

Implementing TaskHelp

Overview

The TaskHelp feature is used to connect the assignment documents in your project database with support documents in another database. These "support" documents could be sections of a corporate policy manual, they could be short video clips of training materials, etc.

Implementing TaskHelp requires three coordinated steps.

1. Creating the TaskHelp database and topic documents.
2. Recording the Topic titles in your project plan in the project management application.
3. Using the TaskHelp option when first publishing the project. The TaskHelp links cannot be added to previously published assignments, they must be created during the initial import.

A sample TaskHelp database is provided with Project Gateway as part of the database installation. This database is titled "TaskHelp for User Manuals" and is designed to be used in conjunction with the "SAMPLEPG.MPX" demonstration file.

The examples in this chapter make use of these files.

In Project Gateway 6 and later, the repository can function as its own taskhelp database. Methodology documents become the taskhelp topics.

Creating A TaskHelp Database

This section explains how to create a database that can be used with the TaskHelp facility of the Create Project In Notes Database function. These instructions are written for Notes 4.6, but a similar process is followed when using the designer client in later versions.

To be used for TaskHelp, a database must have the following properties

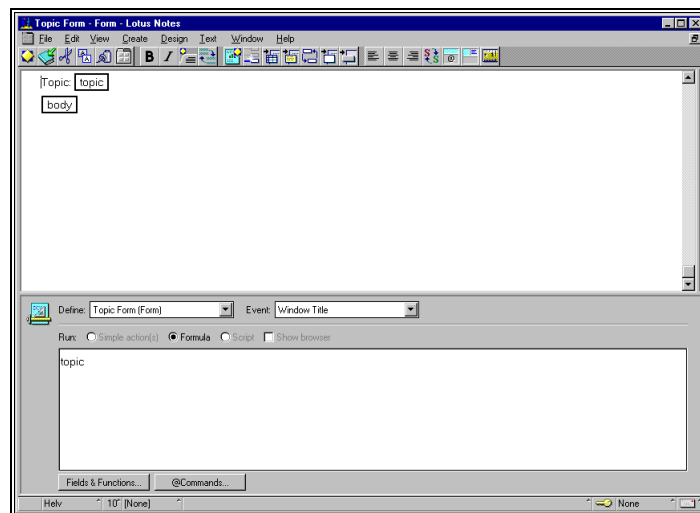
- It must be accessible on the Local system or Server during the publication or synchronization of the project.
- It must have a View that is sorted on a single primary key. The default name of this view is "Topics".

- It must have a Form defined which is used for documents shown in the view. The default name of the form is "Topic form". The form must have at least one field defined, the default name of that field is "topic" and it must be defined as a Text item.
- At least one document must be created using the Form. The default value of the "topic" field is "Overview".

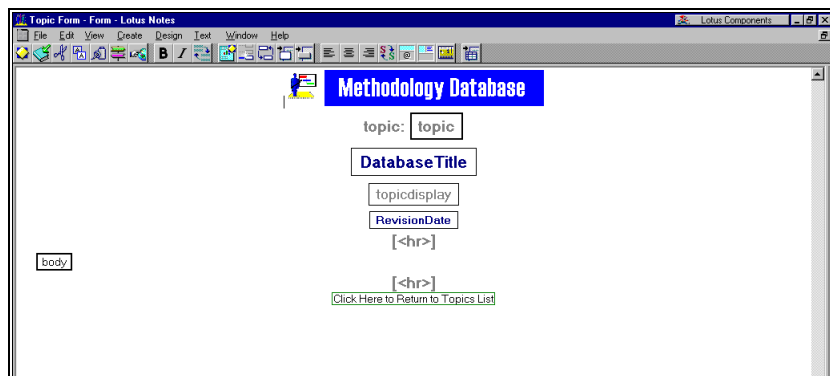
The names of the View, Form, Field, and the document key must be specified in the Create TaskHelp | Setup dialog at the time TaskHelp is created. The values set in this dialog are retained in the INI file so, once set, they will be preset for the next time.

Database Form

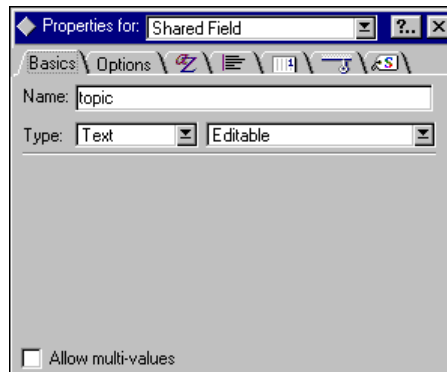
The following is a minimal TaskHelp database form:



A slightly fancier version is found in the sample database as follows.



The topic field is defined as a simple text field.

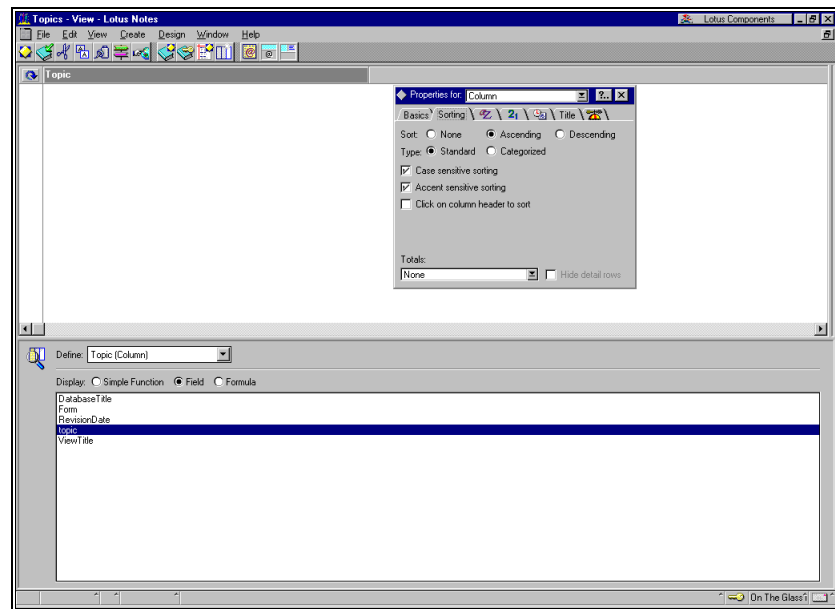


Only the topic field is required in this form, but you would usually have a rich text "body" field to provide a place for the actual information to be provided to users.

Save the form with the name "Topic Form". Any name can be used, but the same name must be specified in the Create TaskHelp/Setup dialog.

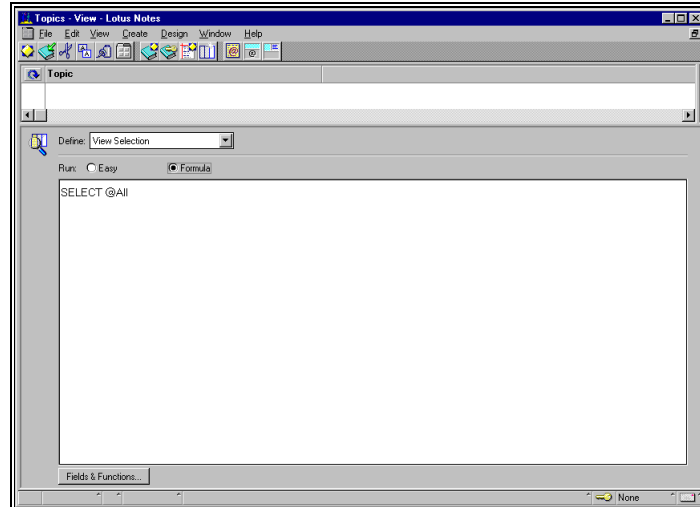
Database Topics View

There must be a view in the database to show the topic forms. This view would be defined as follows:



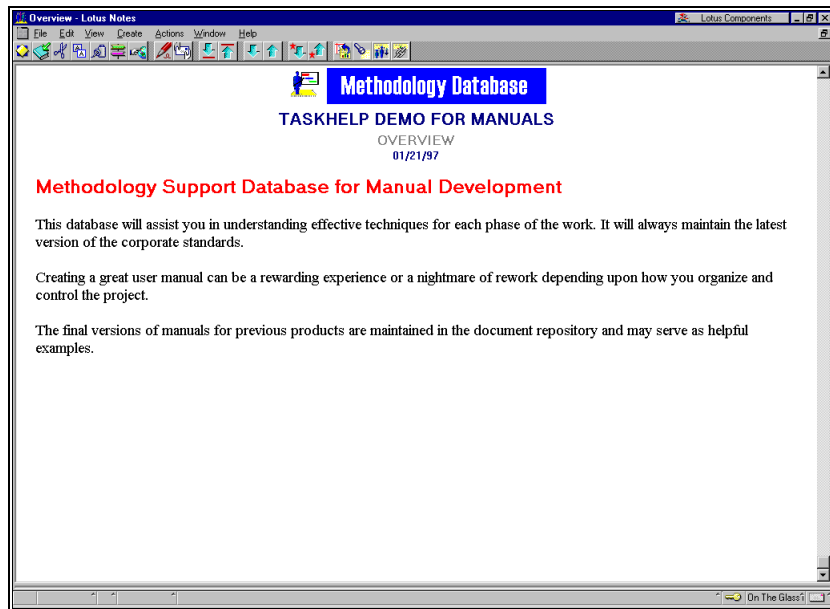
Note the first column must be the "topic" field and it must be sorted.

The Selection Formula should be set to include all documents in the view.



Save the new view with the name "Topics". Any name can be used, but the same name must be entered in the Create TaskHelp/Setup form.

Once these definitions are created, then at least one document must be created using the form.



Naturally, you will be creating a number of topic documents to be linked to your project assignments.

Placing Topic Keys on Tasks

You insert the Topic name used in the TaskHelp documents into the task records in your project planning system. When Project Gateway publishes your plan into the Repository Center database, it uses the topic name from the task record to setup a document link from the assignments documents for that task to the TaskHelp topic document for that topic.

You can use any convenient text field in your project management system to store the topic name. We suggest the following:

Microsoft Project: Text1

Primavera define a custom Activity item named "AUX1"

SureTrak - use activity id as code ACTID

Project Workbench - use guideline number or other deliverable field (AUX1,AUX2 during import)

The topic name in the project should be spelled exactly like the topic field in the TaskHelp document. To avoid mistakes, single word topic names are best.

Using URLs for TaskHelp

In place of a key string, you can specify an Internet Uniform Resource Locator in the form <http://xxxxxxx>.

E.g. <http://www.marinres.com>

When the TaskHelp processor sees a keyword of this form it automatically generates a corresponding URL hotlink in the assignment document instead of a Notes DocLink. Using this method you can directly tie assignments to any page on the net.

Note: If the Notes 4 option "Files, Tools, User Preferences, Basics... Make Internet URL" is selected, when one of these documents is opened by the Notes 4 client, the embedded URL will be automatically underlined and become a hotspot.

When the assignment document is accessed through a web browser, the "reference:" part will be made as a hypertext link to the specified URL.

The TaskHelp system supports a mix of doclink and URLink's within a single project. You must always specify a TaskHelp database even if all the TaskHelp keys are in URL format. Also, please note that no checking is done on the validity of the URL at the time that the project is imported. You must ensure that they are spelled correctly in the project plan.

Here is an example from the SAMPLEPG.MPX Microsoft Project file provided with Project Gateway. Note you must modify the view layout to display the Text1 column. Notice the that last two tasks Text1 values are URL's linking to the Marin Research Home Page.

Task Name	Duration	Text1	Start	Finish	Predecessors	Resource Names
1 Writing	77d					
2 Construct Design Templa	2d	styling	#####	#####		Laura
3 Write Detailed TOC	3d	organizing	#####	#####	2	Laura
4 Write Representative Ch	3d	writing	#####	#####	3	Laura
5 Make Style corrections	3d	styling	#####	#####	3,4	Date
6 Write Other Chapters	20d	writing	#####	#####	4,5	Laura
7 Write Appendices	10d	appendix	#####	#####	6	Laura
8 Implement Review Comm	30d	reviews	#####	#####	12	Laura
9 Index	2d	indexing	#####	#####	5,7,8	Date
10 Review and Publication	62d					
11 Circulate Draft	10d	managing reviews	#####	#####	6	Date[0.5]
12 Print 100 review copies	5d	printing review copies	#####	#####	11	Date[0.1]
13 Print	15d	printing final copies	#####	#####	9,8	Date[0.1]
14 Milestones	52d					
15 All components ready for	0d	http://www.marines.com	#####	#####	2,3,6,7	Debbie
16 Project complete	0d	http://www.marines.com	#####	#####	13	Debbie
17						
18						
19						
20						
21						

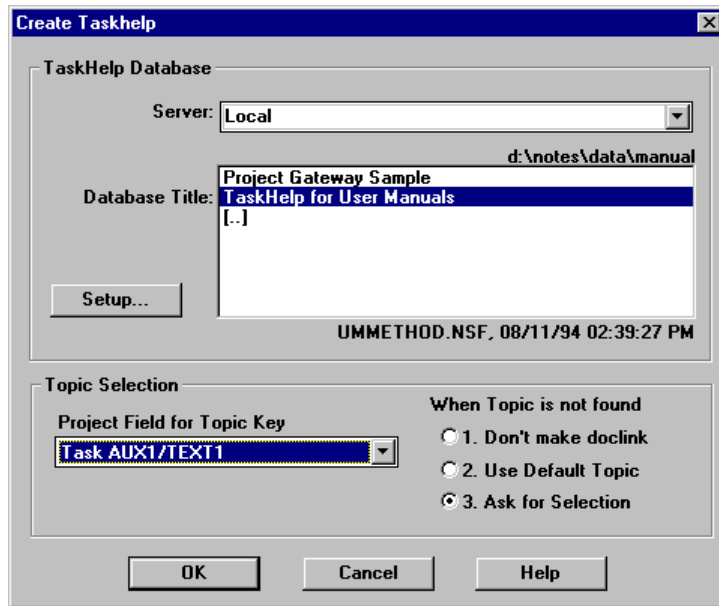
General Notes About TaskHelp

Notes doclinks are made using the *Replica ID* of the TaskHelp database. This means that, when the doclink is double-clicked in the assignment document, the Notes software will search the local system for a database replica. Then it will search the Server(s). When it cannot find a database with the Replica ID, it will complain.

If you want to embed multimedia materials in a TaskHelp document, you may want to use the option to automatically activate the objects when the doclink is selected.

Using the TaskHelp Option when Publishing a Project

When the **Include TaskHelp** checkbox option is checked on the Create Notes Database From Project or Add Project To Database dialog, the "Create TaskHelp" dialog will appear just after the project plan has been imported.



Selecting the TaskHelp Database

Select the server first, and then the database.

If you are using the repository as your taskhelp database, select it.

Topic Selection

Project Gateway implements TaskHelp by constructing doclinks between the assignment documents and the selected TaskHelp database. Since the TaskHelp database will contain information on several topics, it is necessary to identify which topic is to be connected to each assignment. The project manager should store the topic name in the project management plan for each task. Since there are several possible places to put this topic name, and several different brands of project management software, it is necessary to specify exactly where to find the topic name.

You do this by selecting an entry in the "Project Field for Topic Key" list box.

But what do you do when the project model has not been coded for TaskHelp, or for those tasks where nothing was specified? This is the purpose of the selections in the lower right of the dialog.

When Topic is Not Found

There are three possible actions from which you can select.

1. *Don't Make Doclink.* All assignments of tasks without a topic name will link to the "default" topic specified in the Setup dialog. This is a good choice when you have created a table of content documents in the TaskHelp database.
2. *Use Default Topic.* This causes all unspecified assignments to be linked to the default topic specified in the Setup dialog.
3. *Ask for Selection.* This causes the software to stop and ask you to select the topic for assignment where no topic name is provided in the project plan. It results in the display of the Select Topic Dialog for each case.

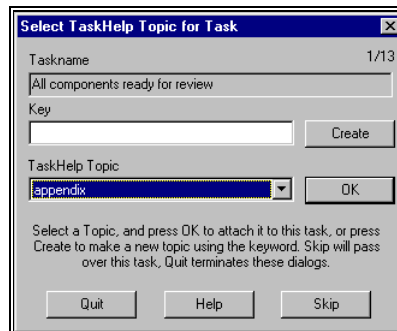
Exiting the Create TaskHelp Dialog

Press OK to implement TaskHelp using the database, setup, and connection parameters you have specified. When you do, the software will open the TaskHelp database and match assignments to topics. If "Ask for Selection" is used, the Select Topic dialog will appear several times. When all assignments have been matched, the "Proceed" confirmation dialog will be displayed. Press Yes to continue with database construction.

If you press *No* at the Proceed dialog, you will remain in the TaskHelp dialog. Press Cancel if you want to exit and stop database creation, or Press OK then Yes on the next Proceed dialog.

The Proceed option allows you to change the Setup, Project Field, or Action selection if you realize that you have made a wrong choice. The evidence of a wrong choice usually a seemingly endless sequence of Select Topic dialogs!

Select Topic Dialog



This dialog appears for each task that cannot be automatically matched to an appropriate TaskHelp topic when "Ask for Selection" is checked. In the upper right corner of the dialog is an indicator showing which instance of this dialog you are seeing and the total number of assignments that are to be manually matched. *Note: If you see something like 2/600 you might want to reconsider your intention to use the Ask For Selection feature by pressing Quit.*

The taskname appears at the top. The currently selected TaskHelp topic will appear on the third line next to the OK button. This field will be set to the most recently selected value. To change the topic, click on the list box arrowhead. The list of all topics in the selected TaskHelp database is shown. Move the cursor to the desired selection, then press OK.

If you decide not to offer TaskHelp on this task's assignments, press the Skip button.

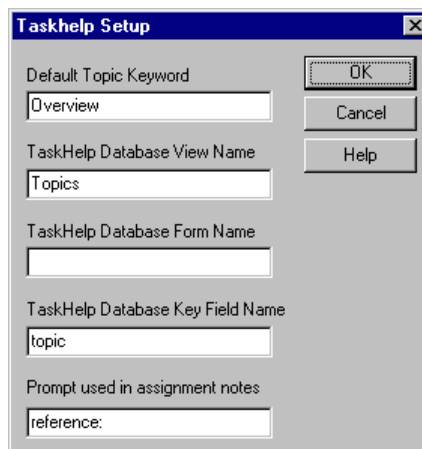
If you decide not to complete this process, press the Quit button. If you press Quit, not all assignments will have TaskHelp available.

Creating a new TaskHelp Topic

Sometimes you will realize that you really need a new topic for a particular task. To create this new topic, enter the topic name in the middle row and press the Create button. This will add a new document to the TaskHelp database using the default form name specified in the Setup dialog. At some later time you can open the TaskHelp database and add content to the topics you have created. *Note: You need at least editor access to the TaskHelp database to use this feature.*

Setup

The Setup button displays the TaskHelp Setup dialog.



Default Topic Keyword	Overview	OK
TaskHelp Database View Name	Topics	Cancel
TaskHelp Database Form Name		Help
TaskHelp Database Key Field Name	topic	
Prompt used in assignment notes	reference:	

The fields in this dialog are needed to allow Project Gateway to construct the linkages between the project database and the TaskHelp database. The default values provided are set for the sample. You will

need to change these if you have used different form, view or field names in your TaskHelp database.

Default Topic Keyword

This is the topic that will be attached to an assignment when no other topic is specified.

TaskHelp Database View Name

This is the name of the view in the TaskHelp database that is indexed by the topic keywords. In the sample provided, this view is called "topics", but you may have created a database with a different view.

If you are using the repository as your taskhelp database, the view is called "Topics" just as is the default.

TaskHelp Database Form Name

This is the name of a Form that must exist in the selected TaskHelp database. It will be used only when a new topic is created during the TaskHelp processing.

If you are using the repository as your taskhelp database, the form is called "Topic Form."

TaskHelp Database Key Field Name

This is the name of the Notes field that is found in each topic form in the selected TaskHelp database. This key field will be used to index the TaskHelp View selected above.

If you are using the repository as your taskhelp database, the fieldname is called "Topic".

Prompt Used in Assignment Notes

This is the text of a word or short phrase that will be placed in the final assignment document to identify the TaskHelp doclink. The default for this is "reference:" Any text can be used.

Taskhelp with Schedule Templates

The task help topic is selected in the Edit Template Task form using the "Methodology" droplist. When the schedule is generated, these topics will be linked to the generated assignments.

If the schedule template is exported to Microsoft Project, the methodology keywords will be placed in "Text1". Thus, when reimporting the revised plan, you should select Text1 as the keyword field, and the repository as the "taskhelp" database.