recording. Ensure you click when you are ready to resume recording. If you have also paused the Re-Record guide script, ensure you click to resume.
Stop the Re-Record process	Click . Use the stop feature only when you are finished Re-Recording. The stop feature ends Re-Recording for the document.

If You Want To	Then
Hide the Re-Record pane	Click .
Hide or show the guide pane	Click .
Hide or show notes	Click .
Hide or show hotspots	Click .
View step details	Click to open an additional step detail pane to help ensure you re-record the correct information.

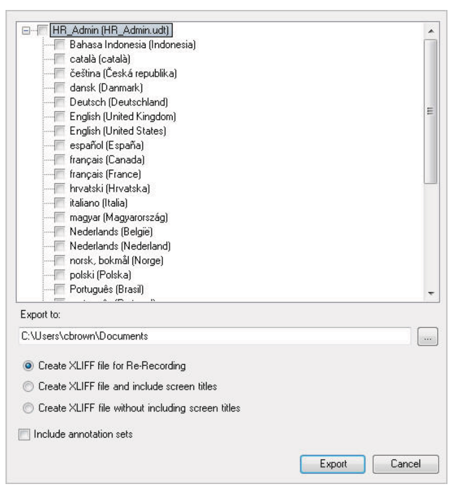
11. Click to stop the guided Re-Record process.

The re-recorded document will open in the editor.

Exporting, Importing, and Applying XLIFF Translations

Exporting Content for Guided Re-Record

1. Open the uPerform Express content.
2. Select FILE > MANAGE CONTENT LANGUAGE > EXPORT [CONTENT NAME].



3. Select the language(s) corresponding to the translated content to be created.

4. Choose from the following options:

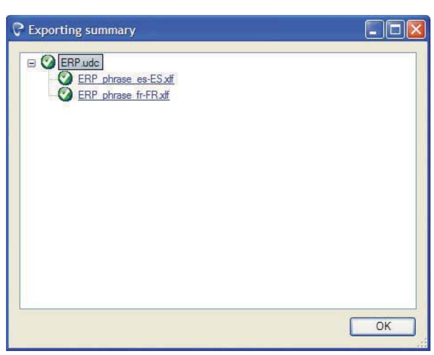
If You Want To	Then
Create XLIFF file for Re-Recording	Select this option to generate the XLIFF file required for Re-Recording. This option does not include screen titles or step text. This model is recommended for use with Scenario 1 and Scenario 2. For more information, refer to Scenario 1: Translating Before Re-Record (on page 82) and Scenario 2: Translating After Re-Record (on page 82).
Create XLIFF file and include screen titles and step text	This option is not recommended for use with Guided Re-Record because Guided Re-Record replaces screen titles based on the user interface you are Re-Recording. If you want the ability to translate screen titles, refer to Creating Translated Documents (on page 71).
Create XLIFF file without including screen titles	Select **Create XLIFF files without including screen titles** to create an XLIFF file for Re-Recording. This option includes step text but does not includes screen titles. This model is recommended for use with Scenario 3. For more information, refer to Scenario 3: Using Translations and Re-Record in Parallel (see "Scenario 3: Using Translation and Guided Re-Record in Parallel" on page 82).
Include annotation sets	Select this option if you want to include your annotations in the XLIFF file.

5. Click  to browse to an export location.

 Note the export location for later use.

6. Click **OK**.

7. Click **Export**.



8. Perform one of the following options:

If You Want To	Then
Edit the files to translate text or values	Refer to Editing Exported Content for Re-Record (see "Editing Exported Content for Guided Re-Record" on page 88).
Close the export summary window	Click **OK**.

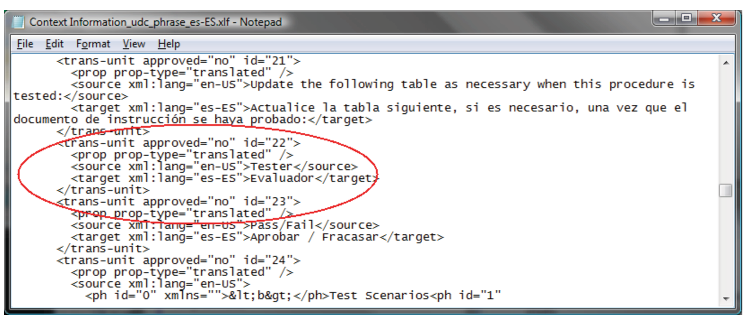
Editing Exported Content for Guided Re-Record

For each exported language, one XML Localization Interchange File Format (XLIFF) file is created. The exported XLIFF file(s) contain all phrases and author-entered text in the content. Both the phrases and the author-entered text must be translated. Boilerplate text provided with the template (for example, "Use this procedure to") is automatically translated via the phrases provided in the template.

The file is formatted to facilitate translation by displaying the source (original) text co-located next to the target translated text.

1. Open the exported XLIFF file in the desired editor.

   The XLIFF file can be edited via a specialized XLIFF editor such as Xliff Editor or Heartsome.



2. Edit the text or data values as necessary.

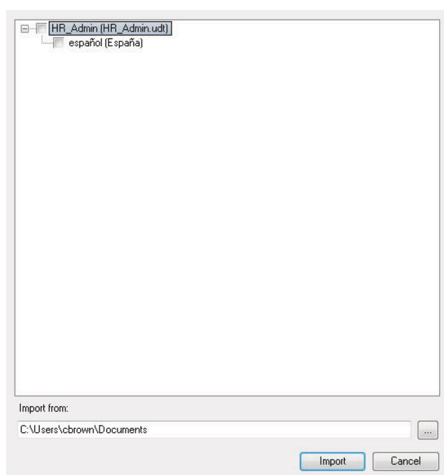
3. Save the file(s).

Importing Content for Guided Re-Record Using Scenario 1

For more information on Scenario One, refer to Scenario 1: Translating Before Re-Record (on page 82).

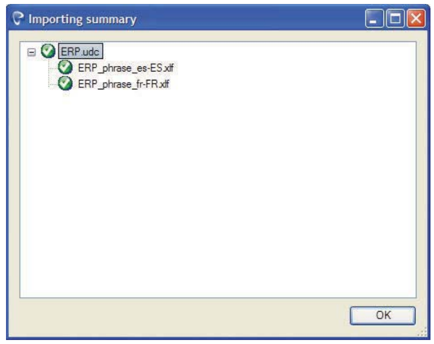
You must perform an export before you can import the files. For more information, refer to Exporting Content for Re-Record (see "Exporting Content for Guided Re-Record" on page 86).

1. Open the uPerform Express file that has been exported.
2. Select **FILE > MANAGE CONTENT LANGUAGE > IMPORT [CONTENT NAME].**
3. Click  in the **Import From** field.
4. Navigate to the **Export to** location specified in Exporting Content for Re-Record (see "Exporting Content for Guided Re-Record" on page 86).
5. Select the folder containing languages you want to import.
6. Click **OK**.



7. Select the exported language(s) for import.
8. Click **OK**.

9. Click **Import**.



10. Click **OK**.

Applying XLIFF Translations for Guided Re-Record Using Scenarios 2 and 3

For more information on Scenarios 2 and 3, refer to Scenario 2: Translating After Re-Record (on page 82) and Scenario 3: Using Translations and Re-Record in Parallel (see "Scenario 3: Using Translation and Guided Re-Record in Parallel" on page 82).

You must perform an export and Guided Re-Record before you can apply XLIFF translations. For more information, refer to Exporting Content for Re-Record (see "Exporting Content for Guided Re-Record" on page 86) and Using Guided Re-Record Functionality (on page 80).

1. Open the Re-Recorded uPerform Express file.
2. Select **FILE > MANAGE CONTENT LANGUAGE > APPLY XLIFF TRANSLATIONS.**
3. Navigate to the location of the exported and translated XLIFF file.
4. Select the **[filename]_[language].xlf** file for which you want to apply translations. For example: NewDocument_ru-RU.xlf
5. Click **Open**.
6. Click **OK**.

Chapter 7: Editing and Formatting: Basics

Basic editing and formatting refers to standard editing features available within the editor. These features apply to all ANCILE uPerform Express files.

Introduction to Editing and Formatting: Basics

You can enhance your content using basic editing and formatting functionality.

Some of the editing and formatting functions available to you include:

- Modify content properties such as title
- Cut, copy, and paste text
- Spellcheck
- Change the language of default text for content

Specify Content Properties

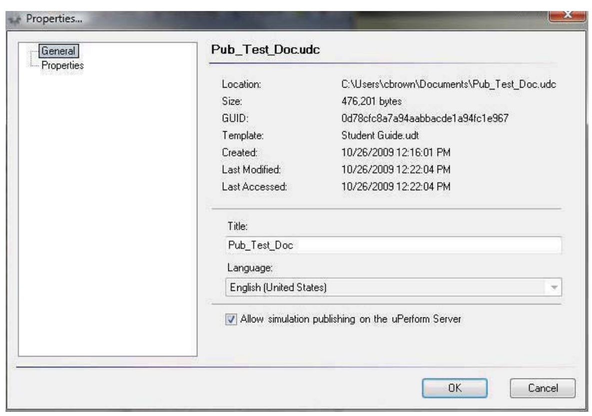
All ANCILE uPerform Express content can be tagged with both built-in and custom properties. Properties are useful in specifying metadata about content. For example, the Transaction Code property is needed in the SAP environment to enable the context-sensitive help link from SAP to uPerform Express content.

Several built-in property fields are delivered with the default uPerform Express template. You can enable and customize display of these properties to your authors by creating a new author template. Custom properties may include such items as business owner or a documentation reference number. For detailed information on creating a new template, refer to Using Author Templates.

Specifying General Properties

1. Create or open uPerform Express content.
2. Select **FILE > PROPERTIES...** on the main window.
3. Click **General** on the left pane.

   Information such as the size, creation date, and last modified date are displayed as view-only information.



4. Review the following fields:

Field	Description
Title	Edit the name for the content.

Field	Description
Language	For information on changing the language of existing content text, refer to Change the Language of Default Text (on page 160). If the content is translated, select the desired language for the content from the drop-down list to enable globalization of definitions in the content. For information on translated content, refer to Using Save As.
Allow simulation publishing on the uPerform server	To enable server publishing of the uPerform document to simulation output, select the **Allow Simulation publishing on the uPerform server** checkbox. This option is not available in course mode.

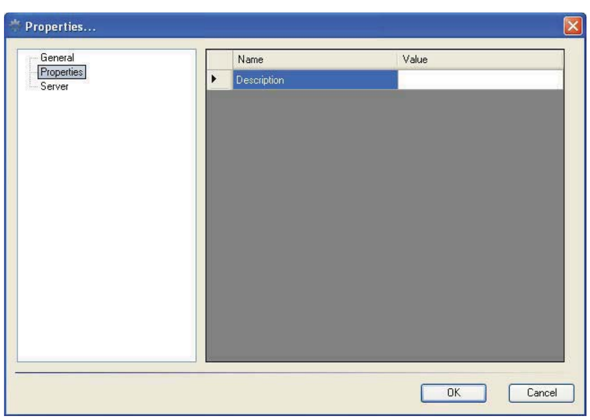
5. Click **OK** to save your changes and close the window.

Specifying Built-In or Custom Properties

By default, the display of all built-in properties, with the exception of **Description**, is disabled in the template. You can enable display of those properties necessary for your authors by creating a custom template.

For information on enabling built-in properties or adding custom properties to your template, refer to "Using Author Templates".

1. Create or open uPerform Express content.
2. Select **FILE > PROPERTIES...** on the main window.
3. Click **Properties** on the left pane.



4. Enter values for the properties in the **Value** column, or select available properties from the drop-down lists.

5. Click **OK** to save your changes and close the window.

Using Undo and Redo During Editing

You can undo and redo one or more editing actions in the editor workspace.

Using Undo During Editing

Select **EDIT** > **UNDO** to remove the last edit.

You can select the **Undo** option more than once to remove additional edits. The undo functionality caches up to twenty steps.

Using Redo During Editing

Select **EDIT** > **REDO** to re-apply the last edit.

You can select the **Redo** option more than once to restore additional edits.

Using Spellcheck

During the spellcheck process, action text, step text, notes, narrative, tooltip text, and course content are reviewed. The spellcheck process does not include audio transcript text.

The proofing language for the spellcheck is based on the current file's language.

Starting a Spellcheck

1. Create or open a file.

2. Select **TOOLS > SPELLCHECK.**

   To apply changes to the entire file, allow spellcheck to complete the entire spellcheck task.

Specifying Spellcheck Options

1. Create or open a file.

2. Select **TOOLS > SPELLCHECK OPTIONS.**

3. Choose one of the following options:

If You Want To	Then
Allow the spellchecker to suggest corrections	Select **Always suggest corrections.**
Enable the spellchecker to suggest from main dictionaries only	Select **Suggest from main dictionaries only**.
Ignore words in uppercase	Select **Ignore words in UPPERCASE**.
Ignore words with numbers	Select **Ignore words with numbers**.
Ignore Internet and file addresses	Select **Ignore internet and file addresses**.

4. Optionally, under **Main Dictionaries**, click **Add** to select a dictionary.

5. Optionally, under **Custom Dictionaries,** perform one of the following:

If You Want To	Then
Create a new custom dictionary from a default dictionary	Click **New...** . Browse to the location of the existing dictionary. Rename the file. Click **Save**. To add words to a dictionary during spellcheck, you must create a custom dictionary from the default dictionary. You cannot add words to the default dictionary.
Add a custom dictionary	Click **Add...** to specify a dictionary.
Edit an existing dictionary	Click on the dictionary in the list box. Click **Edit** to edit the dictionary.
Remove an existing dictionary	Click on the dictionary in the list box. Click **Remove** to remove the dictionary.
Change the default	Click on the dictionary you want to specify as the default. Click **Change Default**.

6. Click **OK**.

Using Save

When you save your work, the content is saved on your local hard drive. The save location is specified when you first record or create the content. uPerform Express notifies you of progress, success, and failure in the status bar.

Saving Your Work

1. Create or open content.
2. Select **FILE > SAVE**.

   It is good practice to save your file before switching between views.

Using Save As

The Save As functionality in uPerform Express is specifically designed to enable you to create a copy of the file.

Using Save As to Create a Duplicate of uPerform Content

1. Create or open uPerform content.
2. Select **File > Save As...** .
3. Click **No** to create a copy.
4. Enter a name in the **File name** field.

   Avoid the use of special characters when naming your content.

5. Click **Save**.

The duplicate will display in the editor.

Using Save As to Assign a New ID to uPerform Content

1. Create or open uPerform content.
2. Select **File > Save As...** .
3. Click **Yes** to assign a new ID.
4. Enter a name in the **File name** field.

   Avoid the use of special characters when naming your content.

5. Click **Save**.

The file with the new ID is displayed in the editor.

Printing

You can send the document view of your procedural content directly to the printer. Header and footer information is not included in the print output. You can also print a student guide and a storyboard of course content.

Printing Content

1. Create or open content.

2. Perform one of the following options:

If You Want To	Then
Print a document, simulation, student guide, or course storyboard	Select **FILE > PRINT**.
Print a course storyboard with annotations	Open the course. Select **VIEW > VIEW ANNOTATIONS**. Select the annotation set you want to print. Select **FILE > PRINT**. Printing a course storyboard with annotations can provide helpful hints to end users and additional information for course instructors.

Closing

Only one uPerform Express file can be open at a time. Close the existing open file before opening a new file.

Closing the Current File

Click to close the current file.

If you attempt to exit the uPerform Express editor prior to saving your content, you will receive a prompt confirming you want to exit prior to saving.

Chapter 8: Editing and Formatting: Procedural Content

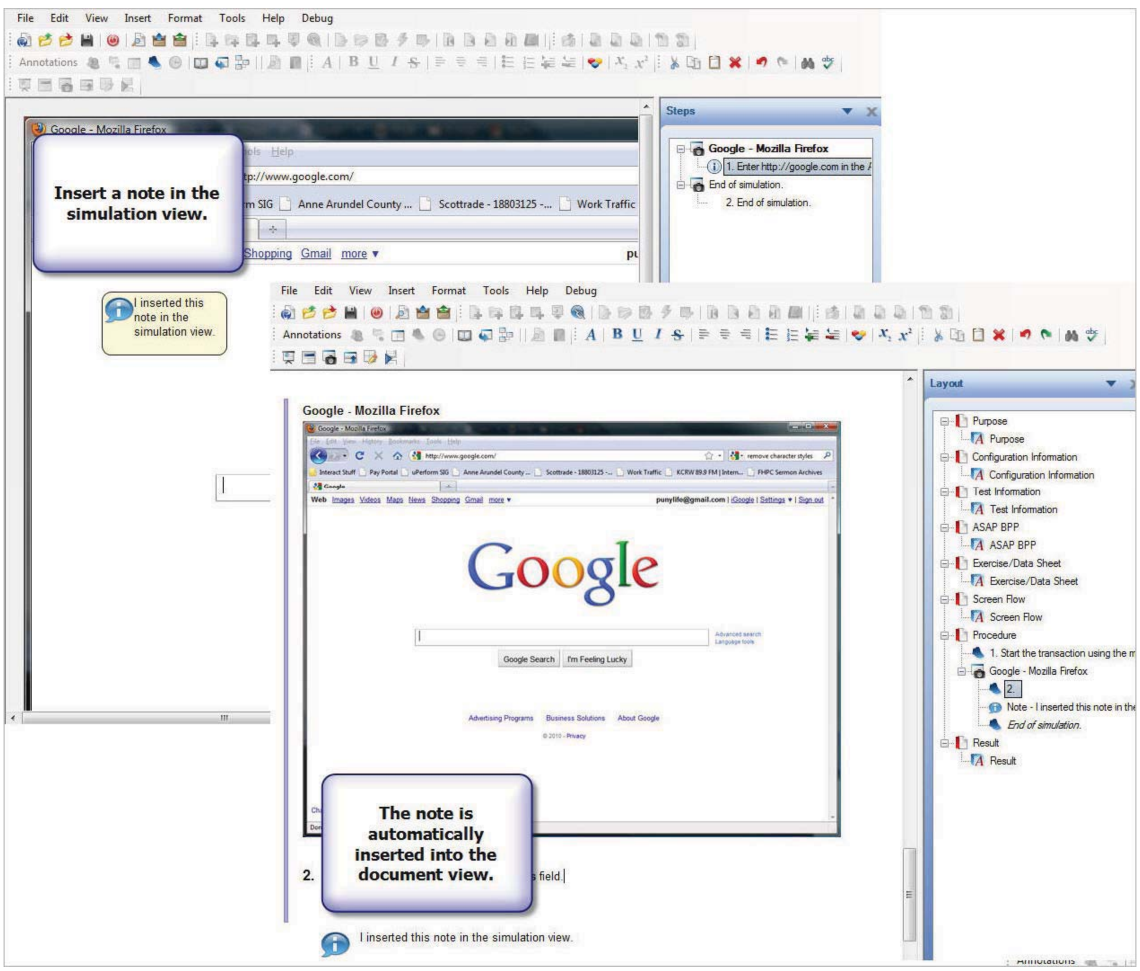
After recording is complete, you have many options for adding and formatting content in both the document and simulation views.

In addition to inserting standard objects such as steps, actions, tooltips, and notes, you can also specify note and step properties.

Introduction to Editing and Formatting: Procedural Content

After you have captured actions in the target application, you can enhance your content using basic editing and formatting functionality. For basic formatting functionality, refer to Editing and Formatting: Basics (on page 91). In addition, you can edit procedural content to insert steps, notes, tooltips, and branches.

Edits performed in one view affect the other view. In other words, when you insert a note in the simulation view, this note is also inserted in the corresponding location in the document view. Edits should be performed on content stored on your local computer.



Inserting Standard Simulation Objects

You can insert several standard simulation objects including:

- Step: You can insert one or more steps from a new recording session or from an existing uPerform Express document. In addition, you can insert default steps or substeps during editing.
- Note: Two types of notes are available: default notes, which can be inserted from the template and are intended to provide standardization across content, and action notes, which are automatically created and include the action text for an action. You can enable or disable the display of action notes.
- Action: An action hotspot is indicated as a border around the relevant item. For example, an action hotspot may be displayed around a button to indicate that clicking the button is the desired user action.
- Tooltip: Tooltips are displayed as notes that pop up when a user hovers over a specific area of the screen.
- Branch: Branches allow you to create a primary simulation path and include secondary path(s) that produce the same end result but offer alternative methods of reaching the result.

Inserting Steps

You can use the recorder to capture your actions and create one or more new steps, or you can insert steps from an existing uPerform Express document.

For information on editing steps properties, refer to Editing Steps (on page 113).

Inserting a Newly-Recorded Step

1. In the editor workspace, click the **Simulation** tab.
2. Select the position to insert the new step(s) in the *Steps* task pane.

3. Select **INSERT > STEPS > FROM NEW RECORDING...** to display the recorder preview pane.

4. Click  to begin recording.

5. Perform the desired steps in the target application.

6. Click  to stop the recording process.

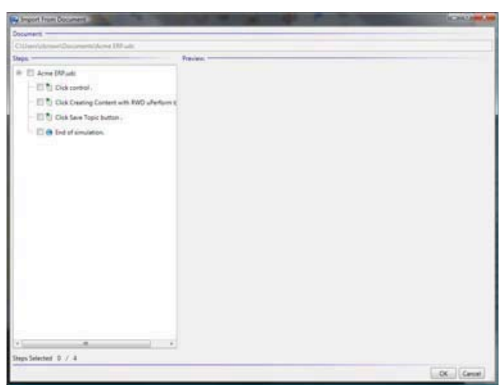
Inserting Steps from an Existing Simulation

1. In the editor workspace, click the **Simulation** tab.

2. Select the position to insert the steps in the *Steps* task pane.

3. Select **INSERT > STEPS > FROM UPERFORM EXPRESS DOCUMENT...** .

4. Browse to the location of the existing document, select the .udc file, and click **Open**.



5. In the **Steps** area, expand the tree view to locate the steps you want to import.

   A preview of the step is displayed to the right of the tree view. You can import more than one step at a time. Each step will be inserted as a new step within the simulation.

6. Select the checkbox next to the steps(s) to import.

7. Click OK.

Inserting Steps and Substeps

1. In the editor workspace, click the **Simulation** tab.
2. Select the position to insert the new step(s) or substep(s) in the *Steps* task pane.
3. Perform one of the following options:

If You Want To	Then
Insert a step	Select **INSERT > STEPS > STEP**.
Insert a substep	Select **INSERT > STEPS > SUBSTEP**.
Create an information-only step from a step containing an action.	Delete the action(s) from the step. Information-only steps are steps that contain notes and references but no action.

4. Edit the step as desired.

Inserting Notes

Notes can be added to simulation steps to help explain an action, provide details regarding the step, or to provide tips to the user in playback mode. The notes display as callout boxes on top of the target application.

Two types of notes are available:

- Default Notes: A standard, information- and icon-only note that provides additional details for a step and provides the option to optionally highlight and draw attention to a specific area within a step.
- Highlighted Notes: An information note that automatically highlights and draws attention to a specific area within a step.

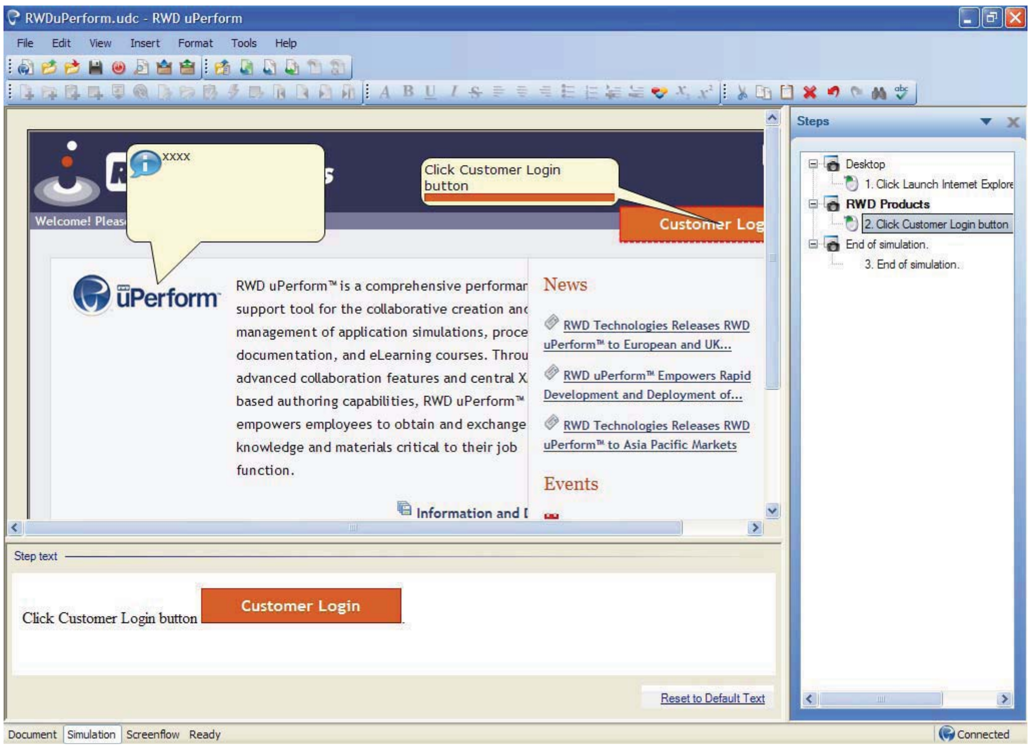
For information on note formatting options, refer to Editing Notes (on page 120). For information on customizing notes, refer to "Specifying New Template Settings: Styles.

Inserting a Default Note

1. In the editor workspace, click the **Simulation** tab.

2. Select the desired step in the *Steps* task pane.

3. Select **I**NSERT **>** **N**OTE **>** **N**OTE.



4. Double-click on the new note, and enter text.

In addition to text, you can create a hyperlink within the note by highlighting the desired link text, right-clicking, and selecting **I**NSERT **>** **W**EB **L**INK from the right-click menu.

Inserting a Highlighted Note

1. In the editor workspace, click the **Simulation** tab.

2. Select the desired step in the *Steps* task pane.

3. Select **I**NSERT **>** **N**OTE **>** **H**IGHLIGHTED **N**OTE.

4. Double-click on the new note, and enter text.

Displaying and Hiding Action Notes in the Document Editor

1. In the editor workspace, select the Simulation view.
2. Right-click on the note.
3. Select **Edit Action**.
4. Click **[Action Type] Action** in the left pane.
5. Select the **Show Action Note** checkbox.
6. Click **OK**.

For information on enabling display of action notes in published output, refer to "Using Author Templates. For information on editing action notes, refer to Editing Actions.

Inserting Actions, Tooltips, and Branches

Action hotspots indicate an action that must be taken to proceed to the next lesson step or branch. Hotspots display as colored rectangles that highlight the area of action:

- Mouse - the area to perform a mouse action (for example, click, right-click, double-click).
- Edit/Text - the area in which text must be entered to complete the action.
- Key - the key required to execute the action (for example, F1, F2, Tab, 1, 2, a, b, c).
- Drag & Drop - the areas to perform a drag-and-drop mouse action (for example, left down, drag, left up).

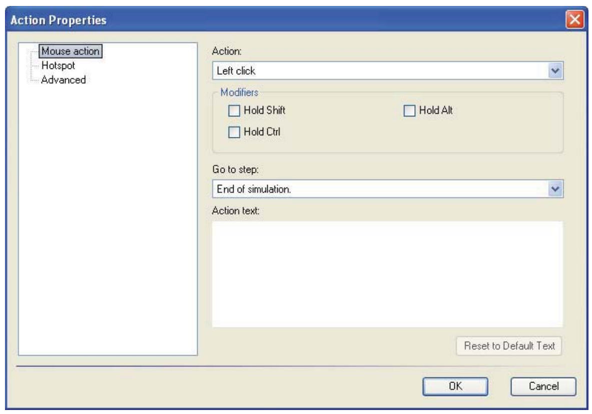
Tooltips can be added to simulation steps to provide amplifying information about a button or area of the screen when the user hovers over the tooltip area.

A branch allows you to create a primary simulation and include secondary simulations, which allow the same end result but offer alternative paths.

Although the steps to insert a branch are essentially the same as inserting steps, some pre-planning is usually required to ensure the simulation logic flows properly. As with the insertion of steps, new branches can originate as steps from an existing simulation or be captured during a new recording session. Secondary branches can be directed to any step in the simulation.

Inserting an Action

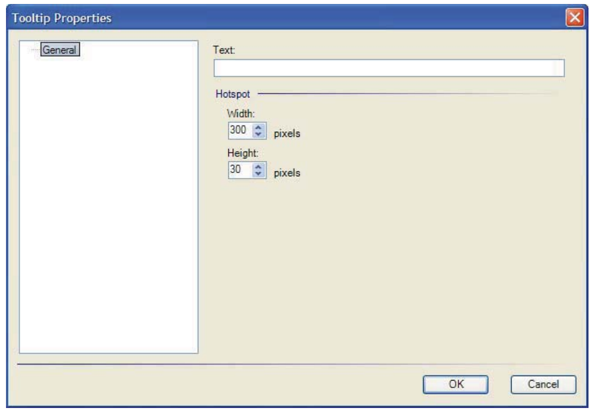
1. In the editor workspace, click the **Simulation** tab.
2. Select the desired step in the *Steps* task pane.
3. Select **INSERT > ACTION > [ACTION TYPE...]** to display the *Action Properties* window.



For information on editing action properties, refer to Editing Actions (on page 125).

Inserting a Tooltip

1. In the editor workspace, click the **Simulation** tab.
2. Select the desired step in the *Steps* task pane.
3. Select **INSERT > TOOLTIP...** to display the *Tooltip Properties* window.

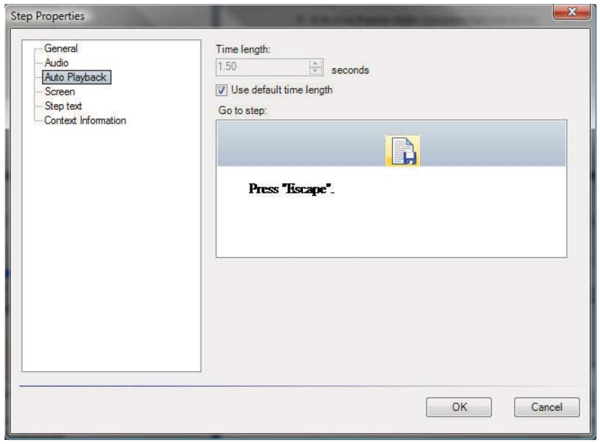


For information on editing tooltip properties, refer to Editing a Tooltip (on page 133).

Inserting a Branch for Display During Auto Playback

1. In the editor workspace, click the **Simulation** tab.
2. Select the position to insert the branch steps in the *Steps* task pane.
3. As necessary, record or insert the new branch steps.
4. Insert the branching action that will lead to the new step via **INSERT > ACTION ... > [ACTION TYPE]**.
5. In the *Action Properties* window, click **[Action Type]** in the left pane.
6. Set the **Go to step** option for this action to be the first step in the new branch.
7. Click **OK**.
8. Right-click on the branch step from which the branch will initiate.
9. Select **Edit Step** to display the *Step Properties* window.

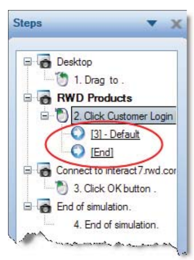
10. Select **Auto Playback** in the left pane.



11. In the **Go to step** listbox, select the action that should be simulated in the output for Auto Playback mode.

12. Click **OK** to save your changes and close the window.

The branch will display under the appropriate step in the *Task Pane*.



Editing Standard Simulation Objects

The standard simulation objects - steps, notes, actions, and tooltips - can be edited to modify their display and functionality. The *Steps* task pane displays the text-only information about the step. You can use the step text editor to edit the step information.

In addition to editing simulation objects using the toolbar and right-click menu, you can double-click on steps within the task pane to open the *Step Properties* window.

Editing Steps

You can edit the general, audio, auto playback, screen, and step text properties of a simulation step by right-clicking or double-clicking on a step in the task pane.

You can view context information for enterprise systems recorded using uPerform. This will assist in setting up context-sensitive help with the uPerform server, as an author will be able to easily identify screen information within a uPerform document.

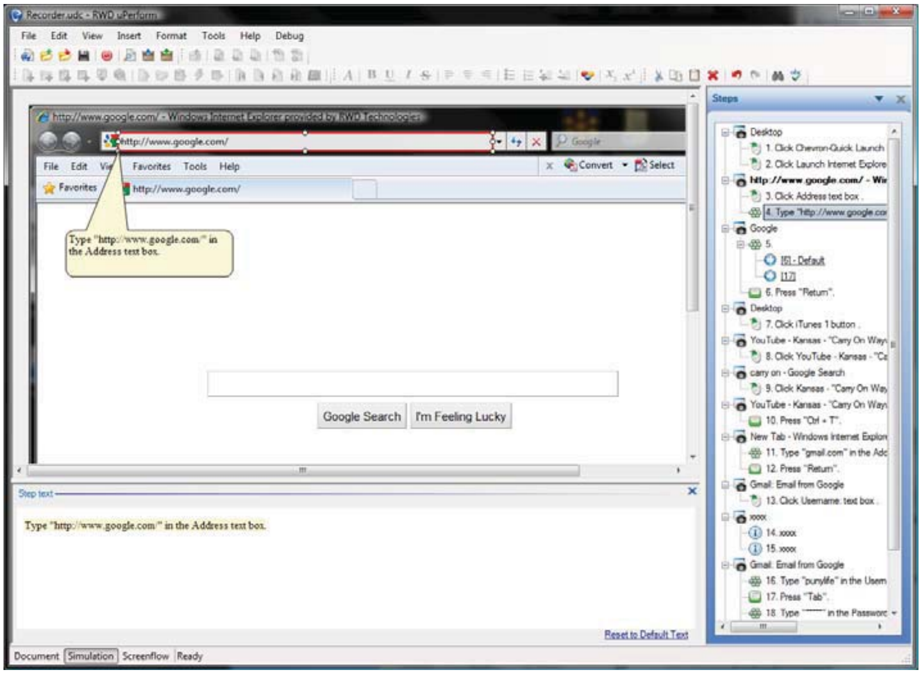
Editing a Simulation Step: Reordering Steps

1. In the *Steps* task pane, click on the step you want to move.
2. Drag the step to above or below the step where you want it to display.

   This action will automatically renumber the steps.

Editing a Simulation Step: Step Text Editor

1. Select **VIEW > SHOW STEP TEXT EDITOR** to display the step text editor.



2. In the *Steps* task pane, select the step to be edited.

Action text is highlighted with the background color of the action note styles. Action text displays in the same color as the text within the note. This will allow you to confirm that the text you are editing is for an action.

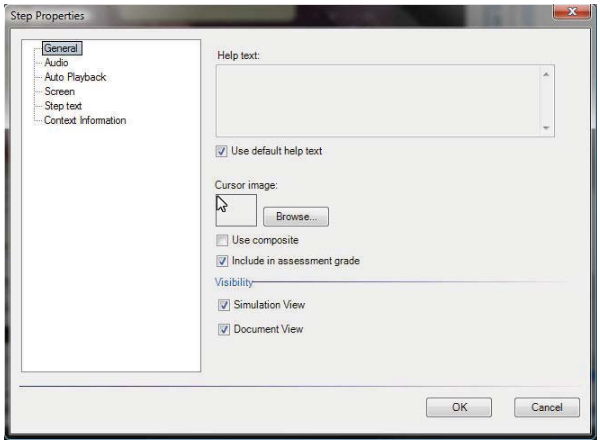
3. Edit the step text in the editor.

4. Optionally, click **Reset to Default Text** to revert to the last saved text.

Editing a Simulation Step: General Properties

1. Double-click on the step in the *Steps* task pane.

2. Select **General** in the left pane.



3. Edit the following fields:

Field	Description
Help text	To display the default help text when the user makes an incorrect response during the Self-Test or Assessment mode, enable the **Use default help text** checkbox. To display custom help text, disable the **Use default help text** checkbox, and enter your text in the **Help text** field.
Cursor image	Browse to select the cursor graphic displayed during the particular step.
Use composite	Brings extra attention to the hotspot by slowly blacking out the screen except for the hotspot area, and then returning to the screen display.
Include in assessment grade	To include this step in the grade calculated for Assessment mode, select the **Include in assessment grade** checkbox.
Visibility	To display this step in the simulation view, select the **Simulation View** checkbox. To display this step in the document view, select the **Document View** checkbox.

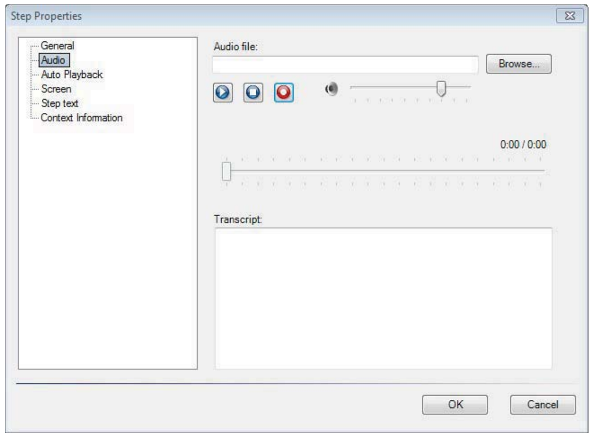
4. Click **OK** to save your changes and close the window.

Editing a Simulation Step: Audio Properties

To enable MP3 recording, refer to Installing LAME (on page 194).

1. Double-click on the step in the *Steps* task pane.

2. Select **Audio** in the left pane.



For more information, see Importing an Audio File (on page 196) and Creating an Audio File (on page 195).

3. Select  to launch the **Recording Options** dialog.

4. Complete the following fields:

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Recording Device</td><td>Specify the input recording device. This selection is computer specific.</td></tr>
<tr><td>Recording Quality</td><td>Specify the audio quality setting.
<table>
<tr><th>Setting</th><th>MP3</th><th>WAV</th></tr>
<tr><td>High</td><td>320kbps</td><td>16-bit sampling</td></tr>
<tr><td>Medium</td><td>128kbps</td><td>8-bit sampling</td></tr>
<tr><td>Low</td><td>64kbps</td><td>8-bit sampling</td></tr>
</table></td></tr>
</table>

5. Once you have set your options, the following controls are activated:

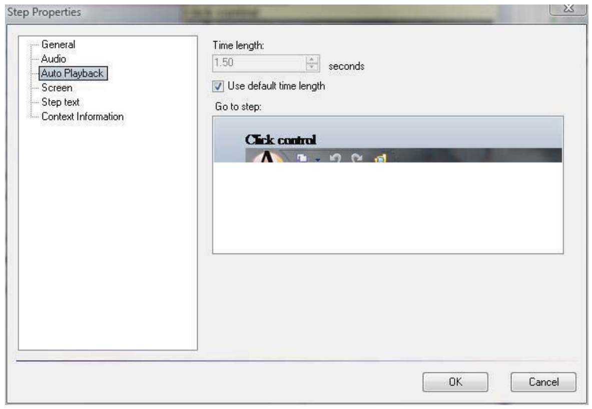
Control	Description
	Click **Pause** to pause the current recording
	Click **Stop** to stop the current recording.
	Click **Play** to review the current recording.

6. Click **OK** to save your changes and close the window.

Editing a Simulation Step: Auto Playback Properties

1. Double-click on the step in the *Steps* task pane.

2. Select **Auto Playback** in the left pane.



3. Edit the following fields:

Field	Description
Time length	Specify the delay between each simulation step during Auto Playback mode. To use the default wait time specified in the template, select **Use default time length**. To specify a custom wait time, enter the value in the **Time length** field.
Go to step	Edit the next step or action to be displayed during Auto Playback mode. Use this option to set which branch should be displayed in Auto Playback mode.

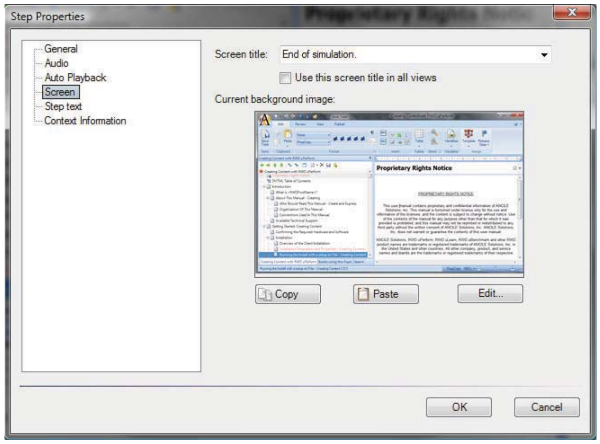
4. Click **OK** to save your changes and close the window.

Editing a Simulation Step: Screen Properties

1. Double-click on the step in the *Steps* task pane.

2. Select **Screen** in the left pane.

3. Optionally, you can edit the screen title of the main window of the target application during this particular step.



4. As desired, select one of the following options:

If You Want To	Then
Paste a new image from the clipboard	Copy the new background image to be used to your Microsoft Windows clipboard. Click **Paste**.
Copy the current image to the clipboard for editing in an external application	Click **Copy**, and edit the image in the external application. Copy the edited image to your Microsoft Windows clipboard, and click **Paste** (as described above) to replace the background image.
Change the display of the image to reflect either the entire desktop or only the application window	Click **Edit...**, and select Regions on the resulting screen. Select the area you want to display. Click **OK**. Click **OK**.

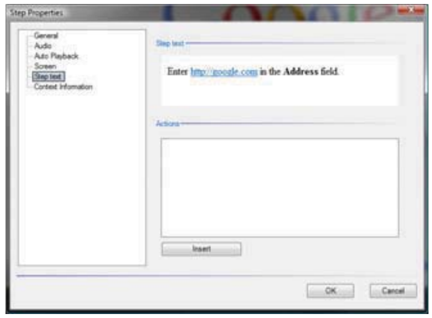
If the clipboard image you are pasting is larger than the current image, a prompt is displayed. Select **Yes** to resize the clipboard image before pasting, or select **No** to insert the image without resizing.

5. Click **OK** to save your changes and close the window.

Editing a Simulation Step: Step Text Properties

1. Double-click on the step in the *Steps* task pane.

2. Select **Step text** in the left pane.



3. Edit the following fields:

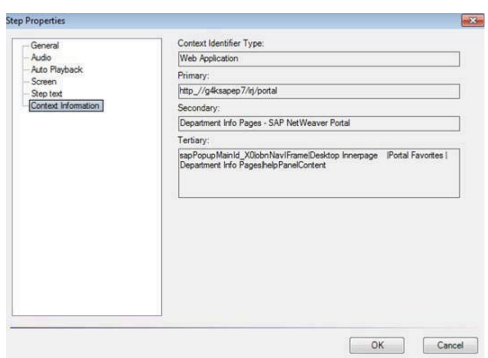
Field	Description
Step text	Displays the current step text.
Actions	You can select any action text in the **Actions** list box and click **Insert** to include the text in the step text. You can also insert additional text before or after the action text by entering the text in the **Step text** field. For example, you can insert "and" or "or" to join two actions in a sentence.

4. Click **OK**.

Editing a Simulation Step: Viewing Context Information

1. Double-click on the step in the *Steps* task pane.

2. Select **Context Information** in the left pane.



3. Review the following fields:

Depending on the application or enterprise system recorder, some fields will not be populated.

Field	Description
Context Identifier Type	Displays the name of the recorded application.
Primary	Displays the transaction code(s) or screen ID(s) associated with the step.
Secondary	Displays the ID for the screen.
Tertiary	Displays the location of the application recorded into the step.

Editing Notes

You can edit and format note text, modify the note display characteristics, and edit the note pointer location and icon.

Notes and action notes have different characteristics. For more information on editing action notes, refer to Editing an Action: Edit (on page 127).

Editing a Note: Note Text

1. Double-click on the note.
2. Highlight the text to be edited or place the cursor at the insertion point.
3. Right-click and select from among the following edit and format options:

Option	Description
Table	Several table options are available, including: Properties, Insert Row, Delete Row, Insert Column, and Delete Column.
Edit	Several editing options are available, including: undo and redo; cut, copy, paste; find and replace; select all; and delete.

Option	Description
Format	Select **Font Dialog** to specify the font style and size. Select **Font Color** to specify the font color. Modify the character format using the **Bold**, **Italic**, **Underline**, **Superscript**, **Subscript**, and **Strikeout** options. To return the character format to the default, select **Normal**. Modify the paragraph format using the indent and list functionality.
Justify	Select **Left**, **Center**, or **Right** to specify the text justification.
Insert: Line	Right-click on the text, and select **INSERT > LINE**.
Insert: Step Link	Click into the text where you want to insert a step link. Select a step from the **Step Link Location** drop-down list.
Insert: Web Link	Highlight the text for the web link, and select **INSERT > WEB LINK**. Specify the link location and the target window. You must publish the document in order to activate the web link.
Insert: Image	Right-click on the text for which you want to insert an image, and select **INSERT > IMAGE**. Specify the image location, caption, and alignment.
Insert: Table	Right-click on the text for which you want to insert a table, and select **INSERT > TABLE**. Specify the properties.
Insert: Captured Image	Highlight the text for which you want to insert a captured image, and select **INSERT > CAPTURED IMAGE**. Specify the application to capture. Click and drag the crosshair to select the image to capture.

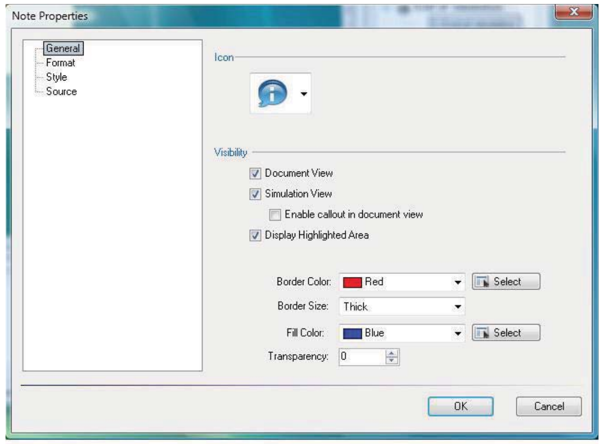
Many of the text format options are also available via the toolbars.

Editing a Note: General

1. Right-click on the note in the editor workspace.

2. Select **Edit Note...** to display the *Note Properties* window.

3. Select **General** in the left pane.



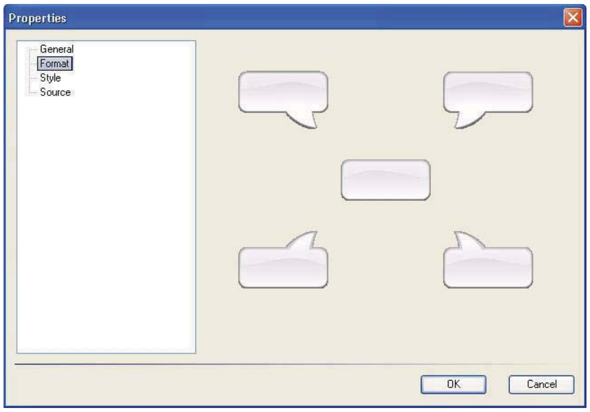
4. Edit the following fields:

Field	Description
Icon	Select a note icon from the drop-down list.
Document View	To display this note in the document view, select the **Document View** checkbox.
Simulation View	To display this note in the simulation view, select the **Simulation View** checkbox.
Enable callout in document view	To display a callout for this note, select the **Enable callout in document view** checkbox.  Callouts must be enabled in the template editor and in the options menu in order for them to display in published output. For more information, refer to Specifying Document Options and Default Publication Settings: Document.
Display the highlighted note area and customize the appearance	To display the visible rectangular line around an area associated with a highlighted note, select the **Display Highlight Area** checkbox. Select a border color, border size, fill color, and transparency for the highlighted note.

5. Click **OK**.

Editing a Note: Format

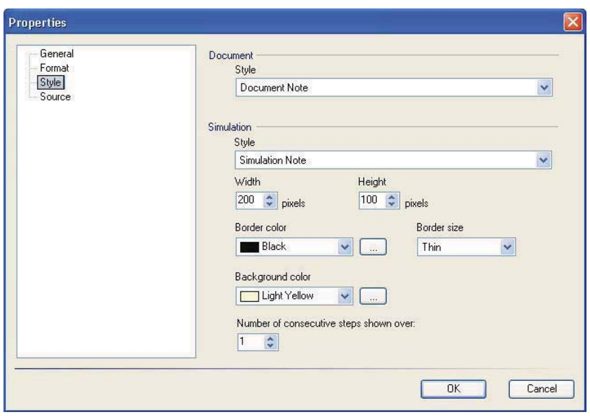
1. Right-click on the note in the editor workspace.
2. Select **Edit Note...** to display the *Note Properties* window.
3. Select **Format** in the left pane.



4. Click the picture of the desired note format.
5. Click **OK** to save your changes and close the window.

Editing a Note: Style

1. Right-click on the note in the editor workspace.
2. Select **Edit Note...** to display the *Note Properties* window.
3. Select **Style** in the left menu.



4. Choose from the following options:

Option	Description
Document: Style	Select a document-display style from the list.
Simulation: Style	Select a simulation-display style from the list.
Width	Specify the width of the note in pixels.
Height	Specify the height of the note in pixels.
Border color	Select the color of the note border from the drop-down list, or click the **...** button to specify a custom color..
Border size	Select the width of the note border from the drop-down list.
Background color	Select the color of the note background from the drop-down list, or click the **...** button to specify a custom color..
Number of consecutive steps shown over	Specify the number of following steps in which the note should be displayed (simulation view only).

5. Click **OK**.

Editing a Note: Size

1. Select the step containing the note you want to resize.

2. Perform one of the following options:

If You Want To	Then
Allow uPerform to auto size the note based on the text within the note	Right-click on the note. Select **Auto Size Note**.
Manually size the note	Click on the note. Click and drag on a sizing handle to resize.

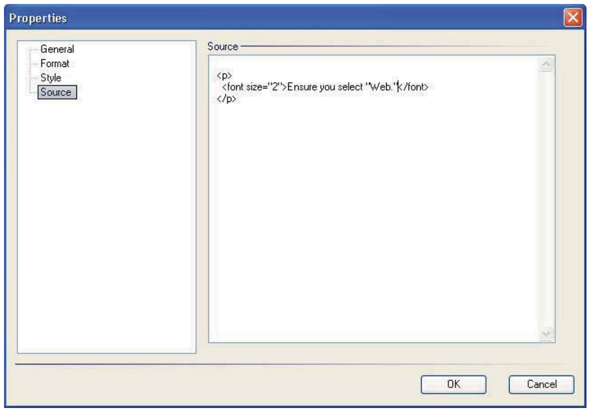
The action note tail will snap to the location closest to the center point of the action note associated with the hotspot.

Editing a Note: Source

1. Right-click on the note in the editor workspace.

2. Select **Edit Note...** to display the *Note Properties* window.

3. Select **Source** in the left pane.



4. Edit the source code.

   Knowledge of HTML is required.

Editing Actions

You can edit and format the general and display properties of mouse, edit, key, and drag & drop actions.

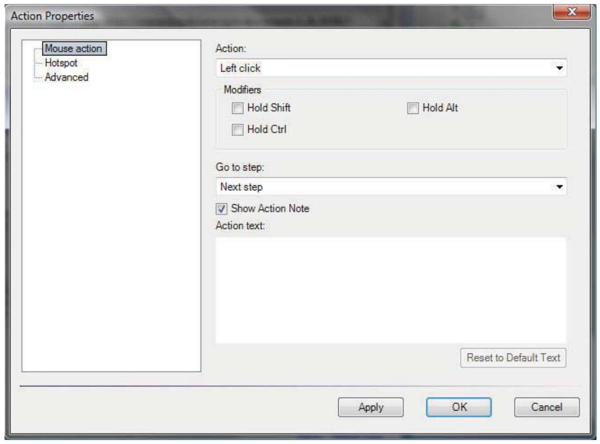
You can also switch an action type, which allows you to utilize existing content without having to recreate a step.

Editing an Action: Mouse

1. Right-click on the mouse action rubber band in the editor workspace.

2. Select **Edit Action...** to display the *Action Properties* window.

3. Select **Mouse action** in the left pane.



4. Edit the following fields:

Field	Description
Action	Select the mouse action required for the user to move to the next step.
Modifiers	If necessary, specify the Shift, Control, and/or Alt key modifiers to accompany the mouse action.
Go to step	Edit the next step to be displayed after performing the action. Use this option to create a new branch in the simulation.
Show Action Note	Select this option to display the action note in the simulation editor.
Action text	Enter the specific instructional text to display to the user. This text is also displayed in action notes and step text. Right-click in this field to format the text. To reflect a change in the action type or a change in the language, click **Reset to Default Text** to reset the action text. (You must click **OK** to save any changes in the current session before you can reflect the changes via **Reset to Default Text**.)

5. To edit hotspot properties, refer to Editing an Action: Hotspot (on page 131).

6. To edit advanced properties, refer to Editing an Action: Advanced (on page 131).

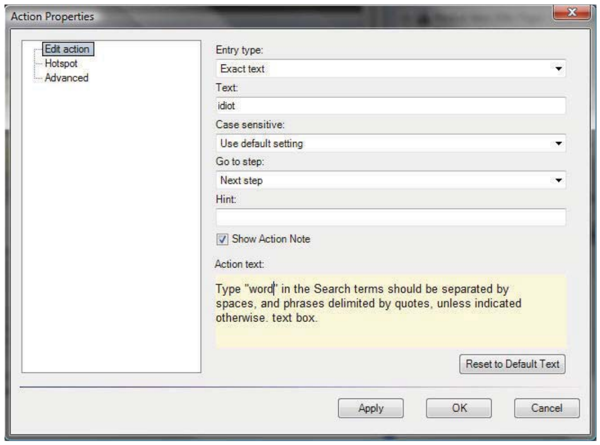
7. Click **OK**.

Editing an Action: Edit

1. Right-click on the edit action rubber band in the editor workspace.

2. Select **Edit Action...** to display the *Action Properties* window.

3. Select **Edit action** in the left pane.



4. Edit the following fields:

Field	Description
Entry type	Select the type of text entry required for the user to move to the next step. **Free text** playback means the user can enter anything in this field to proceed to the next step. **Exact text** playback means the user must enter text that matches your designated entry. **Regular Expression** playback allows the user to enter any data matching the specified regular expression pattern to proceed to the next step. When using regular expression, the user must press a specific key to exit the field: the Enter key is supported in Flash output. Enter the expression in the **Text** field. Example: Email address Example: ^([a-z\.]+)@([a-z\.]+)$ In this example, abc@xxx.org would be permitted, while ABC@xxx.org would not be permitted. Example: ^([a-zA-Z0-9]+)@ancile.com$ In this example, any email address (in upper- or lowercase) from ancile.com would be permitted.

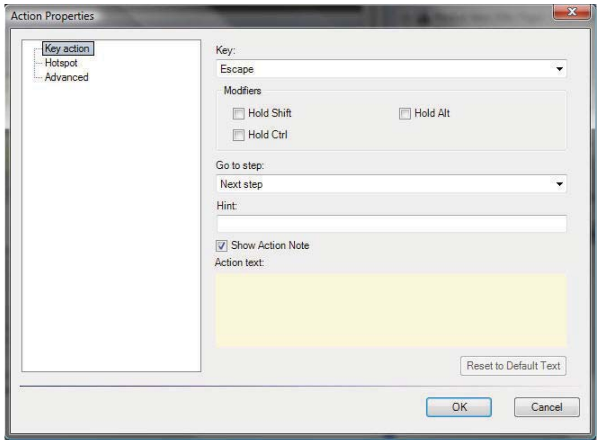
Field	Description
Text	Type the specific text or regular expression pattern the user must enter. Be aware that if the **Case sensitive** option is set to **Yes**, the user must type the case-specific text in the hotspot to continue to the next step.
Case sensitive	Select **Yes** or **No** to specify whether the text entered during playback must exactly match the recorded text. To use the default setting specified in the template, select **Use default setting** from the drop down-list.
Go to step	Edit the next step to be displayed after performing the action. Use this option to create a new branch in the simulation.
Hint	Enter the hint to be displayed during Self-Test or Assessment modes.
Show Action Note	Select this option to toggle the display of the action note in the simulation editor.
Action text	Enter the specific instructional text to display to the user. To reflect a change in the action type or a change in the language, click **Reset to Default Text** to reset the action text. (You must click **OK** to save any changes in the current session before you can reflect the changes via **Reset to Default Text**.)

5. To edit hotspot properties, refer to Editing an Action: Hotspot (on page 131).
6. To edit advanced properties, refer to Editing an Action: Advanced (on page 131).
7. Click **OK.**

Editing an Action: Key

1. Right-click on the key action rubber band in the editor workspace.
2. Select **Edit Action...** to display the *Action Properties* window.

3. Select **Key action** in the left pane.



4. Edit the following fields:

Field	Description
Key	Select the key action required for the user to move to the next step.
Modifiers	If necessary, specify the Shift, Control, and/or Alt key modifiers to accompany the key action.
Go to step	Edit the next step to be displayed after performing the action. Use this option to create a new branch in the simulation.
Hint	Enter the hint to be displayed during Self-Test or Assessment modes.
Show Action Note	Select this option to toggle the display of the action note in the simulation editor.
Action text	Enter the specific instructional text to display to the user. To reflect a change in the action type or a change in the language, click **Reset to Default Text** to reset the action text. (You must click **OK** to save any changes in the current session before you can reflect the changes via **Reset to Default Text**.)

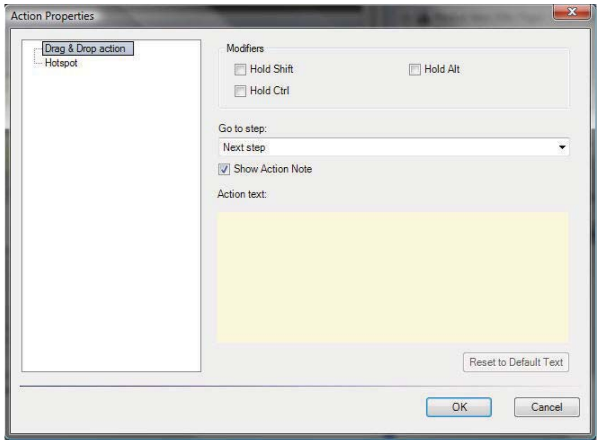
5. To edit hotspot properties, refer to Editing an Action: Hotspot (on page 131).

6. To edit advanced properties, refer to Editing an Action: Advanced (on page 131).

7. Click **OK.**

Editing an Action: Drag & Drop

1. Right-click on the drag & drop action rubber band in the editor workspace.
2. Select **Edit Action...** to display the *Action Properties* window.
3. Select **Drag & Drop action** in the left pane.



4. Edit the following fields:

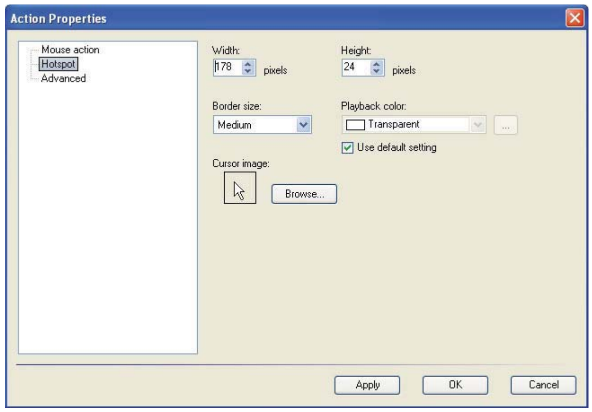
Field	Description
Modifiers	If necessary, specify the Shift, Control, and/or Alt key modifiers to accompany the key action.
Go to step	Edit the next step to be displayed after performing the action. Use this option to create a new branch in the simulation.
Show Action Note	Select this option to toggle the display of the action note in the simulation editor.
Action text	Enter the specific instructional text to display to the user. To reflect a change in the action type or a change in the language, click **Reset to Default Text** to reset the action text. (You must click **OK** to save any changes in the current session before you can reflect the changes via **Reset to Default Text**.)

5. To edit hotspot properties, refer to Editing an Action: Hotspot (on page 131).
6. Click **OK**.

Editing an Action: Hotspot

1. Right-click on the [Action Type] rubberband.

2. Select **Edit Action...** to display the *Action Properties* window.Select **Hotspot** in the left pane.



3. Edit the following fields:

Options display based on the action type selected.

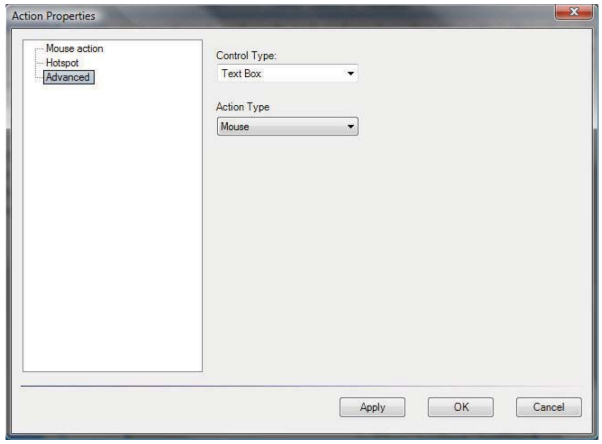
Field	Description
Width	Specify the width of the hotspot in pixels.
Height	Specify the height of the hotspot in pixels.
Border size	Select the width of the hotspot border from the drop-down list.
Playback color	Select the playback color of the hotspot from the drop-down list. Select the **Use default setting** checkbox to specify the template default.
Cursor image	Browse to select the cursor graphic displayed inside the action hotspot.

Editing an Action: Advanced

1. Right-click on the [Action Type] rubberband.

2. Select **Edit Action...** to display the *Action Properties* window.

3. Select **Advanced** in the left pane.



4. Select a control type for the action rubberband from the **Control Type** drop-down list.

   This is useful if you want to change the control type for the action on a step. For example, if you want want to change "Main Menu" to "Menu item, or if you have inserted a step manually and want to define a control type for the action. For example, changing the manually-inserted action from the default "Unknown" to "List Box."

5. Select an action type from the **Action Type** drop-down list.

6. Click **OK** to save your changes and close the window.

Displaying and Hiding Action Notes in the Document Editor

1. In the editor workspace, select the Simulation view.

2. Right-click on the note.

3. Select **Edit Action**.

4. Click **[Action Type] Action** in the left pane.

5. Select the **Show Action Note** checkbox.

6. Click **OK**.

For information on enabling display of action notes in published output, refer to "Using Author Templates". For information on editing action notes, refer to Editing Actions.

Moving and Adjusting a Rubberband

1. Click on the rubberband.

2. Drag the rubberband to the desired location on the image, or click and drag on a sizing handle to resize.

   Optionally, you can use the cursor keys to move the rubberband around on the image. The action note tail will snap to the location closest to the center point of the action note associated with the hotspot.

Editing a Tooltip

1. Right-click on the tooltip in the editor workspace.

2. Select **Edit Tooltip...** to display the *Tooltip Properties* window.

3. Select **General** in the left pane, and edit the following fields:

Field	Description
Text	Enter the specific text to display to the user.
Width	Specify the width of the hotspot in pixels.
Height	Specify the height of the hotspot in pixels.

4. Click **OK** to save your changes and close the window.

Editing a Branch for Display in Auto Playback

1. Click on the branch step in the *Steps* task pane.

2. In the *Content Pane*, right-click on the branch action rubber band.

3. Select **Edit Action...** to display the *Action Properties* window.

4. Select the **[Action Type]** in the left pane.

5. Select the desired step number or action in the **Go to step** field.

6. To edit hotspot properties, refer to Editing an Action: Hotspot (on page 131).

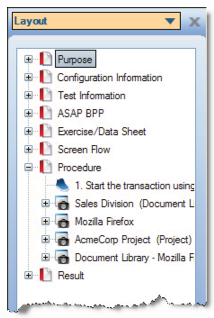
7. To edit Advanced properties, refer to Editing an Action: Advanced (on page 131).

8. Click **OK** to save your changes and close the window.

Using Document Sections

The document view in uPerform Express is divided into several sections. Sections are used to provide 'containers' for specialized information that you may wish to use in your published content. The inclusion and order of sections is dictated by your template.

Sections are displayed in the *Layout* task pane. When you expand a section displayed in the task pane, you can click on a sub-section to navigate to that location in the content area.



Several standard document sections are delivered with uPerform Express:

- Purpose (Overview) - contains front matter information.
- Configuration Information: Lists information such as configuration menu path, key field changes, and date of configuration change.
- Test Information: Documents the test conditions, expected results, and actual results that ensure that the related transaction has been correctly configured and documented and is functioning correctly in the system.
- ASAP BPP: Mimics the business process procedure (BPP) documents delivered with an Accelerated SAP (ASAP) implementation.
- Exercise/Data Sheet: Provides a user training document that includes data for a given procedure, and tasks and questions for students to complete. For additional information on the exercise section, refer to Generating the Exercise Section (on page 158).
- Screenflow: Provides a graphical overview of the entire task or process. For additional information on the screenflow section, refer to Working with the Screenflow (on page 161).
- Procedure - end user procedures with steps, field description tables, and screen shots.
- Result - provides a location to enter any final comments or notes.

Only the Procedure, Screenflow, and Exercise/Data Sheet sections are required to be included in the document. All other sections can be included or excluded from your documents via the template. In addition, the administrator can create custom sections within the author template. For more information on author templates, refer to "Create and Open a New Author Template".

Editing Document Sections

The uPerform Express document view contains overview information consisting of:

- Purpose: intention of the document
- Trigger: activities that may trigger use of the documented procedure
- Prerequisites: requirements for using the documented procedure
- Menu Path: menu path for initiating the application or transaction addressed in the document
- Transaction Code: References the transaction code to which the document refers
- Helpful Hints: information that the end user may find beneficial

In addition, each uPerform Express document contains a Result section at the conclusion of the procedure steps. These sections, and the Configuration, Test, and ASAP BPP sections, can be edited to include supplemental text, tables, and images.

The majority of editing and formatting options are available from both the toolbars and the right-click menu.

Inserting Objects in Document Sections

Inserting Text

1. Create or open a document.
2. Click the **Document** tab.
3. Place the cursor at the desired insertion point.
4. Enter text.

Inserting a Manual Page Break

1. Place the cursor where you want to insert the page break.
2. Select **INSERT > INSERT PAGE BREAK**.
3. To remove, right-click on the page break, and select **Remove Page Break**.

Inserting a Web, File, or Intra Link

1. Highlight the free text or text within a note.
2. Select **INSERT > LINK** from the drop-down list.
3. Complete the following fields:

Field	Description
Type	Select **Web Link** to add a link to a URL or to a file. Select **Intra-Link** to add a link to a location within the document.
Text	Displays the text selected for link. This field is not editable.
Target	For a web link, select the action for the link: **Default**: Opens the link based on your browser settings. **New Window**: Opens the link in a new browser window. **Same Window**: Opens the link in an existing browser window.
Link Location	Enter a URL address, or click **Browse ...** to specify a file location locally or on a network.
Intra-Link Location	Click **Browse ...** to select a location within the document.

4. Click **Insert**.

Inserting Headings, Examples, and Menu Items

1. Create or open a document.
2. Click the **Document** tab.
3. Place the cursor at the desired insertion point.

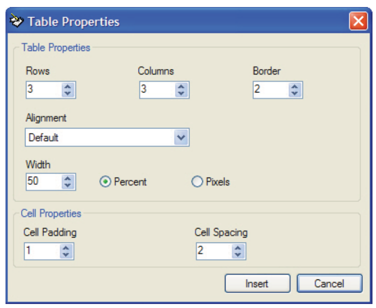
4. As desired, select one of the following options:

If You Want To	Then
Insert a heading and sub-bullets	Select **INSERT > INSERT HEADING**.
Insert an example	Select **INSERT > INSERT EXAMPLE**.
Insert a menu item	Select **INSERT > INSERT MENU ITEM**.
Insert a standard code	Select **INSERT > STANDARD CODE**.

Inserting a Table

1. Position the cursor where the table is to be inserted.

2. Select **INSERT > INSERT TABLE**.



3. Complete the following fields:

Field	Description
Rows	Enter the number of table rows.
Columns	Enter the number of table columns.
Border	Enter a value for the table border width.
Alignment	Specify a **Left**, **Center**, or **Right** alignment for the caption.
Width	Specify **Percent** or **Pixels**, and enter the width of the table.
Cell Padding	Specify the amount of space between the border of the cell and the content of the cell.
Cell Spacing	Specify the amount of space between the cells within a table.

4. Click **Insert** to insert the table.

Inserting and Deleting Rows and Columns

1. Right-click on the table.
2. Select **INSERT > TABLE**.
3. Choose from the following options:

Field	Description
Properties	Allows you to edit the properties specified in Inserting a Table (on page 137).
Insert Row	Inserts a row below the selected row.
Delete Row	Deletes the selected row.
Insert Column	Inserts a column to the left of the selected column.
Delete Column	Deletes the selected column.

Inserting and Editing a Field/Description or an If/Then Table

A Field/Description table is used to capture the name of the field; whether the field is required, optional, or conditional; and a description of the field. An editable area below the table allows you to enter additional information about what the table contains.

An If/Then table provides the user with more than one performance option before continuing to the next step.

1. Position the cursor where the table is to be inserted.
2. Select **INSERT >STEPS**.
3. Choose from the following options:

If You Want To	Then
Insert a Field/Description Table	Select **Field**.
Insert an If/Then Table	Select **If**.

4. Optionally, right-click within the table, and select **INSERT > INSERT FIELD ENTRY** to insert a new field into the table.
5. Optionally, click on the **Example** text and press the **Delete** key to remove the **Example** field from the table.

Manually inserted Field/Description tables are not globalized. For more information on globalizing, refer to "Using Globalize".

Inserting an If/Then/Go To Table

An If/Then/Go To table provides a user with more than one performance option to complete before branching to another step.

1. Click the **Simulation** tab
2. Select the step in which you want to insert an If/Then/Go To table.
3. Select **INSERT >ACTION>[ACTION TYPE]**.
4. Edit the action properties.
5. Click **OK**.
6. Right-click on the step and select **Edit in document view** to edit the If/Then/Go To table.
7. Optionally, right-click in a row and select **Move Up** or **Move Down** to reorder the rows in the table.

Inserting a Freetext Block

1. Position the cursor where the freetext block is to be inserted.
2. Select **INSERT > FREETEXT > [BLOCK NAME]**.

Inserting a Note

1. Position the cursor where the note is to be inserted.
2. Select **INSERT > NOTE > [NOTE]**.

Inserting an Icon

1. Position the cursor in the freetext block, note, or Field/Description into which you want to insert an icon.
2. Right-click and select **ICON > [ICON]**.

Inserting a Step

1. Position the cursor where the step is to be inserted.
2. Select **INSERT > STEPS > [STEP TYPE]**.

   If you are inserting a step from the first step, you will be prompted as to where you want to insert the step.

Editing Objects in Document Sections

Editing Button Image Layout

1. Create or open a document.
2. Click the **Document** tab.
3. Navigate to the step containing the button image you want to edit.
4. Right-click on the image.
5. Select **Image Layout**.
6. Choose from the following options:

Field	Description
Bottom	Positions the button image along the bottom of the step text.
Left	Positions the image to the left of the step text.
Image Middle = Text Bottom	Positions the image in the center of the image area within the step text.
Right	Positions the image to the right of the step text.
Top	Positions the image at the top of the step text.

7. Click **OK**.

Copying Steps, Notes, and Freetext Blocks

1. In the *Task Pane*, right-click on the step, note, or freetext block to be copied.
2. Select **EDIT > COPY**.

3. Click below the object where you would like to insert the step, note, or freetext.

4. Right-click, and select **EDIT > PASTE** to paste the step, note, or freetext.

Deleting Steps, Notes, and Freetext Blocks

1. In the *Task Pane*, right-click on the step, note, or freetext block to be deleted.

2. Select **EDIT > DELETE** to delete the object.

Deleting a Web Link

1. Right-click on the web link you want to delete.

2. Select **INSERT > REMOVE LINK**.

3. Click **Remove Link**.

Editing Text

1. Create or open a document.

2. Highlight the text to be edited.

3. Right-click and select the desired option from the **Edit** submenu.

Editing the Format of Blocks Within a Section

1. Create or open a document.

2. Click the **Document** tab.

3. Select the desired block in the *Layout* pane (for example, Configuration Information).

4. Select **FORMAT > FORMAT OBJECT**.

5. Select **Format** in the left pane.

6. Select a style from the **Style** drop-down list.

7. Optionally, select or deselect, the **Make Step Visible** checkbox.

8. Select **Source** in the left pane.

9. Edit the source code.

   Basic knowledge of HTML is required.

For detailed information on editing blocks, refer to Specifying New Template Settings: Blocks.

Editing Notes and Free Text

1. Create or open a document.

2. Click the **Document** tab.

3. In the *Content Area*, right-click on the note or free text you want to edit.

4. Choose from the following options:

If You Want To	Then
Insert an object	Select an object from the list.
Delete the note or free text	Select **EDIT > DELETE**.
Modify the note or free text	Select **Edit [Freetext or Note] ...**, and go to Step 5.

5. In the *Format* pane choose from the following options:

   Depending on the item selected, some of the following options may not display.

Field	Description
Document	Select a style from the **Style** drop-down list. Click in the checkbox next to **Visible** to enable display in published output.
Simulation	Select a style from the **Style** drop-down list. Click in the checkbox next to **Visible** to enable display in published output.
Note	Select an icon from the **Icon** drop-down list. Click the checkbox next to **Pointer** to enable a pointer in published output.

6. In the *Source* pane, edit the note or free text.

7. Click **OK** to apply changes.

Editing Steps

1. Create or open a document.
2. Click the **Document** tab.
3. Perform one of the following options:

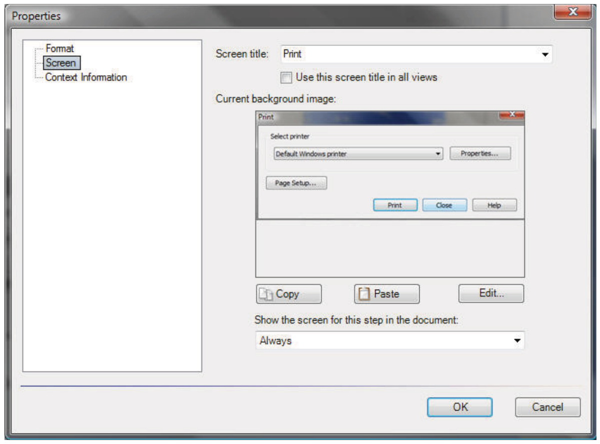
If You Want To	Then
Edit a single step	In the *Task Pane,* right-click on the step you want to edit. Select **Insert**, and select an object from the list. Go to Step 5.
Edit multiple steps	In the *Task Pane*, shift+left-click, or Ctrl+left-click, to select multiple steps. Right-click on any selected step, and go to Step 4.

4. Choose from the following options:

If You Want To	Then
Insert an object	Select **Insert**, and select an object from the list.
Delete the step	Select **Delete**.
Modify the step	Select **Edit Step ...** and go to Step 5.
Copy the step	Select **Copy**.
Cut the step to paste in another location within the document	Select **Cut**.

5. In the *Format* pane choose from the following options:

Field	Description
Document	Select a style from the **Style** drop-down list. Select the **Make Step Visible** checkbox to enable display in the published output. Select the **Make Callouts Visible** checkbox to enable display in the published output.
Simulation	Select the **Make Step Visible** checkbox to enable display in the published output.
Step Numbers	Select a style from the **Style** drop-down list to select the style of the step-action type. Select a level from the **Level** drop-down list to enable the step as a sub-step.



6. In the *Screen* pane, choose from the following options:

Field	Description
Screen title	Select a screen title from the **Screen title** drop-down list or manually specify a caption. Optionally, select **Use this screen title in all views**.
Use this screen title in all views	Select the **Use this screen title in all views** option to use the selected screen title for all matching screens in the document.
Screen	Click **Select...** or use the **Copy** and **Paste** commands to specify a screen to use for the step or to choose an appropriate thumbnail on the *Available Backgrounds* window.
Show the screen for this step in the document	**Only if it is the first time this screen is used**: Displays a new screen only if the screen is different from the previous step. This is the default action. **Never**: Does not display a screen for this step. **Always**: Displays a new screen for the step.

7. In the *Step* pane, choose from the following options:

This pane is only available if the object is a field entry in a Field/Description table.

If you want to	Then
Enable a field	Click the **Enabled** checkbox to display the label during publication.
Add a new label	Click **Add**. Enter a caption in the **Caption** field. Select a location from the **Location** drop-down list. Click **OK**.

Modify a field	Select a label from the *Label* window. Click **Modify**. Edit the caption in the **Caption** field. Edit the location in the **Location** drop-down list. Click **OK**.
Delete a field	Select a label from the *Label* window. Click **Delete**.
Specify a field requirement	Select Required, Optional, or Conditional from the **Required** drop-down list to determine the requirement for the step. Optionally, you can edit the requirement by clicking on the requirement in the R/O/C column in the Field/Description table in the *Editor Pane*, and then selecting a requirement from the drop-down list.

8. In the *Source* pane, edit the source code.

   Depending on what action the step contains, this pane may not be available. Basic knowledge of HTML is required.

9. Select **Context Information** in the left pane.

10. Review the context information.

    For more information, refer to Editing a Simulation Step: Viewing Context Information (on page 119).

11. Click **OK** to save your changes and close the window.

Modifying Paragraphs

Setting the Paragraph Format

1. Right-click within the paragraph you wish to edit and select **Format**.

2. Modify the paragraph format using the indent and list functionalities.

Setting the Paragraph Justification

1. Right-click within the paragraph you wish to edit, and select **Justify**.

2. Select **Left**, **Center**, or **Right** to specify the text justification.

Modifying Characters

Setting the Font Type and Size

1. Highlight the text.
2. Right-click, and select **Format.**
3. Select **Font Dialog** to specify the font style and size, or select **Font Color** to specify the font color.

Setting the Character Format

1. Highlight the text.
2. Right-click, and select **Format**.
3. Modify the character format using the **Bold**, **Italic**, **Underline**, **Superscript**, **Subscript**, and **Strikeout** options. To return the character format to the default, select **Normal**.

Working With Images, Masks, and Callouts

Images allow you to provide graphic examples within your documents and simulations. You can control what displays in your images and reduce the amount of time your authors spend editing and formatting after image capture. You don't have to take extra steps to modify a screen shot, alter information, or move action notes to hide non-pertinent information.

Callouts allow you to bring attention to specific controls and regions on screen images within a published uPerform document. Two types of callouts are available:

- Numbered callouts, which are automatically created for mouse, edit, and drag-and-drop actions; field/description tables; and if/then tables within the procedure section of a document. These callouts display as a number in the left or right margins of the screen image. For a field/description or if/then table, the callout will display in published output as a bracket that highlights a group of fields. For all other actions, the callout displays as a trajectory line.

- Non-step callouts, which you can create manually anywhere within the procedure section of the document. Non-step callouts display and are edited like simulation notes.

Callout display is enabled in the simulation by editing the step properties. Callout display and line color in published content is controlled within the template. For more information, refer to Default Publication Settings: Document.

Callout lines are created and adjusted according to the following conditions:

Condition	How the Line is Drawn
The step number is placed within the vertical coordinate range of the hotspot.	The starting point of the callout will display on the side of the action note with the central vertical coordinate matching. For example, center to center. A horizontal line will be drawn to connect the step number with the starting point of the callout.
The step number is placed above/below the vertical coordinate range of the hotspot.	The starting point of the callout will display at the top/bottom center of the hotspot. A vertical line is drawn from that position to the central vertical coordinate of the step number. A horizontal line is drawn to connect the vertical line with the step number.
The step number is placed above/below the vertical coordinate range of the combined hotspot region.	A Z-shaped line will connect the center of the bracket to the step number. The vertical split of the Z-shaped line will start halfway between the step number and the bracket.

Condition	How the Line is Drawn
The step number is placed within the vertical coordinate range of the hotspot.	You can shift the callout horizontally from the margin to the callout hotspot. In the case of range callouts, the limiting hotspot will be the hotspot closest to the margin that the callout step number is drawn on.
Step number is placed above/below the vertical coordinate range of the hotspot.	You can shift the callout horizontally within horizontal range of the callout hotspot. If a hotspot covers a textbox, you can only shift the callout along the bottom or top side of the textbox.

Working with Images

Editing Images

1. Create or open a document.
2. Click the **Document** tab.
3. Navigate to the step containing the image you want to edit.
4. Right-click on the image.
5. Select **Edit Screen ...** .

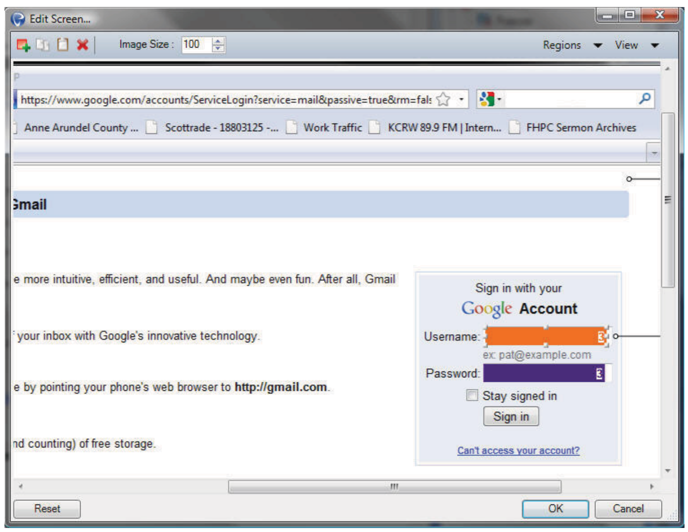
6. Perform one of the following options:

If You Want To	Then
Resize the image	Click on the up or down arrow in the **Image Size** field .
Crop the image	Grab a sizing handle and drag to crop the image.
Determine the region that displays	Select an image from the **Regions** drop-down list.

7. Click **OK**.

Viewing an Image Mask

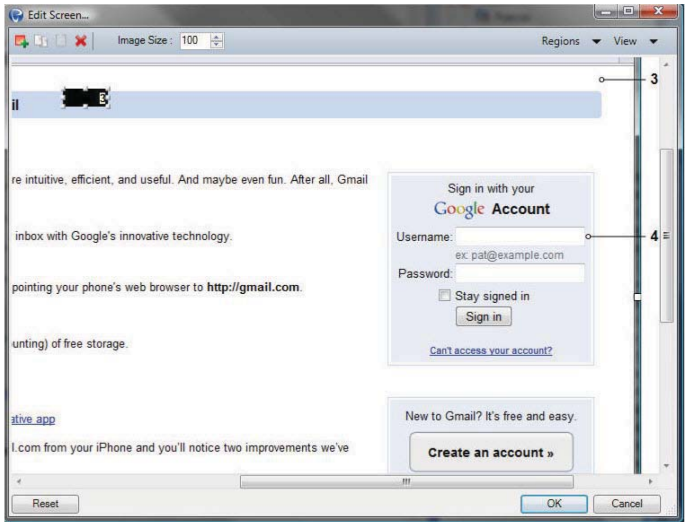
1. Create or open a document.
2. Click the **Document** tab.
3. Navigate to the step containing the mask you want to view.
4. Right-click on the imag containing the mask.
5. Select **Edit Screen ...** .
6. Select **View** > **Masks**.



Creating an Image Mask

1. Create or open a document.
2. Click the **Document** tab.
3. Navigate to the step containing an image for which you want to create a mask.
4. Select **Edit Screen ...** .
5. Right-click on the image.

6. Click .



The mask will display as a small, rectangular, black box in the upper left corner of the screen image.

7. Select the mask, and drag it to the area you want to mask.

8. Click **OK**.

Editing an Image Mask

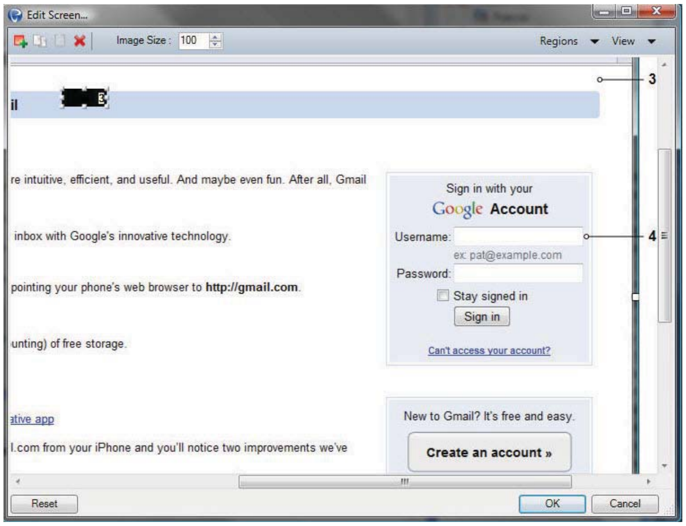
1. Create or open a document.

2. Click the **Document** tab.

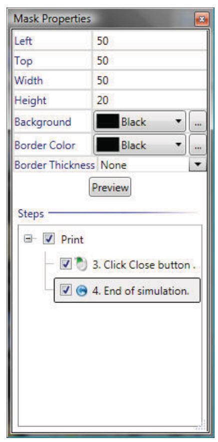
3. Navigate to the step containing the mask you want to edit.

4. Right-click on the image containing the mask.

5. Select **Edit Screen ...** .



6. Select **View** > **Mask Properties**.



7. Choose from the following options:

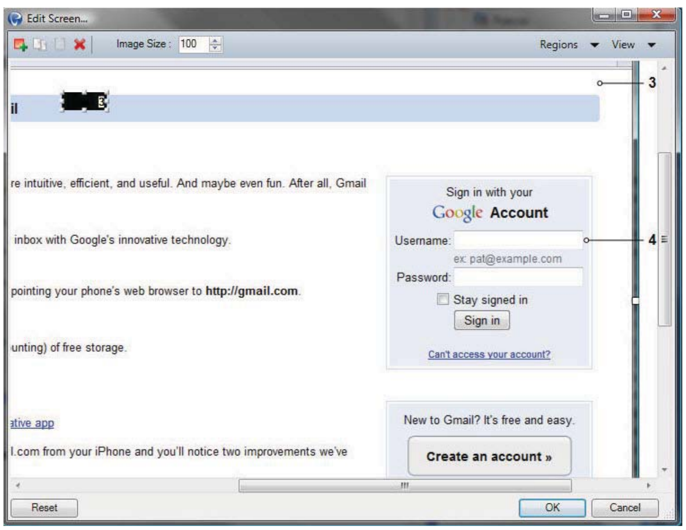
Field	Description
Left, Top, Width, Height	Enter values in the **Left**, **Right**, **Height**, and **Width** fields, or grab a sizing handle on the mask within the image, and drag it to the size you want the mask to cover. The **Left**, **Right**, **Height**, and **Width** fields will adjust accordingly.
Background	Click **...** to select a background color.
Border Color	Click **...** to select a background color.
Border Thickness	Chose a border thickness from the drop-down list.
Preview	Allows you to preview the mask.
Steps	Select the steps for which you want to include the mask.

8. Click the **X** to close the Mask Properties window.

9. Click **OK**.

Copying and Pasting an Image Mask

1. Create or open a document.
2. Click the **Document** tab.
3. Navigate to the step containing the image you want to copy and paste.
4. Right-click on the image containing the mask.
5. Select **Edit Screen ...** .

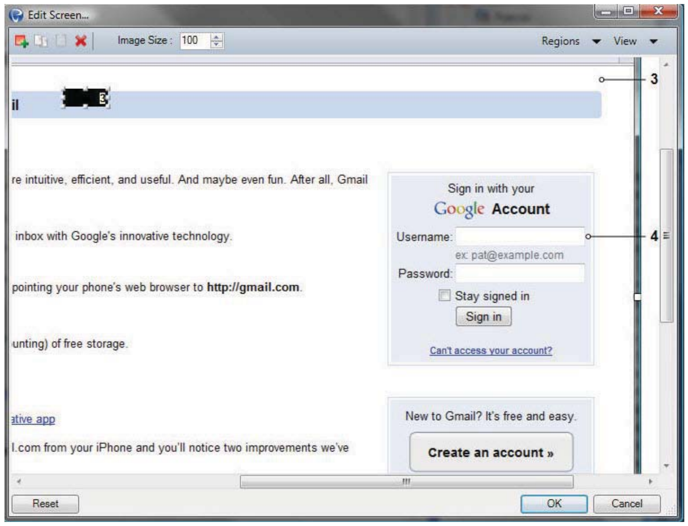


6. Select the mask you want to copy.
7. Click to copy the mask.
8. Click to paste the mask.

Deleting an Image Mask

1. Create or open a document.
2. Click the **Document** tab.
3. Navigate to the step containing the mask you want to delete.
4. Right-click on the image containing the mask.

5. Select **Edit Screen ...** .



6. Right-click on the mask to be deleted.

7. Select **Delete**.

8. Click **OK**.

Resetting Screen Images

You can reset an image to its originally-recorded state as long as the image has not been saved. Resetting an image will remove all masks, callout edits, and additional image edits you have made to the screen.

1. Create or open a document.

2. Click the **Document** tab.

3. Navigate to the step containing the image you want to edit.

4. Right-click on the image.

5. Select **Edit Screen ...** .

6. Click **Reset**.

Working with Callouts

Inserting a Numbered Callout

If callout functionality has been enabled in the template and visibility turned on within the document options, numbered callouts are automatically inserted into the document.

For information on enabling functionality within the template, refer to Default Publication Settings: Document. For information on enabling visibility within the document, Specifying Document Options (on page 43).

Simulation View must be enabled in order to activate the display of callouts.

Inserting a Non-Step Callout

1. Create or open a document.
2. Click the **Simulation** tab.
3. Navigate to the step for which you want to create a callout.
4. Select **INSERT > NOTE > NOTE**.
5. Reposition the callout within the screen image.

   Non-step callouts will not display in the document view if they are placed outside the screen image.

6. Right-click on the note.
7. Select **Edit Note...** .
8. Select **General** on the left pane.
9. Select the **Enable callout in document view** checkbox.

   Simulation View must be enabled in order to activate the display of callouts.

10. Click **OK**.

Viewing Callouts

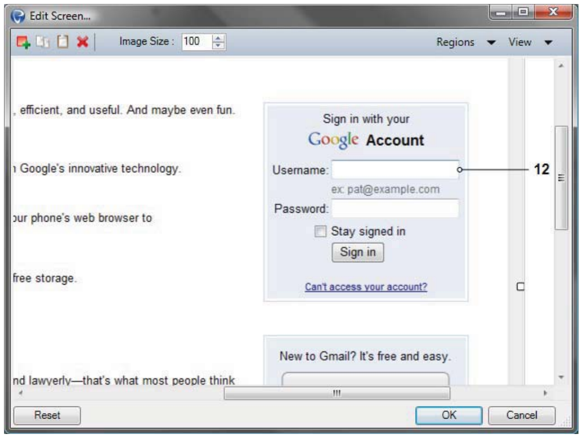
1. Create or open a document.
2. Click the **Document** tab.
3. Navigate to the step containing the callout you want to view.
4. Right-click on the imag containing the callout.
5. Select **Edit Screen ...** .

6. Select **View > Callouts**.

Editing a Numbered Callout

1. Create or open a document.
2. Click the **Document** tab.
3. Navigate to the step containing the numbered callout you want to edit.
4. Right-click on the image containing the callout.

5. Select **Edit Screen ...** .



6. Click on a callout.

The displayed number is the step number to which the callout is associated.

7. Perform one of the following actions:

If You Want To	Then
Edit the location of the callout number	Drag the callout up, down, left, or right to change the angle of the trajectory line.
Edit the destination of the trajectory line	Click on the circular grip and move it left or right to adjust the destination of the trajectory line.

8. Click **OK**.

Callout line color is defined in the template. For more information, refer to Specifying General Settings: Information.

Editing a Non-Step Callout

1. Create or open a document.

2. Click the **Document** tab.

3. Navigate to the step containing the non-step callout you want to edit.

4. Edit the callout as you would a simulation note. For more information, refer to Editing Notes (on page 120).

Generating the Exercise Section

The Exercise section is automatically generated based on the information contained in the Procedure section of the document. To limit rework, you should complete editing of the Procedure section before generating the exercise section.

If you must repopulate the Exercise section after initial creation, refer to Rebuilding the Exercise Section (on page 159).

When generating the Exercise section, data is taken from the field description tables and screen titles to create and populate the Required Data table and the Tasks section.

Required Data Table

A required data table is created from field description tables in the Procedure section. The required data table lists field names and the values listed as examples in the field description tables. If the recorder was used to capture data, these examples are the actual data typed during the task. It does not matter if the examples were automatically inserted during recording or manually inserted later.

Tasks Section

Specific tasks are created for each screen documented. These tasks are created from the screen titles that exist in the Procedure section. It does not matter if the screens were originally captured during recording or were inserted later in editing.

Generating the Exercise Section

1. Open the uPerform Express document.
2. Select **TOOLS > GENERATE EXERCISE SECTION**.
3. Scroll to the Exercise section and edit the section as needed.

Adding User-Specific Data

In certain transactions, the same data cannot be used for every user in the training environment, and user-specific data must be used. This user-specific data will not automatically be created by the template and must be populated by the author.

1. Open the uPerform Express document.

2. Scroll to the User-Specific Data subsection.

3. Double-click to highlight the **xxxx** generic text in the column headings, and type the desired student identifier (for example, "Student 1").

4. Double-click to highlight the **xxxx** generic text in the rows, and type the user-specific data.

Replacing the Boilerplate Questions

You should enter customized questions and answers in the Tasks subsection.

1. Double-click to highlight the **xxxx** generic text.

2. Type the appropriate question or answer.

Rebuilding the Exercise Section

The Exercise section is automatically populated based on the information contained in the Procedure section of the document. While it is recommended that you complete the Procedure section before including the Exercise section, you can rebuild your exercise information after initial creation if necessary.

When you rebuild the Exercise section, any text you have entered in the tables, tasks, or question and answer areas will be overwritten.

Change the Language of Default Text

After document creation, you can morph the language of the boilerplate text and simulation action text in your uPerform Express document, simulation, or course. The boilerplate text includes such phrases as "Use this procedure to" and "Helpful Hints." The simulation action text includes such standard introductory step text as "Click," "Type," and "Press."

uPerform Express will only morph default text. Text you type in the document, simulation, or course views is not morphed to another language. In addition, if you have customized simulation action text, these customizations will be lost during morphing.

Changing the Language of Default Text

1. Open the uPerform Express document.
2. Select **FILE > PROPERTIES...** .
3. Select the new language from the **Language** drop-down list.
4. Click **OK**.
5. Click **Yes** at the confirmation prompt.

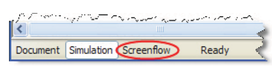
Working with the Screenflow

The uPerform Express screenflow is an additional view available from the editor workspace. The screenflow provides a graphical overview of the entire task or process. The screenflow is automatically updated as elements are added or edited in either the document or the simulation view. Branching is not depicted in the screenflow.

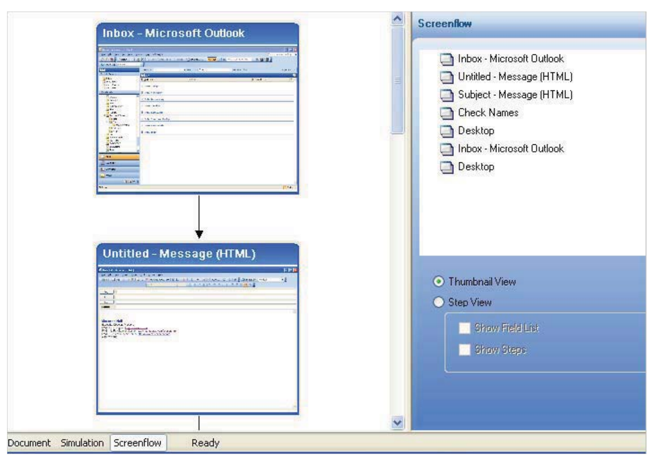
When published in HTML output, the screenflow displays at the beginning of the document and is mapped so that each screen in the flow is hyperlinked to the correlating step in the procedure.

Viewing the Screenflow

1. Select the **Screenflow** tab in the lower left.

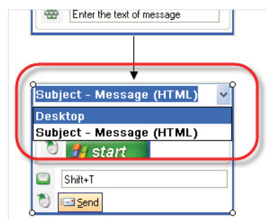


The screenflow view is also available via the **VIEW > SCREENFLOW** menu option.



Customizing the Screenflow Display

Choose one or more of the following options:

If You Want To	Then
Display the screens in a thumbnail view	Select the **Thumbnail View** radio button in the task pane. The view that is selected in the document will be reflected in the published output.
Display only the screen title bars with optional additional information	Select the **Step View** radio button in the task pane. When displaying the step view, you can also elect to display a list of the fields and/or the steps on the screen. The view that is selected in the document will be reflected in the published output.
Edit the screen title	Double-click in the screen title portion of the screen image, and select a new title from the drop-down menu or enter a new title.  Changing the screen title in this manner in the screenflow view will also change the screen title for all screens with the same title in the document view. The simulation view is not affected.
Quickly navigate to a particular step in the document or simulation views	Right-click on the screen image and select **Edit in document view** or **Edit in simulation view**.

Chapter 9: Editing and Formatting: Courses

After you have created a course, you have many options for editing and formatting content in the course.

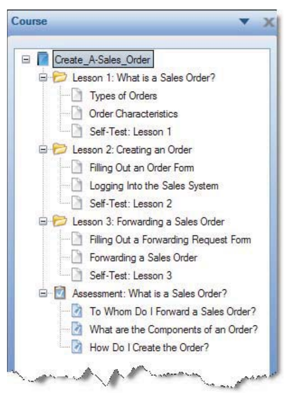
In addition to inserting standard objects such as lessons, pages, and assessment sections, you can also insert text, images, hyperlinks, hotspots, Microsoft PowerPoint content, Adobe Flash content, and audio.

Introduction to Editing and Formatting: Courses

After you have created a course, you can enhance your course using basic editing and formatting functionality. For basic formatting functionality, refer to Editing and Formatting: Basics (on page 91). In addition, you can edit course content to include such options as inserting text, images, pages, Microsoft PowerPoint content, and Flash content. Edits should be performed on content stored on your local computer.

ANCILE uPerform Express courses are made up of a course root page, lesson folders, pages (standard or interaction), and optional branching or assessment sections. Standard content pages can contain conceptual information about the course topic and interaction pages quiz the end user on course materials. Results of the optional branching or assessment sections can be tracked and analyzed using a Learning Management System (LMS).

Lessons are similar to a chapter in a textbook. You can use lessons to introduce content, and then use pages to deliver topic details to the end user. The following is an illustration of a typical course hierarchy within the uPerform Express course editor:



Some of the editing and formatting functions available to you include:

- Insert text and images, and apply formatting
- Insert uPerform Express procedural content
- Import Microsoft PowerPoint content
- Import content from another uPerform Express course
- Insert hotspots and links
- Embed Flash content
- Insert MP3 audio files

- ❒ Create self-tests
- ❒ Create branching sections
- ❒ Create assessments for integration with an LMS

Working with Lessons

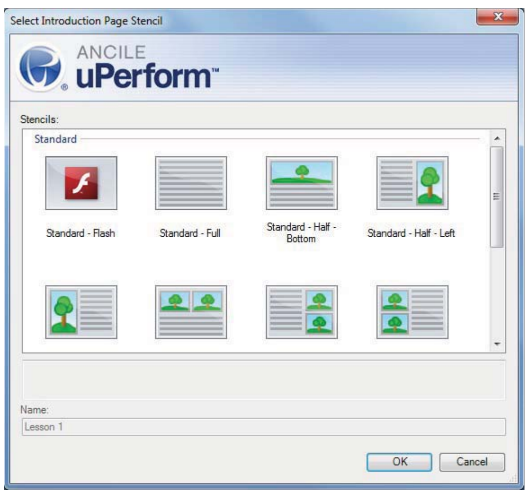
ANCILE uPerform Express course lessons are folders that contain pages. Pages are inserted into lesson folders to create the course content. You can use standard content pages to provide conceptual information to end users. You can use interaction pages to quiz the user throughout the course, then track and analyze results via an LMS.

For detailed information on creating a course, refer to Introduction to Creating and Opening Content.

1. Create or open a course.

2. In the *Course Pane* area, select the course root page or place the cursor where you want to insert a lesson.

3. Select **INSERT > INSERT LESSON...** .



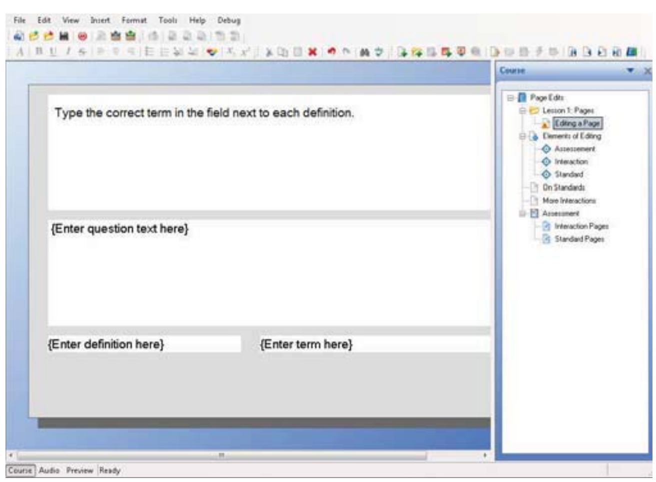
4. Choose a stencil from the following options:

Stencil	Options
Standard - Flash	This stencil creates a standard content page containing a single Flash file.
Standard - Full	This stencil creates a standard content page with text.
Standard - Half - Bottom	This stencil creates a standard content page with text on the bottom of the page. An optional image can be placed on top.
Standard - Half - Left	This stencil creates a standard content page with text on the left of the page. An optional image can be placed to the right.

Stencil	Options
Standard - Half - Right	This stencil creates a standard content page with text on the right of the page. An optional image can be placed to the left.
Standard - Half - Two Image - Bottom	This stencil creates a standard content page with text on the bottom of the page. An optional two images can be placed on top.
Standard - Half - Two Image - Left	This stencil creates a standard content page with text on the left of the page. An optional two images can be placed to the right.
Standard - Half - Two Image - Right	This stencil creates a standard content page with text on the right of the page. An optional two images can be placed to the left.
Standard - Image	This stencil creates a standard content page containing an image.
Standard - Image - Diagonal - Left	This stencil creates a standard content page with text on the top left and bottom right of the page. An optional two images can be placed diagonally within the stencil.
Standard - Image - Diagonal - Right	This stencil creates a standard content page with text on the top right and bottom left of the page. An optional two images can be placed diagonally within the stencil.
Simulation	This stencil creates a standard content page that allows you to import a published uPerform Express simulation.

5. Enter a name in the **Name** field.

6. Click **OK**.



7. In the course content pane, complete the following fields:

Based on the page selected, some of the following options may not be displayed.

Field	Description
{Enter content title here}	Click to highlight the placeholder and overwrite with the title of the lesson.
{Enter content here}	Click to highlight the placeholder and overwrite with the lesson page content.
Add Picture...	Click the hyperlink to browse to the image location.
Add Simulation ...	Click the hyperlink to browse to the published simulation location.

A caution icon will display in the outline view on a lesson that does not contain pages or that contains pages that have not been filled out completely.

Working with Pages

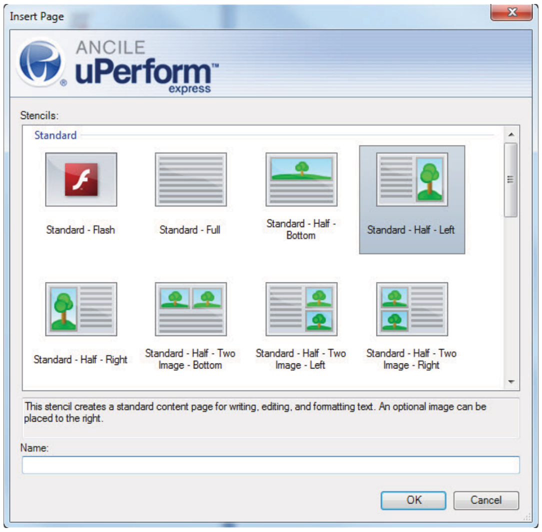
ANCILE uPerform Express pages contain the content for the course. The layout of a page is based on the stencil that you choose when you insert a new page into the course. Two types of stencils are available:

- Standard Content: Contains informational content and optional images.
- Interaction: Contains content consisting of questions and answers and optional images. These stencils use traditional eLearning models such as multiple choice, drag and drop, and fill-in.

Interaction pages can be used with an LMS for tracking purposes, or as a standalone self-test for the user. For more information on working with assessments and self-tests, refer to Working with Assessment Sections and Self-Tests.

Inserting a Page

1. Create or open a course.
2. In the *Task Pane*, click on a course root folder, lesson, page, or assessment.
3. Select **INSERT > INSERT PAGE...**.



4. Choose a stencil from the following options:

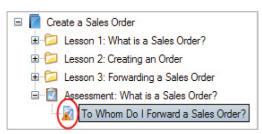
Stencil	Option
Standard - Flash	This stencil creates a standard content page containing a single Flash file.
Standard - Full	This stencil creates a standard content page with text.
Standard - Half - Bottom	This stencil creates a standard content page with text on the bottom of the page. An optional image can be placed on top.
Standard - Half - Left	This stencil creates a standard content page with text on the left of the page. An optional image can be placed to the right.
Standard - Half - Right	This stencil creates a standard content page with text on the right of the page. An optional image can be placed to the left.
Standard - Half - Two Image - Bottom	This stencil creates a standard content page with text on the bottom of the page. An optional two images can be placed on top.
Standard - Half - Two Image - Left	This stencil creates a standard content page with text on the left of the page. An optional two images can be placed to the right.
Standard - Half - Two Image - Right	This stencil creates a standard content page with text on the right of the page. An optional two images can be placed to the left.
Standard - Image - Diagonal - Left	This stencil creates a standard content page with text on the top left and bottom right of the page. An optional two images can be placed diagonally within the stencil.
Standard - Image - Diagonal - Right	This stencil creates a standard content page with text on the top right and bottom left of the page. An optional two images can be placed diagonally within the stencil.
Branching	This stencil creates a branch that allows the user to decide where to go next in the course.
Standard - Image	This stencil creates a standard content page containing an image.
Drag and Drop	This stencil creates an interaction page featuring one matching item per definition.
Drag and Drop - Many-to-One	This stencil creates an interaction page featuring one or more drag-and-drop responses to a single question.
Fill In - Multiple	This stencil creates an interaction page that allows the user to enter responses to multiple questions.
Fill In - Single	This stencil creates an interaction page that allows the user to enter a response to a single question.

Stencil	Option
Multiple Choice	This stencil creates an interaction page featuring several possible responses to a single question. Only one response is correct.
Multiple Choice - Half	This stencil creates an interaction page featuring several possible responses to a single question. Only one response is correct. An optional image can be placed to the right.
Multiple Correct	This stencil creates an interaction page featuring several possible responses to a single question. One or more responses may be correct.
Multiple Correct - Half	This stencil creates an interaction page featuring several possible responses to a single question. One or more responses may be correct. An optional image can be placed to the right.
Simulation	This option is not available for ANCILE uPerform Express. This stencil creates a standard content page that allows you to import a published uPerform Express simulation.

5. Enter a name in the **Name** field.

6. Click **OK**.

A caution icon will display in the outline view on a page for which content has not been filled out completely and on the Assessment section if there are no pages inserted into the assessment.



Switching a Stencil

Switching a stencil allows you to modify any stencil in a uPerform course. This is helpful if you are creating translated courses or need to update the appearance of content within a course stencil. When you switch a stencil, uPerform will preserve the page content.

Switching a Stencil

1. Click in the toolbar.
2. Choose a stencil from the list of options.
3. Click **OK**.

   You will be prompted to confirm your choice. To continue, click **Yes**. To keep the existing stencil, click **No**.

Editing Course Content

The course editor allows you to set formatting within a page. You can also reorder lessons and pages. By default, uPerform Express inserts lessons and pages below the object selected in the task pane.

Setting the Character Format

1. Highlight the text you want to format.
2. In the toolbar, select one of the following rich-text formatting options:

Field	Description
Bold	Select this option to bold the text.
Underline	Select this option to underline the text.
Italic	Select this option to italicize the text.
Bullet List	Select this option to format the text in a bulleted list.
Numbered List	Select this option to format the text in a numbered list.
Increase/Decrease Indent	Select this option to increase/decrease the indent.
Subscript	Select this option to move a character to the bottom of the character line.
Superscript	Select this option to move a character to the top of the character line.

To return the character format to normal, deselect the rich-text formatting from the toolbar.

Reordering Lessons and Pages

1. Click on the lesson or page you want to move.
2. Choose from the following options:

If You Want To	Then
Move the lesson or page above or below another lesson or page	Drag the lesson or page above or below another item in the Course task pane.
Move the lesson or page into another lesson or page	Drag the lesson or page onto the item in the Course task pane.

Using Images

Images can be used to further illustrate a specific point in a lesson and also to enhance conceptual points or questions and answers.

Inserting Images Into Pages

1. During page creation, select a stencil that allows you to insert an image. For more information, refer to Inserting a Page.
2. In the course content area, click **Add Picture...**.
3. Navigate to the image you want to insert.
4. Click **Open**.

Editing Images

1. Navigate to the image you want to edit.
2. Click on the image.
3. Choose from the following options:

If You Want To	Then
Edit the size of the image	Click on a sizing handle and adjust the size of the image.
Edit the content area of the image	Click on the four dots in the center line, and move the line up/down or left/right to adjust the content area of the image.

If You Want To	Then
Edit the image layout	Right-click on the image, and select **Image Layout**. Choose from the following options: **Top left corner** - Aligns the image in the top left corner of the image workspace. **Top right corner** - Aligns the image in the top right corner of the image workspace. **Center** - Aligns the image in the center of the image workspace. **Bottom left corner**- Aligns the image in the bottom left corner of the image workspace. **Bottom right corner** - Aligns the image in the bottom right corner of the image workspace.

Editing Interaction Pages

Interaction pages apply only to self-tests, branching pages, and pages within an assessment section. After you insert a page and choose an interaction page stencil, you must enter content into the fields and select your interactions in order to validate the page within the course.

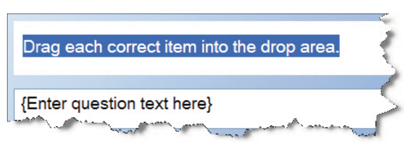
Interactions differ based on the stencil. Interactions only apply to stencils with a question and answer format. In some stencils, the question and answer displays as a term and definition.

You can also customize the instructional phrases of your interactions. For example, you can modify, "Match the term on the left with the definition on the right" to read, "Select the best term for the definition."

Customizing Instructional Phrases

Customized instructional phrases will no longer translate when the course language is changed. You can customize interaction instructional phrases globally within the uPerform Express author template. For more information regarding author templates, refer to Using Author Templates.

1. Click to highlight text in the instructional phrase field.

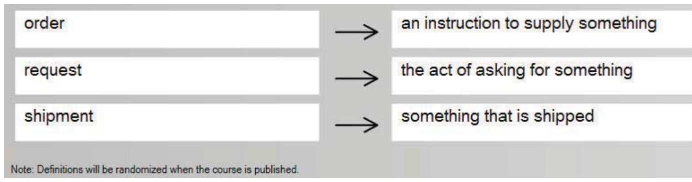


2. Enter new text.

Editing Interactions for Drag and Drop

1. Click on the **{Enter term here}** field.
2. Enter a term.
3. Click on the corresponding **{Enter definition here}** field.

4. Enter a definition.



Definitions will be randomized when the course is published.

Editing Interactions for Drag and Drop - Many-to-One

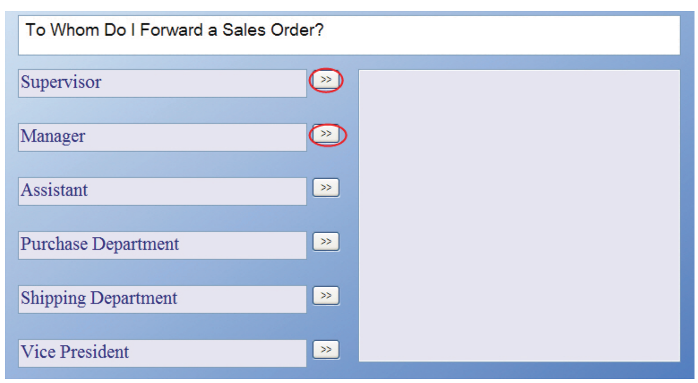
1. Click on the **{Enter question text here}** field.

2. Enter a question.

3. Click on an **{Enter answer text here}** field.

4. Enter an answer.

5. Click next to the correct answer(s) to move the item to the answer pane.



To move an incorrect answer from the answer pane, click .

Editing Interactions for Fill In - Multiple and Single

1. Click on the **{Enter question text here}** field.

2. Enter a question.

3. Click on the **{Enter definition here}** field.

4. Enter a definition.

5. Click on the corresponding **{Enter term here}** field.

6. Enter a term.

If you have multiple correct definitions for a term, separate them with a comma.

Editing Interactions for Multiple Choice - Multiple and Half

If you choose the Multiple Choice - Half stencil, you can insert an optional image to the right. For detailed information, refer to Using Images (on page 175).

1. Click on the **{Enter question text here}** field.

2. Enter a question.

3. Click on the **{Enter answer text here}** field.

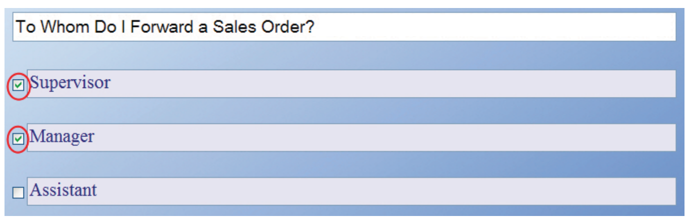
4. Enter possible answer text.

5. Click the radio button next to the correct answer.

Editing Interactions for Multiple Correct - Multiple and Half

If you choose the Multiple Correct - Half stencil, you can insert an optional image to the right. For detailed information, refer to Using Images (on page 175).

1. Click on the **{Enter question text here}** field.
2. Enter a question.
3. Click on the **{Enter answer text here}** field.
4. Enter possible answer text.
5. Click the checkboxes next to the correct answers.



Importing Microsoft PowerPoint Content

ANCILE uPerform Express allows you to import elements from Microsoft PowerPoint presentations. For information on supported versions of Microsoft PowerPoint, refer to the *ANCILE uPerform Express Technical Specifications*. There are three options for importing Microsoft PowerPoint elements:

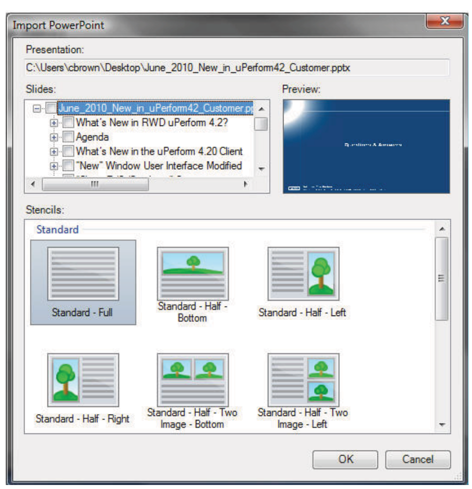
- ❒ Import a slide as a single image
- ❒ Import graphics from the presentation
- ❒ Import text elements from the presentation

Importing PowerPoint Slides as Images

1. Select **INSERT > IMPORT POWERPOINT... .**
2. Choose the .ppt or .pptx file from which you want to import slides.
3. Click **Open**.

   ⚠ This action will open Microsoft PowerPoint. Do not close the application until you are finished importing slides.

4. In the **Slides** area, expand the tree view to locate the slides you want to import.



A preview of the slide is displayed to the right of the tree view. You can import more than one slide at a time. Each slide will be inserted as an image in a new standard content page within the course.

5. Select the checkbox next to the slide(s) to import.

6. Choose a stencil from the following options:

Stencil	Options
Standard - Full	This stencil creates a standard content page with text.
Standard - Half - Bottom	This stencil creates a standard content page with text on the bottom of the page. An optional image can be placed on top.
Standard - Half - Left	This stencil creates a standard content page with text on the left of the page. An optional image can be placed to the right.
Standard - Half - Right	This stencil creates a standard content page with text on the right of the page. An optional image can be placed to the left.
Standard - Half - Two Image - Bottom	This stencil creates a standard content page with text on the bottom of the page. An optional two images can be placed on top.
Standard - Half - Two Image - Left	This stencil creates a standard content page with text on the left of the page. An optional two images can be placed to the right.
Standard - Half - Two Image - Right	This stencil creates a standard content page with text on the right of the page. An optional two images can be placed to the left.
Standard - Image	This stencil creates a standard content page containing an image.
Standard - Image - Diagonal - Left	This stencil creates a standard content page with text on the top left and bottom right of the page. An optional two images can be placed diagonally within the stencil.
Standard - Image - Diagonal - Right	This stencil creates a standard content page with text on the top right and bottom left of the page. An optional two images can be placed diagonally within the stencil.

7. Click **OK**.

8. Click **Yes** to confirm the import.

Importing Graphics from PowerPoint Slides

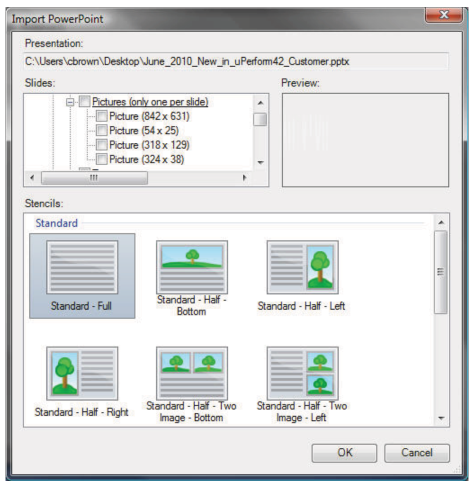
1. Select **INSERT > IMPORT POWERPOINT... .**

2. Choose the .ppt or .pptx file from which you want to import graphics.

3. Click **Open**.

   This action will open Microsoft PowerPoint. Do not close the application until you are finished importing graphics.

4. In the **Slides** area, expand the tree view to locate the pictures you want to import.



A preview of the graphic is displayed to the right of the tree view. You can only import one graphic per slide, however, you can import graphics from other slides during a single import action. Each graphic is inserted as a new standard content page within the course. The image is not editable on the resulting page.

5. Select the checkbox next to the graphic(s) you want to import.

6. Choose a stencil from the following options:

Stencil	Options
Standard - Full	This stencil creates a standard content page with text. It is recommended that you do not use the Standard - Full template as it does not support graphics.
Standard - Half - Bottom	This stencil creates a standard content page with text on the bottom of the page. An optional image can be placed on top.
Standard - Half - Left	This stencil creates a standard content page with text on the left of the page. An optional image can be placed to the right.

Stencil	Options
Standard - Half - Right	This stencil creates a standard content page with text on the right of the page. An optional image can be placed to the left.
Standard - Half - Two Image - Bottom	This stencil creates a standard content page with text on the bottom of the page. An optional two images can be placed on top.
Standard - Half - Two Image - Left	This stencil creates a standard content page with text on the left of the page. An optional two images can be placed to the right.
Standard - Half - Two Image - Right	This stencil creates a standard content page with text on the right of the page. An optional two images can be placed to the left.
Standard - Image	This stencil creates a standard content page containing an image.
Standard - Image - Diagonal - Left	This stencil creates a standard content page with text on the top left and bottom right of the page. An optional two images can be placed diagonally within the stencil.
Standard - Image - Diagonal - Right	This stencil creates a standard content page with text on the top right and bottom left of the page. An optional two images can be placed diagonally within the stencil.

7. Click **OK**.

8. Click **Yes** to confirm the import.

Importing Text from PowerPoint Slides

ANCILE recommends you arrange the slide elements within Powerpoint using the **Move to Back** functionality so that the text box you wish to import as the title is the bottom/back-most element within each slide.

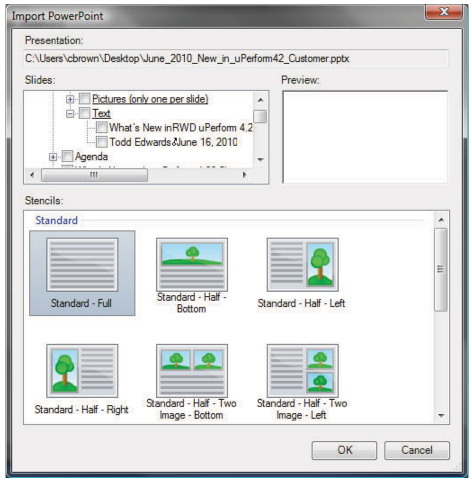
1. Select **INSERT > IMPORT POWERPOINT... .**

2. Choose the .ppt or .pptx file from which you want to import text.

3. Click **Open**.

   This action will open Microsoft PowerPoint. Do not close the application until you are finished importing text.

4. In the **Slides** area, expand the tree view to locate the text you want to import.



A preview of the text is displayed to the right of the tree view. You can import more than one text element at a time. All text elements selected are imported into the content area of one new standard content page. Text elements are imported as plain text without character formatting.

5. Select the checkbox next to the text item(s) you want to import.

6. Choose a stencil from the following options:

Stencil	Options
Standard - Full	This stencil creates a standard content page with text.
Standard - Half - Bottom	This stencil creates a standard content page with text on the bottom of the page. An optional image can be placed on top.
Standard - Half - Left	This stencil creates a standard content page with text on the left of the page. An optional image can be placed to the right.
Standard - Half - Right	This stencil creates a standard content page with text on the right of the page. An optional image can be placed to the left.
Standard - Half - Two Image - Bottom	This stencil creates a standard content page with text on the bottom of the page. An optional two images can be placed on top.
Standard - Half - Two Image - Left	This stencil creates a standard content page with text on the left of the page. An optional two images can be placed to the right.
Standard - Half - Two Image - Right	This stencil creates a standard content page with text on the right of the page. An optional two images can be placed to the left.

Stencil	Options
Standard - Image	This stencil creates a standard content page containing an image.
Standard - Image - Diagonal - Left	This stencil creates a standard content page with text on the top left and bottom right of the page. An optional two images can be placed diagonally within the stencil.
Standard - Image - Diagonal - Right	This stencil creates a standard content page with text on the top right and bottom left of the page. An optional two images can be placed diagonally within the stencil.

7. Click **OK**.

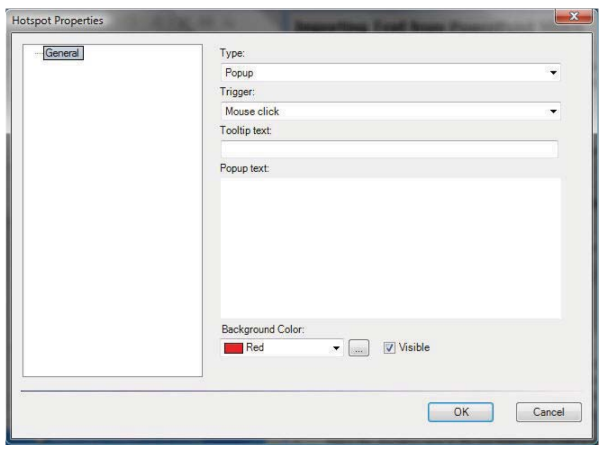
8. Click **Yes** to confirm the import.

Using Hotspots, Popups, and Hyperlinks

ANCILE uPerform Express allows you to insert hotspots on images to provide additional information or hints to end users. In addition, you can insert popups, page links, and hyperlinks in text within standard content areas. Hyperlinks from text launch a destination website in a new web browser window.

Inserting a Hotspot on an Image

1. Select a page that contains an image.
2. Click on the image on which you want to insert the hotspot.
3. Select **INSERT > INSERT HOTSPOT...**.



4. Choose from the following options:

Depending on the type selected, some of the following options may not be displayed.

Field	Description
Type	Specify **Popup**, **Web Link**, or **Page Link**. **Popup**: Displays text based on an assigned trigger. **Web Link**: Launches a webpage. **Page Link**: Navigates to a page within the course
Trigger	Specify **Mouse click** or **Mouse over**.
Tooltip Text	Enter text to display when a user pauses the mouse on the popup.

Popup Text	Enter text to be displayed in a popup in a published course.
Link Location	Specify a destination website, or a link to published content, to launch from the published course.
Page	Specify a destination within the course.
Background Color	Specify a background color for the hotspot. This will display as a gradient box with a matching border in a published course.
Visible	Select the **Visible** checkbox to display the hotspot in published output.

5. Click **OK**.

Moving and Adjusting a Hotspot

1. Click on the hotspot.
2. Drag the hotspot to the desired location on the image, or click and drag on a sizing handle to resize.

Optionally, you can use the cursor keys to move the hotspot around on the image.

Editing Hotspot Properties

1. Right-click on the hotspot.
2. Select **Edit Hotspot....**
3. Complete the following fields:

Based on the type selected, some of the following options may not be displayed.

Field	Description
Type	Specify **Popup** or **Web Link.** **Popup**: Displays text based on an assigned trigger. **Web Link**: Launches a webpage.
Trigger	Specify **Mouse click** or **Mouse over**.

Field	Description
Tooltip Text	Enter text to display when a user pauses the mouse on the popup.
Popup Text	Enter text to be displayed in a popup in a published course.
Link Location	Specify a destination website, or a link to published content, to launch from the published course.
Background Color	Specify a background color for the hotspot. This will display as a gradient box with a matching border in a published course.

4. Click **OK**.

Inserting Popups, Web Links, and Page Links in Text

Popups and hyperlinks are inserted in the text of standard content pages, and can also be inserted into the directions of any interaction page.

1. Select and highlight text within the content area.
2. Click .
3. Complete the following fields:

   Depending on the type selected, some of the following options may not be displayed.

Field	Description
Type	Specify **Popup**, **Web Link**, or **Page Link**. **Popup**: Displays text based on an assigned trigger. **Web Link**: Launches a webpage. **Page Link**: Links to another page within the course.
Popup Text	Enter text to be displayed in a popup in a published course.
Link Location	Specify a destination website, or a link to published content to launch from the published course.
Page	Expand or collapse the tree view as needed. Select a page from the list.

4. Click **OK**.

Insert Published Simulations and Course Content

You can insert a published uPerform Express simulation via the Simulation stencil. This stencil is accessible when creating a new course or when inserting a new page into an existing course.

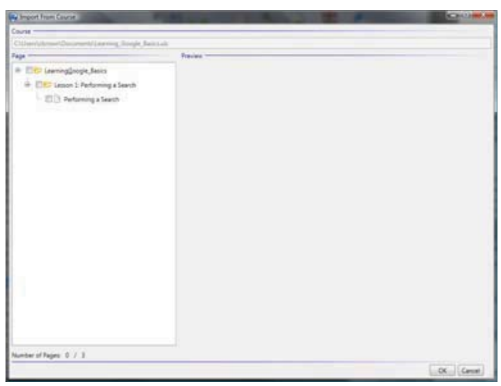
A uPerform course treats an inserted published uPerform simulation as a single page. A uPerform course will appear as a single object to an LMS. The LMS will not recognize the simulation as a standalone object.

You can insert course content via the Insert menu. This option is available when inserting objects into an existing course. You can select only the pages you want to include in your course, decreasing the amount of time spent editing.

Inserting Content from Existing Courses

You can insert content from an existing uPerform course.

1. Create or open a course.
2. Select **INSERT > IMPORT FROM COURSE**.
3. Browse to the location of the existing course, select the .ulc file, and click **Open**.



4. In the **Page** area, expand the tree view to locate the page(s) you want to import.

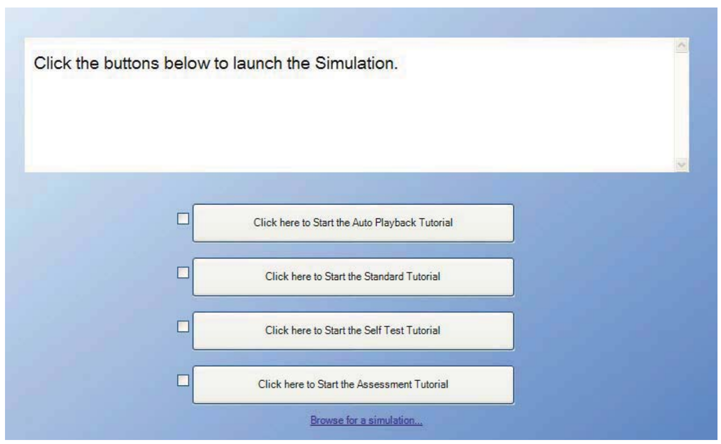
   A preview of the page is displayed to the right of the tree view. You can import more than one page at a time. Each page will be inserted as a new page within the course.

5. Select the page(s) you want to import.
6. Click **OK**.

You can edit the course using the procedures described in Editing and Formatting: Basics (on page 91) and Editing and Formatting: Courses (on page 163).

Inserting Published Simulations

1. Create or open a course.
2. Select **INSERT > PAGE, INSERT > LESSON, OR INSERT > ASSESSMENT**.
3. Select the **Simulation** stencil.
4. Enter a name in the **Name** field.
5. Click **OK**.



6. Click **Browse for a simulation ...**.
7. Perform one of the following options:

If You Want To	Then
Insert a new simulation	Click . Select the root folder containing all of the elements for the published simulation. Click **OK**.
Use an available simulation	Select a simulation from the **Available Simulations** window. This window lists all simulations that have been inserted into the course.

8. Click **OK**.

9. Optionally, enter identifying information about the simulation into the text field.

10. Complete the following:

Field	Description
Click here to Start the Auto Playback Tutorial	Select the checkbox to enable this playback option in a published course.
Click here to Start the Standard Tutorial	Select the checkbox to enable this playback option in a published course.
Click here to Start the Self Test Tutorial	Select the checkbox to enable this playback option in a published course.
Click here to Start the Assessment Tutorial	Select the checkbox to enable this playback option in a published course.

Working with Flash Content

ANCILE uPerform Express allows you to embed a single Flash file (.swf) into your course. The Flash content must contain all of the files necessary for playback.

You can also edit the Flash file via settings in the Adobe Flash Player Settings.

Embedding and Editing Flash Content

1. Choose one of the following options:

If You Want To	Then
Embed Flash content as a course root page	Select **FILE > NEW.** Select **Course** from the *Type* drop-down list. Choose a project from the *Project* listbox. Choose a template from the *Template* listbox. Enter a name in the **Name** field.
Embed Flash content as a lesson	Select **INSERT > INSERT LESSON...**.
Embed Flash content as a standard content page	Select **INSERT > INSERT PAGE...**.

2. Select the **Standard - Flash** stencil.
3. Enter a name in the **Name** field.
4. Click **OK**.
5. In the content area, click **Add Flash content ....**
6. Navigate to the .swf file.
7. Click **Open**.
8. Right-click on the flash file in the editor.
9. Select **Settings ...**.
10. Edit the settings using the *Adobe Flash Player Settings* window.
11. Click **Close**.

Using Audio Files

Audio files can help guide the end user through the course and provide supplemental information. Each page or step within a course or simulation can have a supported audio file - MP3 or WAV - associated with the content.

uPerform allows you to incorporate audio two ways:

- Create an audio recording from directly within the application. This capability is excellent for quick, simple recordings that will not require further editing or processing.
- Import an audio file created with an external audio editor application. Using an external audio editor allows you more flexibility to enhance or edit your audio recording.

Installing LAME

To create MP3 files from within uPerform, your computer must have the LAME application installed within the uPerform application directory.

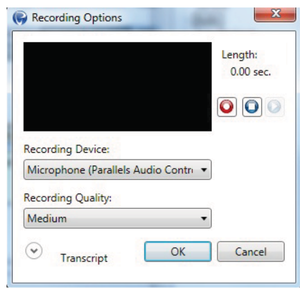
To perform this task, you must be an Administrator on your computer. If you are not, contact your IT department for assistance.

1. In your web browser, navigate to http://www.rarewares.org/mp3-lame-bundle.php.
2. Download the latest version of LAME that is compatible with your computer.
3. On your computer, navigate to your browser's Download folder.
4. Double-click on the LAME zip file to open the file.
5. Select both lame.exe and LAME_ENC.DLL
6. Right-click the selected files and select Copy.
7. Navigate to **LOCAL DISK (C:)>PROGRAM FILES>HP ADOPTION READINESS TOOL>BIN**.
8. Paste both files into the bin directory.
9. If the uPerform client is running, restart the uPerform client for the changes to take effect.

Once you have installed LAME, all recordings will be encoded as MP3 files.

Creating an Audio File

1. In the Course Pane area, select the page to contain the audio.
2. Click the Audio tab on the status bar.
3. Select to launch the **Recording Options** dialog.



4. Complete the following fields:

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Recording Device</td><td>Specify the input recording device. This selection is machine specific.</td></tr>
<tr><td>Recording Quality</td><td>Specify the audio quality setting.
<table>
<tr><th>Setting</th><th>MP3</th><th>WAV</th></tr>
<tr><td>High</td><td>320kbps</td><td>16-bit</td></tr>
<tr><td>Medium</td><td>128kbps</td><td>8-bit</td></tr>
<tr><td>Low</td><td>64kbps</td><td>8-bit</td></tr>
</table></td></tr>
</table>

5. Click to start the recording. **Length** will display the recording length in seconds.
6. Once you have set your options, the following controls are activated:

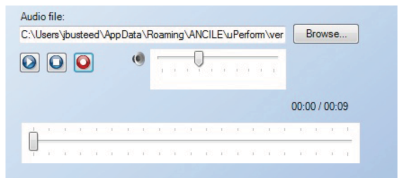
Control	Description
	Click **Pause** to pause the current recording.
	Click **Stop** to stop the current recording.
	Click **Play** to review the current recording.

7. Click **OK** to save your changes and close the window.

Importing an Audio File

The recommended MP3 encoding quality/bitrate is between 48-64 kbps.
Ensure the file is converted to mono to keep the file size as small as possible.

1. In the task pane, select the page for which you want to insert audio.
2. In the status bar, click the **Audio** tab.



3. Click **Browse...**.
4. Choose the MP3 or WAV audio file to import.
5. Click **Open**.

Playing an Audio File

Adobe Flash must be installed to enable audio playback.

1. In the task pane, select the page containing the audio.
2. In the status bar, click the **Audio** tab.
3. Click .

   You can adjust the volume using the slide bar . To stop the playback, click .

Transcribing an Audio File

1. In the task pane, select the page containing the audio.
2. In the status bar, click the **Audio** tab.
3. Click in the **Transcript** field.

4. Enter the text of the audio file.

   The transcript text is plain text.

Working with Assessment Sections, Self-Tests, and Branches

Interaction pages are inserted into an assessment section to test user knowledge. Results can be tracked and reported via email, Active Server Pages (ASP), or a Learning Management System (LMS).

Interaction pages can also be used as self-tests to provide ungraded feedback to a user during the course. Insert self-tests within a lesson to allow end users to test themselves on the knowledge in each lesson before moving into an optional graded assessment section.

Inserting an Assessment Section

1. Select INSERT > INSERT ASSESSMENT.

2. Choose a stencil from the following options:

Stencil	Options
Standard - Full	This stencil creates a standard content page with text.
Standard - Half - Bottom	This stencil creates a standard content page with text on the bottom of the page. An optional image can be placed on top.
Standard - Half - Left	This stencil creates a standard content page with text on the left of the page. An optional image can be placed to the right.
Standard - Half - Right	This stencil creates a standard content page with text on the right of the page. An optional image can be placed to the left.
Standard - Half - Two Image - Bottom	This stencil creates a standard content page with text on the bottom of the page. An optional two images can be placed on top.
Standard - Half - Two Image - Left	This stencil creates a standard content page with text on the left of the page. An optional two images can be placed to the right.
Standard - Half - Two Image - Right	This stencil creates a standard content page with text on the right of the page. An optional two images can be placed to the left.
Standard - Image	This stencil creates a standard content page containing an image.
Standard - Image - Diagonal - Left	This stencil creates a standard content page with text on the top left and bottom right of the page. An optional two images can be placed diagonally within the stencil.

Stencil	Options
Standard - Image - Diagonal - Right	This stencil creates a standard content page with text on the top right and bottom left of the page. An optional two images can be placed diagonally within the stencil.

3. Enter a name in the **Name** field.

4. Click **OK**.

Inserting Interaction Pages Into an Assessment Section

1. In the task pane, right-click on the assessment root page.

2. Select **Insert Page...**.

3. Choose a stencil from one of the following options:

Stencil	Options
Drag and Drop	This stencil creates an interaction page featuring one matching item per definition.
Drag and Drop - Many-to-One	This stencil creates an interaction page featuring one or more drag-and-drop responses to a single question.
Fill In - Multiple	This stencil creates an interaction page that allows the user to enter responses to multiple questions.
Fill In - Single	This stencil creates an interaction page that allows the user to enter a response to a single question.
Multiple Choice	This stencil creates an interaction page featuring several possible responses to a single question. Only one response is correct.
Multiple Choice - Half	This stencil creates an interaction page featuring several possible responses to a single question. Only one response is correct. An optional image can be placed to the right.
Multiple Correct	This stencil creates an interaction page featuring several possible responses to a single question. One or more responses may be correct.
Multiple Correct - Half	This stencil creates an interaction page featuring several possible responses to a single question. One or more responses may be correct. An optional image can be placed to the right.
Simulation	This stencil creates a standard content page that allows you to import a published uPerform Express simulation.

4. Enter a name in the **Name** field.

5. Click **OK**.

Editing Assessment Section Properties

1. In the task pane, right-click on the assessment root page.

2. Select **EDIT ASSESSMENT...**.

3. Edit the following options:

Field	Description
Name	Edit the assessment name.
Select questions from a question pool	This option indicates to display a pre-determined number of interaction pages during the course.
Number of questions to use	Use the up and down arrows to specify the number of questions to display during the course.

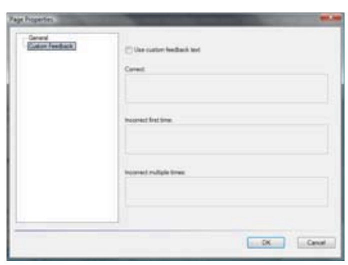
4. Click **OK**.

Creating Custom Assessment Feedback for a Page

1. In the task pane, right-click on an interaction page.

2. Select **Edit Assessment ...**.

3. Select **Custom Feedback**.



4. Select the **Use custom feedback text** checkbox.

5. Complete the following fields:

Depending on the type of page selected, some options may not display.

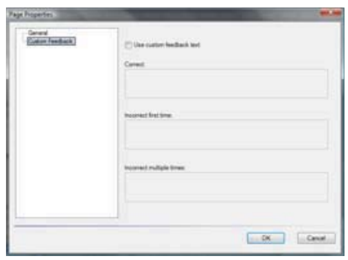
Field	Description
Correct	Enter the text to display in response to a correct answer. For example: That is correct.
Incorrect	Enter the text to display in response to an incorrect answer. For example: That is incorrect. Would you like to try again?

6. Click **OK**.

Editing Custom Assessment Feedback for a Page

1. In the task pane, right-click on the interaction page for which you want to edit custom assessment feedback.

2. Select **Edit Assessment ...**.



3. Select **Custom Feedback**.

4. Select the **Use custom feedback text** checkbox.

5. Edit/review the following fields:

Depending on the type of page selected, some options may not display.

Field	Description
Correct	Enter a value to display for a correct answer. For example: Correct.
Incorrect	Enter a value to display for an incorrect answer. For example: Incorrect. Would you like to try again.

6. Click **OK**.

Creating a Self-Test

1. Click on any page within a lesson.
2. Select **INSERT > INSERT PAGE....**
3. Choose from one of the following options:

Stencils for standard content pages also display in this window. To create a self-test, choose only one of the stencils listed below.

Stencil	Options
Drag and Drop	This stencil creates an interaction page featuring one matching item per definition.
Drag and Drop - Many-to-One	This stencil creates an interaction page featuring one or more drag-and-drop responses to a single question.
Fill In - Multiple	This stencil creates an interaction page that allows the user to enter responses to multiple questions.
Fill In - Single	This stencil creates an interaction page that allows the user to enter a response to a single question.
Multiple Choice	This stencil creates an interaction page featuring several possible responses to a single question. Only one response is correct.
Multiple Choice - Half	This stencil creates an interaction page featuring several possible responses to a single question. Only one response is correct. An optional image can be placed to the right.
Multiple Correct	This stencil creates an interaction page featuring several possible responses to a single question. One or more responses may be correct.
Multiple Correct - Half	This stencil creates an interaction page featuring several possible responses to a single question. One or more responses may be correct. An optional image can be placed to the right.

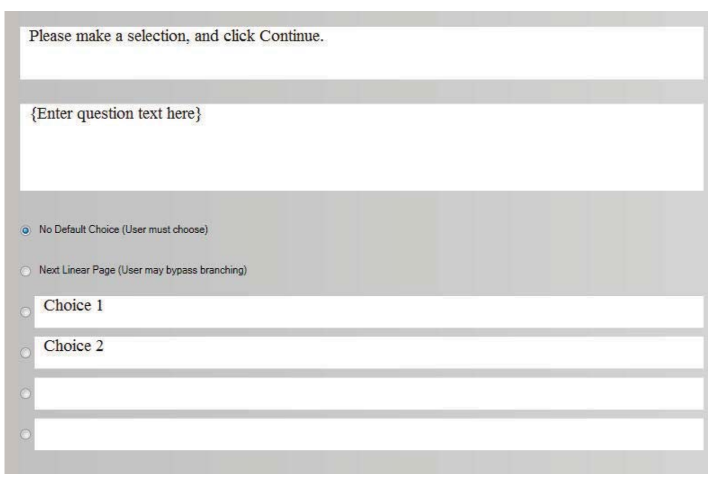
4. Enter a name in the **Name** field.
5. Click **OK**.

Working with Branches

You can use interaction and standard pages to create branches within your course. Branches allow users to choose where in the course they want to go and these choices are specified when you create the branch. The choice will cause the user to take a side road in the content. Based on input provided by the user, and the nature of the branch, the user can then return to the main flow of the course after all pages in the branch have been visited. Branches allow you to give a variety of options to your end users, which allows them to partake in the eLearning course based on their personal needs.

Creating a Branch

1. Select INSERT > INSERT LESSON or INSERT > INSERT PAGE.
2. Select the **Branching** stencil.
3. Enter a name in the **Name** field.
4. Click **OK**.
5. Enter a question.

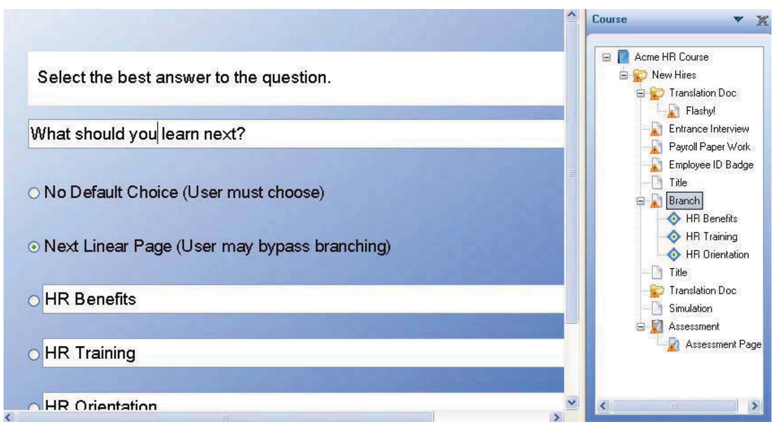


6. Click the radio button next to the preferred choice:

Field	Description
No Default Choice (User must choose)	Select this option to allow the user to choose which page to visit.
Next Linear Page (User may bypass branching)	Select this option to allow the user to continue to the next page.
Custom Choice	Select a custom choice to determine which page the user will visit next.

7. Complete the following fields:

Field	Description
Choice 1	Enter text for the choice. Example: Go to the HR Training lesson.
Choice 2	Enter text for the choice. Example: Go to the HR Benefits lesson
Blank field	Enter text for the choice. Example: Go to the HR Orientation lesson.



8. On the right pane, right-click on a choice within the branching page.

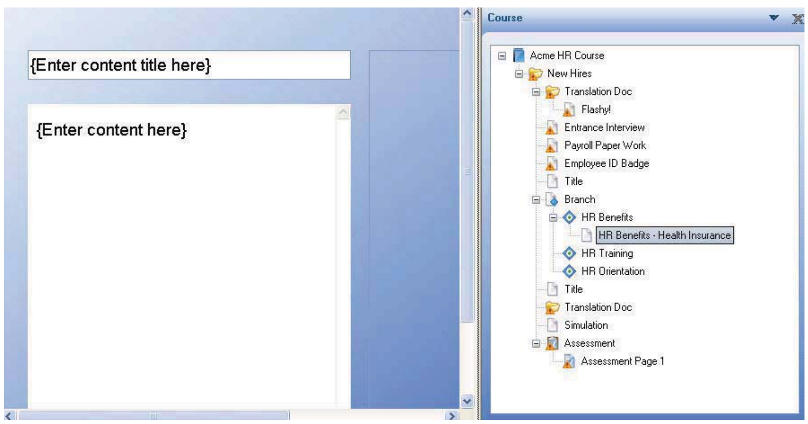
9. Select **Insert Page ...** .

10. Choose a stencil from the following options:

Stencil	Option
Standard - Flash	This stencil creates a standard content page containing a single Flash file.
Standard - Full	This stencil creates a standard content page with text.

Stencil	Option
Standard - Half - Bottom	This stencil creates a standard content page with text on the bottom of the page. An optional image can be placed on top.
Standard - Half - Left	This stencil creates a standard content page with text on the left of the page. An optional image can be placed to the right.
Standard - Half - Right	This stencil creates a standard content page with text on the right of the page. An optional image can be placed to the left.
Standard - Half - Two Image - Bottom	This stencil creates a standard content page with text on the bottom of the page. An optional two images can be placed on top.
Standard - Half - Two Image - Left	This stencil creates a standard content page with text on the left of the page. An optional two images can be placed to the right.
Standard - Half - Two Image - Right	This stencil creates a standard content page with text on the right of the page. An optional two images can be placed to the left.
Standard - Image	This stencil creates a standard content page containing an image.
Standard - Image - Diagonal - Left	This stencil creates a standard content page with text on the top left and bottom right of the page. An optional two images can be placed diagonally within the stencil.
Standard - Image - Diagonal - Right	This stencil creates a standard content page with text on the top right and bottom left of the page. An optional two images can be placed diagonally within the stencil.
Branching	This stencil creates a branch that allows the user to decide where to go next in the course.
Drag and Drop	This stencil creates an interaction page featuring one matching item per definition.
Drag and Drop - Many-to-One	This stencil creates an interaction page featuring one or more drag-and-drop responses to a single question.
Fill In - Multiple	This stencil creates an interaction page that allows the user to enter responses to multiple questions.
Fill In - Single	This stencil creates an interaction page that allows the user to enter a response to a single question.
Multiple Choice	This stencil creates an interaction page featuring several possible responses to a single question. Only one response is correct.
Multiple Choice - Half	This stencil creates an interaction page featuring several possible responses to a single question. Only one response is correct. An optional image can be placed to the right.

Stencil	Option
Multiple Correct	This stencil creates an interaction page featuring several possible responses to a single question. One or more responses may be correct.
Multiple Correct - Half	This stencil creates an interaction page featuring several possible responses to a single question. One or more responses may be correct. An optional image can be placed to the right.
Simulation	This stencil creates a standard content page that allows you to import a published uPerform simulation.



11. Edit the stencil using one of the procedures in Editing and Formatting: Courses (on page 163).

12. Repeat Steps 7 - 11 to create additional pages within the branch choice.

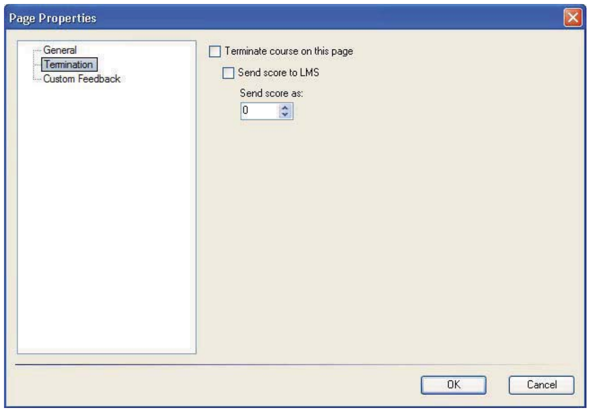
Editing Branching Page Properties

1. Right-click on a choice within a branch.

To edit branching properties, a choice must contain one or more pages.

2. Select **Edit Page**.

3. Select **Termination** in the left pane.



The General tab is read only. The page name is not editable through the properties window.

4. Choose from the following options:

Field	Description
Terminate course on this page	Select the **Terminate course on this page** checkbox to end the course once the user has completed this page.
Send score to LMS	Select the **Send score to LMS** checkbox to send the page score to a registered LMS.
Send score as	Select a score to be sent to the LMS.

5. Click **OK**.

Chapter 10: Editing and Formatting: Student Guides and Course Packages

You can edit and format a student guide to combine concepts, procedures, and exercises related to a series of tasks or a process. In addition, you can publish multiple uPerform document and course files into a single master SCORM package.

Introduction to Editing and Formatting Student Guides and Course Packages

ANCILE uPerform student guides allow you to combine concepts, procedures, and exercises related to a series of tasks or a process. Student guides can include uPerform documents and courses, as well as Microsoft Word documents. By combining related information into one booklet, you can provide your end users with an easily printable collection of relevant content.

Student guides can be published to Word format and have the file extension .usg. Published student guides can be checked into the uPerform server as a managed document, or they can be printed out as a single file for distribution to end users.

Creating a course package allows a mobile player within a learning management system (LMS), such as ANCILE uLearn, to recognize the course structure without the course structure being created manually. Course packages can be published locally and checked into the uPerform server for content management.

An ANCILE course package allows you to publish multiple uPerform content files into a single master SCORM package. You can combine documents and courses that are based on the same template, and specify the order in which content will be presented to the end user. When adding uPerform source files, you have the option of selecting files that reside locally as well as on a uPerform server. Course packages have the file extension .upc.

Working With a Student Guide

Inserting Content Into a Student Guide

1. Create a student guide using the procedure found in Creating Content.
2. Perform one of the following options:

If You Want To	Then
Insert uPerform source content	Select **Insert > Insert uPerform Source File**. Go to Step 3.
Insert a Microsoft Word document	Select **Insert > Insert Word Document**. Navigate to the .doc or .docx file you want to insert. Click **OK**. Go to Step 5.

3. From the **Insert** menu, chose **Local**.
4. Perform one of the following options:

If You Want To	Then
Insert a uPerform eLearning course	In the *Source file* window, click on the .ulc file you want to insert.
Insert a published uPerform document	In the *Source file* window, click on the .udc file you want to insert. In the *Publication* window, click on the publication type. Only those publication types that produce Word output are listed.

5. Click **Insert**.

Replacing uPerform Express Content within a Student Guide

1. Open a uPerform Express student guide.
2. Select the uPerform content you want to edit or replace in the *Task Pane*.
3. Click **Replace**.
4. In the *Source file* window, click on the .udc or .ulc file you want to insert.

5. In the Publication window, click on the publication type.

   Publication types will display for .udc files only if they can be published to Word format. For more information, refer to Previewing and Publishing Content.

6. Click **Insert**.

Replacing or Editing Microsoft Word Content Within a Student Guide

1. Open a uPerform Express student guide.

2. Select the Word file in the *Task Pane* that you would like to edit or replace.

3. Perform one of the following options:

If You Want To	Then
Replace the Word file	Click **Replace**. Navigate to the replacement file. Click **OK**.
Edit the existing Word file	Click **Edit**. This will open the document in Microsoft Word. Edit the **Word** file. In Word, select **FILE > SAVE**. In uPerform, click **OK** when prompted to update the student guide.

Reordering Content within a Student Guide

1. Click on the content you want to move.

2. Choose one of the following options:

If You Want To	Then
Move the content above or below another item	Drag the content above or below another item in the task pane.
Move the content under another item to create a chapter	Drag the content onto the item in the task pane.

Previewing the Table of Contents

1. Open a uPerform Express student guide.
2. Select **Table of Contents** in the *Task Pane*.
3. Click **Preview**.

   The table of contents preview will open in Microsoft Word. Any edits made to the table of contents in Word will not be saved in the .usg file.

   The display is controlled by options available in the template editor. For more information, refer to Default Publication Settings: Student Guide.

4. Optionally, review the following fields:

Field	Description
File Name	Displays the file name for the Student Guide.
Source Directory	Displays the location where the student guide is save on the author's local computer.

After publishing a student guide, you must open the guide in Microsoft Word and update the table of contents as per Word's table of contents update functionality.

Viewing and Editing Properties for Student Guide Content

1. Open a uPerform Express student guide.
2. Select a file type from the *Task Pan*e.
3. Optionally, edit the name of the document in the **Name** field.

   This changes the display of the document name in the table of contents.

4. Review the following information:

Field	Description
File Name	Displays the file name for the content
Publication	Displays the publication type. This option is available only for uPerform content.

GUID	Displays the unique identifier for the content. This option is available only for uPerform content.
Version Number	Displays the current version number for the content. This option is available only for uPerform content.
Language	Displays the language of the content. This option is available only for uPerform content.
Created	Displays the creation date of the content to ensure content is up to date.
Last Modified	Display date and time the document was last modified.
Last Accessed	Displays the date and time the content was last accessed.

Working with Course Packages

Inserting a Lesson Into a Course Package

1. Create or open a course package.
2. In the *Course Package* area, select the package root page or place the cursor where you want to insert a lesson.
3. Select **INSERT > INSERT LESSON...** .
4. Enter a name for the lesson in the **Name** field.

Inserting a uPerform Express Source File into a Course Package

1. Create or open a course package.
2. In the *Course Package* area, click on a root folder, lesson, or uPerform Express source file.
3. Select **INSERT > INSERT UPERFORM SOURCE FILE...**.

4. From the **Insert** drop-down list, choose one of the following options:

If You Want To	Then
Insert content saved to your local source directory	Select **Local**.
Insert content from the uPerform server	Select **From ANCILE uPerform Server**. Select a project from the **Project** drop-down list.

5. In the *Source file* window, click on the file you want to insert.
6. In the *Publication* window, click on the publication type. Only those publication types that produce Flash output are listed.
7. Click **Insert**.

Updating or Replacing a uPerform Express uPerform Source File

1. Create or open a course package.
2. In the *Course Package* area, click on the uPerform Express source file you want to replace.
3. Click **Replace**.
4. From the **Insert** drop-down list, choose one of the following options:

If You Want To	Then
Update content saved to your local source directory	Select **Local**.
Update content from the uPerform server	Select **From ANCILE uPerform Server**. Select a project from the **Project** drop-down list.

5. In the *Source file* window, click on the file you want to insert.
6. In the Publication window, click on the publication type. Only those publication types that produce Flash output are listed.
7. Click **Insert**.
8. If you are updating a document from the uPerform server, click **Update** to ensure you are inserting the most recent version from the server.

Reordering Content within a Course Package

1. Click on the lesson or uPerform Express source file you want to move.
2. Choose from the following options:

If You Want To	Then
Move the lesson or source file above or below another lesson or source file	Drag the lesson or page above or below another item in the *Course Package* pane.
Move the lesson or page into another lesson	Drag the lesson or page onto the item in the *Course Package* task pane.

Viewing and Editing Properties for Course Packages

1. Open a course package.

2. Select a file type from the *Course Package* pane.

3. Optionally, edit the name of the document in the **Name** field.

4. Review the following information for uPerform Express source files:

Field	Description
File Name	Displays the file name for the content.
Publication	Displays the publication type.
GUID	Displays the unique identifier for the content.
Version Number	Displays the current version number for the content.
Language	Displays the language of the content.
Created	Displays the creation date of the content to ensure content is up to date.
Last Modified	Display date and time the document was last modified.
Last Accessed	Displays the date and time the content was last accessed.

Chapter 11: Searching Content

Search functionality in the editor allows you to search within content.

Introduction to Searching

In addition to basic search functionality, uPerform also includes a find and replace feature to allow you to easily locate and change text within your content.

Searching Within Content

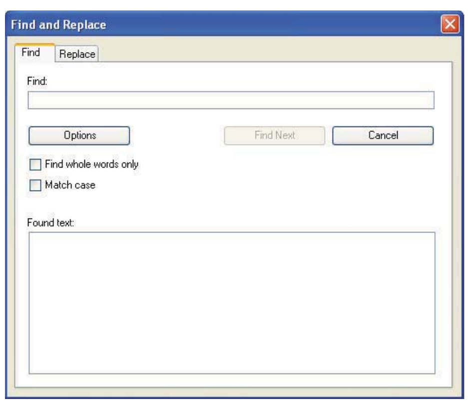
Two search functions are available within a document or course:

- Find one or more instances of particular text
- Find and replace one or more instances of particular text

You can search within notes, actions, steps, the document narrative, course text and annotations.

Executing a Search

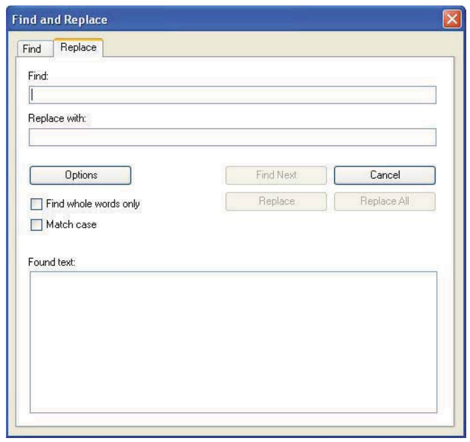
1. Create or open content.
2. Select **EDIT > FIND AND REPLACE...** .
3. Select the **Find** tab.
4. Enter the search text in the **Find** field.



5. Optionally, click **Options** to expand and collapse additional search criteria.
6. Optionally, click **Find whole words only** to search for an exact word, or click **Match case** to search for words using case sensitivity.
7. Click **Find Next**.
8. To find additional instances of the search text, click **Find Next**.
9. Click **Cancel** to close the window.

Using Find and Replace

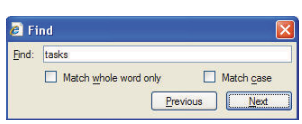
1. Create or open content.
2. Select **EDIT > FIND AND REPLACE...** .
3. Select the **Replace** tab.
4. Enter the search text in the **Find** field.
5. Enter the replacement text in the **Replace with** field.



6. Optionally, click **More Option** to expand and collapse additional search criteria.
7. Optionally, click **Find whole words only** to search for an exact word, or click **Match case** to search for words using case sensitivity.
8. Click **Replace** to find and replace the next instance of the search text, or click **Replace All** to find and replace all instances of the search text.
9. To find additional instances of the text, click **Find Next**.
10. Click **Cancel** to close the window.

Performing a Quick Search

1. Create or open content.
2. Enter **Ctrl+F**.



3. Enter the search term in the **Find** field.

4. Optionally, click **Find whole words only** to search for an exact word, or click **Match case** to search for words using case sensitivity.

5. Click **Next**.

6. Repeat Step 5 to find the next instance of the term.

7. Click the red X to close the window.

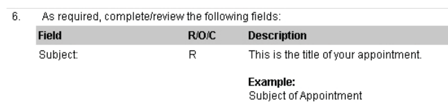
Chapter 12: Using the Glossary

ANCILE uPerform Express allows you to maintain a central file of terms and definitions used in procedural content. The glossary functionality ensures authors are using consistent and approved definitions.

Introduction to the Glossary

Glossary functionality is provided with uPerform Express to allow you to maintain a collection of terms and definitions used in procedural content. The glossary allows you to specify consistent, business-specific definitions for your terms and then automatically push these definitions into your uPerform Express documents.

Terms and definitions are displayed in recorded Field/Description tables within the document view of uPerform Express content. Field description tables that are inserted during editing as a step will not support glossary functionality. The following is an illustration of a recorded Field/Description table.



6. As required, complete/review the following fields:

Field	R/O/C	Description
Subject:	R	This is the title of your appointment. **Example:** Subject of Appointment

Maintaining terms and definitions in one file allows documents to be updated quickly and accurately. New terms can be added, and changes can be made to definitions for existing terms within the glossary. The glossary functionality supports one definition per term.

Once you have standardized the valid terms and definitions, the administrator executes the globalization process to update definitions (descriptions) of terms (fields) within the documents prior to making the documents available to your end users.

Only those documents created with the same template as that used by the current glossary template can be globalized.

To ensure a manageable glossary file size and ensure optimum performance, there is a system limitation of 2500 terms that can be stored and managed in a uPerform Express Glossary. If an action within the glossary editor would cause this limit to be exceeded, a message is displayed. The number of available terms remaining is always displayed in the lower left.

You can choose not to use a central glossary but, rather, have authors enter definitions directly into the Description column of tables.

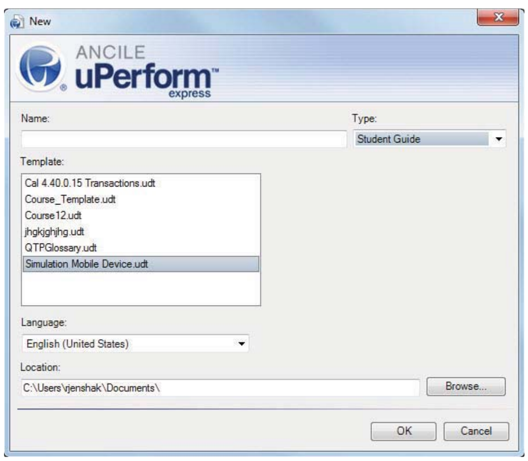
Create the Glossary

There are two methods for initially creating your glossary:

- ❒ Create the glossary file from within the uPerform Express editor and proceed to populate the file manually or via the globalization process.
- ❒ Create the glossary file by importing an existing, tab-delimited text file containing terms and definitions or terms only.

Creating a Glossary

1. Select **FILE > NEW** from the editor.



2. Select **Glossary** from the **Type** drop-down list.
3. Complete/review the following information:

Field	Description
Name	Enter the name of the glossary.
Template	Select the template associated with this glossary. The template controls the glossary layout and the term and definition styles used. Only documents created with this template can be globalized using this glossary.
Language	This field is not applicable to the glossary file type.
Location	As desired, edit the default location of the glossary.

4. Click **OK**.

For information on adding terms and definitions to your glossary, refer to Adding a Term and Definition (on page 230).

Creating a Glossary by Importing a Text File

Prior to importing the text file, save the file using UTF-8 or Unicode encoding to ensure special characters are imported correctly. When saving a text file in Notepad, select **FILE > SAVE AS...** and specify UTF-8 or Unicode from the Encoding drop-down list.

1. Create the glossary file as described in Creating a Glossary (on page 227).
2. Select **TOOLS > IMPORT A GLOSSARY**.
3. Click **Browse...** to navigate to the tab-delimited text file.
4. Click **OK**.
5. At the confirmation prompt, click Yes to confirm replacement of any existing terms and definitions.

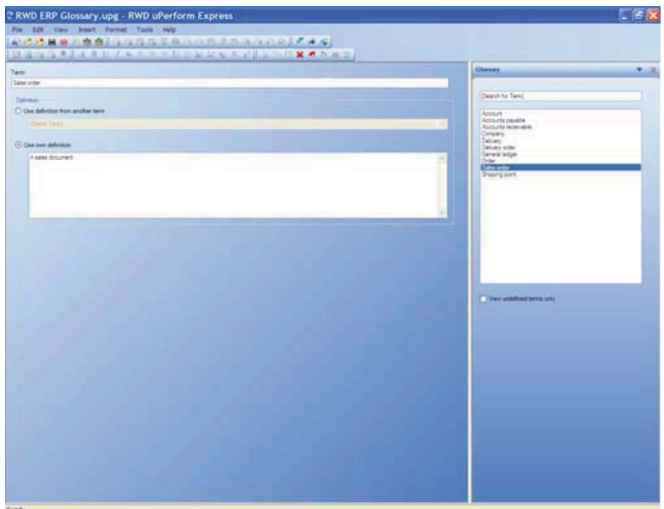
   If a line within the file includes a tab, a term and definition pair is imported. If a line within the file does not include a tab but does include text, a term is imported.

6. Review the Application log for any errors. In Windows XP, the log is stored in the \Documents and Settings\[username]\Application Data\ANCILE\uPerform Express\Version X.X\Logs directory. In Windows Vista and Windows 7, the log is stored in the \User\App Data\Roaming\ANCILE\uPerform Express\Version X.X\Logs directory.

Open and Save the Glossary

Opening a Glossary

1. Select **FILE > OPEN > OPEN LOCAL...** .
2. Select the .upg file.
3. Click **Open**.



Saving a Glossary

Perform one of the following actions:

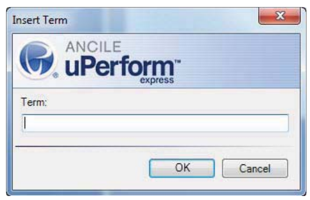
If You Want To	Then
Save an existing glossary	Select **FILE > SAVE**. If this is the first time you are saving the file and the display of the *Properties* window is enabled, the *Properties* window is displayed.
Save the open glossary as a new file	Select **FILE > SAVE AS...** . Enter a new filename, and click **Save**.

Adding Terms and Definitions

When you add a new term and definition pair, the pair is available to all uPerform Express documents when a globalization process is executed.

Adding a Term and Definition

1. Select **INSERT > INSERT TERM**.



2. Enter the new term in the **Term:** field.

3. Click **OK**.

4. Perform one or more of the following actions:

If You Want To	Then
Specify a definition from an existing term (a synonym)	Click **Use definition from another term**. Select the synonym from the drop-down list.
Add a definition	Click **Use own definition**. Enter the definition.

The term and definition pair are added.

Adding a Definition to an Existing Term

1. Select the term from the *Glossary* task pane.

2. Enter a definition or specify a synonym.

Updating Terms and Definitions

Editing a Term or Definition

1. Select the term from the *Glossary* task pane.
2. Edit the term or definition.

Deleting a Term

1. Select the term from the *Glossary* task pane.
2. Select **EDIT > DELETE**.

   Deleting a term removes the term and its definition from the glossary. If you attempt to delete a term used as a synonym, a warning message is displayed. Any terms using the deleted term as a synonym will be updated to reflect a blank definition.

Browsing the Glossary

You can search for one or more specific terms and view all undefined terms in the glossary.

Viewing Term Information

1. Select a term in the *Glossary* task pane.

2. View the definition or synonym in the content area.

Searching for a Term

1. In the *Glossary* task pane, enter the term in the **[Search for Term]** field.

   The list refreshes to highlight the first term matching the search criteria. In addition, terms not matching the search criteria are filtered out of the list.

2. View the associated definition or synonym in the content area.

Viewing Undefined Terms

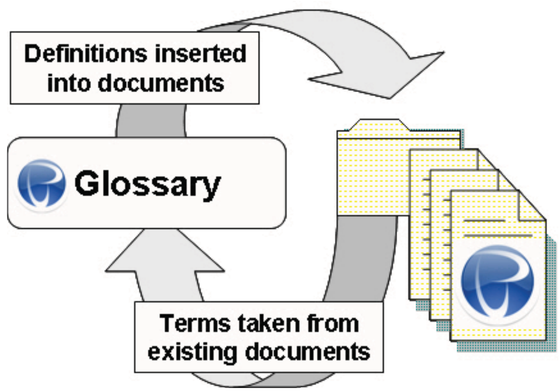
In the *Glossary* task pane, click **View undefined terms only**.

The list refreshes to display terms with a synonym and terms without a definition.

Using Globalize

Definitions for terms in uPerform Express content can be updated using a process called globalization. During globalization, definitions are inserted into documents and new terms in documents are gathered for inclusion in the glossary. The globalization process affects only text within recorded Field/Description tables. Text within Field/Description tables inserted during editing is ignored.

If a term exists in the document, but not in the glossary, the term is added to the glossary with a blank definition. The glossary will then need to be updated with a customized definition of the new term. You can then globalize to distribute the update to the documents containing the term.



Only those documents created with the same template as that used by the current glossary file can be globalized.

Definitions are never retrieved from documents during globalization. If an author has entered a definition for a term in a document, this definition will be overwritten by the globalization process.

The glossary functionality is not case-sensitive, meaning that a term in a document will be considered the same as a term in the glossary regardless of whether the same capitalization rules are applied. Purchase order and Purchase Order in documents are considered the same term. The Glossary is character-string dependent, however; Purchase order (one space) is different than Purchase   order (two spaces).

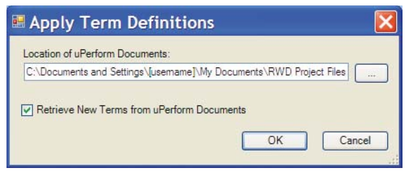
Globalizing Documents

You can globalize a batch of uPerform Express documents directly from the editor workspace. This task is typically performed by your project administrator. During globalization, definitions are pushed to documents. Optionally, new terms (with a blank definition) are added to the glossary.

The documents to be globalized must be stored in a location accessible by the computer executing the globalization. Prior to globalization, request that your authoring team upload their uPerform Express content to a designated file server.

Globalizing a Batch of Documents

1. Select **TOOLS** > **APPLY TERM DEFINITIONS**.



2. Select one of the following options:

If You Want To	Then
Apply definitions to a set of documents	Click **...** . Specify the location of the uPerform Express content. Click **OK**.
Apply definitions to a set of documents and retrieve new terms from these documents	Click **...** . Specify the location of the uPerform Express content. Select **Retrieve New Terms from uPerform Express Documents**. Click **OK**.

All uPerform Express content in the specified folder and any subfolders is globalized.

3. Optionally, review the Application log for details and information on any errors. In Windows XP, the log is stored in the \Documents and Settings\[username]\Application Data\ANCILE\uPerform Express\Version X.X\Logs directory. In Windows Vista and Windows 7, the log is stored in the \User\App Data\Roaming\ANCILE\uPerform Express\Version X.X\Logs directory.

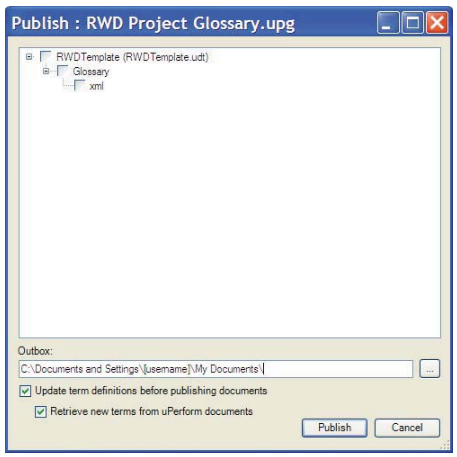
Publish the Glossary

The following subsection describes the steps to publish your glossary.

For detailed information on publishing documents, simulations, and courses, refer to Publishing Content. For information on batch publishing content, the glossary, and your website, refer to Batch Publishing (on page 359).

Publishing the Active Glossary

1. Select **FILE > PUBLISH [GLOSSARY NAME]...** .



2. Select the template corresponding to the glossary to be published.

3. Optionally, browse to specify an outbox other than the default.

   The additional options below the outbox are applicable only if you are batch publishing content and the glossary. For information on batch publishing content, the glossary, and your website, refer to Batch Publishing (on page 359).

4. Click **Publish** to publish the active glossary.

   When you publish the glossary, any existing, previously published glossary at the same location is deleted.

When publishing is complete, a summary message is displayed with a hyperlink to the successfully published glossary. The name of the published glossary is determined by the entry in the glossary publication settings in your template. For detailed information on glossary publication settings, refer to Manage All Publications (on page 282).

Optionally, review the Application and Transformation logs for detailed information on events. In Windows XP, the logs are stored in the \Documents and Settings\[username]\Application Data\ANCILE\uPerform Express\Version X.X\Logs directory. In Windows Vista and Windows 7, the logs are stored in the \User\App Data\Roaming\ANCILE\uPerform Express\Version X.X\Logs directory.

To print the glossary, open and print the published index.xml file located in the specified outbox at \[glossary name]\glossary\xml.

Integrating a Published Glossary into the Website

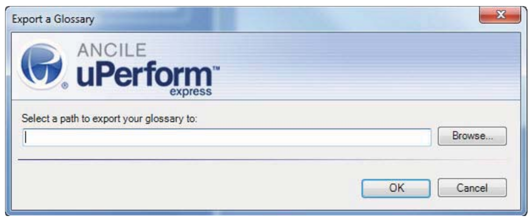
After publishing the glossary and website, the link to the glossary in the upper right of the website will automatically point to the glossary file. Ensure you move all published files to a central file or web server as described in Making Your Website Available to End Users (on page 363).

Export a Glossary File

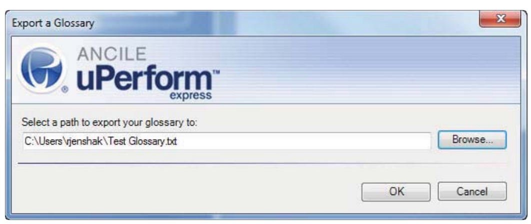
You can export a uPerform Express glossary file for import into the uPerform server. This is useful if you have an glossary database and are planning to upgrade from uPerform Express to the full version of uPerform.

Exporting a Glossary File

1. Open a glossary file.
2. Select TOOLS > EXPORT A GLOSSARY.



3. Click **Browse...** to navigate to the export location.
4. Enter a file name in the **File Name** field.
5. Click **OK**.



6. Click **OK**.
7. Click **OK**.

Chapter 13: Using Annotations

Annotation functionality within the editor allows authors and reviewers to add notes and comments into uPerform Express content.

Introduction to Annotations

Annotations allow authors and reviewers to insert comments in the form of notes directly within a document, simulation, or course. Annotations are created within a set; each author or reviewer can have a unique, customized annotation set to contain his notes to the author.

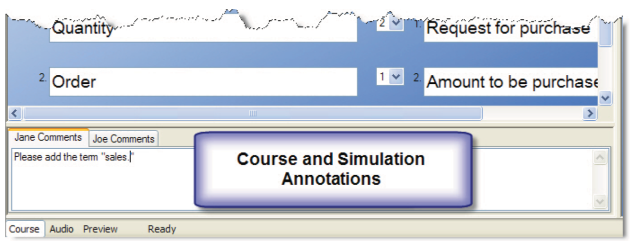
Annotations display in the procedural view and in the course view. Annotations made in one procedural view will affect the other view. Annotations do not display on the published content available to end users. Course annotations can be displayed on a printed course storyboard. For more information, refer to Printing Content (on page 101). Printing course annotations can provide additional information for students and course instructors.

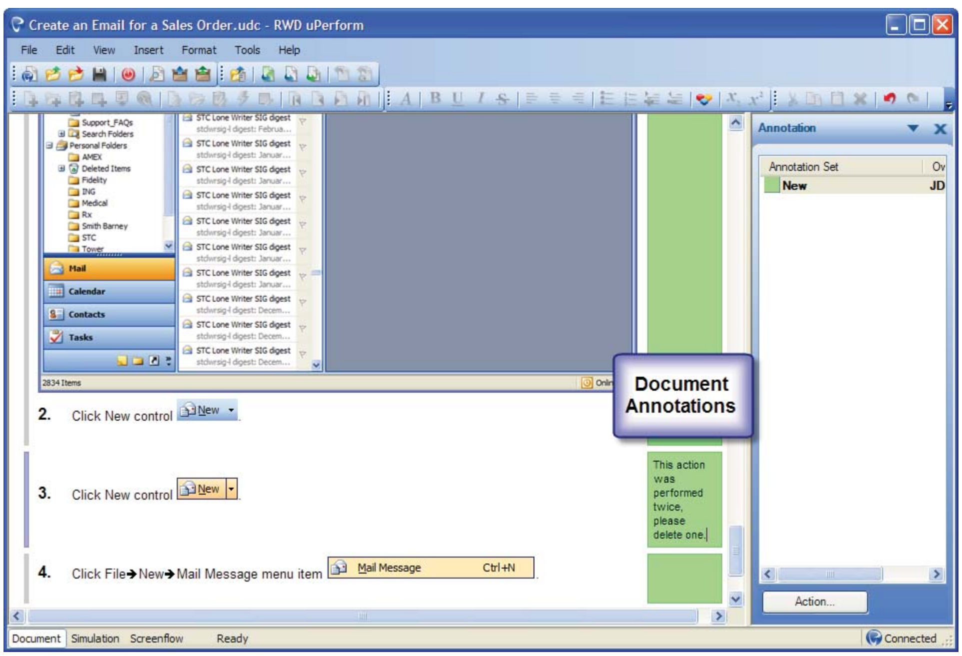
You can display or hide annotations within content.

Viewing Annotations

You can toggle the display of annotation sets in the content area.

Course annotations are displayed on the bottom of the content area. Document and simulation annotations are displayed in the task pane in the Document view.





Viewing an Annotation Set

1. Open a document, simulation, or course and perform one of the following actions:

If You Want To	Then
View annotations for a document or simulation	Select the **Document** or **Simulation** tab. Select **VIEW > TASK PANE > ANNOTATIONS** to display the *Annotation* task pane.
View annotations for a course	Select **VIEW > VIEW ANNOTATIONS.**

2. Perform one of the following actions:

If You Want To	Then
Select an annotation set in a document or simulation	Right-click on the annotation set in the task pane, and select **View**.
Select an annotation set in a course	In the content area, click on the tab name corresponding to the annotation set.

3. In the content area, review the annotation notes.

Hiding All Annotation Sets

1. Perform one of the following actions:

If You Want To	Then
Hide annotations in a document or simulation	Select the **Document** or **Simulation** tab. Right-click on the annotation set name in the task pane.
Hide annotations in a course	Right-click on an annotation tab in the content area.

2. Click **Hide** to hide all notes within the content area.

Creating Annotation Sets

An annotation set contains all the individual annotations made by one author or reviewer for a simulation, document, or course. A document or course can have more than one annotation set, but only one annotation set is viewable at a time.

Creating an annotation set automatically creates all annotations within the set. Each annotation within an annotation set is associated with only one element in the document or one page in a course. Annotations are stored as part of the uPerform content; they are not stored separately on the local computer.

Creating an Annotation Set

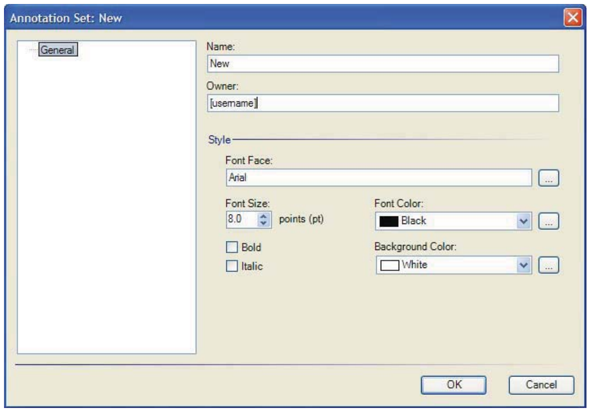
1. Create or open a document, simulation, or course.
2. Perform one of the following actions:

If You Want To	Then
Create an annotation set for a document	Select the **Document** or **Simulation** tab, and go to Step 3.
Create an annotation set for a course or a simulation	Go to Step 3.

3. Select VIEW > VIEW ANNOTATIONS to display the *Annotation* task pane.
4. Perform one of the following actions:

If You Want To	Then
Create an annotation set for a document	Right-click in the task pane, and go to Step 5.
Create an annotation set for a course or a simulation	Click on the **Click here to create a new Annotation Set** hyperlink, and go to Step 6.

5. Click **New...** .



6. Complete the following fields:

Field	Description
Name	Enter the name of the annotation set.
Owner	Enter the name of the annotation author.
Style: Font Face	Specify a font for the annotation text from the drop-down list or optionally browse to locate a font.
Style: Font Size	Specify a font size for the annotation text from the drop-down list.
Style: Color	Specify a font color for the annotation text or optionally browse to choose a custom font color.
Style: Bold	Click the checkbox to activate bold formatting.
Style: Italic	Click the checkbox to active italic formatting.
Style: Background Color	Specify a background color for the annotation note or optionally browse to choose a custom background color.

7. Click **OK**.

Entering Annotation Text

1. Create or open a document, simulation, or course.

2. Perform one of the following actions:

If You Want To	Then
Enter annotation text in a document or simulation	Select the **Document** or **Simulation** tab. Select **VIEW > TASK PANE > ANNOTATIONS** to display the *Annotation* task pane.
Enter annotation text in a course or a simulation	Select **VIEW > VIEW ANNOTATIONS**.

3. In the content area, perform one of the following actions:

If You Want To	Then
Enter annotation text in a document	In the content area, double-click in the annotation note corresponding to the element you wish to annotate, and go to Step 5.
Enter annotation text in a course or a simulation	Navigate to the page you want to annotate. Click on the appropriate tab. Click in the annotation content area, and go to Step 5.

4. Enter your annotation text.

Managing Annotation Sets

You can create copies of existing annotation sets, modify an annotation set, and delete annotation sets.

Duplicating an Annotation Set

1. Create or open a document, simulation, or course.
2. Perform one of the following actions:

If You Want To	Then
Duplicate an annotation set in a document or simulation	Select the **Document** or **Simulation** tab. Select **VIEW > TASK PANE > ANNOTATIONS** to display the *Annotation* task pane.
Duplicate an annotation set in a course	Select **VIEW > VIEW ANNOTATIONS**.

3. Select the annotation set to duplicate.
4. Perform one of the following actions:

If You Want To	Then
Duplicate an annotation set in a document	Right-click on the annotation set name in the task pane. Select **Duplicate**.
Duplicate an annotation set in a course or a simulation	Right-click on the tab of the annotation set you want to duplicate, and select **Duplicate**.

5. Right-click on the duplicated annotation set, and select **Modify**.
6. Specify the annotation set properties. For information on entering properties, refer to Creating an Annotation Set (on page 243).
7. Click **OK**.

Updating an Annotation Set

1. Create or open a document, simulation, or course.

2. Perform one of the following actions:

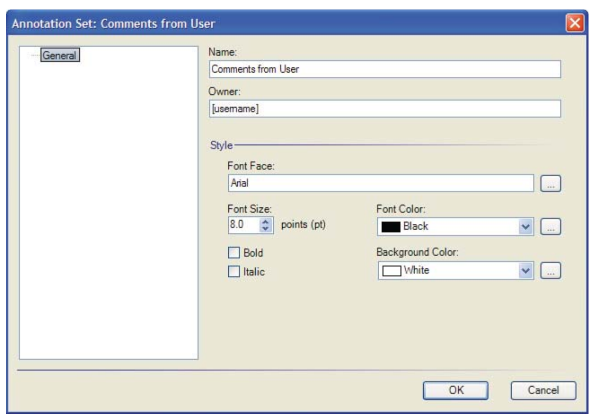
If You Want To	Then
Update an annotation set in a document or simulation	Select the **Document** or **Simulation** tab. Select **VIEW > TASK PANE > ANNOTATIONS** to display the *Annotation* task pane.
Update an annotation set in a course	Select **VIEW > VIEW ANNOTATIONS**.

3. Select the annotation set to modify.

4. Perform one of the following actions:

If You Want To	Then
Update an annotation set in a document or simulation	Right-click on the annotation set name in the task pane.
Update an annotation set in a course	Right-click on the tab of the annotation to be edited.

5. Click **Modify...** .



6. Edit the annotation set properties. For information on maintaining properties, refer to Creating an Annotation Set (on page 243).

7. Click **OK**.

Deleting an Annotation Set

1. Create or open a document, simulation, or course.

2. Perform one of the following actions:

If You Want To	Then
Delete an annotation set in a document or simulation	Select the **Document** or **Simulation** tab. Select **VIEW > TASK PANE > ANNOTATIONS** to display the *Annotation* task pane.
Delete an annotation set in a course	Select **VIEW > VIEW ANNOTATIONS**.

3. Select the annotation set to delete.

4. Perform one of the following actions:

If You Want To	Then
Delete an annotation set in a document or simulation	Right-click on the annotation set name in the task pane.
Delete an annotation set in a course	Right-click on the annotation set you want to delete.

5. Click **Delete**.

6. Click **Yes** at the confirmation prompt.

Managing Annotation Notes

After you have created your annotation set and individual annotation notes, you can update the text within a note and modify the note format.

Editing an Annotation Note

1. Perform one of the following actions:

If You Want To	Then
Edit an annotation note for a document	Double-click on the annotation set name to edit, and go to Step 2.
Edit an annotation note for a course or a simulation	Go to Step 2.

2. Click in the note in the content area.

3. Edit text as desired.

Chapter 14: Previewing and Publishing Content

ANCILE uPerform Express offers flexibility in the content types and formats that you can publish. Published content can be incorporated into your end user website.

Introduction to Previewing and Publishing Content

Publishing has many functions within uPerform Express, and allows you to:

- Convert certain sections of a single document into complete, stand-alone publications intended for end user consumption.
- Convert your course or simulation into web-ready content.
- Create a printable booklet containing concepts, procedures, and exercises.
- Combine multiple uPerform content files into a single master SCORM package for use with an LMS.
- Produce guided help output to use during task execution.

You may publish as often as necessary. Content that is locally published to the same location will overwrite existing content of the same format and type.

For detailed information regarding publishing the glossary and website, refer to Publishing the Active Glossary (on page 235) and Publishing the Active Website (on page 357).

Overview of Document Publishing

Based on the settings specified by the author template you are using, the following document types may be available to publish:

- ASAP BPP (Business Process Procedure) - Mimics the BPP documents that come with an Accelerated SAP (ASAP) implementation.
- ASAP BPP Cue Card (HTML and XML formats only) - Mimics the ASAP BPP documents and provides a dynamic, multi-layer format designed specifically for context-sensitive help.
- Configuration Information - Lists information such as configuration menu path, key field changes, and date of configuration change.
- Cue Card (HTML and XML formats only) - Provides a dynamic, multi-layer document designed specifically for context-sensitive help, includes screenflows.
- Exercise - Includes data for a given procedure, and tasks and questions for end users to complete.
- Quick Reference (Flow) - Includes overview information and a screenflow.

- Quick Reference (Step) - Includes overview information and end user steps without screen images or field definitions.
- Test Document - Includes scenarios and results used in system testing.
- Work Instruction - Includes overview information, end user procedures with steps, field description tables, screen shots, and screenflows.
- Test Script - Publishes an XML file and creates an "Images" folder containing images that correspond to each step in a uPerform document. A Microsoft Excel add-in allows you to upload this publication type to HP Quality Center version 9.2 or higher as a manual test script.

Your available document publishing settings and output types is mandated by your template. For detailed information on creating and maintaining templates, refer to Using Author Templates.

Overview of Simulation Publishing

Simulations are published as interactive tutorials. Based on the settings specified by the template you are using, the following simulation playback modes may be available to publish:

- Auto Playback: Replays the task; no user intervention is required.
- Standard: Guides the user through the task with step-by-step instructions.
- Self Test: Allows the user to attempt the task and provides guidance when an error is made.
- Assessment: Allows results to be captured and integrated into custom or third-party tracking applications.

Interactive tutorials are output as HTML files. HTML output is viewable through standard web browsers.

The tutorials are accessible through a main lesson homepage. The homepage display can be modified via your template. For detailed information on creating and maintaining templates to define your simulation publishing options, refer to Using Author Templates.

Overview of Course Publishing

Courses are published as self-paced content in HTML format, which provides optimal output performance by streaming audio after the content is buffered. Courses are interactive and can be played back using a supported web browser.

In addition, you can publish courses to PDF, print, and Word for distribution to your end users.

Overview of Student Guide Publishing

Student guides are published to Microsoft Word format. You must ensure that all uPerform source files exist in the same directory as the student guide. In addition, your source files must use the same template as the student guide to which they are inserted.

After publishing a student guide, you must open the guide in Microsoft Word and update the table of contents as per Word's table of contents update functionality.

Overview of Course Package Publishing

A uPerform course package (.ucp) is published to .zip, and allows you to publish multiple uPerform content files into a single master SCORM package.

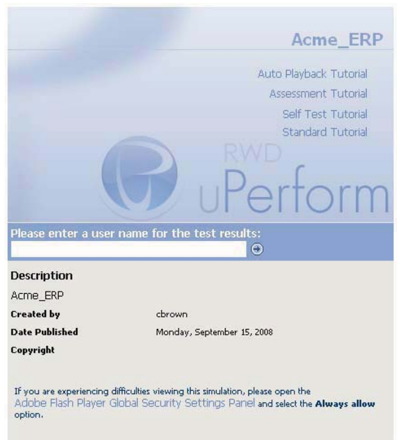
Overview of Guided Help Publishing

Guided Help is published HTML content designed to be used during task execution. Users can start guided help playback for on-the-job support.

Previewing a Simulation

You can preview simulations prior to publishing output locally or by checking the content into the uPerform Express server.

1. Select **FILE > PREVIEW SIMULATION...** to display the *Preview Simulation* window.



2. Click on one of the listed tutorial modes to launch the simulation.

Hyperlinks and hotspots inserted into the simulation will not be active until the simulation is published.

For detailed instructions on interacting with a simulation during playback, refer to Viewing Simulations (on page 260).

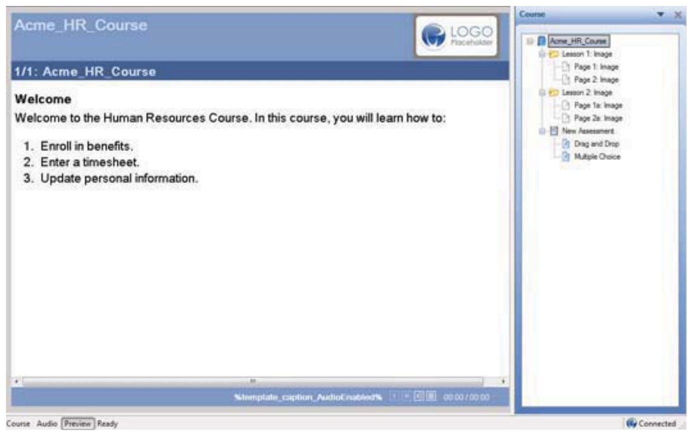
Previewing a Course

You can preview individual course pages prior to publishing. Only one page can be viewed at a time.

1. In the *Course* pane, click on the desired page to preview.

Hyperlinks, hotspots, and simulations inserted into the course will not be active until the course is published.

2. Click **Preview** in the status bar.



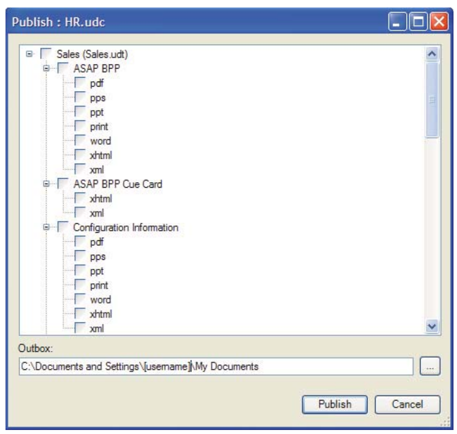
Publishing Content

You can publish the current open uPerform Express content, or specify an inbox of uPerform Express content to publish in batch mode.

You must have Microsoft Office (specifically, Microsoft PowerPoint and Word) installed on your computer to locally publish .ppt, .pptx, .doc, .docx and .pps output.

Publishing Active Content

1. Select **FILE > PUBLISH [DOCUMENT NAME]...** .



2. Perform one of the following actions:

If You Want To	Then
Publish documents and simulations	Select the appropriate checkboxes to the left of the desired simulation and document types and formats.
Publish a course	Select the HTML, PDF, Print, or Word option.
Publish a student guide	Select the Word option.
Publish a course package	Select the zip option.
Publish guided help	Select the Guided Help option.

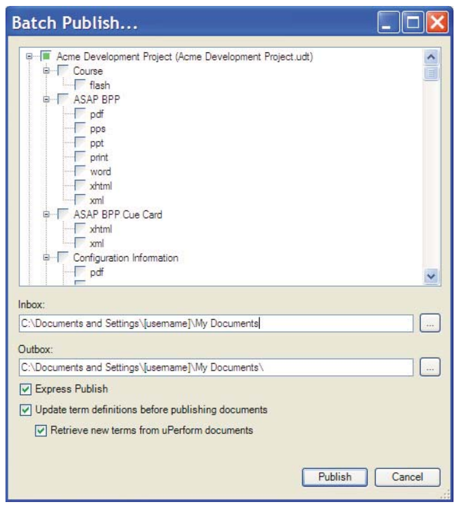
3. Optionally, browse to specify an outbox other than the default.

4. Click **Publish** to publish the selected output types and formats.

When publishing is complete, a summary message is displayed with a hyperlink to successfully published content. For detailed information on viewing simulation playback, refer to Viewing Simulations (on page 260). For detailed information on viewing a course, refer to Viewing Courses (on page 262).

Batch Publishing Content

1. Select **FILE > BATCH PUBLISH...** .



2. Select the appropriate checkboxes to the left of the desired template, content types, glossaries, websites, and associated formats.

3. Optionally, browse to specify an inbox and/or outbox other than the default.

4. Optionally, select the **Publish** checkbox to publish only files in the inbox that have changed since the last publish operation.

   When this option is enabled, uPerform scans the inbox folder to determine which documents and courses have been modified since the last publish operation. uPerform then includes only these changed files in the list of content to be published to the outbox folder.

5. Click **Publish** to publish the selected output types and formats.

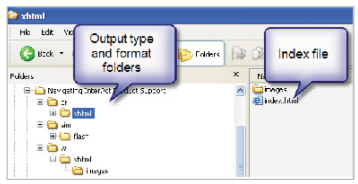
When publishing is complete, a summary message is displayed with hyperlinks to successfully published content. For detailed information on viewing simulation playback, refer to Viewing Simulations (on page 260). For detailed information on viewing course playback, refer to Viewing Courses (on page 262).

Viewing and Working with Published Content

Viewing Documents

Published content is stored in the specified outbox folder. Within this folder, content is stored in subfolders based on file name.

Within each folder, output type and format subfolders are displayed. Navigate to the desired subfolder and double-click on the index file to display content.



Working with Test Scripts

The test script publication publishes an XML file formatted for use in a Microsoft Excel spreadsheet. If you are using HP Quality Center version 10.0 or higher, the publication will also publish an "Images" folder containing images that correspond to each step in a uPerform document. The XML file contains paths to the images, which are automatically attached to the steps in HP Quality Center version 10.0 or higher.

This document type is available only from the uPerform client. For more information on installing and configuring the Microsoft Excel Add-In, refer to the "Microsoft Excel Add-In Guide" provided with your supported version of HP Quality Center.

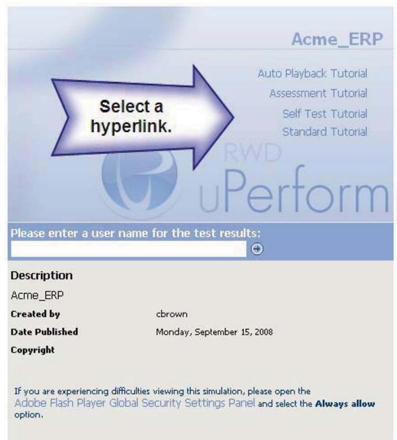
The following provides an overview of how to enable and produce a test script publication:

1. Enable **Test Script** on the *Publications* tab in the template.
2. Publish the test script from uPerform.
3. Open the test script in Microsoft Excel. Only the step text will be published in the Excel Spreadsheet (XML); no images will display.
4. Complete the **Subject** and **Expected Results** columns fields. uPerform documents do not contain a field that represents these values.
5. Upload the test script to HP Quality Center using the Microsoft Excel Add-in.

Viewing Simulations

If you are viewing a simulation outside of a SCORM- or AICC-conformant LMS, enter a username in the **Please enter a user name for the test results** field, and click .

All output modes can be started by selecting a hyperlink on the published homepage.



For detailed information on customizing playback modes, refer to Default Publication Settings: Simulation: General Settings.

Viewing a Standard Simulation

In this playback mode, the end user interacts with the lesson. End users are shown the action hotspots, the steps in the *Steps* window, the step status bar, notes, and any incorporated audio. The end user performs the actions to complete the tutorial.

Standard mode allows the end user to skip around in the lesson by selecting the desired step in the *Steps* window. The *Steps* window display can also be customized.

The following playback options are available:

If You Want To	Then
Enable or disable playback of an associated audio file	Click on the bottom right of the simulation playback page.
Remove a bookmark	To remove a bookmark, select the bookmarked step, and click .
Hide the *Steps* window	To hide the *Step Window*, click **Hide Steps**.
Restore the *Steps* window	To restore the *Step Window*, click **Restore Steps**.

If You Want To	Then
Send the simulation output to a printer	To send the step text and screens to the printer, click in the *Step Window*.
Expand or collapse the *Step Window* window	Click in the *Step Window*.
Move to the next or previous step.	Click or on the bottom left of the simulation playback page.

Viewing an Auto Playback Simulation

This playback mode will automatically run the lesson without user interaction. In this mode, the application performs the actions to complete the simulation with the user as an observer. Although the action hotspots and step status bar are viewable, the user has no input into the actions occurring during playback of the lesson. A Control Toolbar is displayed during the Auto Playback mode so that the user can reverse, pause, forward, stop, or resume the lesson playback. In addition, the user can move forward or backward by selecting a step in the *Steps* window.

For instructions on creating printable output and inserting bookmarks, refer to Viewing a Standard Simulation (on page 260). In Auto Playback mode, the user must first stop the playback before inserting a bookmark.

Viewing a Self-Test Simulation

The Self-Test has no *Steps* window instructions, hotspots, notes, audio playback, or step status bar information. In this playback mode, the user is encouraged to remember and perform all necessary steps for testing purposes.

If you have enabled the display of hints for this lesson or for all lessons, the hint for the nonessential data will display in the lower left of the playback window. For example, one step of the simulation assessment might require users to enter a training ID, but in real life they will enter their own user id. When creating the simulation, you can type a note in the hint field like "Type Training ID 0001 for this simulation. On the production site, you will use your own User ID". For more information on enabling hints, refer to Default Publication Settings: Simulation: General Settings.

The user must perform all steps within the simulation from memory. If the user makes a mistake on a step, a Help window will display. By selecting **Yes** on the Help window, the system will display only the location of the required action with the appropriate hotspot.

Upon completion of a lesson in Self-Test mode, the user will receive an accuracy score measuring his performance.

Viewing an Assessment Simulation

The Assessment mode has no *Steps* window instructions, hotspots, notes, audio playback, or step status bar information. In this playback mode, the user is encouraged to remember and perform all necessary steps for testing purposes.

If you have enabled the display of hints for this lesson or for all lessons, the hint for the nonessential data will display in the lower left of the playback window. For example, one step of the simulation assessment might require users to enter a training ID, but in real life they will enter their own user id. When creating the simulation, you can type a note in the hint field like "Type Training ID 0001 for this simulation. On the production site, you will use your own User ID". For more information, refer to Default Publication Settings: Simulation: General Settings.

This mode also provides the ability to send test results. To capture the results of an assessment tutorial if you are working outside of an LMS, you must enter a URL specifying the test result destination in the template. For complete details on specifying assessment options in the template, For more information, refer to Default Publication Settings: Simulation: General Settings.

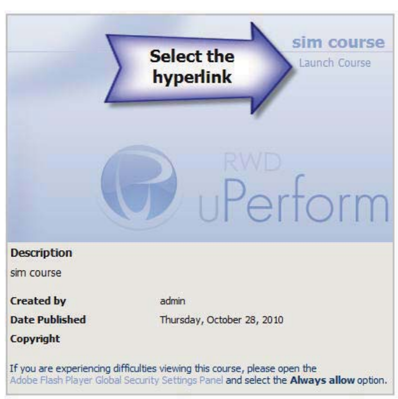
The user must perform all steps within the simulation from memory. If the user makes a mistake on a step, a Help window will display. By selecting **Yes** on the Help window, the system will display only the location of the required action with the appropriate hotspot.

Upon completion, the user will receive an accuracy score measuring his performance.

Viewing Courses

If you are using an LMS or score catcher, enter a username in the **Please enter a user name for the test results** field, and click .

View a course by selecting the **Course** hyperlink on the published homepage.



Buttons such as **Back** and **Next** are used to navigate through the course. The **Menu** button allows the user to display an outline view of course content and identify his location within the course. The user can also jump to different pages within the course.

The audio toolbar allows the user to play, pause, stop, and mute the audio that accompanies an individual page.

The **History** option allows the user to display only pages that have been visited. For example, if a user wanted to change a choice, or review page content, selecting this option displays only the pages visited. This is useful if your course incorporates branching so that the user sees only content relevant to the branch selected, or if a user wants to go directly to a specific page that has already been visited.

A user can opt to zoom into an image on a published page by hovering over the image and clicking the plus (+) sign on the image. This will open the image in a new window.

When a user reaches the end of the course, the user will be given the option to continue into the assessment.

A user can exit the course at any time by clicking **Exit**. The user will be prompted to confirm course results.

Upon completion, the user will receive an accuracy score measuring his performance.

Viewing Student Guides and Course Packages

Published student guide content is stored in the specified saved location. You can view published student guides by opening them in Microsoft Word.

Published course package content is stored as a .zip file in the specified saved location. You can view content within a published course package by opening the index.html file in a web browser.

Viewing Simulations on the Apple iPad

ANCILE uPerform now supports playback of simulations on Apple iPads. Because the iPad does not natively support Windows-specific keys on its keyboard, uPerform provides specific key combinations to allow users to complete simulations.

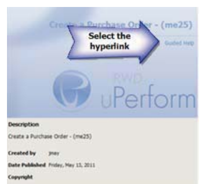
The following options are available:

If You Want To	Then
Display iPad-specific help	Click  on the bottom right of the simulation playback page.
Enable a right-click event	Click  on the bottom right of the simulation playback page.

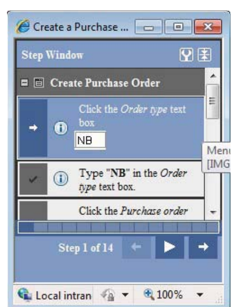
If You Want To	Then
Enable the Control (CTRL) key	Click CTRL on the bottom right of the simulation playback page.
Enable the Alt key	Click ALT on the bottom right of the simulation playback page.
Enable the Shift key	Click SHIFT on the bottom right of the simulation playback page.

Viewing Guided Help

Guided help is launched by selecting the hyperlink on the published content home page.



Once the user starts playback, guided help will automatically run without user interaction. This mode is quite similar to the autoplayback mode in simulations; the application performs the actions to complete the transaction with the user as an observer.



A Control Toolbar is displayed in the guided help to allow users to reverse, pause, forward, stop, or resume the help playback. In addition, the user can move forward or backward by selecting a step in the *Step* window.

If You Want To	Then
Play the playback	Click ▶ on the bottom right of the help playback page.
Pause the playback	Click ⏸ on the bottom right of the help playback page.

If You Want To	Then
Advance one step	Click on the bottom right of the help playback page.
Reverse one step	Click on the bottom right of the help playback page.
Change Options	Click on the top right to open Options. Refer to Setting Guided Help Options for additional information.
Change to current step mode	Click on the top right of the help playback page to toggle between Current Step mode and Full View mode. Current Step mode focuses on the current step only. Full View mode displays the entire transaction and highlights the current step.

Chapter 15: Using Author Templates

Author templates in ANCILE uPerform Express control the formatting and publishing options available to authors. Templates allow you to set standards and maintain consistency within your authoring team. The template also controls the functionality and display of your glossary and website.

Introduction to Author Templates

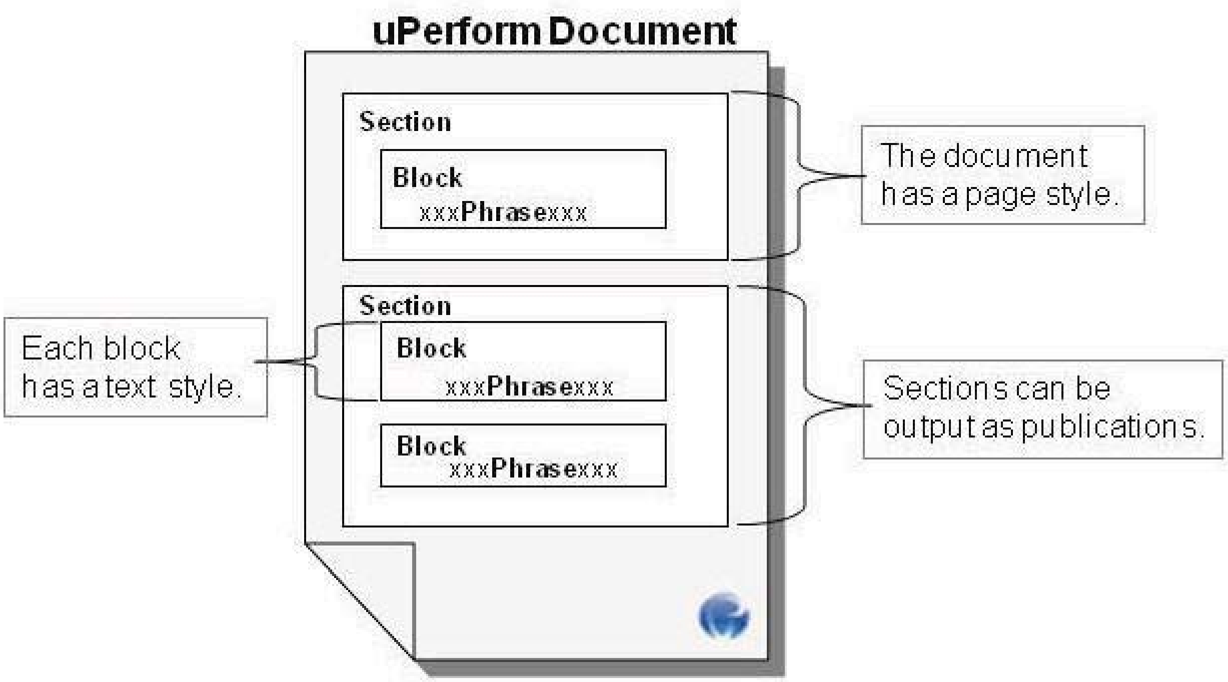
A key capability of uPerform Express is the ability to allow administrators to establish and enforce standards through the use of author templates. Author templates contain configuration and style settings to control the appearance and content of your training materials. Templates help you to enforce consistency via these predetermined formatting and configuration settings. Consistent formatting enables your users to quickly and easily find information in all content.

Author templates provide control over the following elements.

- Styles - a group of formatting options that relate to paragraphs or character text.
- Publications - a designator indicating content output.
- Phrases - a group of culture-specific boilerplate text items that are placed into a block by default.
- uPerform Properties - metadata such as document title, owner, and version used to describe content.
- Image, Data, and Language Management - allows you to control images, data fields, and languages associated with a template.

You can edit author templates via the uPerform editor.

The following diagram illustrates many of the basic uPerform Express procedural document elements that you can modify within the template:



Managing Author Templates

At the start of your project, you should create a new template and specify your configuration settings.

Each uPerform Express file is linked to a template via the template's unique 32-bit identifier.

During creation and edit, author templates are stored on your computer in the following locations:

- For Windows XP: C:\Documents and Settings\[user name]\Application Data\uPerform\Version X.X\templates
- For Windows Vista and Windows 7: C:\User\App Data\Roaming\uPerform\VersionX.X\templates

You can manage local templates directly through uPerform Express. Author templates have a .udt file extension.

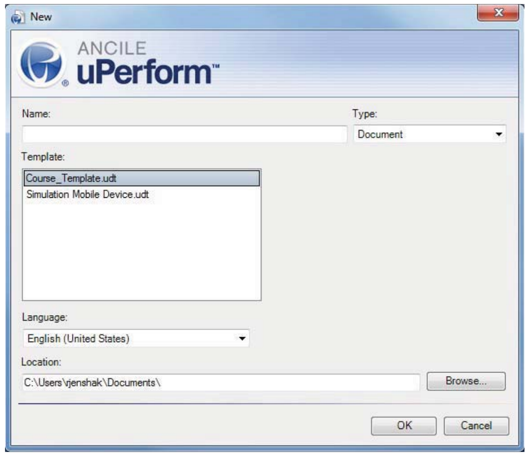
Create and Open a New Author Template

The following best practices apply to your use of author templates:

- Create a new template using the uPerform **FILE > NEW** menu. Do not copy and rename a .udt file. The copy process renames the file but does not modify the template's unique identifier. A uPerform document is linked to a template via the template identifier, not the template name.
- After creating a .udt file, do not rename the file via Microsoft Windows Explorer as this may cause an author to have multiple template files with the same identifier.

Creating a New Author Template

1. From the editor, select **File** > **New**.



2. Enter a name for the new template in the **Name** field.

3. Select **Template** from the **Type** drop-down list.

4. Select a template from the **Template** list.

5. Click **OK**.

   Refer to any of the following subsections for more information on customizing the template.

Opening a Template

1. From the editor, select **FILE** > **OPEN** > **TEMPLATE.**

2. Select the template you want to open.

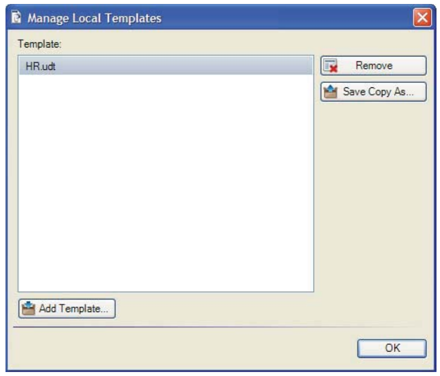
3. Optionally, select **Lock template for editing**.

4. Click **OK**.

   The standard author template delivered with the product cannot be opened in the editor.

Managing Local Templates

1. Select FILE > MANAGE LOCAL TEMPLATES....



2. Perform one of the following options:

If You Want To	Then
Save a copy of a template	Click **Save Copy As....** Navigate to the template location. Enter a new file name. Click **OK**.
Add a template	Click **Add Template....** Navigate to the location where you want to save the template. Enter a name for the template. Click **OK**.
Remove a template	Select a template from the list. Click **Remove**. Click **Yes**.

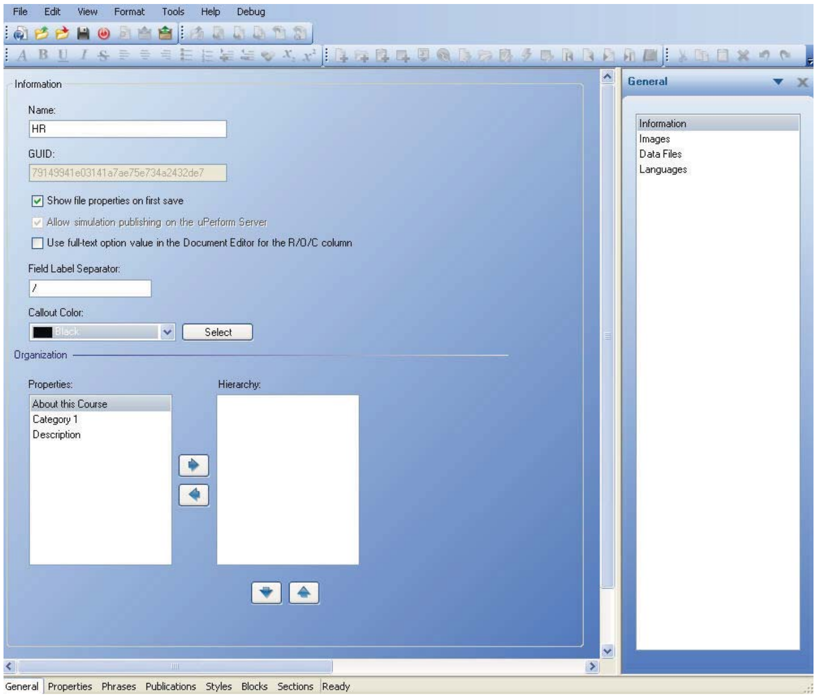
Specifying New Template Settings: General

Specifying General Settings: Information

1. From the editor, open the new template.

2. Click **General** on the status bar.

3. Click **Information** in the task pane.



4. Review the following information:

Field	Description
Name	Specifies the name of the new template.
GUID	Specifies the unique ID of the template.
Show file properties on first save	Select the **Show file properties on first save** checkbox to display the *Properties* window to the author upon the first save during a new recording.
Allow simulation publishing on the uPerform Express Server	This setting is not applicable to uPerform Express.
Use full text option value in the Document Editor for the R/O/C table	Select the **Use full text option value in the Document Editor for the R/O/C table** to display Required, Optional, or Conditional in the Document Editor.
Field Label Separator	Specifies what character should be used to separate multiple labels in a Field/Description table.
Callout Color	Select the color to be used for displayed callouts. Optionally, click **Select** to choose a color.

5. Perform one or more of the following options:

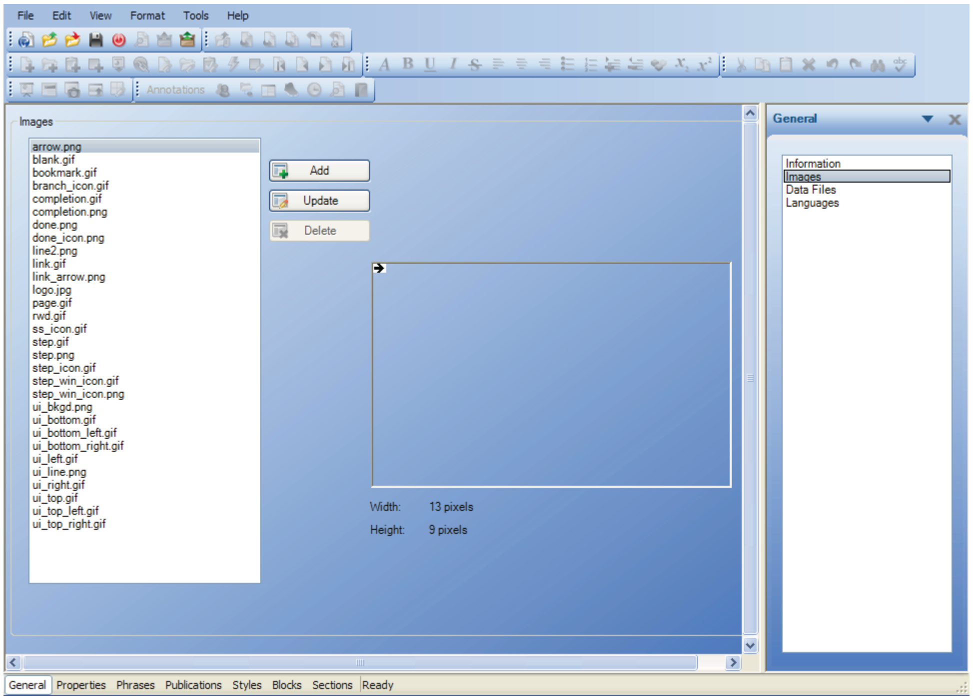
If You Want To	Then
Add built-in or custom properties to be used to organize the website hierarchy Only enabled properties will be displayed in the **Properties** box. For detailed instructions on enabling built-in and custom properties, refer to Managing Built-in Properties (on page 277) and Creating and Managing Custom Properties (on page 279).	Click on the desired property in the **Properties** box. Click the right arrow to move the property to the **Hierarchy** box. If you will be building your website based on properties, it is helpful to ensure the above option - **Show file properties on first save** - is enabled. This will prompt your authors to specify properties when creating content.
Remove built-in or custom properties to be used to organize the website hierarchy	Click on the desired property in the **Hierarchy** box. Click the left arrow to move the property to the **Properties** box.
Specify the hierarchy of selected properties	Use the up and down arrows to order the hierarchy of properties.

6. Select **FILE > SAVE** to save the template.

Specifying General Settings: Images

1. From the editor, open the new template.
2. Click **General** on the status bar.

3. Click **Images** in the task pane.



4. Perform one of the following options:

If You Want To	Then
Add an image to the template	Click **Add**. Navigate to the image and click **Open.**
Update an image	Select the image to update, and click **Update**. Navigate to the updated image, and click **Open**.
Delete a custom image	Select the custom image from the list, and click **Delete**. At the prompt, click **Yes**. You cannot delete the standard images delivered with uPerform Express.

A preview of the selected image will display to the right.

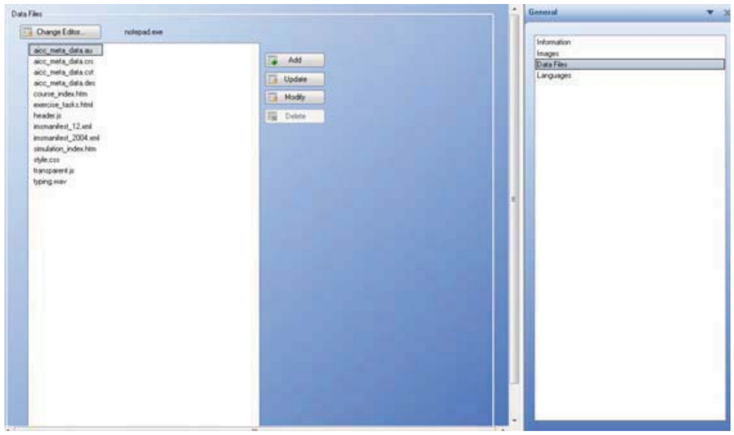
5. Select **FILE** > **SAVE** to save the template.

Specifying General Settings: Data Files

1. From the editor, open the new template.

2. Click **General** on the status bar.

3. Click **Data Files** in the task pane.



4. Perform one of the following options:

If You Want To	Then
Add a data file to the template	Click **Add**. Navigate to the data file and click **Open.**
Update a data file	Select the data file to update, and click **Update**. Navigate to the updated data file, and click **Open**.
Modify a data file	Select a data file, and click **Modify**. Edit the file, and select **FILE > SAVE**. Basic knowledge of HTML, XSL, and Java is required. Optionally, click **Change Editor ...** to specify a different data file editor.
Delete a custom data file	Select the custom data file from the list, and click **Delete**. At the prompt, click **Yes**. You cannot delete the standard data files delivered with uPerform Express.

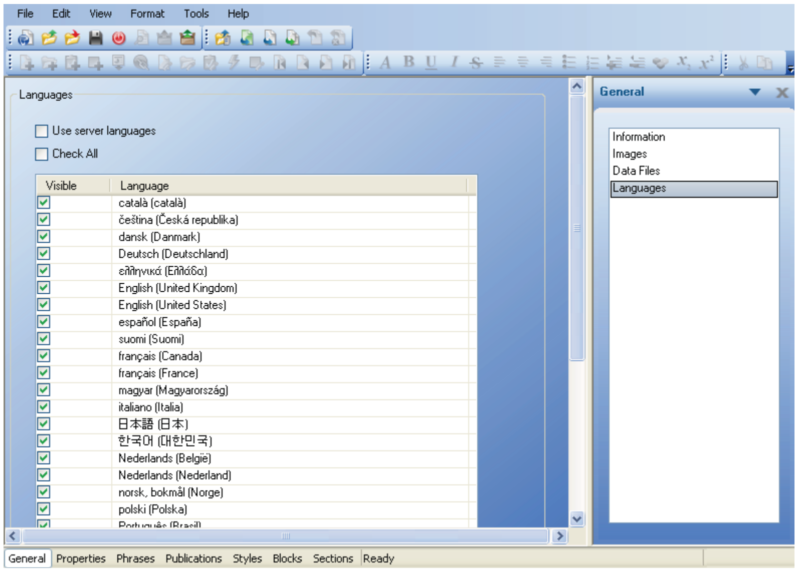
5. Select **FILE > SAVE** to save the template.

Specifying General Settings: Languages

1. From the editor, open the new template.

2. Click **General** on the status bar.

3. Click **Languages** in the task pane.



4. Perform one of the following options:

If You Want To	Then
Use languages specified on the uPerform server (This setting is not applicable to uPerform Express.)	Select **Use Server Languages**.
Manually select languages to be enabled in this template	Deselect **Use server languages**. Select or deselect one or more checkboxes in the **Visible** column.
Select all languages to be used in this template.	Select **Check All**.

5. Select **FILE > SAVE** to save the template.

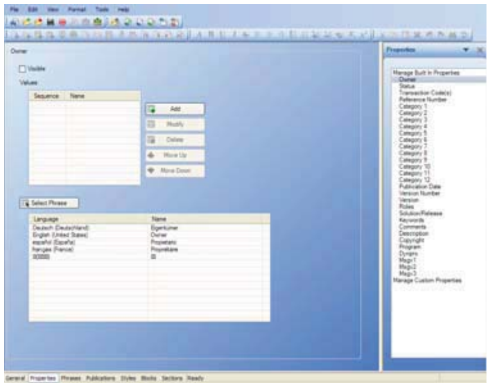
Specifying New Template Settings: Properties

Managing Built-in Properties

1. From the editor, open the new template.

2. Click **Properties** on the status bar.

3. Select a built-in property from the *Task Pane*.



4. To make the property visible to authors in the *Properties...* window, click the **Visible** checkbox.

5. Select one of the following options:

Based on the item selected, not all options will display.

If You Want To	Then
Create a value	Click **Add...**, and specify a name for the value. Click **OK**.
Modify the selected value	Click **Modify** to edit the value.
Delete the selected value	Click **Delete**.
Move the value earlier in the list	Click **Move Up** one or more times as needed.
Move the value later in the list	Click **Move Down** one or more times as needed.

6. Click **Select Phrase.**

7. Perform one of the following options:

If You Want To	Then
Add a custom phrase	Click **Add**. Select a language from the left. Enter the text in the **Content** area. Click **OK**.
Select a phrase	Select a language from the **Language** drop-down list. Select a phrase from the **Phrase** listbox. Optionally, enter text into the **Phrases** field to search for text. Click **OK**.

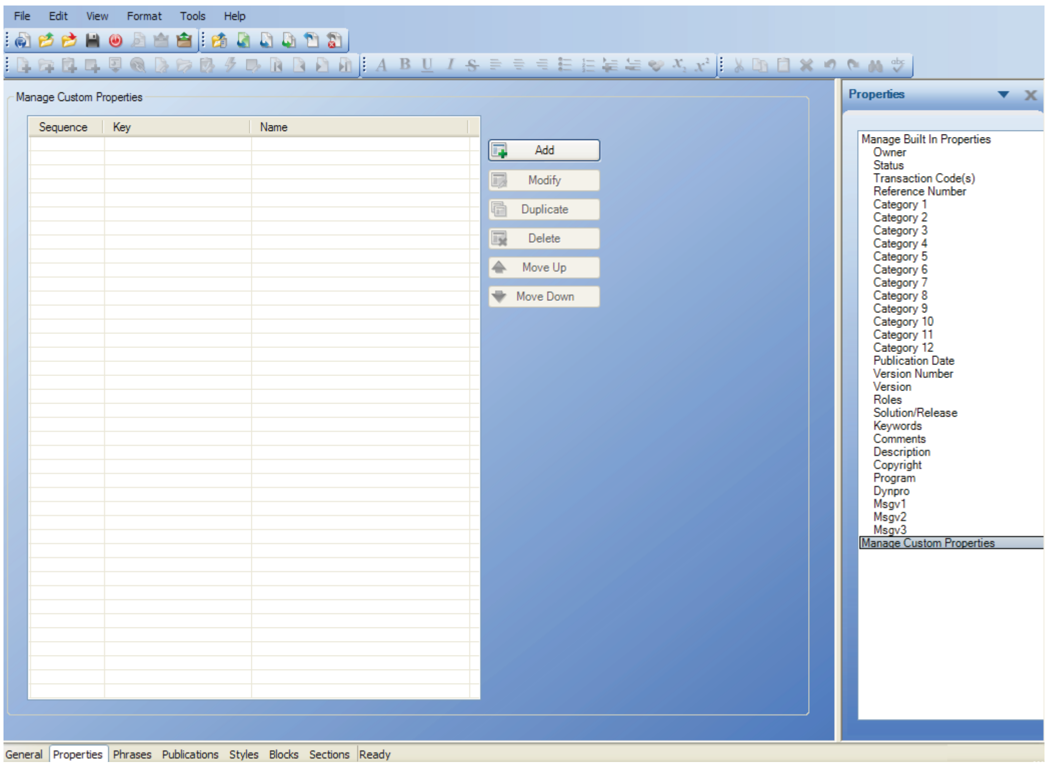
8. Select **FILE > SAVE** to save the template.

Creating and Managing Custom Properties

1. From the editor, open the new template.

2. Click **Properties** on the status bar.

3. Click *Manage Custom Properties* in the task pane.



4. Perform one of the following options:

If You Want To	Then
Add a new custom property	Click **Add**. Enter a value in the **Property** field. Click **OK**. Go to Step 5.
Modify an existing custom property	Go to Step 5.

5. Select the custom property from the *Task Pane*.

6. To make the property visible to authors in the *Properties...* window, click the **Visible** checkbox.

7. Select one of the following options:

Based on the item selected, some options may not display.

If You Want To	Then
Modify the selected property	Click **Modify** to edit the property.
Delete the selected property	Click **Delete**.
Move the property earlier in the list	Click **Move Up** one or more times as needed.
Move the property later in the list	Click **Move Down** one or more times as needed.

8. Click **Select Phrase.**

9. Perform one of the following options:

If You Want To	Then
Add a custom phrase	Click **Add**. Select a language from the left. Enter the text in the **Content** area. Click **OK.**
Select a phrase	Select a language from the **Language** drop-down list. Select a phrase from the **Phrase** listbox. Optionally, enter text into the **Phrases** field to search for text. Click **OK**.

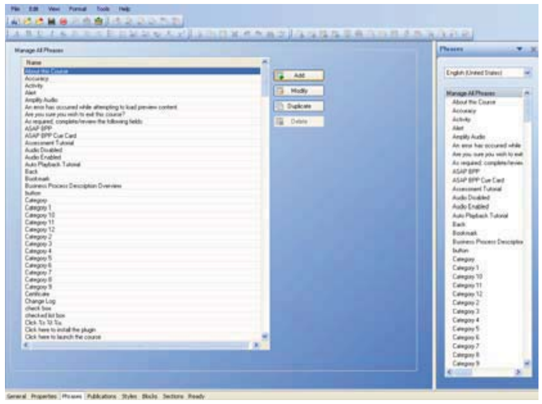
10. Select **FILE** > **SAVE** to save the template.

Specifying New Template Settings: Phrases

Managing Phrases

1. From the editor, open the new template.

2. Click **Phrases** on the status bar.



3. Select a language from the **Language** drop-down list in the *Task Pane*.

4. Choose a phrase name.

The following table lists the phrases for actions during recording and the common phrases for keyboard keys.

Field	Description
Click %s %t %u	%s = label % t= control type %u = image
Double-click %s %t %u	%s = label % t= control type %u = image
Right-click %s %t %u	%s = label % t= control type %u = image
Right double-click %s %t %u	%s = label % t= control type %u = image
Type %s in the %t %u	%s = typed text
Drag %s to %t	%s = first image %t = second image
Up, **Down**, **Left**, **Right**	Press "Up" Press "Down" Press "Left" Press "Right"
Page Up, **Page Down**	Press "Page Up" Press "Page Down"
Tab	Press "Tab"
Return	Press "Return"

Home, **End**	Press "Home" Press "End"
Insert, **Delete**	Press "Insert" Press "Delete"

5. Perform one of the following options:

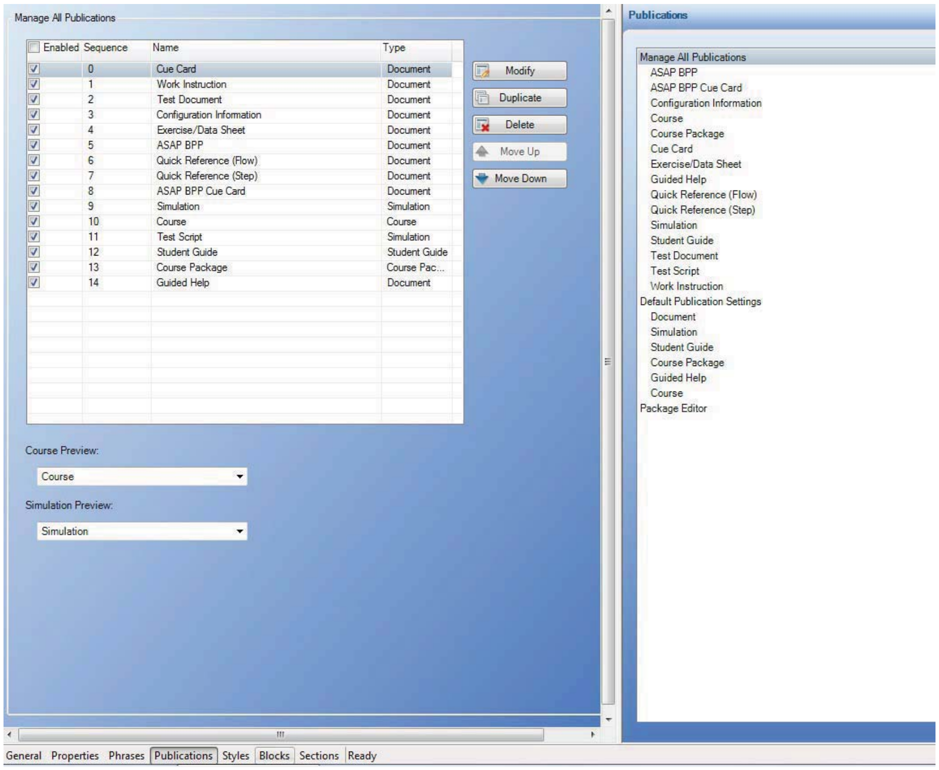
If You Want To	Then
Add a phrase	In the content pane, click **Add**. Select a language from the left navigation pane. Enter the phrase in the **Content** pane. Click **OK**.
Modify a phrase	Select a phrase in the content pane. Click **Modify**. Optionally, select a new language from the left navigation pane. Edit the phrase in the **Content** pane.
Duplicate a phrase	Select the phrase you want to duplicate from the *Content Pane*. Click **Duplicate**.
Delete a phrase	Select the phrase you want to delete. Click **Delete**. At the prompt, click **Yes**.

6. Select **FILE > SAVE** to save the template.

Specifying New Template Settings: Publications

Manage All Publications

1. From the editor, open the new template.



2. Click **Publications** on the status bar.

3. Click the checkbox in the **Enabled** column next to the publication types you want to activate.

4. Choose from the following options:

Field	Description
Course Preview	Select an option from the drop-down list to display which style course you want to preview. You can create an option by duplicating and modifying the **Course** publication type as described in Duplicating, Deleting, and Moving Publication Types (on page 285).

Field	Description
Simulation Preview	Select an option from the drop-down list to display which style simulation you want to preview. You can create an option by duplicating and modifying the **Simulation** publication type as described in Duplicating, Deleting, and Moving Publication Types (on page 285).

5. Select a publication type from the *Manage All Publications* list in the task pane.

6. Click **Select Phrase.**

7. Perform one of the following options:

If You Want To	Then
Add a custom phrase	Click **Add**. Select a language from the left. Enter the text in the **Content** area. Click **OK.**
Select a phrase	Select a language from the **Language** drop-down list. Select a phrase from the **Phrase** listbox. Optionally, enter text into the **Phrases** field to search for text. Click **OK**.

8. Perform one of the following options:

If You Want To	Then
Add a section	Click **Add**. Select a section from the list. Click **OK**.
Remove a section	Click **Remove**. At the prompt, click **Yes**.
Move the section earlier in the list	Click **Move Up** one or more times as needed.
Move the section later in the list	Click **Move Down** one or more times as needed.
Delete a section	Select the section. Click **Delete**. You cannot delete standard sections delivered with uPerform Express .

Section functionality is not applicable to the glossary or website publication types.

9. Review the publication type in the **Type** field.

   The **Type** field is not configurable.

10. Enter a format name in the **Name** field.

11. Perform one of the following options:

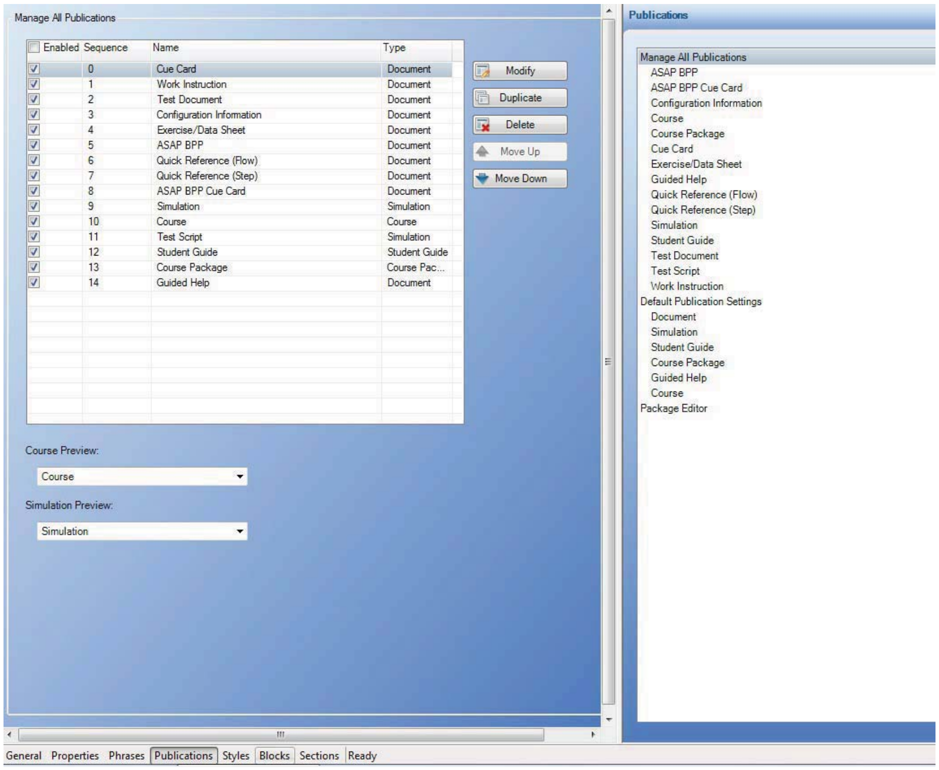
If You Want To	Then
Use default publication settings	Select the checkbox next to **Use Default Publication Settings**.
Create custom publication settings	Deselect the checkbox next to **Use Default Publication Settings**. Click a publication setting under the selected publication type. Refer to Setting Default Publication Setting for more information.

12. Select **FILE > SAVE** to save the template.

Duplicating, Deleting, and Moving Publication Types

1. From the editor, open the new template.

2. Click **Publications** on the status bar.



3. Choose from the following options:

If You Want To	Then
Copy a publication type	Select the publication type you want to copy, and click **Duplicate**.
Delete a publication type	Select the publication type you want to delete, and click **Delete**.
Move the publication type earlier in the list	Click **Move Up** one or more times as needed to determine where the publication type will display in the uPerform Express website drop-down list.
Move the publication type later in the list	Click **Move Down** one or more times as needed to determine where the publication type will display in the uPerform Express website drop-down list.

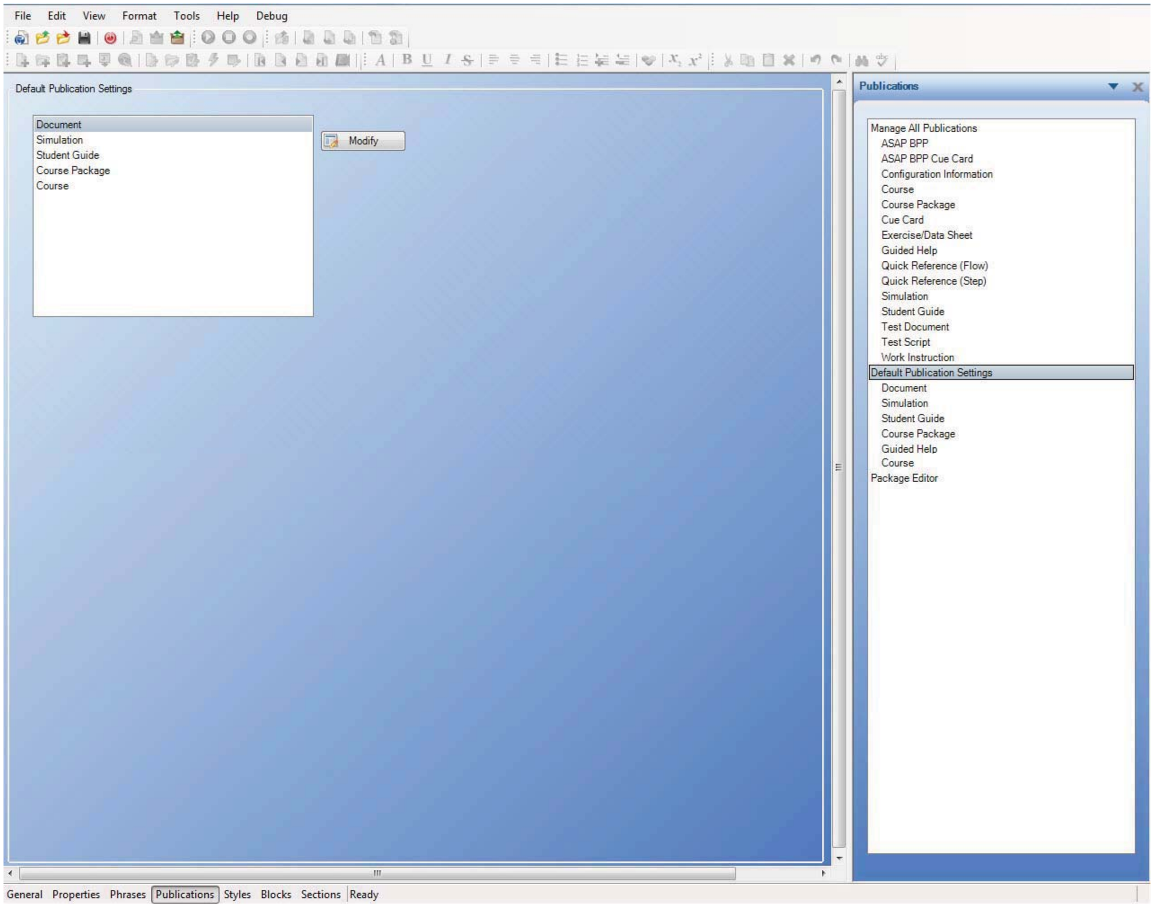
4. Select **FILE > SAVE** to save the template.

Setting Default Publication Settings

1. From the editor, open the new template.

2. Click **Publications** on the status bar.

3. Click *Default Publication Settings* in the task pane.



4. Select one of the following options:

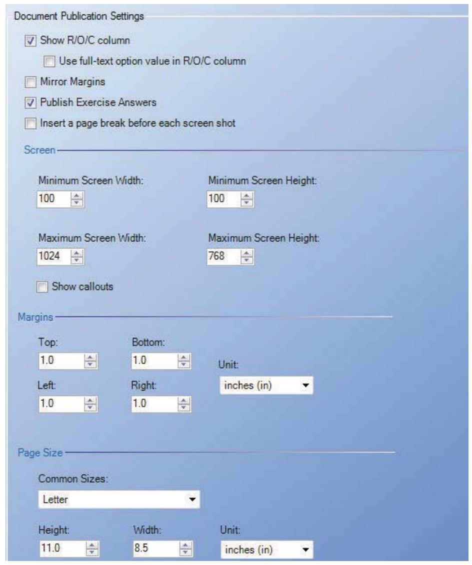
If You Want To	Then
Modify document publication settings	Select **Document** under *Default Publication Settings* in the task pane. Refer to Default Publication Settings: Document (on page 288) for more information.
Modify simulation publication settings	Select **Simulation** under *Default Publication Settings* in the task pane. Refer to Default Publication Settings: Simulation: General Settings (on page 290), Default Publication Settings: Simulation: User Interface Settings (on page 292), Default Publication Settings: Simulation: LMS Settings (on page 294), and Default Publication Settings: Simulation: Caption Settings (on page 296) for more information.

If You Want To	Then
Modify student guide publication settings	Select **Student Guide** under *Default Publication Settings* in the task pane. Refer to Default Publication Settings: Student Guide (on page 296) for more information.
Modify course package settings	Select **Course Package** under *Default Publication Settings* in the task pane. Refer to Default Publication Settings: Course Package for more information.
Modify course publication settings	Select **Course** under *Default Publication Settings* in the task pane. Refer to Default Publication Settings: Course: General Settings (on page 303), Default Publication Settings: Course: User Interface Settings (on page 306), Default Publication Settings: Course: LMS Settings (on page 307), Default Publication Settings: Course: Caption Settings (on page 309), and Default Publication Settings: Course: Page Settings (on page 310) for more information.
Modify guided help settings	Select Guided Help under Default Publication Settings in the task pane. Refer to Guided Help Settings: Guided Help General Settings, refer to Guided Help Settings: User Interface Settings, refer to Guided Help Settings: Guided Help Captions, refer to Guided Help Settings: Mobile Device Publication Settings for more information.

Default Publication Settings: Document

1. From the editor, open the new template.
2. Click **Publications** on the status bar.

3. Select **Document** under *Default Publication Settings* in the task pane.



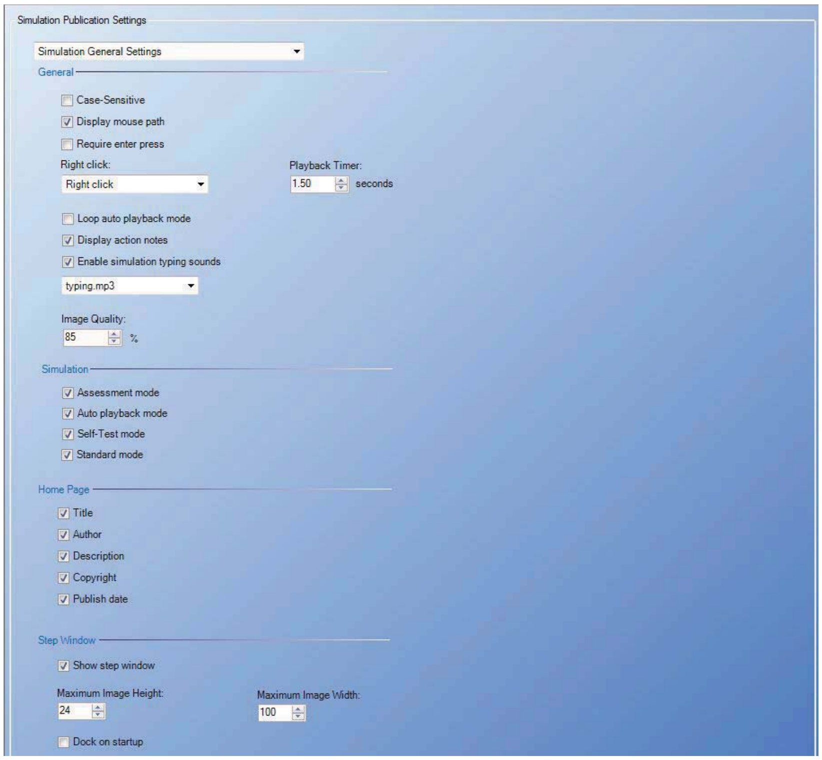
4. Complete/review the following fields:

Field	Description
Display the R/O/C column in published output	Select **Show R/O/C column** to display the R/O/C column in published output.
Use full text option value in the Document Editor for the R/O/C table	Select **Use full text option value in the Document Editor for the R/O/C table** to display Required, Optional, or Conditional in the document editor. **Show R/O/C column** must be selected in order to enable this option.
Mirror Margins	Select **Mirror Margins** to create booklet-style, double-sided pages for PDF and Word outputs.
Publish Exercise Answers	Select **Publish Exercise Answers** to publish exercise answers.
Insert a page break before each screen shot	Select **Insert a page break before each screen shot** to insert a break before screen shots.
Screen	Select minimum and maximum screen heights and widths. Select **Show callouts** to display callouts. Callouts will only display in publications containing screen captures. The font, font size, and line thickness of the callout is not configurable.
Margins	Select the unit of measurement and specify the margins for the top, bottom, left, and right pages.
Page Size	Select common size, unit of measurement and specify the height and width.

5. Select **FILE > SAVE** to save the template.

Default Publication Settings: Simulation: General Settings

1. From the editor, open the new template.
2. Click **Publications** on the status bar.
3. Select **Simulation** under *Default Publication Settings* in the task pane.



4. Select **Simulation General Settings** from the drop-down list.
5. Complete the following fields:

Field	Description
Case-Sensitive	Select the **Case-Sensitive** checkbox to require the user to enter all text in the same case specified in the action properties (provided an Edit action of type 'Exact String' is used).
Display mouse path	Select the **Display mouse path** checkbox to display mouse movements associated with each step of the simulation during auto playback.
Require enter press	Select the **Require enter press** checkbox to require the user to press enter after an action.

Field	Description
Right click	Select the mouse and key combination to be used to represent a right-click action in the simulation.
Playback Timer	Specify the default wait time between steps during auto playback.
Loop auto playback mode	Select this option to loop a simulation when viewed in auto-playback mode.
Display action notes	Select the **Display action notes** checkbox to enable the display and publishing of the auto-generated action notes in simulations.
Enable simulation typing sounds	Select the **Enable simulation typing sounds** checkbox, and select a sound from the drop-down list to enable typing sounds during simulation playback. For information on adding sound files to the template, refer to Specifying General Settings: Data Files (on page 275).
Image Quality	Select a percentage from the drop-down list. The **Image Quality** option allows you to specify the compression quality of the image. ANCILE recommends the default 85%.

6. Select one of the following modes:

Field	Description
Assessment mode	Select to confirm that this mode is available for publishing.
Auto Playback mode	Select to confirm that this mode is available for publishing.
Self-Test mode	Select to confirm that this mode is available for publishing.
Standard mode	Select to confirm that this mode is available for publishing.

For more information on simulation output modes, refer to Viewing Simulations (on page 260).

7. Complete the following fields:

These options are set in the document properties and are customizable. For more information on customizing properties, refer to Specifying New Template Settings: Properties (on page 277).

Field	Description
Title	Select **Title** to display the title on the home page.
Author	Select **Author** to display the author on the home page.
Description	Select **Description** to display the description on the home page.
Copyright	Select **Copyright** to display the copyright on the home page.
Publish date	Select **Publish Date** to display the publish date on the home page.

8. Complete the following fields:

Field	Description
Show step window	Select the **Show Step Window** checkbox to display the *Steps* window to users during simulation playback.
Height	Select the height of the published step window.
Width	Select the width of the published step window.
Dock on startup	Select **Dock on startup** checkbox to set the dock position on startup.
Dock Position	Select a dock position of right or left.
Border color	Select the color of the hotspot border. Optionally, specify custom colors by clicking **Select** to the right of the color drop-down list.
Border size	Select the size of the hotspot border.
Flashing	Select the checkbox next to **Flashing** to enable flashing hotspots.

9. Select **FILE > SAVE** to save the template.

Default Publication Settings: Simulation: User Interface Settings

1. From the editor, open the new template.
2. Click **Publications** on the status bar.
3. Select **Simulation** under *Default Publication Settings* in the task pane.

4. Select **Simulation User Interface Settings** from the drop-down list.

5. Select a skin from the **Skins** drop-down list.

A preview of the skin selection will display in the **Preview** window.

6. Complete the following fields:

Field	Description
Player Colors	Select a background color, and primary and secondary colors for the banner background from the drop-down list.
Text Colors	Select a primary color for the banner text from the drop-down list.

Optionally, specify custom colors by clicking **Select** to the right of the color drop-down list.

7. Choose from the following options:

Field	Description
Enable Transitions	Enables a smooth, animated transmission from step to step.
Reuse existing window	Uses the same window when an external link is launched from a simulation.
Hide audio bar when audio is not present	Hides the audio bar when audio is not present.
Do not resize	Opens the simulation in the current window size.
Resize and center window	Opens the simulation at the size specified by the screen width and height, and centers the simulation window.
Start in full screen mode	Opens the simulation in full screen mode.

8. Under **Screen**, select a minimum and maximum screen height and width.

   This option is available only if **Resize and center window** is selected.

9. Under **Maximum Screen Size**, select a minimum or maximum screen size.

10. Select **FILE > SAVE** to save the template.

Default Publication Settings: Simulation: LMS Settings

1. From the editor, open the new template.

2. Click **Publications** on the status bar.

3. Select **Simulation** under *Default Publication Settings* in the task pane.

4. Select **Simulation LMS Settings** from the drop-down-list.

5. Complete/review the following fields:

Field	Description
Create package	Click the **Create Package** checkbox to create LMS-conformant output for integration with a Learning Management System (LMS).
Show hints	Select the **Show hints** checkbox to display hints during the simulation self test or assessment test. Hints are nonessential data (for example, a user name) required to complete the simulation.

Field	Description
Enable remote proxy support	Select the **Enable remote proxy support** checkbox to enable content to communicate with a custom proxy that has been placed on the LMS server. Enter the file location in the Assessment URI field.
Display username prompt	Select this option to display the username prompt on the home page.
Package Type	Select **SCORM 2004**, **SCORM 1.2**, or **AICC** from the drop-down list to select the output. You can edit the SCORM and AICC imsmanifest.xml file via the package editor. For more information, refer to Default Publication Settings: Package Editor (on page 312).
Package Status Value	Select a completion-type value from the drop-down list. This option is available only for SCORM 1.2 and AICC.
Assessment URI	Enter a destination URI (Uniform Resource Identifier) to send test results for capture by a custom-built utility. You can create an Active Server Page (ASP) or Java Server Page (JSP) on a web server to receive the output for subsequent storage and reporting in a learning management system. Any technology that accepts the form Post method using HTTP can be used to handle the output. Example: http://www.yourcompany.com/results.asp Note that if the student's web browser security settings are set to High, warning messages will be displayed. The **Create Package** option must be disabled in order to enter a URI.

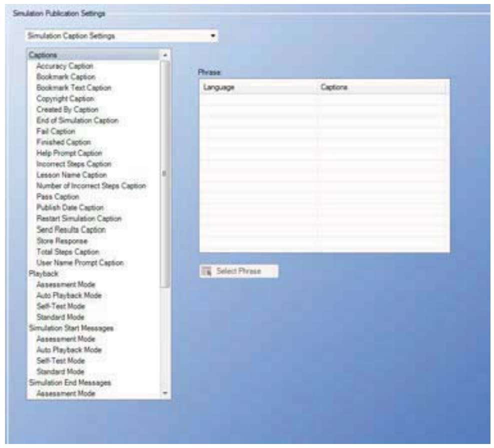
6. Complete/review the following fields:

Field	Description
Include in results	Select the desired checkboxes to indicate the information to be captured when the simulation self test or assessment is completed.
Passing score	Specify the required passing score.

7. Select **FILE > SAVE** to save the template.

Default Publication Settings: Simulation: Caption Settings

1. From the editor, open the new template.
2. Click **Publications** on the status bar.
3. Select **Simulation** under *Default Publication Settings* in the task pane.
4. Select **Simulation Caption Settings**.



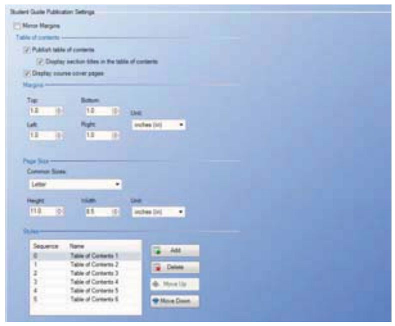
5. Highlight a phrase in the phrase list.
6. Click **Select Phrase**.
7. Perform one of the following options:

If You Want To	Then
Add a custom phrase	Click **Add**. Select a language from the left. Enter the text in the **Content** area. Click **OK**.
Select a phrase	Select a language from the **Language** drop-down list. Select a phrase from the **Phrase** listbox. Optionally, enter text into the **Phrases** field to search for text. Click **OK**.

8. Select **FILE > SAVE** to save the template.

Default Publication Settings: Student Guide

1. From the editor, open the new template.
2. Click **Publications** on the status bar.
3. Select **Student Guide** under *Default Publication Settings* in the task pane.



4. Complete/review the following fields:

Field	Description
Mirror Margins	Select **Mirror Margins** to create booklet-style, double-sided pages for output.
Table of Contents	Select **Publish Table of Contents** to create a table of contents for output. Select **Display section titles in the table of contents** to display the section titles in inserted uPerform content in the published output. Select **Display course cover pages** to display the course cover page in published output.
Margins	Select the unit of measurement and specify the margins for the top, bottom, left, and right pages.
Page Size	Select size and unit of measurement.

5. Choose from the following options:

If You Want To	Then
Copy a style	Select the style you want to copy, and click **Add...**.
Delete a style	Select the style you want to delete, and click **Delete**.
Move the style earlier in the list	Click **Move Up** one or more times as needed to determine where the style will display in the table of contents.
Move the style later in the list	Click Move Down one or more times as needed to determine where the style will display in the table of contents.

6. Click Select Phrase to select a phrase for the player.

7. Perform one of the following options:

If You Want To	Then
Add a custom phrase	Click **Add**. Select a language from the left. Enter the text in the **Content** area. Click **OK**.
Select a phrase	Select a language from the **Language** drop-down list. Select a phrase from the **Phrase** listbox. Optionally, enter text into the **Phrases** field to search for text. Click **OK**.

8. Click **Select Phrase**.

9. Choose a phrase from the list.

10. Click **OK**.

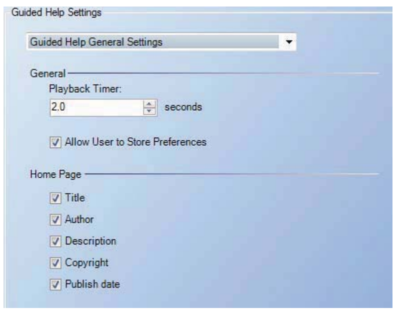
11. Select **FILE > SAVE** to save the template.

Default Publication Settings: Guided Help: General Settings

1. From the editor, open the new template.

2. Click **Publications** on the status bar.

3. Selected **Guided Help** under *Default Publication Settings* in the task pane.



4. Select **Guided Help General Settings** from the drop-down list.

5. Complete the following fields:

Field	Description
Playback Timer	Select the Playback Timer up-down controls to set the default time in seconds that guided help displays for each page.
Allow User to Store Preferences	Select the Allow User to Store Preferences checkbox to allow users to store preference settings for playback time, screen location of Guided Help, window size and window mode (maximize/minimize).

6. Complete the following fields:

These options are set in the document properties and are customizable. For more information on customizing properties, refer to Specifying New Template Settings: Properties (on page 277).

Field	Description
Title	Select **Title** to display the title on the home page.
Author	Select **Author** to display the author on the home page.
Description	Select **Description** to display the description on the home page.
Copyright	Select **Copyright** to display the copyright on the home page.
Publish date	Select **Publish Date** to display the publish date on the home page.

7. Select **File>SAVE** to save the template.

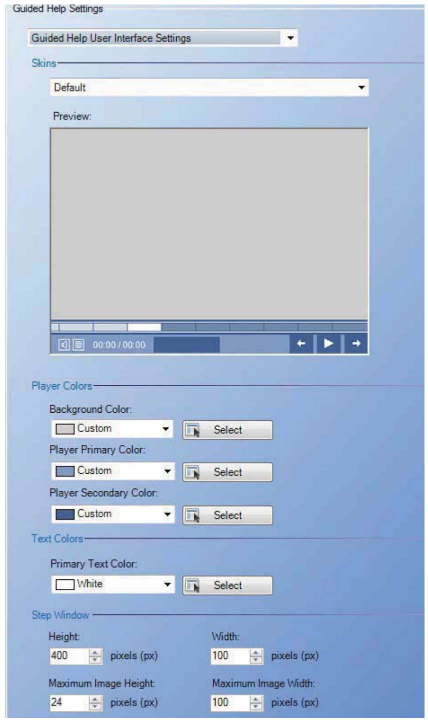
Default Publication Settings: Guided Help: User Interface Settings

1. From the editor, open the new template.

2. Click **Publications** on the status bar.

3. Select **Guided Help** under *Default Publication Settings* in the task pane.

4. Select **Guided Help User Interface Settings** from the drop-down list.



5. Select a skin from the **Skins** drop-down list.

A preview of the skin selection will display in the **Preview** window.

6. Complete the following fields:

Field	Description
Player Colors	Select primary and secondary colors from the drop-down list.
Text Colors	Select primary and secondary, and link text colors from the drop-down list.

Optionally, specify custom colors by clicking **Select** to the right of list.

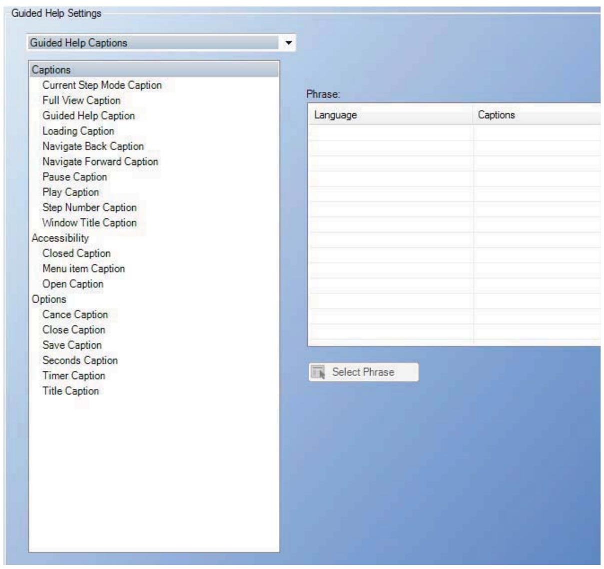
7. Select from the following options:

Field	Description
Step Window	Under **Step Window**, select a height and width, maximum image height and width, and screen position and whether to maximize on startup.
General	Enables a smooth, animated transmission from step to step. Also allows the help to always display on top of all other windows when running in Internet Explorer.

8. Select FILE > SAVE to save the template.

Default Publication Settings: Guided Help: Guided Help Captions

1. From the editor, open the new template.
2. Click **Publications** on the status bar.
3. Selected **Guided Help** under *Default Publication Settings* in the task pane.
4. Select **Guided Help Captions**.



5. Highlight a phrase in the phrase list.
6. Click **Select Phrase**.
7. Perform one of the following options:

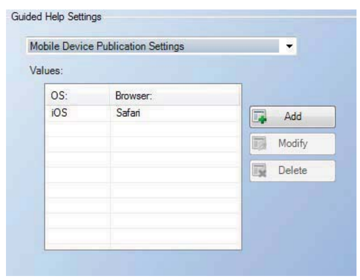
If You Want To	Then
Add a custom phrase	Click **Add**. Select a language from the left. Enter the text in the **Content** area. Click **OK**.

Select a phrase	Select a language from the **Language** drop-down list. Select a phrase from the **Phrase** listbox. Optionally, enter text into the **Phrases** field to search for text. Click **OK**.

8. Select **FILE>SAVE** to save the template.

Default Publication Settings: Guided Help: Mobile Device Publication Settings

1. From the editor, open the new template.
2. Click **Publications** on the status bar.
3. Selected **Guided Help** under *Default Publication Settings* in the task pane.
4. Select **Mobile Device Publication Settings** from the drop-down list.



5. Perform one of the following options:

If You Want To	Then
Add a new operating system/browser configuration	Click **Add**. Enter an operating system in the **Operating System** field. Enter the Browser type in the **Browser** field. Click **OK**.
Modify an existing operating system/browser configuration	Select an operating system/browser combination. Select **Modify**. Change operating system/browser setting as desired. Click **OK**.
Delete an existing operating system/browser configuration	Select an operating system/browser combination. Select **Delete**. Click **Yes**.

The Operating System and Browser settings are detected by Guided Help during launch. At this time, there are no custom settings for each mobile device.

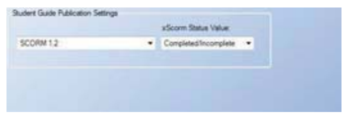
6. Select **FILE>SAVE** to save the template.

Default Publication Settings: Course Package

1. From the editor, open the new template.

2. Click **Publications** on the status bar.

3. Select **Course Package** under *Default Publication Settings* in the task pane.



4. Select **SCORM 2004** or **SCORM 1.2** from the drop-down list to select the output.

5. If you are using SCORM 1.2, select a completion-type value from the drop-down list.

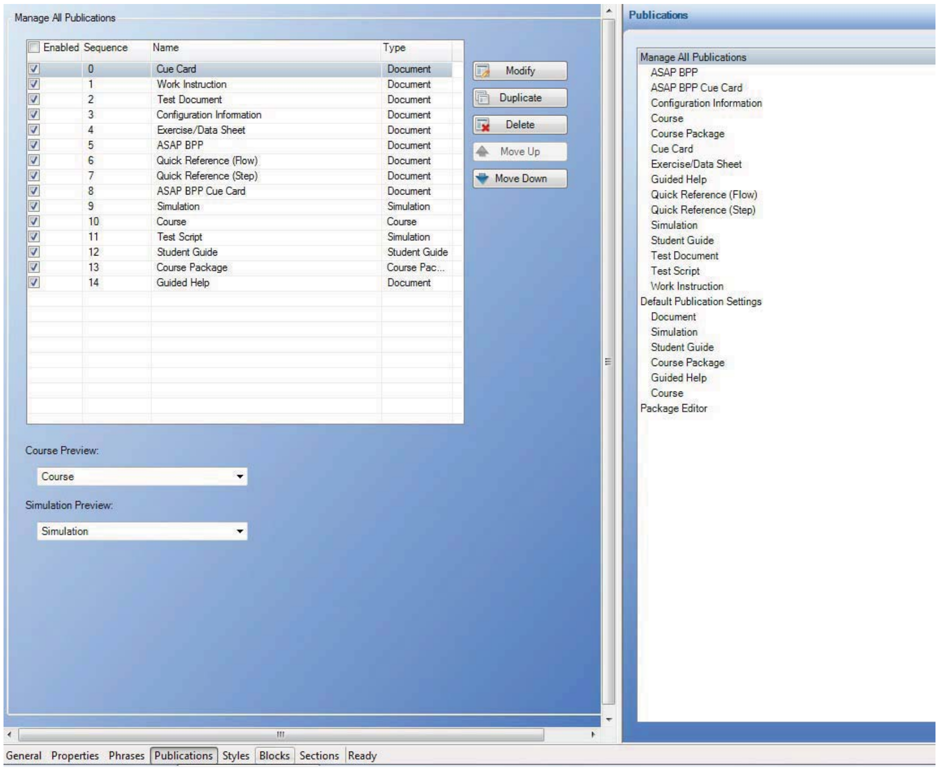
6. Select **FILE > SAVE** to save the template.

Default Publication Settings: Course: General Settings

1. From the editor, open the new template.

2. Click **Publications** on the status bar.

3. Select **Course** under *Default Publication Settings* in the task pane.



4. Select **Course General Settings** from the drop-down list.

5. Complete the following fields:

These options are pulled from the document properties and are customizable. For more information on customizing properties, refer to Specifying New Template Settings: Properties (on page 277).

Field	Description
Title	Select **Title** to display the title on the home page.
Author	Select **Author** to display the author on the home page.
Description	Select **Description** to display the description on the home page.
Copyright	Select **Copyright** to display the copyright on the home page.
Publish date	Select **Publish Date** to display the publish date on the home page.
Match the course stage size	Select **Match the course stage size** to display the course at the same size as the imported PowerPoint.
Specific dimensions	Select **Specific dimensions** to display the course in a specified width and height.

Increase slide size if possible	Select **Increase slide size if possible** to increase the size of the slides.

6. Select a player element.

7. Select the **Enable player element in published output** checkbox to enable the use of the element.

8. Click **Select Phrase** to select a phrase for the player.

9. Perform one of the following phrases:

If You Want To	Then
Add a custom phrase	Click **Add**. Select a language from the left. Enter the text in the **Content** area. Click **OK**.
Select a phrase	Select a language from the **Language** drop-down list. Select a phrase from the **Phrase** listbox. Optionally, enter text into the **Phrases** field to search for text. Click **OK**.

10. Select one of the following feedback phrases:

Field	Description
Correct	Displays when the end user enters the correct answer.
First Attempt Incorrect	Displays when the end user enters an incorrect answer the first time.
Second Attempt Incorrect	Displays when the end user enters an incorrect answer the second time.

11. Click **Select Phrase**.

12. Perform one of the following phrases:

If You Want To	Then
Add a custom phrase	Click **Add**. Select a language from the left. Enter the text in the **Content** area. Click **OK**.

If You Want To	Then
Select a phrase	Select a language from the **Language** drop-down list. Select a phrase from the **Phrase** listbox. Optionally, enter text into the **Phrases** field to search for text. Click **OK**.

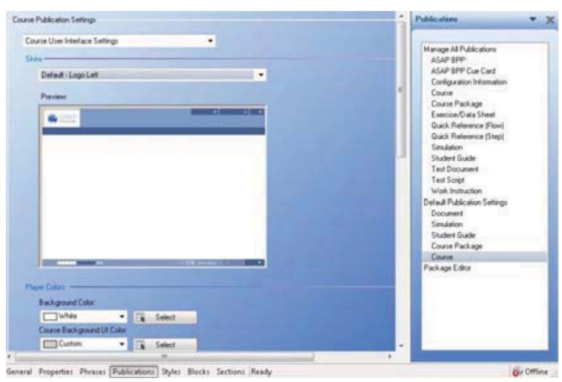
13. Enter a URL in the URL field.

    Based on the item selected, this option may not display.

14. Select **FILE** > **SAVE** to save the template.

Default Publication Settings: Course: User Interface Settings

1. From the editor, open the new template.
2. Click **Publications** on the status bar.
3. Select **Course** under *Default Publication Settings* in the task pane.
4. Select **Course User Interface Settings** from the drop-down list.



5. Select a skin from the **Skins** drop-down list.

   A preview of the skin selection will display in the **Preview** window.

6. Complete the following fields:

Field	Description
Player Colors	Select primary and secondary colors from the drop-down list.

Field	Description
Text Colors	Select primary and secondary, and link text colors from the drop-down list.

Optionally, specify custom colors by clicking **Select** to the right of list.

7. Select from the following options:

Field	Description
Enable Transitions	Enables a smooth, animated transition from slide to slide.
Reuse existing window	Uses the same window when an external link is launched from the course.
Hide audio bar when audio is not present	Hides the audio bar when audio is not present.
Base progress on current location	Shows percent complete based on where the user is in the course.
Base progress on percentage done	Shows percent complete based on how many of the assessments a user has completed.
Do not resize	Opens the course in the current window size.
Resize and center window	Opens the course at the size specified by the screen width and height, and centers the course window.
Start in full screen mode	Opens the course in full screen mode.
Screen	Choose the width and height for the course display. **Resize and center window** must be enabled.
Stage	Specifies the size of the course page content within the browser window.
Logo	Select a logo to display in the published course and on the website. Logos are managed in the Image area of the template editor. For more information on images, refer to Specifying General Settings: Images (on page 274).

8. Select **FILE > SAVE** to save the template.

Default Publication Settings: Course: LMS Settings

1. From the editor, open the new template.

2. Click **Publications** on the status bar.

3. Select **Course** under *Default Publication Settings* in the task pane.

4. Select **Course LMS Settings** from the drop-down list.

5. Complete the following fields:

Field	Description
Create package	Click the **Create Package** checkbox to create SCORM-conformant or AICC-conformant output for integration with a Learning Management System (LMS). For more information on package creation, refer to Default Publication Settings: Package Editor (on page 312).
Show answers	Click the **Show Answers** button to display the answer after a user has submitted a selection.
Enable remote proxy support	Click the **Enable Remote Proxy Support** checkbox to enable remote proxy support.
Display username prompt	Select this option to display the username prompt on the home page.
LMS Package Type	Select **SCORM 2004**, **SCORM 1.2**, or **AICC** from the drop-down list to select the output. For more information on packages, refer to Default Publication Settings: Package Editor (on page 312).
Package status value	Select a completion-type value from the drop-down list. This option is available only for SCORM 1.2 and AICC.

Field	Description
Assessment URI	Enter a destination URI (Uniform Resource Identifier) to send test results for capture by a custom-built utility. You can create an Active Server Page (ASP) or Java Server Page (JSP) on a web server to receive the output for subsequent storage and reporting in a learning management system. Any technology that accepts the form Post method using HTTP can be used to handle the output. Example: http://www.yourcompany.com/results.asp Note that if the student's web browser security settings are set to High, warning messages will be displayed. The **Create Package** option must be disabled in order to enter a URI.

6. Complete the following fields:

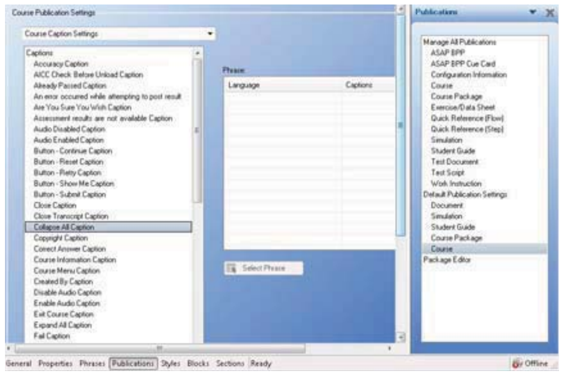
Field	Description
Include in results	Select the desired checkboxes to indicate the information to be captured when the simulation self test or assessment is completed. The **Create Package** option must be disabled in order to enter a URI.
Randomize questions in playback	Select this option to randomize the order of assessment pages.
Provide individual feedback	Select this option to provide feedback on individual assessment questions.
Passing score	Specify the required passing score.
Users may retake	**No questions**: Users may not retake any questions. **Incorrect questions**: Users may retake only those questions that were answered incorrectly. **All questions**: Users may retake all questions.

7. Select **FILE > SAVE** to save the template.

Default Publication Settings: Course: Caption Settings

1. From the editor, open the new template.
2. Click **Publications** on the status bar.
3. Select **Course** under *Default Publication Settings* in the task pane.

4. Select **Course Caption Settings** from the drop-down list.



5. Highlight a phrase in the phrase listbox.

6. Click **Select Phrase**.

7. Perform one of the following options:

If You Want To	Then
Add a custom phrase	Click **Add**. Select a language from the left. Enter the text in the **Content** area. Click **OK**.
Select a phrase	Select a language from the **Language** drop-down list. Select a phrase from the **Phrase** listbox. Optionally, enter text into the **Phrases** field to search for text. Click **OK**.

8. Select **FILE > SAVE** to save the template.

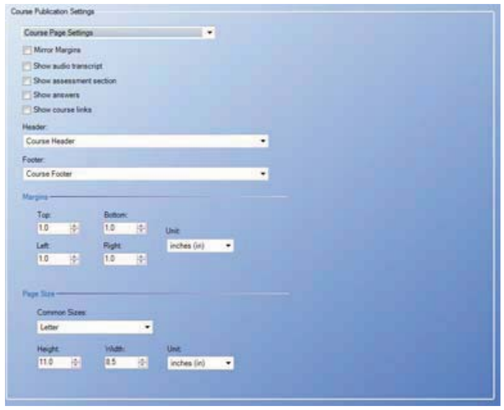
Default Publication Settings: Course: Page Settings

1. From the editor, open the new template.

2. Click **Publications** on the status bar.

3. Select **Course** under *Default Publication Settings* in the task pane.

4. Select **Course Page Settings** from the drop-down list.



5. Complete the following fields:

Field	Description
Mirror Margins	Select **Mirror Margins** to create booklet-style, double-sided pages for PDF and Word publication.
Show audio transcript	Select **Show audio transcript** to display the audio transcript in published courses.
Show assessment section	Select **Show assessment section** to display the assessment section in a published course.
Show answers	Select **Show answers** to display assessment answers.
Show course links	Select **Show course links** to display links when you publish a course to Word or PDF format.

6. Complete the following fields:

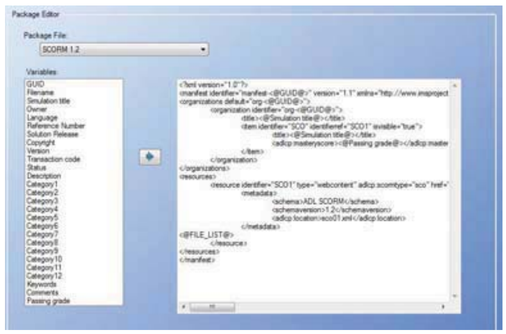
Field	Description
Header	Select **Course Header**, **Header**, **Course Footer**, or **Footer** from the drop-down list to select the header.
Footer	Select **Course Footer**, **Footer**, **Course Header**, or **Header** from the drop-down list to select the footer.
Margins	Specify margins for **Top**, **Bottom**, **Left**, and **Right**. Optionally, select the unit of measurement from the **Unit** drop-down box.
Page Size	Specify the common sizes, height, width, and unit of measurement.

7. Select **FILE > SAVE** to save the template.

Default Publication Settings: Package Editor

You can edit the SCORM and AICC imsmanifest.xml file via the package editor.

1. From the editor, open the new template.
2. Click **Publications** on the status bar.
3. Select **Package Editor** in the task pane.



4. Select the package file type from the **Package File** drop down list.
5. In the code box, insert the cursor where you want to insert a variable.
6. Select the variable(s) to be included from the **Variables** list.
7. Click the right arrow to add the variable(s) to the package file.
8. Edit the file as desired.
9. Repeat Steps 5 through 8 for each element you want to add.
10. Select **FILE > SAVE** to save the template.

ANCILE supports the following elements from the SCORM/AICC specifications:

Package File	Supported Data Elements
SCORM 1.2	Lesson Status (cmi.core.lesson_status) Lesson Location (cmi.core.lesson_location) Suspend Data (cmi.suspend_data) Raw Score (cmi.core.score.raw) Min Score (cmi.core.score.min) Max Score (cmi.core.score max) Session Time (cmi.core.session_time) Interactions (cmi.interactions) Interaction ID (cmi.interactions n.id)

Package File	Supported Data Elements
	Interaction Time (cmi.interactions.n.time) Interaction Type (cmi.interactions n.type) Interaction Correct Response (cmi.interactions n.correct_responses.n.pattern) Interaction Student Response (cmi.interactions n.student_response) Interaction Result (cmi.interactions n.result) *Interaction Description (rwd.interactions.n.description)
SCORM 2004	Completion Status (cmi.completion_status) Success Status (cmi.success_status) Lesson Location (cmi.location) Suspend Data (cmi.suspend_data) Raw Score (cmi.score.raw) Min Score (cmi.score min) Max Score (cmi.score.max) Scaled Score (cmi.score.scaled) Session Time (cmi.session_time) Interactions (cmi.interactions) Interaction ID (cmi.interactions n.id) Interaction Type (cmi.interactions n.type) Interaction Correct Response (cmi.interactions n.correct_responses.n.pattern) Interaction Student Response (cmi.interactions n.student_response) Interaction Result (cmi.interactions n.result) Interaction Description (cmi.interactions n.description)
AICC	Lesson Location (Core.Lesson_Status) Lesson Status (Core.Lesson_Location) Suspend Data (Core_Lesson) Raw Score (Core.Score) Session Time (Core.Time)

The following table explains the Data Elements:

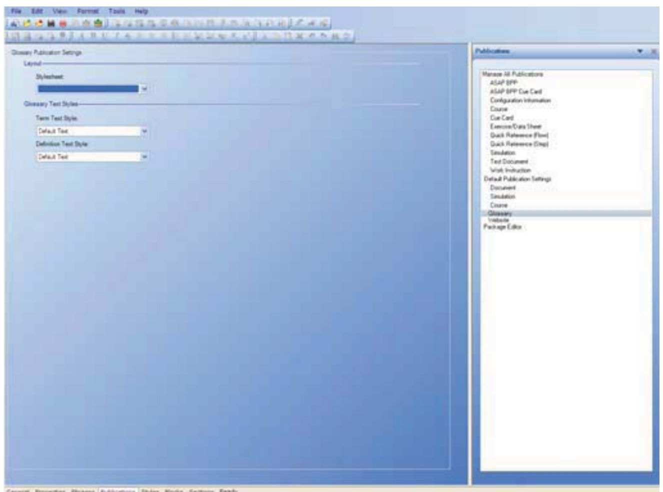
Data Element	Explanation
Lesson Status	Element utilized to specify the completion status of the SCO (completed/incomplete). This element can also be utilized to specify the mastery/success of the SCO (passed/failed).
Completion Status	Element utilized to specify the completion status of the SCO (completed/incomplete).
Success Status	The element utilized to specify the mastery of the SCO (passed/failed).

Data Element	Explanation
Lesson Location	The element used to specify the step/page at which the learner terminated the SCO. Also referred to as the SCO bookmark.
Suspend Data	The element utilized to persist content-specific information, such as the pages/steps the learner has viewed within the SCO. This element is primarily utilized by uPerform courses.
Raw Score (0-100)	The element utilized for specifying the score achieved by the learner within the SCO. The value is based on the performance within the assessment mode of a simulation, or within either an assessment or terminated branch, with scoring enabled, inserted into a course.
Min Score	The minimum score a learner can achieve within a lesson. This value is currently always set to a value of "0" (zero) within published uPerform content.
Max Score	The maximum score a learner can achieve within a lesson. This value is currently always set to a value of "100" within published uPerform content.
Scaled Score (0-10)	The element utilized to specify the performance of a learner within the SCO that is scaled to fit with the range of 0 – 1.0. The value is based on the performance within the assessment mode of a simulation, or within either an assessment or terminated branch, with scoring enabled, inserted into a course.
Session Time	The time the learner has spent in the lesson during a given session.
Interactions	The data related to the questions/steps within an assessment. The value is based on the performance within the assessment mode of a simulation, or an assessment inserted into a course. **Interaction ID** - The unique identifier of the interaction. **Interaction Time** - A timestamp at which the interaction was completed. **Interaction Type** - The type of the interaction. **Interaction Correct Response** - The correct answer for the interaction. **Interaction Student Response** - The learner's response to the interaction. **Interaction Result** - The success outcome (correct or incorrect/wrong) **Interaction Description** - The description of the interaction, utilized to persist the question stem in uPerform. In the case of SCORM 1.2, this is a

Data Element	Explanation
	custom data model element that is utilized by ANCILE uLearn.

Default Publication Settings: Glossary

1. From the editor, open the new template.
2. Click **Publications** on the status bar.
3. Select **Glossary** under *Default Publication Settings* in the task pane.



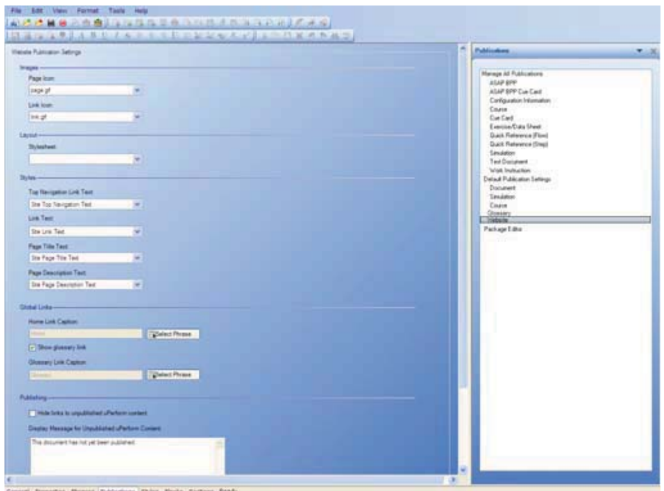
4. Complete the following fields:

Field	Description
Layout: Stylesheet	Select the stylesheet used to control the layout of the glossary. Stylesheets are managed in the Data Files area of the template editor. For more information on data files, refer to Specifying General Settings: Data Files (on page 275).
Glossary Text Styles: Term Text Style	Select the style to be used for the glossary term text. Styles are managed in the Styles area of the template editor. For more information on styles, refer to Specifying Styles (on page 318).
Glossary Text Styles: Definition Text Style	Select the style to be used for the glossary definition text. Styles are managed in the Styles area of the template editor. For more information on styles, refer to Specifying Styles (on page 318).

5. Select **FILE > SAVE** to save the template.

Default Publication Settings: Website

1. From the editor, open the new template.
2. Click **Publications** on the status bar.
3. Select **Website** under *Default Publication Settings* in the task pane.



4. Complete the following fields:

Field	Description
Images: Page Icon	Select an image for the page icon from the drop-down list. Images are managed in the Images area of the template editor. For more information on Images, refer to Specifying General Settings: Images (on page 274).
Images: Link Icon	Select an image for the link icon from the drop-down list. Images are managed in the Images area of the template editor. For more information on Images, refer to Specifying General Settings: Images (on page 274).
Layout: Stylesheet	Select the stylesheet used to control the layout of the website. Stylesheets are managed in the Data Files area of the template editor. For more information on data files, refer to Specifying General Settings: Data Files (on page 275).

Field	Description
Styles: Top Navigation Link Text	Select the style to be used for the navigation text displayed at the top of the website window. Styles are managed in the Styles area of the template editor. For more information on styles, refer to Specifying Styles (on page 318).
Styles: Link Text	Select the style to be used for hyperlinked text on the website. Styles are managed in the Styles area of the template editor. For more information on styles, refer to Specifying Styles (on page 318).
Styles: Page Title Text	Select the style to be used for page titles on the website. Styles are managed in the Styles area of the template editor. For more information on styles, refer to Specifying Styles (on page 318).
Styles: Page Description Text	Select the style to be used for page description text on the website. Styles are managed in the Styles area of the template editor. For more information on styles, refer to Specifying Styles (on page 318).
Global Links: Home Link Caption	Click **Select Phrase** to specify an alternate phrase for the home link on the website. The default is "Home".
Show glossary link	Select this checkbox to display the hyperlink to the glossary from the website.
Global Links: Glossary Link Caption	Click **Select Phrase** to specify an alternate phrase for the glossary link on the website. The default is "Glossary".
Show Help Link	Select this option to display the help link.
Help Link Caption	Click **Select Phrase** to select a phrase for the help link. **Show Help Link** must be enabled.
Help Link URL	Enter a URL for the help link. **Show Help Link** must be enabled.

5. Perform one or more of the following options:

If You Want To	Then
Hide links to content not yet published to the website	Select the checkbox to the left of **Hide links to unpublished uPerform Express content**.
Change the message displayed when a user selects a hyperlink for unpublished content	Enter the message to be displayed. This option is not available if you have selected to hide links to unpublished content.

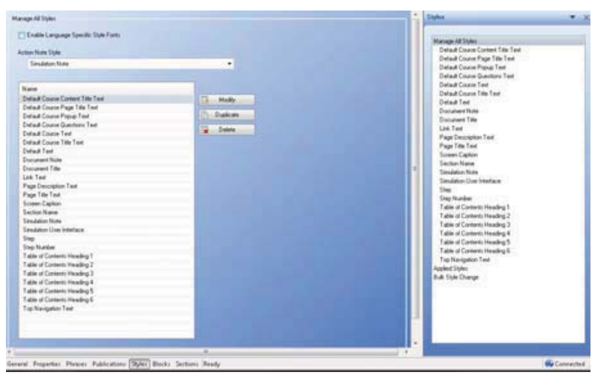
If You Want To	Then
Specify a property from which to build quick launch pages for use with SAP and Help Launchpad. You must have first enabled or created the specified property via the template **Properties** tab.	Select the transaction code property to enable context-sensitive help based on the SAP transaction code. For more information on other properties used for applications other than SAP R/3, refer to Transferring Your Website to a Server (on page 364).
Select the separator to be used if an author specifies multiple property values for content	When entering multiple values for the specified property, you must select a separator to define these values. The default value is a comma.

6. Select **FILE > SAVE** to save the template.

Specifying New Template Settings: Styles

Specifying Styles

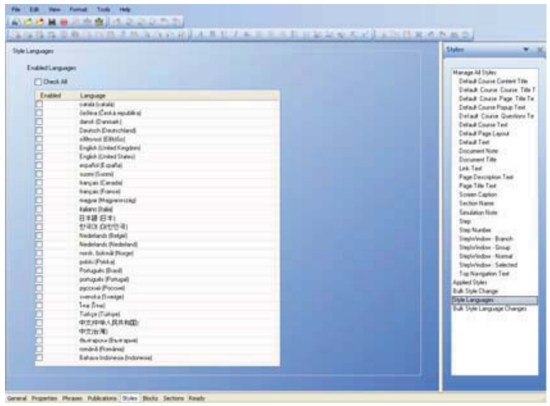
1. From the editor, open the new template.
2. Click **Styles** on the status bar.



3. Perform one of the following options:

If You Want To	Then
Enable the use of language-specific fonts	Select **Enable Language Specific Style Fonts**, and go to Step 4.
Disable the use of language-specific fonts	Deselect **Enable Language Specific Style Fonts**, and go to Step 7.

4. Select **Style Languages** from the task pane.



5. Perform one of the following options:

If You Want To	Then
Manually select style languages to be enabled in this template	Select or deselect one or more checkboxes in the **Enabled** column.
Select all languages to be used in this template.	Select **Check All**.

6. Select **Manage All Styles**.

7. Click on the drop-down list below **Action Note Style**.

8. Select one of the following styles from the task pane:

Field	Description
Default Course Content Title Text	The style to be used for the text displayed in the content title area of a course.
Default Course Page Title Text	The style to be used for the text displayed as the page title in a course.
Default Course Popup Text	The style to be used for the text displayed as a popup in a course.
Default Course Questions Text	The style to be used for the text displayed as assessment questions in a course.
Default Course Text	The style to be used for the course text.
Default Course Title Text	The style to be used for the text displayed as the course title.
Default Text	The style to be used for the page text.
Document Note	The style to be used for the document note.
Document Title	The style to be used for the document title that displays at the top of a document.
Link Text	The style to be used for the link text.
Page Description Text	The style to be used for the page description text.

Field	Description
Page Title Text	The style to be used for the page title text.
Screen Caption	The style to be used for the captions displayed above screen captures in a document.
Section Name	The style to be used for sections displayed in your document.
Simulation Note	The style to be used for simulation notes.
Simulation User Interface	The style to be used for simulation user interface.
Step	The style to be used for step text.
Step Number	The style to be used for the step number.
Table of Contents	The style to be used for table of contents heading
Table of Contents Heading 1-6	The style to be used for the levels within the table of contents.
Top Navigation Text	The style to be used for the top navigation text displayed in a uPerform Express course.

9. Click **Modify**.

10. Click **Select Phrase**.

11. Perform one of the following options:

If You Want To	Then
Add a custom phrase	Click **Add**. Select a language from the left. Enter the text in the **Content** area. Click **OK**.
Select a phrase	Select a language from the **Language** drop-down list. Select a phrase from the **Phrase** listbox. Optionally, enter text into the **Phrases** field to search for text. Click **OK**.

12. Complete the following fields:

Depending on the style selected, some of the following options may not be displayed.

Field	Description
Font	Click **Select** to choose a font
Size	Specify the font size.

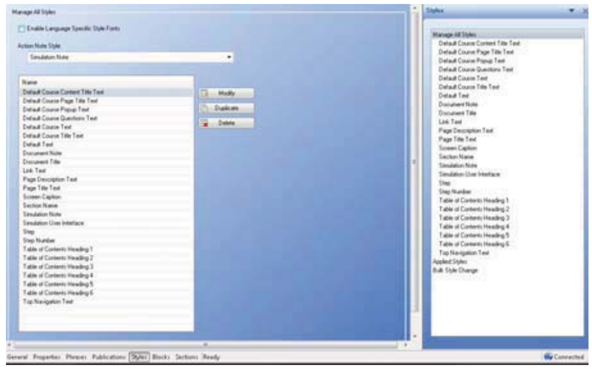
Font Color	Select a font color from the drop-down list. Optionally, click **Select** to create a custom color.
Effects	Click the checkbox(es) next to **Bold**, **Underline**, **Italic**, or **Strikethrough**, to apply rich text formatting.
Use Language Specific Fonts	Click the checkbox next to **Use Language Specific Fonts** and click **Select** to choose the language specific font(s).
Justification	Specify a justification setting from the drop-down list.
Margins	Specify margins for **Top**, **Bottom**, **Left**, and **Right**. Optionally, select the unit of measurement from the **Unit** drop-down box.
First Line	Specify the indent of the first line. Optionally, select the unit of measurement from the **Unit** drop-down box.
Background Color	Specify a background color from the drop-down list. Optionally, click **Select** to create a custom color.
Gradient	Select the **Gradient** checkbox to apply a gradient to section header backgrounds in HMTL outputs viewable in supported versions of Internet Explorer.
Start Color	Specify a gradient start color from the drop-down list. Optionally, click **Select** to create a custom color.
End Color	Specify a gradient end color from the drop-down list. Optionally, click **Select** to create a custom color.
Orientation	Specify the orientation of the gradient from the drop-down list.
Border Color	Specify a border color from the drop-down list. Optionally, click **Select** to create a custom color.
Border Size	Specify the border width from the drop-down list.

13. Select **FILE > SAVE** to save the template.

Modifying, Duplicating, and Deleting Styles

1. From the editor, open the new template.
2. Click **Styles** on the status bar.

3. Click *Manage All Styles* from the task pane.



4. Select a style from the editor pane.

5. Choose from one of the following options:

If You Want To	Then
Modify the selected style	Click **Modify**, and refer to Specifying Styles (on page 318).
Duplicate the style	Click **Duplicate**. The duplicated style is added below the original style. Modify the property to specify a new name and characteristics. For more information, refer to Specifying Styles (on page 318).
Delete the selected style	Click **Delete**. At the prompt, click **Yes**.

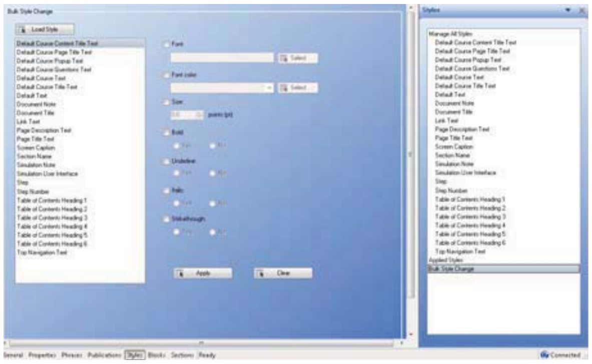
6. Click **FILE > SAVE** to save the template.

Changing Bulk Styles

1. From the editor, open the new template.

2. Click **Styles** on the status bar.

3. Click *Bulk Style Change* from the task pane.



4. Select a style from the list.

5. Click **Load Style** to view the current style settings for the item selected.

6. Using the Ctrl or Shift key, select one or more styles for which you want to apply a bulk change.

7. Complete the following fields:

Field	Description
Font	Select the checkbox next to **Font** to specify a font.
Font Color	Select the checkbox next to **Font Color** to specify a font color.
Size	Select the checkbox next to **Size** to specify a font size.
Bold	Select the checkbox next to **Bold**, and select **Yes** or **No** to specify a bold font.
Underline	Select the checkbox next to **Underline**, and select **Yes** or **No** to specify an underline font.
Italic	Select the checkbox next to **Italic**, and select **Yes** or **No** to specify an italic font.
Strikethrough	Select the checkbox next to **Strikethrough**, and select **Yes** or **No** to specify a strikethrough font.

8. Click **Apply**.

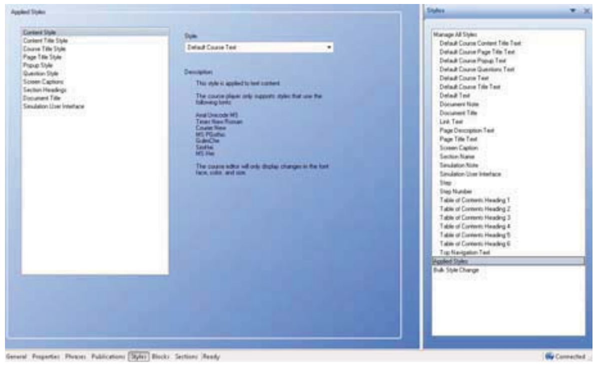
9. Select **FILE > SAVE** to save the template.

Viewing Styles

1. From the editor, open the new template.

2. Click **Styles** on the status bar.

3. Click *Applied Styles* from the task pane.



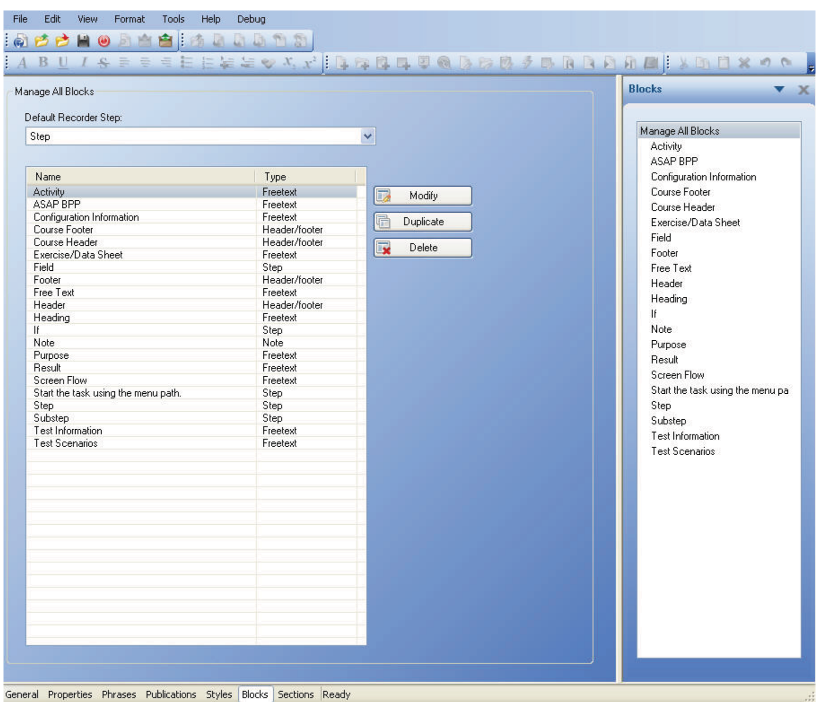
A list of styles and their descriptions is displayed in the *Editor Pane*.

Specifying New Template Settings: Blocks

Specifying Blocks

1. From the editor, open the new template.

2. Click **Blocks** on the status bar.



3. Perform one of the following options:

If You Want To	Then
Modify a block	Go to Step 5.
Duplicate a block	Select the block from the content area, and click **Duplicate**.
Delete a block	Select the block from the content area, and click **Delete**. At the prompt, click **Yes**.

4. Optionally, select a step type from the **Default Recorder Step** drop-down list.

5. Select one of the following blocks from the task pane:

Field	Description
Activity	The block that contains the task information.
ASAP BPP	The block that contains the business process description overview, input, output, comments, and tips and tricks.
Configuration Information	The block that contains the configuration information for the document.
Course Footer	The block that contains the course footer information.
Course Header	The block that contains the course header information.
Exercise/Data Sheet	The block that contains information relevant to the end user's task.
Field	The block that contains the Field/Description table.
Footer	The block that contains the footer information.
Free Text	The block that contains the boilerplate freetext.
Header	The block that contains the header information.
Heading	The block that contains the heading boilerplate text.
If	The block that contains the If/Then table.
Note	The block that contains the note boilerplate text.
Purpose	The block that contains the trigger, prerequisites, menu path, transaction code, and helpful hints.
Result	The block that contains the percent complete.
Screen Flow	The block that contains the screen flow image file.
Start the task using the menu path	The block the contains the start transaction text.
Step	The block that contains the step boilerplate text.
Student Guide Footer	The block that contains the student guide footer information.

Field	Description
Student Guide Header	The block that contains the student guide header information.
Substep	The block that contains the substep boilerplate text.
Test Information	The block that contains the test history and scenarios.
Test Scenarios	The block that contains the table specific to test scenarios.

6. Click **Modify**.

7. Click **Select Phrase.**

8. Perform one of the following options:

If You Want To	Then
Add a custom phrase	Click **Add**. Select a language from the left. Enter the text in the **Content** area. Click **OK**.
Select a phrase	Select a language from the **Language** drop-down list. Select a phrase from the **Phrase** listbox. Optionally, enter text into the **Phrases** field to search for text. Click **OK**.

9. In the **Content** area, modify the text within the curly braces.

10. Perform one or more of the following options:

If You Want To	Then
Modify the format of displayed block text	Highlight the text to be formatted. Click **Format...** , and select from the **Edit**, **Format**, or **Justify** options.
Insert an image, table, weblink, or line at the cursor location in the displayed block text	Click **Format...** , and select from the **Table** or **Insert** options.
Insert a phrase or standard document property code at the cursor location in the displayed block text	Click **INSERT... > PHRASE...** [or] **Standard Code...**, and select from the displayed list.
Determine where the block is used	View the **This item is used by the items below** area.

11. Optionally, edit the source content of the block in the **Source** pane.

Basic knowledge of HTML, XML, and Java is required.

12. Under **Format**, select a style from the drop-down list.

13. Click the checkbox next to **Visible** to display the block in published documentation.

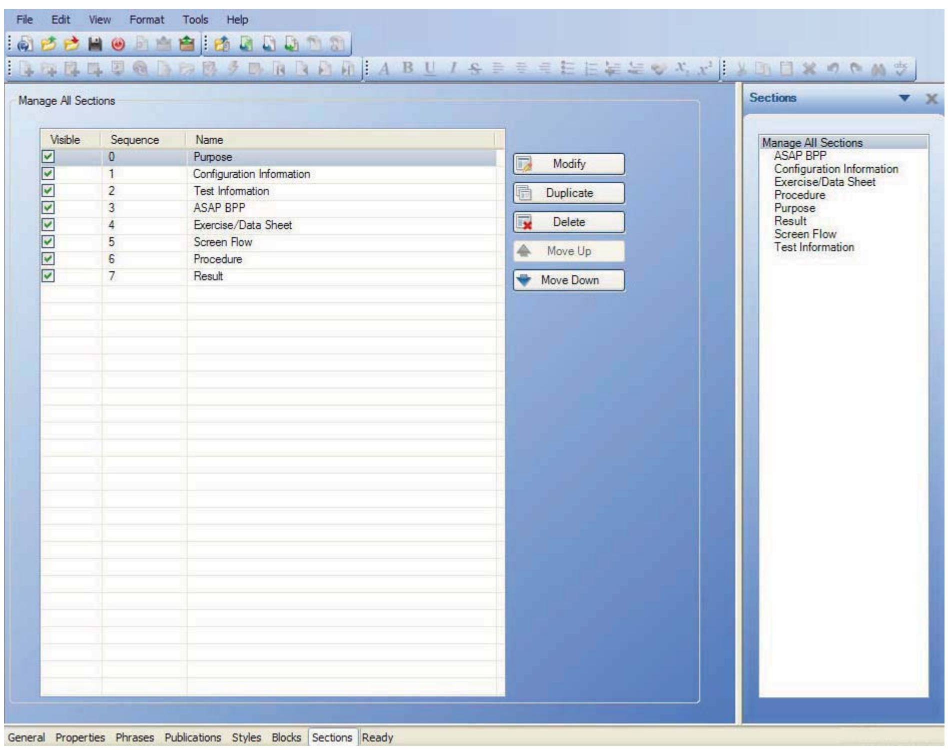
14. Select **FILE > SAVE** to save the template.

Specifying New Template Settings: Sections

Specifying Sections

1. From the editor, open the new template.

2. Click **Sections** on the status bar.



3. Select a section from the *Task Pane*.

4. Click the checkbox next to **Visible** to display the section in published documentation.

New sections will display in all new documents and older documents will be upgraded to add newly added sections when opened.

5. Complete the following fields:

Field	Description
Header	Specify the header for the section.
Footer	Specify the footer for the section.

6. Click **Select Phrase**.

7. Perform one of the following options:

If You Want To	Then
Add a custom phrase	Click **Add**. Select a language from the left. Enter the text in the **Content** area. Click **OK**.
Select a phrase	Select a language from the **Language** drop-down list. Select a phrase from the **Phrase** listbox. Optionally, enter text into the **Phrases** field to search for text. Click **OK**.

8. Under **Content**, perform one of the following options:

If You Want To	Then
Add content to the section	Click **Add**. Select a block from the list. Click **OK**.
Remove content	Click **Remove**. At the prompt, click **Yes**.
Move content to earlier in the list	Click **Move Up** one or more times as needed.
Move content to later in the list	Click **Move Down** one or more times as needed.

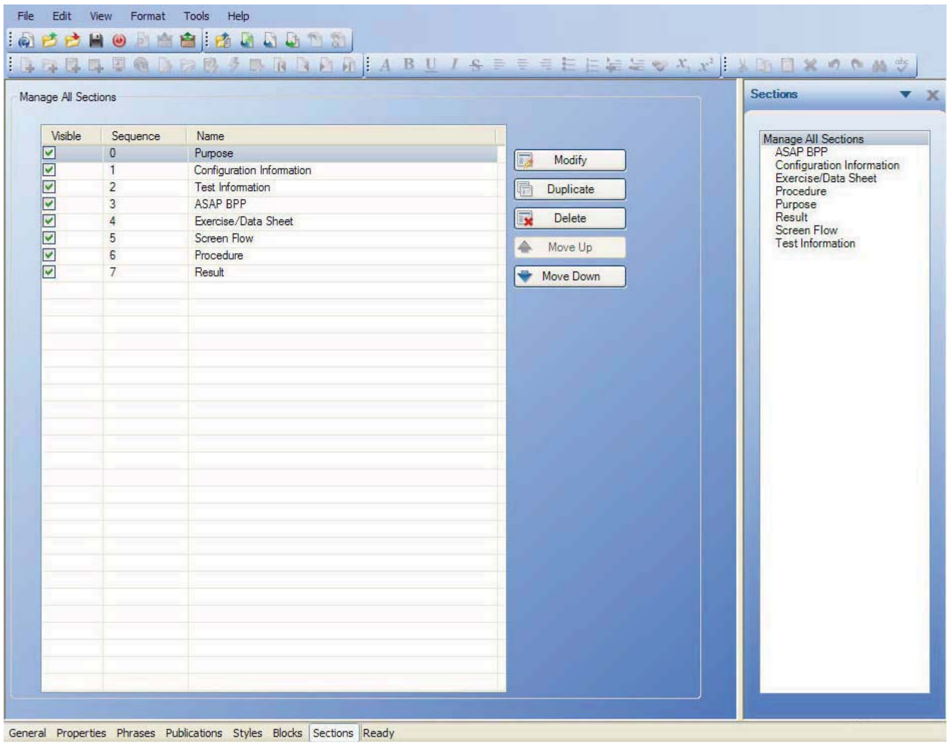
9. Determine where the section is used in the **This item is used by the items below** area.

10. Click **FILE > SAVE** to specify additional sections.

Modifying, Duplicating, and Deleting Sections

1. From the editor, open the new template.

2. Click **Sections** on the status bar.



3. Perform one of the following options:

If You Want To	Then
Modify a section	Select the section from the *Manage All Sections* list in the content pane. Click **Modify**. For information on modifying a section, refer to Specifying Sections (on page 327).
Duplicate a section	Select the section from the content area, and click **Duplicate**. The duplicated section is added below the original section. Modify the property to specify a new name and characteristics. For information, refer to Specifying Sections (on page 327).
Delete a section	Select the section from the content area, and click **Delete**. At the prompt, click **Yes**.

If You Want To	Then
Move a section earlier in the list	Select the section. Click **Move Up** one or more times as needed.
Move the section later in the list	Select the section. Click **Move Down** one or more times as needed.

4. Click FILE > SAVE to save the template.

Export and Import an Author Template

ANCILE uPerform Express allows users to import and export author template phrases via the XML Localization Interchange File Format (XLIFF) for translating template content in to multiple languages. When a template is exported, one XLIFF file will be created for each language. When a template is imported, it is updated to contain the translated phrases.

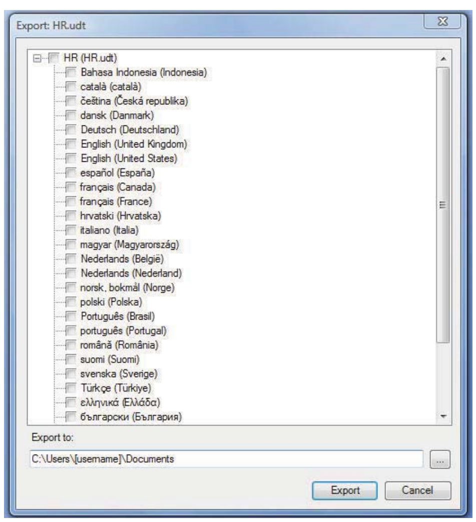
The file is formatted to facilitate translation by displaying the source (original) text co-located next to the target translated text.

The XLIFF file can be edited in Notepad, in an HTML editor, or via a specialized XLIFF editor such as Xliff Editor or Heartsome.

Exporting Template Content

1. Select **FILE> MANAGE CONTENT LANGUAGE**.

2. Select **Export [template name]**.



3. Select the target export language(s).

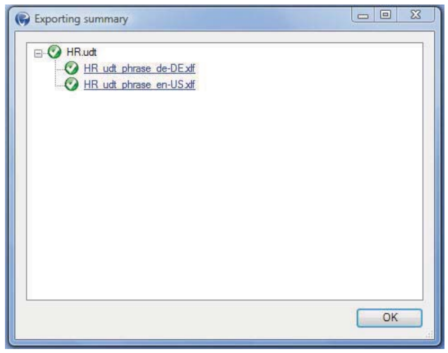
   Multiple languages can be selected. Click the checkbox beside the template name to select all languages.

4. Click **Export**.

5. Optionally, select , to specify a destination folder other than the default.

Only the template will be exported. Any depending uPerform Express content will not be represented in the output.

6. Click **Export**.

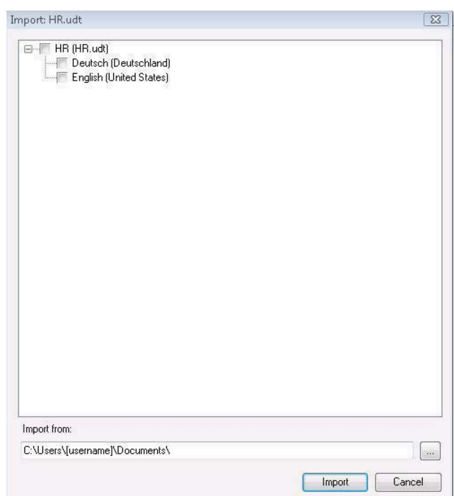


7. Click **OK**.

Importing Template Content

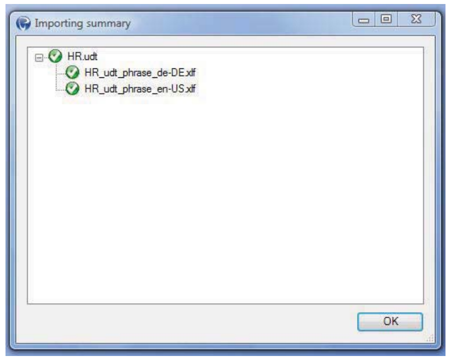
1. Select **FILE> MANAGE CONTENT LANGUAGE**.

2. Select **Import [template name]**.



3. Select the template and language(s) to import.

4. Click **Import**.



5. Click **OK**.

The template is now updated to include the translated phrases, and will be included in content using that template.

Delete an Author Template

Create a backup of the template file prior to deleting the template. Any existing documents created with the deleted template cannot be opened after the template is deleted.

Deleting an Author Template

1. Select **FILE > MANAGE LOCAL TEMPLATES**.
2. Select the template you want to delete.
3. Click **Remove**.
4. Click **OK**.

Chapter 16: Building a Website

With ANCILE uPerform Express you can design, build, and maintain a website to deliver content to your end users. In addition to standard uPerform Express documents, simulations, student guides, and eLearning courses, non-uPerform Express content can be included in the website.

Introduction to the Website

ANCILE uPerform Express allows you to present published content to your end users via a website. You can rapidly build your website by assigning properties to uPerform Express content and then leveraging these properties to automatically organize your website hierarchy. Alternately, you can manually create your website hierarchy and drag-and-drop content into the hierarchy structure.

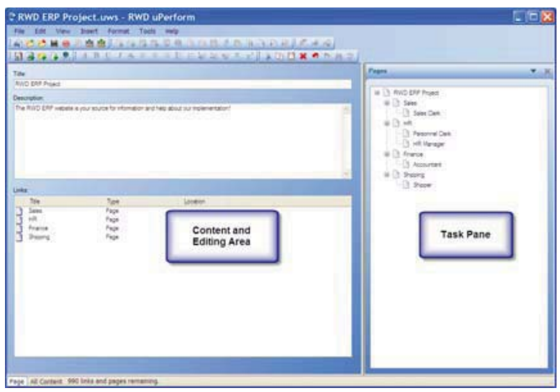
The uPerform Express website is a collection and organization of pages and content links, not a document repository. You must host the generated website, including the published content, on a web server or network file server to make the website available to your end users.

Create the Website

Exploring the Website Editor

The uPerform Express website editor consists of the following areas:

- Content and Editing Area - displays the title and description of the selected page; also displays the content available from each page and the content available on the entire website.
- Task Pane - displays a tree view of the website structure.



Two tabs in the lower left allow you to customize your view of website content:

- The **Page** tab displays the title, description, and included links for the page currently selected in the task pane.
- The **All Content** tab displays the list of all links available for inclusion in the website. Only those links which have been added to a page will display on the website.

Planning and Designing the Website

Before creating your website, you should determine the desired navigation structure to present to your end users. Some potential organization methods include:

- Application module (for example, Sales, Human Resources, Finance)
- Employee role (for example, Sales Clerk, Personnel Manager, Accountant)
- Geographic or organizational location (for example, Headquarters, United States, Tokyo)

- Business process or function (Sales Orders, Personnel Development, Budgeting)

When working with uPerform Express, it is helpful to think of your navigation structure as being made up of pages, which can contain subpages and/or links. The pages in your website reflect your desired navigation structure. For example, you might have a page named "Sales" with a subpage named "Sales Clerk."

There are two methods for structuring and populating your website:

- Create your website structure manually by creating pages and populate the website by adding content links to these pages.

- Automatically build your website structure and populate the website based on the properties of your uPerform Express content. For example, you can use the built-in Category properties within a uPerform Express template to specify your structure. You might specify Category 1 as business process and Category 2 as role. The template also allows you to specify a hierarchy of these category properties. After authors assign a value to the category properties within uPerform Express content, your published website would reflect a navigation structure based on business process as the primary selection and role as the secondary selection.

  If you will be automatically populating your website using properties, you should enable these properties in your project template, specify the valid values, and ensure your authors have access to this template prior to developing content. For detailed information on templates, refer to Using Author Templates (on page 267).

What Can My Website Include?

The following types of content can be included within a uPerform Express website:

- uPerform Express content, including documents, simulations, and courses

  The website can only contain uPerform Express content that was created with the same template as the website.

- Hyperlinks to other websites or to files stored on other servers or websites

Within the website editor, the following icons are used to identify content types:

- - indicates a uPerform Express document/simulation or student guide.

- - indicates a uPerform Express course.

- - indicates a link to another website or file.

- - indicates a website page.
- - indicates a page shortcut.
- - indicates the source file cannot be found.

Page and Link Limits

ANCILE uPerform Express is specifically designed to produce and manage small- and medium-size websites. Consequently, there is a limit of 1000 links or pages within the website to maximize performance and to keep the website to a manageable file size.

Pages are displayed in the task pane. Links are displayed in the **Links** list.

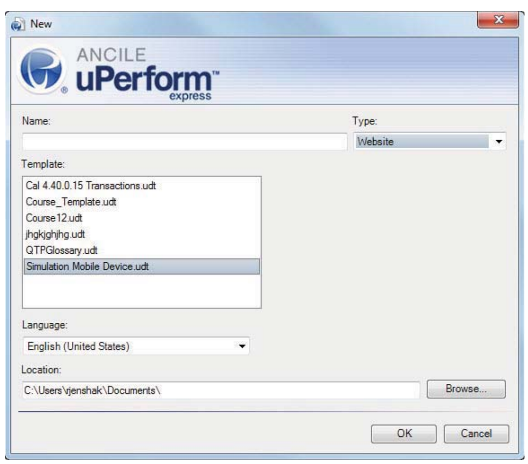
The number of remaining pages and links is displayed to the right of the tabs in the lower left.

Pages and links that are copied and pasted are included in the limit. A shortcut to a page or link does not count against the limit.

If you attempt to add a page or link and this action will exceed the limit, an error message is displayed. You cannot complete an operation that would result in exceeding the limit.

Creating a Website

1. Select **FILE > NEW** from the editor.



2. Select **Website** from the **Type** drop-down list.

3. Complete/review the following information:

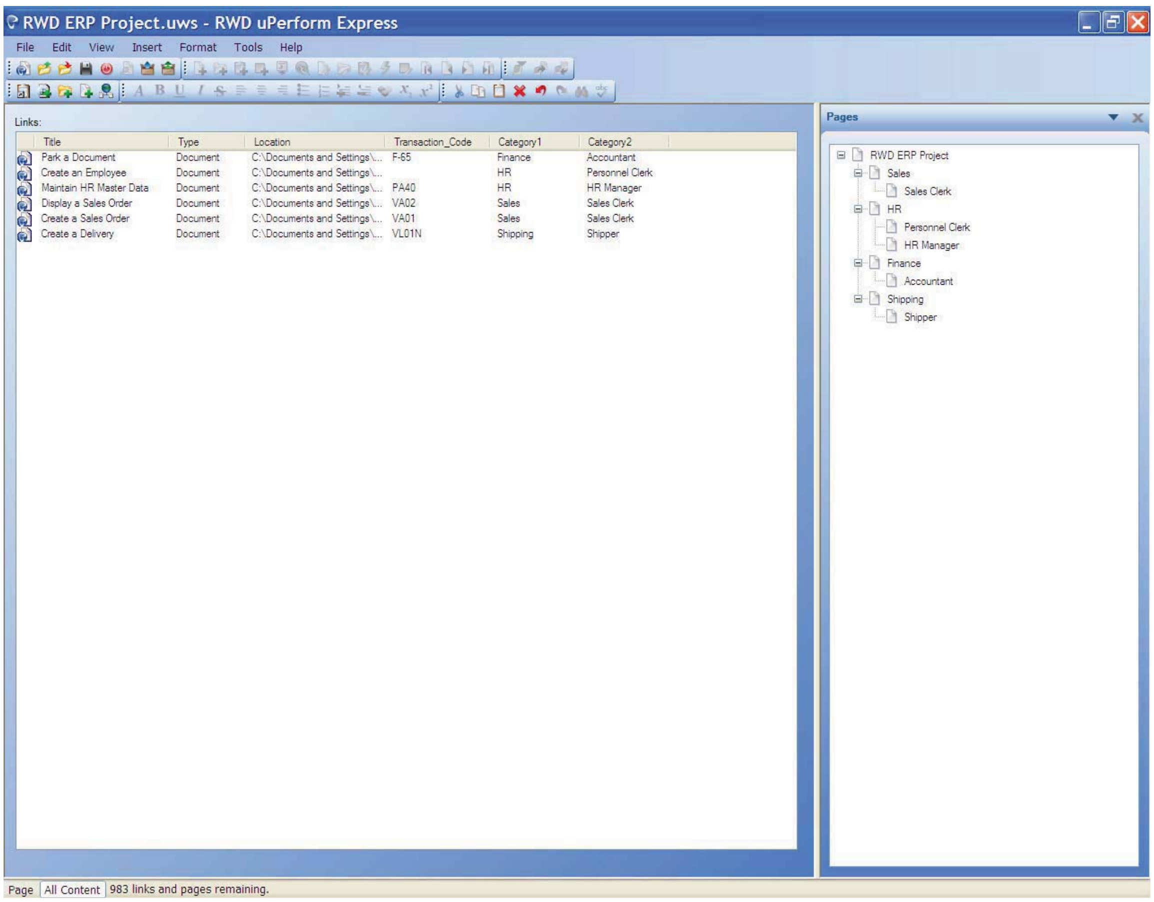
Field	Description
Name	Enter the name of the website. The name you specify here will also be displayed at the top of published website pages.
Template	Select the template associated with this website. The template controls the website appearance and, if used, the properties on which the website organization is based. The website can only contain uPerform Express content that is generated by the selected template. For detailed information on templates, refer to .
Language	Select the website language from the drop-down list. This selection determines the language used in the list of available child documents on the published website.
Location	As desired, edit the default location of the website.

4. Click **OK**.

Open and Save the Website

Opening a Website

1. Select **FILE > OPEN > OPEN LOCAL...** .
2. Select the .uws file.
3. Click **Open**.



Saving the Website

Perform one of the following actions:

If You Want To	Then
Save an existing website	Select **FILE > SAVE**. If this is the first time you are saving the file and the display of the *Properties* window is enabled, the *Properties* window is displayed.
Save the open website as a new file	Select **FILE > SAVE AS...** . Enter a new filename, and click **Save**.

Building the Website Structure Manually

You can manually build your website structure by creating pages within the website editor.

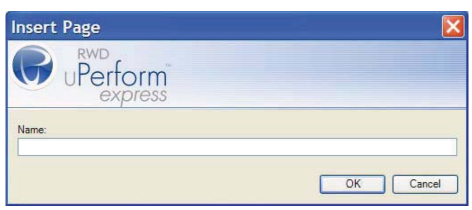
For information on leveraging content properties to automatically generate a website based on the values of the properties, refer to Populating the Website Structure Automatically (on page 351).

Create and Edit Pages

Pages contain links to uPerform Express   content or to content stored on other websites. By defining pages and subpages, you create the website navigation structure that will be viewed by your end users.

Creating a Page

1. Select the **Page** tab.
2. Select the parent of the new page in the *Pages* task pane.
3. Select INSERT > INSERT WEBSITE PAGE.

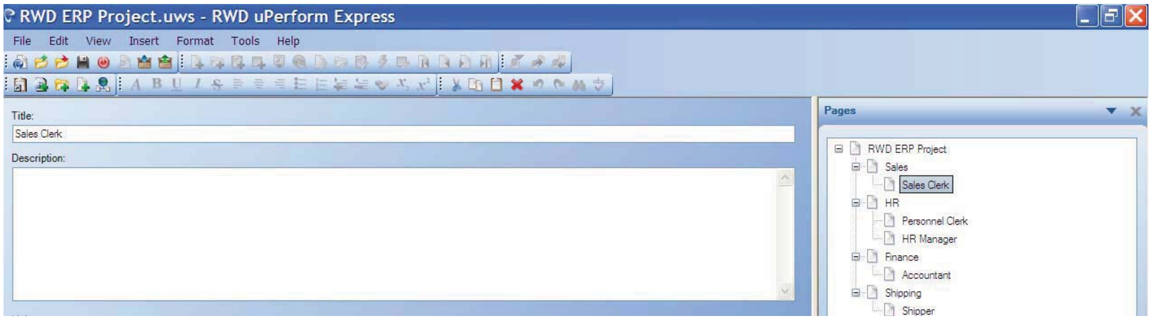


4. Enter the name of the page. This text will display at the top of this website page.
5. Click **OK**.

Editing a Page

1. Select the **Page** tab.

2. Select the page in the *Pages* task pane.



3. Edit the text in the **Title** or **Description** fields.

   Only plain text is supported in these fields.

Your changes are saved when you move to another page or when you exit a field.

Moving or Copying a Page

1. Select the page to move or copy in the *Pages* task pane.

2. Perform one of the following options:

If You Want To	Then
Move the page	Right-click on the page, and select **Cut**. Right-click on the new parent for the page, and select **Paste** to insert the page under the selected parent. OR Click and hold the left mouse button on the name of the page, and drag the page to the new location. A black line is displayed to indicate where the page will be inserted. Release the mouse button.
Copy the page	Right-click on the page, and select **Copy**. Right-click on the new parent for the page, and select **Paste** to insert the page under the selected parent. OR Control-click the left mouse button on the name of the page, and drag the page to the new location. A black line is displayed to indicate where the page will be inserted. Release the mouse button.

If You Want To	Then
Create a shortcut to an existing page	Right-click on the page, and select **Copy**. Right-click on the new parent for the page, and select **Paste Shortcut**. The shortcut link is displayed in the **Links** list to the left.

Deleting a Page

1. In the *Pages* task pane, right-click on the page to be deleted.
2. Select **Delete** to remove the page from the website.

Adding Content to the Website

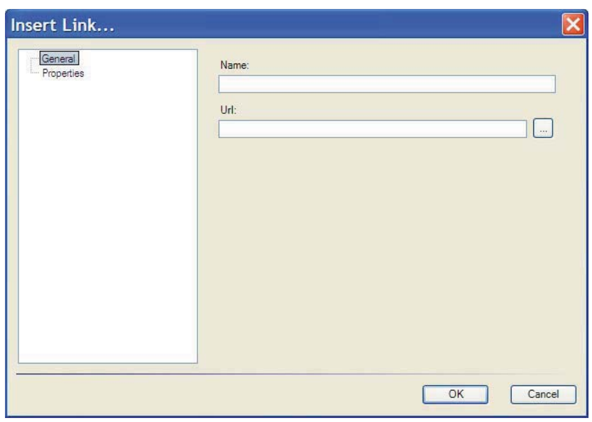
Pages and subpages allow you to provide a structural organization to your website. Links are added to these pages to allow your end users to launch specific content items.

Add and Edit Content Links

When you add a link to a page, you are inserting a hyperlink to published uPerform Express content or to non-uPerform Express content stored on another file or web server. You can add a single link to your website or import a folder of links.

Adding a Link to a Page

1. Select the page to contain the link from the *Pages* task pane.
2. Select **INSERT > INSERT LINK...** .

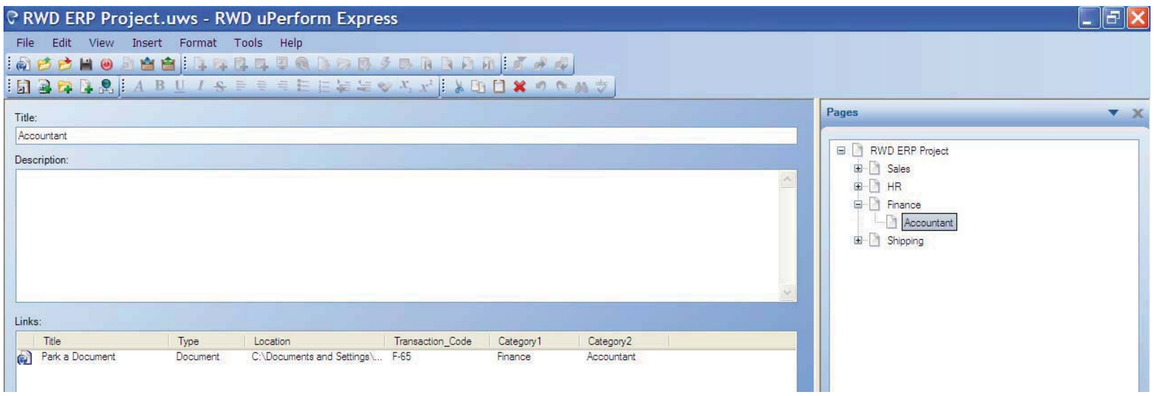


3. Perform one of the following options:

If You Want To	Then
Create a link to a website location	Enter a name for the website location in the **Name** field. Example: ANCILE Corporate Website Enter the complete website address in the **Url** field. Example: http://www.ancile.com
Create a link to uPerform Express content	Click **...** , and select the uPerform Express file. The **Name** field is automatically populated based on the filename.

Create a link to non-uPerform Express content	Click **...** , and select the file. The file must be located on a file or web server accessible by your end users. Enter the name of the document in the **Name** field.

4. Click **OK**.



The content link is displayed in the **Links** list.

Adding Links via Drag-and-Drop

1. Select the page to contain the link(s) from the *Pages* task pane.

2. Select the **Page** tab.

3. In Windows Explorer, select one or more files or a folder of files.

4. Drag and drop the file(s) or folder into the **Links** list.

Adding Multiple Links to a Page

1. Select the page to contain the links from the *Pages* task pane.

2. Select **INSERT > INSERT MULTIPLE LINKS...** .

3. Select the folder from which links should be imported.

4. Click **OK**.

ANCILE uPerform Express will import links from the specified folder and all subfolders for all supported document types. These links will be added to the selected page.

Editing a Link

1. Select the **Page** or **All Content** tab.

2. Right-click the link name, and select **Properties**.

3. For non-uPerform Express content, you can edit the name and location fields and the propentry values. For uPerform Express content, only the location field may be edited.

Moving and Copying a Link

1. Select the **Page** tab.

2. Perform one of the following options:

If You Want To	Then
Move a link to another page	Right-click on the link in the **Links** list, and select **Cut**. Right-click on the target page in the *Pages* task pane, and select **Paste** to insert the link on the selected page. OR Click and hold the left mouse button on the link in the **Links** list, and drag the link to the target page in the *Pages* task pane. Release the mouse button.
Copy a link to another page	Right-click on the link in the **Links** list, and select **Copy**. Right-click on the target page in the task pane, and select **Paste** to insert the link on the selected page. OR Control-click the left mouse button on the link in the **Links** list, and drag the link to the target page in the task pane. Release the mouse button.

Reordering Links on a Page

1. Select the **Page** tab.

2. From the *Pages* task pane, select the page containing the links to be reordered.

3. From the **Links** list, select the link to be reordered, and drag the link up or down within the list.

   A black line is displayed to indicate where the page will be inserted when you release the mouse button. Note that pages are always displayed above links in the list.

4. Release the mouse button to move the link to the new position.

Removing a Link from a Page

1. Select the **Page** tab.

2. From the *Pages* task pane, select the page containing the link to be removed.

3. Right-click on the desired link in the **Links** list, and select **Delete**.

Deleting a Link from the Website

Deleting a link removes all instances of the link in the website. If you want to remove the link only from a specific page, remove the link via the **Page** tab.

1. Select the **All Content** tab.

2. Right-click on the desired link, and select **Delete**.

3. Click **Yes** to remove the link from the website.

Populating the Website Structure Automatically

You can automatically populate your website structure by leveraging the properties and associated property values specified within your uPerform Express template and stored within the content. To enable use of this functionality, you perform the following steps:

1. Enable built-in properties or create custom properties in your template. For example, you might designate Category 1 as Business Process. Refer to Specifying New Template Settings: Properties (on page 277) for detailed information on properties.

2. Specify possible values for these properties in your template. For example, possible values for Business Process might include Sales Orders, Personnel Management, and Accounts Payable.

3. Specify the hierarchy of the properties in your template. For example, Category 2 - Role - might be subordinate to the Business Process property. Refer to Specifying General Settings: Information (on page 272) for detailed information on specifying property hierarchy.

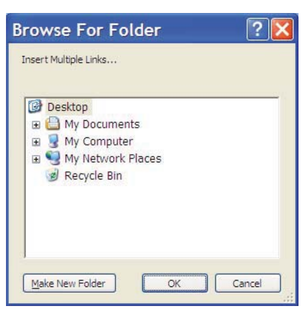
4. Ensure the template is accessible from a location for your users to download.

5. Instruct your authors to specify values for all applicable categories in each uPerform Express file.

You are then ready to import content and automatically structure the website based on the content properties.

Importing Content Links

1. Select INSERT > INSERT MULTIPLE LINKS... to import one or more folders containing your content.



2. Navigate to the folder location.

3. Click **OK**.

   Refer to "Automatically Organizing the Website" below for detailed instructions on automatically organizing the imported content based on the content property values.

Automatically Organizing the Website

1. Select **TOOLS > ORGANIZE WEBSITE**.

   A warning message displays indicating that the current website structure will be overwritten.

2. Click **OK**.

   The *Pages* task pane is updated to reflect the properties and hierarchy specified in the template. Links to imported content are added to pages based on the property values specified in the content.

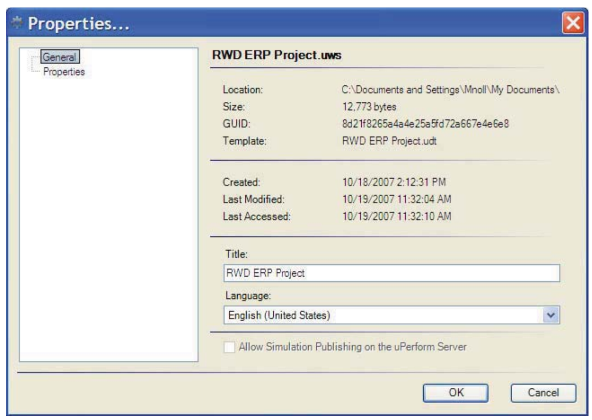
Viewing Website Properties

Viewing Website Properties

1. Select **FILE > PROPERTIES...** .

2. Click **General** on the left pane.

   Information such as the size, associated template, creation date, and last modified date are displayed as view-only information.



3. As desired, edit the **Title** or **Language** fields.

   The data entered into the **Title** field will display as the header on the published website.

4. Click **OK** to save your changes and close the window.

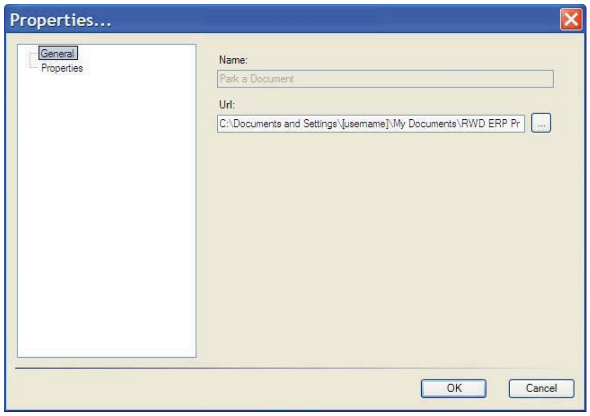
View Content Properties

From the website editor, you can view properties of the included links.

You can modify the properties of non-uPerform Express content only. To modify uPerform Express content properties, you must open and edit the uPerform Express file.

Viewing Link Properties

1. Right-click on a link in the **Links** list, and select **Properties**.



2. Perform one of the following options:

If You Want To	Then
View general properties	Select the **General** tab.
View content properties	Select the **Properties** tab.
Edit the properties of non-uPerform Express content	Select the **Properties** tab. Select or enter a value for the desired property. You cannot edit the properties of uPerform Express documents from the website editor. You must open and edit the uPerform Express document to modify the properties.

3. Click **OK**.

Set Link List Details

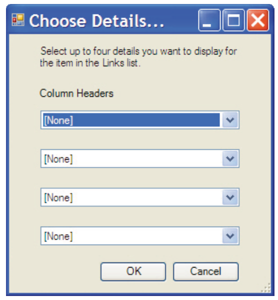
Within the **Links** list you can specify up to four built-in or custom properties to display for the content items in the list. Examples of these properties include transaction code and content location. The Title and Type are always displayed.

Note that you must have first enabled the desired properties in the template associated with the website.

For detailed information on templates, refer to Using Author Templates (on page 267).

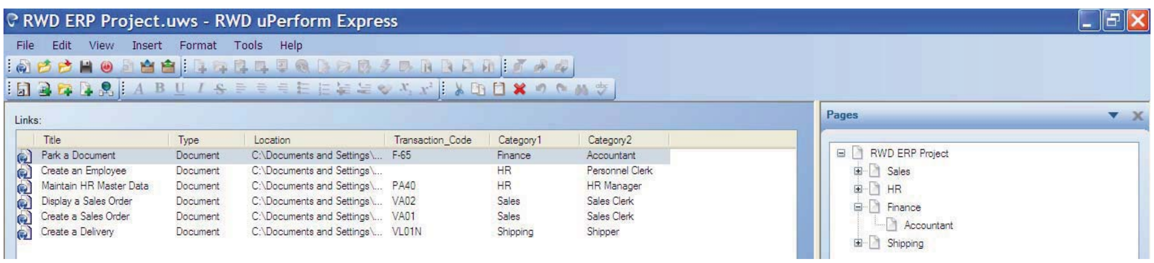
Setting Link List Details

1. Select **VIEW > CHOOSE DETAILS...** .



2. Select up to four enabled built-in or custom properties available from the template to display as a column header in the **Links** list. You can also specify that the Location property be displayed.

3. Click **OK**.



The list is refreshed and the selected column headings are displayed.

Refreshing the Website

You should periodically refresh your website if authors are continuing to make changes to materials and may be moving or deleting content. By executing a refresh, you can easily check and verify links without rebrowsing to find content items.

The refresh process checks all uPerform Express links in the website and updates the titles or properties within uPerform Express content if these have changed. In addition, the refresh process will verify that content items are still available at the originally-specified locations. If content has been moved, the links are noted as 'source not found' in the **Links** list. Provided this content has already been published, it will still be available on the website, however. If source content is replaced, a subsequent refresh will repair these links.

To execute a refresh, select **VIEW > REFRESH**.

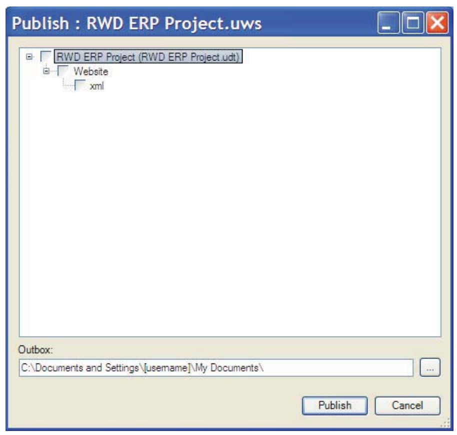
Publishing the Website

The following subsection describes the steps to publish your website.

For detailed information on publishing documents, simulations, and courses, refer to Publishing Content (on page 257). For information on batch publishing content, the glossary, and your website, refer to Batch Publishing (on page 359).

Publishing the Active Website

1. Select **FILE > PUBLISH [WEBSITE NAME]...** .



2. Select the template corresponding to the website to be published.

3. Optionally, browse to specify an outbox other than the default.

4. Click **Publish** to publish the selected website.

   When you publish the website, any existing, previously published website at the same location is deleted.

When publishing is complete, a summary message is displayed with a hyperlink to the successfully published website. On the published website, active links are only provided to uPerform Express documents and courses that have at least one published output in the outbox directory. If a uPerform Express document or course has no published content in the outbox directory, the publication settings in the template determine whether an inactive link or no link is shown.

Optionally, review the Application and Transformation logs for detailed information on events. In Windows XP, the logs are stored in the \Documents and Settings\[username]\Application Data\uPerform\Version X.X\Logs directory. In Windows Vista and Windows 7, the logs are stored in the \User\App Data\Roaming\uPerform\Version X.X\Logs directory.

Refer to Making Your Website Available to End Users (on page 363) for information on making the website available to end users.

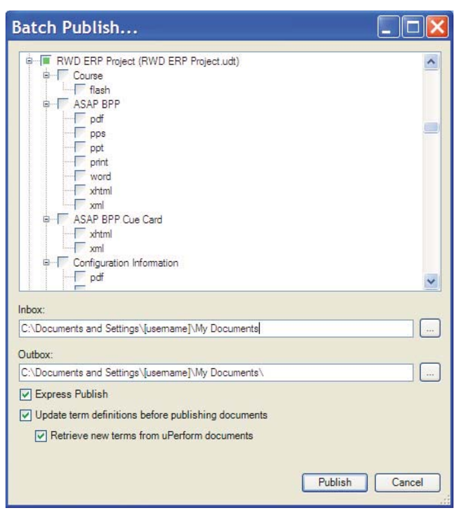
Batch Publish Process

When publishing content, one or more glossaries, and one or more websites in a batch operation, the following processing order is followed:

1. All files in the specified inbox are read.
2. If the inbox contains a glossary, definitions are updated in content and new terms are retrieved (provided these options are enabled in the *Batch Publish...* window). This step is repeated for each glossary selected to be published.
3. Documents and courses are published. Only updated content is published if **Express Publish** is selected.
4. If the inbox contains a website, the website is updated and published. This step is repeated for each website selected to be published.

Batch Publishing

1. Select **FILE > BATCH PUBLISH...** .



2. Select the appropriate checkboxes to the left of the desired template, content types and formats, website, and glossary.
3. Optionally, browse to specify an inbox other than the default.
4. Optionally, browse to specify an outbox other than the default.

5. Perform one or more of the following options:

If You Want To	Then
Publish only files that have changed since the last publish operation	Select the **Express Publish** checkbox. When this option is enabled, uPerform Express scans the inbox folder to determine which documents and courses have been modified since the last publish operation. uPerform Express then includes only these changed files in the list of content to be published to the outbox folder.
Update the definitions in uPerform Express documents prior to publishing documents	Select the **Update terms definitions before publishing documents** checkbox. If you are publishing many documents, updating terms may substantially increase the time necessary to complete the publish process.
Automatically add new terms found in uPerform Express documents to the current glossary while updating the document definitions	Select the **Retrieve new terms from uPerform Express documents** checkbox. This option is only enabled if the option to update term definitions is enabled. If you are publishing many documents, updating terms may substantially increase the time necessary to complete the publish process.

6. Click **Publish** to publish the selected content.

When publishing is complete, a summary message is displayed with hyperlinks to successfully published content.

Navigate the Website

Overview of Navigation Pages

The end user can navigate within the website by selecting one of the following links:

- Home - Click to return to the home page.
- Glossary - Click to display the list of terms and definitions.
- Page or content link - Click on the page name or link to navigate within the website or display content.

Overview of Content Pages

After selecting a content link, the end user selects one of the available published types and formats from the drop-down list.

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To return to a preceding page in the website, the end user clicks on a breadcrumb link in the upper left below the page title.

Making Your Website Available to End Users

Overview of the Website Directory Structure

The following list depicts the directory structure of the website after publishing.

- [Outbox Directory]
  - website name
    - website folder
      - xml folder
        - index.htm
        - site_index.htm
        - assets folder
        - content folder
          - [page id code] folder
            - index.xml
            - [link id code] folder
              - index.xml
            - [link id code] folder
              - index.xml
            - [link id code] folder
              - index.xml
          - [page id code] folder
        - qlaunch folder
          - fp_upload.txt
          - [property value] folder
            - index.xml
            - [link id code] folder
              - index.xml
            - [link id code] folder
              - index.xml

[property value] folder

[property value] folder

Directory Structure Details

The index.htm file located in the \[outbox]\[website name]\[website folder]\xml directory is the launching page for the website.

For each page in the website, uPerform Express creates a subdirectory within the \xml directory. The name of the subdirectory is determined using a unique alphanumeric id code. To aid in navigating to content folders with an alphanumeric id code, open the site_index.htm file in the \xml directory.

Within each page subdirectory, uPerform Express writes a single "index.xml" file. The index.xml file contains the page information and XSLT stylesheet-linking information.

For each uPerform Express document or course in the website, uPerform Express creates a subdirectory and writes a single "index.xml" file within the subdirectory. The index.xml file contains the list of available publication types and formats for the content, along with XSLT stylesheet-linking information. The publication information in the template determines the link priority of the publish types and formats.

The standard Windows folder structure supports folder names up to 100 characters. If you are using SAP SRM, folder names can be up to 200 characters based on the transaction code associated with the folder. In this instance, the uPerform website will take the first 100 characters, append a unique code, and use this for the folder name in the directory structure.

Transferring Your Website to a Server

To make your content available to end users, you must copy the entire contents of the outbox folder specified during publishing.

Glossary of Terms

Annotation

A note added to content by another author or a reviewer.

Annotation Set

The collection of reviewer notes on a particular document.

Application Mode

One of three available recording modes. Allows the author to capture actions in one target application.

Assessment Page

A page in a course that consists of questions, answers, and optional images. Assessment pages can be used as self-tests throughout the course or can be inserted into an assessment section for tracking via a Learning Management System (LMS).

Assessment Section

Part of a course that records an end user's answers and sends results to a Learning Management System (LMS) for tracking.

Author

A user who creates or edits content.

Auto Playback

A simulation playback mode that automatically runs the lesson without user interaction. In this mode, the application performs the actions to complete the simulation with the user as an observer.

Batch

An operation performed on more than one document (for example, the batch publishing of content).

Block

A content element containing the information required to render a discrete item in all available views. Types include step, note, freetext, and the header and footer areas. A Freetext Block contains user-defined formatted text. A Note Block contains notation text and a single pre-defined icon graphic. A Step Block contains the information that describes a discrete action, including the screen image for the action.

Branch
An alternate sequence of steps used to accomplish a secondary flow within a course or simulation.

Branching Table
A table inserted into the procedural section of a document to direct users to make a decision regarding going to other steps or options.

Callouts
Numbered objects or notes that allow you to bring attention to specific controls and regions on screen images within a published uPerform document.

Configuration Information
A section within a document that contains configuration information and can be output as a publication.

Course
A collection of informational content and optional assessment tools such as multiple choice, drag-and-drop, and fill-in-the-blank.

Course Homepage
A web page generated by uPerform Express that contains the link to the published course.

Course Package
A container for multiple uPerform content files output to a single master SCORM package.

Cue Card
A publication type created from uPerform Express content and typically used in context-sensitive help.

Definition
Within the glossary functionality, amplifying information about a term used in the target application. A term can have multiple definitions based on the context of the document.

Desktop Mode
One of three available recording modes. Allows the author to capture the complete desktop and actions across a series of applications.

Document
A set of instructions, images, and associated objects intended for use as online help or performance support.

Drag and Drop Action
A simulation action indicating mouse input is required. This action is used to identify a click, drag, and release mouse action required to navigate to the next step in a simulation or to answer a question in a drag-and-drop assessment page within a course.

Edit Action

A simulation action indicating text input is required. This action is used to identify a string of keyboard input (text input) required to navigate to the next step in a simulation.

Editor

The application used to create and modify uPerform content.

eLearning

Self-paced, online learning developed by authors and subject matter experts using the uPerform Express editor.

End User

Any person who accesses performance support content through a website.

Express Publish

The process of publishing only those documents that have been modified since the last publish operation.

Flash

A file format developed by Adobe; this output type is used to display content within uPerform Express courses and simulations.

Glossary

The uPerform Express function that enables the management of terms and definitions. Also, the name of an ANCILE Info Pak application.

Guided Help

Published HTML content designed to be used during task execution.

Hint

The nonessential data (for example, a user name) required to complete a simulation. Hints can be provided to the student during playback of the simulation.

Hotspot

A resizable box surrounding an action location in a simulation or course.

HP Adoption Readiness Tool (ART)

An HPSE solution that accelerates user adoption of HP software for customers.

Inbox

Folder location containing source content to be published or leveraged.

Key Action

A simulation action indicating keyboard input. This action is used to identify a specific keystroke or sequence of keystrokes required to navigate to the next step in a simulation.

Lesson, Course

A component of an eLearning course. A lesson contains pages and is typically used as an introduction to a section.

Lesson, Simulation

The output of a uPerform Express recording and subsequent editing that simulates a task in a software application.

Link

A hyperlink within a document, a course, or a website page.

Outbox

Folder location containing content that has been published.

Overview

The introduction section of a document that contains purpose, trigger, prerequisites, menu paths, and helpful hints; included in Work Instructions, Quick References, and Cue Cards after publishing.

Page

A page contains the content of the eLearning course. Page layout is governed by the use of stencils. There are two different page types available: standard content and assessment.

Passing Grade

Specifies the minimum percentage of correct responses that the user must achieve to pass the test.

Phrase

A group of culture-specific boilerplate text items that are placed into a content block by default.

Playback

The interactive output mode of a simulation. Simulator supports four types of playback: Standard Tutorial, Auto Playback Tutorial, Self-Test Tutorial, and Assessment Tutorial.

Preloader

A performance-enhancing feature that enables preloading of the simulation or course on the target computer before the content begins to execute.

Properties

Metadata such as document title, owner, and version used to describe content. In addition to the standard built-in properties, custom properties may be created.

Publication

Output published from uPerform Express content; a publication is meant to be consumed by an end user.

Publish

A process that exports content to a variety of types and formats, including cue card and Flash simulation.

Publish Format

The output format of published content. Available formats include Flash simulations and PDF.

Publish Type
The output type of published content. Available types include work instruction, cue card, and simulation.

Quick Reference
A type of procedural publication often used in end user training.

Quick Start Panel
An interface feature of the uPerform Express editor that provides expedited access to the recording and editing functions.

Recorder
The uPerform Express functionality that captures author actions in one or more target applications to produce a formatted document, simulation, and screenflow.

Redo
An editing option that allows the author to reverse the last Undo action performed.

Screenflow
A diagram representing the flow of steps in a task.

Section
A section represents a single, contiguous group of blocks in a document. In the document arrangement, a block must belong to a section. Each section element consists of a sequential array of cross-references to the available blocks. Similar items within a document can be grouped into discrete sections, and publications can include/exclude particular sections. A section cannot contain another section.

Self-Test
A simulation playback mode that includes no instructions, hotspot objects, notes, audio playback, or step status bar information. In this playback mode, the user is encouraged to remember and perform all necessary steps for testing purposes.

Simulation
A set of instructions, images, and associated objects intended for export as interactive output.

Simulation Assessment
A simulation playback mode with no instructions, hotspot objects, notes, audio playback, or step status bar information. In this mode, the user is encouraged to answer questions regarding material and to remember and perform all necessary simulation steps for testing and grading purposes.

Stencil
A layout tool governing the design of a course page.

Step
One of a series of actions that collectively form the procedure captured in the document or simulation.

Student Guide
A collection of concepts, procedures, and exercises related to a series of tasks or a process.

Style
A group of formatting options that relate to paragraphs or character text.

Task Pane
The area of the editing application that provides access to items such as annotations, document layout, and simulation steps.

Template
A set of document, simulation, and course options that control formatting and content. Each content file is created from a template which determines the basic structure for content and specifies the content settings. The template also specifies information about the types and formats of content that can be published.

Term
The name of a field or option in the target application being documented. A term can have one or more definitions.

Testing Information
A section that contains testing scenarios and history, and can be output as a publication.

Tooltip
A type of note that displays during simulation playback when the user hovers over the specified area.

Undo
An editing option that allow the author to reverse the last action performed. Undo caches up to twenty steps.

uPerform Document
The XML content produced by uPerform as a result of recording author actions in a target application; includes the document, simulation, and screenflow views.

uPerform Express Editor
The application used to create, record, and modify documents, simulations, courses, websites, and glossaries.

User
The consumer of final published content via online help or the website.

View
A way of displaying content to an author or user; there are four views of uPerform content available: document, simulation, screenflow, and course.

Voice Over
An option allowing for the inclusion of an audio file during simulation or course playback.

Website

A collection of performance support materials such as procedures, simulations, and courses that are available to end users via a web browser.

Work Instruction

A type of content output typically used in user training that contains end user procedural information, including screen shots and field description tables.

XML

Extensible Markup Language; the source format of uPerform content.

XSL

Extensible Stylesheet Language; the file used to control the format of the content displayed in an XML file.

Index