# APPENDIX A:Configuring System Help

Introduction

Installation of the *Govern Release 5.1* Help system is managed by the *Deploy EZ* application during the installation or update process. It is during this process that required directories are created and help content is updated. For the Govern application, unlike the Help system of the other applications in the suite, *Govern* help content is **not** invoked with the **F1** key. *Help* content is displayed with a click on one of the help icons (**A**) displayed under the **Help** tab (**B**) in the *Govern* application interface. The user selects the icon that corresponds to the profile, form, or entity of interest.
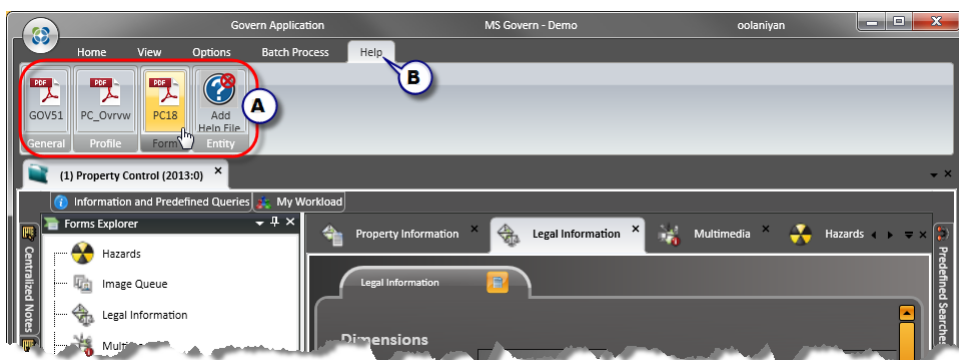
> **Note:** Users can still invoke Help content with the F1 key in all other applications within the Govern suite. All help content that is presented to the user is contextual, i.e. relevant to the active user screen.

Open Form Hierarchy

The Open Forms hierarchy is as follows with order of precedence decreasing from left to right.

The above hierarchy is reflected in the structure of the *Help* directories and subdirectories.

Changes to the Help Directory

For *Govern Release 5.1* and greater, changes were made to the structure of the Help file directories. The new structure was created to be able to present users with help content in different file formats. Content can include video clips, user system supported file types, custom images, and so on. As with prior versions of the help, the Adobe Acrobat PDF file format is used to distribute the content.

For *Release 5.1*, help content is stored in multiple level directories. All standard content will be deployed as a ZIP archive file. Upon installation, the.ZIP package is then extracted to the *Standard* directory.

Help Content Directory Structure

The directory structure, as in previous releases, has two (2) principal subdirectories, **Standard**, and **Custom**. Both the *Standard* and *Custom* directory structures are set by the system and should not be modified by the user. The structure, and how the system will access the *Custom* directory can be determined by the user through settings in the *Govern New Administration* (**GNA**). There are two (2) options to choose from in the form.
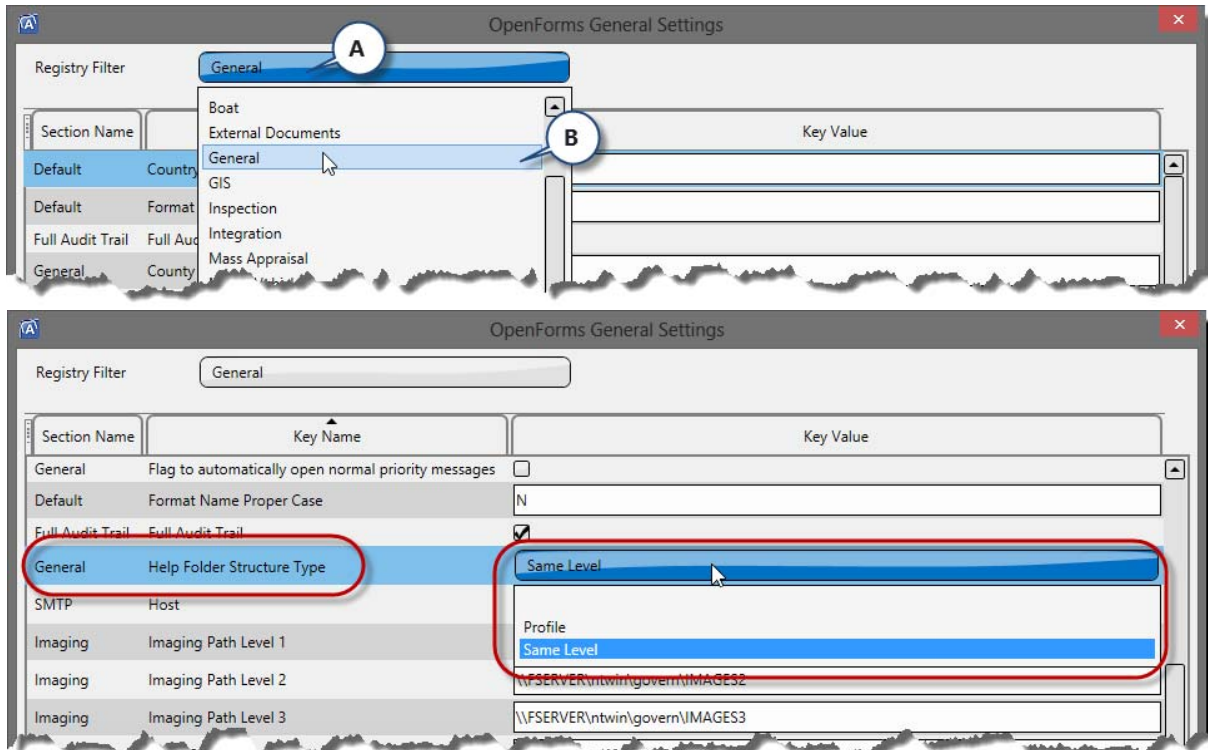
To open the form, in the *GNA,* select the *System Parameters* (tab) > **General Settings Editor…**
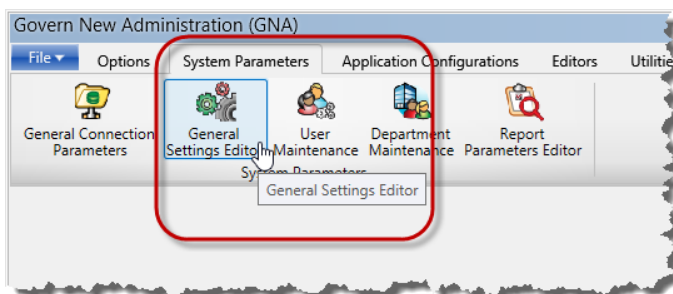
In the *Open Forms General Settings* editor, select the following:

1. Under the *Registry Filter*, select **General** (**A**).

2. Locate the **General** *Section Name* (**B**), available options are **Profile** or **Same Level**.

The selection of **Profile** or **Same Level**, are dependent upon user requirements.

Same Level option

Users that are content with the Property Control (PC) profile that is the system default should use the **Same Level** option. The same profile will be used by all departments, i.e. the same Open Forms will be accessible to all users. All users will be viewing the same help content for the active forms.

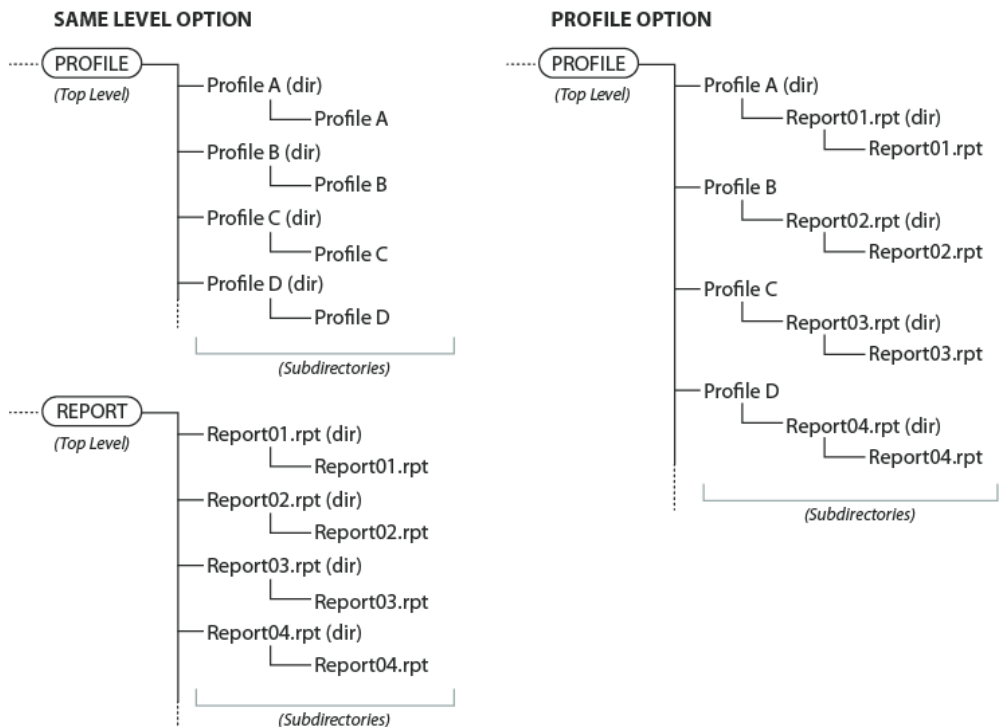**Note:** The **Same Level** option is the system default.

Profile option

In situations when different profiles are required for the same, or different departments customized profiles will need to be designed. For example, a *PC* profile that is created for the *Assessors* department may not necessarily be the same one used by the *Public Works* department. As the Profiles and
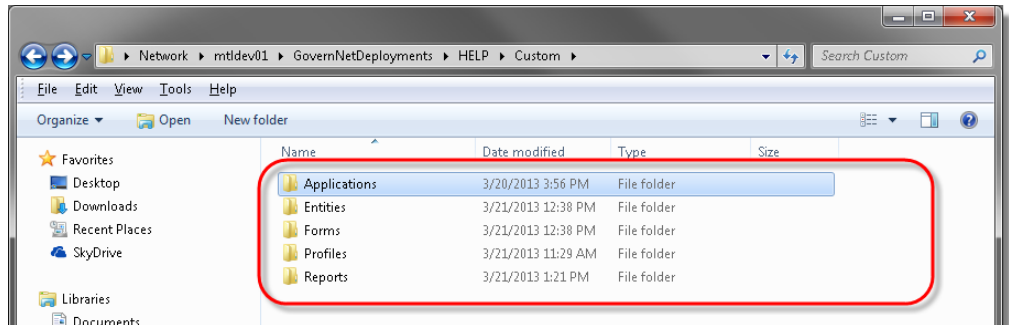
Forms are different, the *Help* content may not be the same. Some confusion regarding functionality may arise unless specific instructions are provided. In this situation, the option for **Profile** should be selected. With the *Profile* option, content is placed in a separate directory that corresponds to each customized profile.

> **Note:** Changing the parameter after the directory structure has been established is not destructive to the custom help content, but it will no longer be available until the settings are restored.

SAME LEVEL OPTION

PROFILE
(Top Level)
— Profile A (dir)
  └── Profile A
— Profile B (dir)
  └── Profile B
— Profile C (dir)
  └── Profile C
— Profile D (dir)
  └── Profile D
(Subdirectories)

REPORT
(Top Level)
— Report01.rpt (dir)
  └── Report01.rpt
— Report02.rpt (dir)
  └── Report02.rpt
— Report03.rpt (dir)
  └── Report03.rpt
— Report04.rpt (dir)
  └── Report04.rpt
(Subdirectories)

PROFILE OPTION

PROFILE
(Top Level)
— Profile A (dir)
  └── Report01.rpt (dir)
      └── Report01.rpt
— Profile B
  └── Report02.rpt (dir)
      └── Report02.rpt
— Profile C
  └── Report03.rpt (dir)
      └── Report03.rpt
— Profile D
  └── Report04.rpt (dir)
      └── Report04.rpt
(Subdirectories)

Help Content Directory Structure

As illustrated in the grid below, the structure of the Help directory is multi-leveled. The **<HELP ROOT>** refers to the root level of the help directory, and not the actual deployment installation of the *Deploy EZ* application.

Govern HELP 5.x - STANDARD Directory Structure: (Same Level option)

The structure for the Standard directory is as follow. The **versionNum** directory will be a version number, i.e. 5.1, 5.2, 5.x,…

<HELP ROOT>	Level 1	Level 2	Level 3 - Directory / Content	Level 4 - Directory / Content
	versionNum (dir) *Ex. 5.1, 6.0, etc.*	**Applications** (dir)	**MSGNET** (dir)	*.pdf Help* and required supplemental files. i.e. avi, docx, jpg, etc.
			GNA (dir)	*.pdf Help* and required supplemental files. i.e. avi, docx, jpg, etc.
			QT (dir)	*.pdf Help* and required supplemental files. i.e. avi, docx, jpg, etc.
			. . .	
		Entities (dir)	**entityName01** (dir)	.pdf Help files
			entityName02 (dir)	.pdf Help files
			. . .	
		Forms (dir)	**formName01** (dir)	.pdf Help files
			formName02 (dir)	.pdf Help files
			. . .	
		Profiles (dir)	**profileName01** (dir)	
			reportName02 (dir)	
			. . .	
		Reports (dir)		
			reportName01.rpt (dir)	*.pdf Help* and required supplemental files. i.e. avi, docx, jpg, etc.
			reportName02.rpt (dir)	*.pdf Help* and required supplemental files. i.e. avi, docx, jpg, etc.
			. . .	

Govern HELP 5.x - CUSTOM Directory Structure: (Same Level option)

The structure for the *Custom* directory is nearly identical to that of the *Standard* directory. The exception is that the *Version* directory is not present at *Level 1*. All sub-directories are shifted up by one level.

<HELP>	Level 1	Level 2	Level 3 - Directory / Content	Level 4 - Directory / Content
	Applications (dir)	**MSGNET** (dir)	*.pdf Help* and required supplemental files. i.e. avi, docx, jpg, etc.	
		GNA (dir)	*.pdf Help* and required supplemental files. i.e. avi, docx, jpg, etc.	
		QT (dir)	*.pdf Help* and required supplemental files. i.e. avi, docx, jpg, etc.	
		. . .		
	Entities (dir)	**entityName01** (dir)	.pdf Help files	
		entityName02 (dir)	.pdf Help files	
		. . .		
	Forms (dir)	**formName01** (dir)	.pdf Help files	
		formName02 (dir)	.pdf Help files	
		. . .		
	Profiles (dir)	**profileName01** (dir)	.pdf Help files	
		profileName02 (dir)	.pdf Help files	
		. . .		
	Reports (dir)			
		reportName01.rpt (dir)	*.pdf Help* and required supplemental files. i.e. avi, docx, jpg, etc.	
		reportName02.rpt (dir)	*.pdf Help* and required supplemental files. i.e. avi, docx, jpg, etc.	
		. . .		

Govern HELP 5.x - CUSTOM Directory Structure: (Profile option)

<HELP>	Level 1	Level 2	Level 3	Level 4	Level 5
CUSTOM	Applications (dir) MSGNET (dir)	**Profiles** (dir) **profileName01** (dir)	Forms (dir) formName01 (dir)	Entities (dir) entityName01 (dir)	Reports (dir) reportName01.rpt (dir) **reportName01.rpt**
		Profiles (dir) **profileName02** (dir)	Forms (dir) formName01 (dir)	Entities (dir) entityName01 (dir)	Reports (dir) reportName01.rpt (dir) **reportName01.rpt**

In the above example, different profiles will require the same report. When the **Profile** option is selected in the *System Registry*, the different profiles will be using the same report. Copies of the same report are placed in the different *Profile* directory.

Custom Directories

> **Note:** The structure of default **Standard**, and **Custom** folders **should not** be modified.

Users are not required to create directories for the **Custom** *Help* folder; the structure established during installation must be kept in order for the content to be available.

> **Note:** Unless additional files are required, the help content are in **PDF** format. Any additional formats that are mentioned above are files that are **supplemental** to the PDF with the main help content.

> **Note:** When including any supplemental content, users must ensure that the file format is supported by the end-users system; e.g. if a MicroSoft Office PowerPoint document is to be one of the supplemental files, a PowerPoint viewer or a fully licensed version must be installed on the installation computer.

Creating and Using Custom Help Files

For a user to open the Help file within the Govern application, they will need to select the **Help** tab in the ribbon of the *Govern* application (**A**). Under the ribbon, the help content which corresponds to the **Application**, the **Profile**, the displayed **Open Form**, and the **Entity** is displayed (**B**).

- **Applications** - Content corresponding to the suite *Application*; the *General* group
- **Profile** - Help content for the *Profile*
- **Form** - The help content for the displayed *Open Form*
- **Entity** - Help content related to the *Entity*
- **Report** - This is the *Report* associated with the form or entity.

The *Help* button displays information for the main application, and the *OpenForm Help* will display Help content that is related to the active OpenForm.

Missing / Unavailable Help Content

When content is not present the broken help link icon is displayed. This icon is an indication that there is an issue with accessing the Help file(s). Issues can be anything from the files not being present or incorrect directory structure due to a change in the *Open Forms General Settings* form in *GNA*; the **Help Folder Structure Type** parameter may have been changed.To correct this situation, users will need to either:

• Place the required content in the appropriate directory.

   OR

• Verify that the **Help Folder Structure Type** parameter setting in the *Open Forms General Settings* form in *GNA* is set to the correct Help folder structure.

<div style="border:1px solid #000; padding:10px;">

BEST PRACTICES - CUSTOM HELP CONTENT NOMENCLATURE

- Lower case names should be used.
- Users should try to limit filenames of help content to no more than 12 characters because the group will expand to accommodate the name. *See image below*
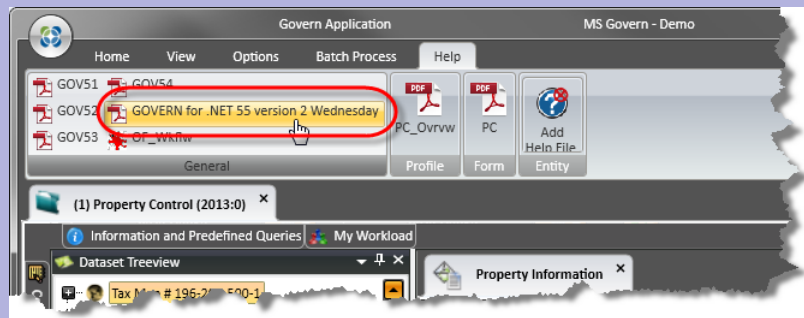
- Limit the length of directory names directories; try not to exceed 12 characters
- Use the underscore character "**_**" in place of spaces. Ex. parcel_asmnt
- Ensure that the extension of the file is supported by the end-user's system that the content will be viewed on.
- As a result of the brevity required for the filename, a detailed description of the *Help Content* can be entered using the **Resource File** editor in *GNA*. The node that contains this information is located in the **WD** module, **CustomHelp** function. The Keys for tool tips will be appended with an **_TT** in the names.
Refer to the Govern New Administration (GNA) Release 5.1 user guide for details about using the Resource File editor.

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Order of Precedence for Help files Directories

When a user invokes or calls the help file, the Govern system first checks in the **Custom** folder. If the requested file is not found, it will default to the **Standard** folder to display the file. The *Custom* folder is reserved for users that want to generate their own custom PDF help files.

Security for Custom Folders

Note: There is no security imposed on the Custom Help directories. This is the default setting for the installation. Administrators that wish to limit user access to these directories will have to do so using Windows security. Security settings will also need to be done on a user by user basis.

BEST PRACTICES - SECURITY

The recommended security setting for administrators that require user restriction to directories, is as follows:

• All top level Help directories should be set to **READ ONLY**. for the Custom folder.
• In order for users to be able to add or update custom content, subdirectories of the top level **Custom** folder should be made accessible, i.e. **READ / WRITE** for users. This will allow them to place help in the directories when required.

Creating Custom Help Files

The Govern application is designed to be flexible, with the understanding that users are able to design forms and reports. It is therefore expected that they may have a requirement to customize their Help files contents. When users customize Govern, supplementary help content can be created in one of two (2) ways.

• Annotate existing system Help files
• Generate new content with new PDF files

Annotating System Help Files

Users may annotate, i.e. add Notes, to existing system PDF files that correspond to the modules. Although system files should not be modified, there are steps that can be taken to ensure that system integrity is maintained.

BEST PRACTICES - ANNOTATING SYSTEM FILES

When annotating system PDF files, users should make a complete back up of the installed files. Only the copied files should be annotated and placed in the **Custom** folder. Original system files will remain in the **Standard** folder.

Generating PDF Help Files

When generating a PDF file with custom content, in order for the system to recognize the custom PDF file, it must have the same name as the one that is used in the Govern application or module.

For example, the **Hazards** (**PC24**) OpenForm in the *Property Control* module has been customized. A new PDF file is made containing custom instructions. In order for it to be accessible, the new PDF file should have the same name as the system default Help file. For *Hazards* the file is **PC24.pdf**; when this file is created, it should then be placed in the appropriate subdirectory in the **Custom** folder.

> **Note:** When a custom PDF is placed in the *Custom* folder, it is not necessary to remove the system default help file in the **Standard** folder. System files should never be modified.

Adding or Replacing Help Content
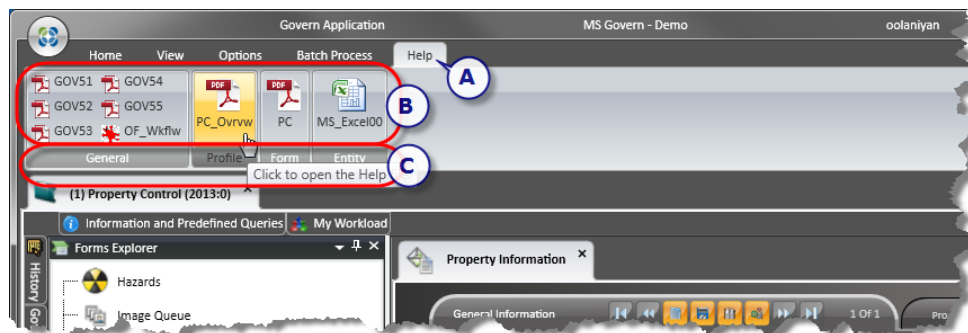
There are two zones to the Help content ribbon in Govern (**A**). Zone 1 (**B**) which contains the icon for the help content file is the area to click when you

need to access the content. Zone 2 (**C**), when selected, will give access to the directory that the content is located in.

> **Note:** In instance where there is no help content and the broken help link icon is displayed (**D**), a click on the link will also display the directory.

The directories at the custom content is to be placed in is easily accessible with a click on the icon under the *Help* tab in the *Govern* ribbon.