



Customization Guide for ToolBook Developers

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Introduction

You can share templates and custom objects that you create in ToolBook Instructor with content developers using ToolBook Assistant as well as other authors who use Instructor. Authors on your team can use the custom objects, catalogs, and templates that you build in Instructor to create more robust applications than they would otherwise be able to produce.

By taking advantage of the techniques described in this document, you'll be able to deliver custom resources and tools to other ToolBook users and enhance their authoring environment. Your resources can make the development of content in Assistant faster and more efficient. Also included is a description of how to deliver online documentation that will explain how to use your custom resources in the ToolBook environment.

Creating Templates

So that you can provide a consistent feature set and save time while building applications, Instructor and Assistant provide templates—prebuilt books that include page organization, graphic theme, interactive objects, and navigation controls. A template is ready for the addition of content.

By delivering a template created in Instructor to Assistant authors or other Instructor authors, you allow them to take advantage of any objects with behavior you've assigned through the Actions Editor.

There are several ways to develop a new template:

- Open a blank book, add your own content and graphics, and then save the book as a template. You can open a blank book from the Quick Start tab of the ToolBook Instructor Startup dialog box and the New Book dialog box available from the File menu.
- Open an existing template, modify it by adding or deleting objects and pages, and then save the book as a new template. You will find the templates that Instructor provides on the Templates tab of the ToolBook Instructor Startup dialog box that appears when you open Instructor and the New Book dialog box.
- Create a book using the ToolBook Instructor Book Specialist and then save the book as a template. Following the prompts in the Book Specialist, you provide responses that Instructor uses to build a book to your specifications. After clicking the Build button in the Book Specialist, you can add objects or make modifications before you save the book as a template. You can open the Book Specialist (or the Quick Specialist, a streamlined version of the Book Specialist) from the Specialists tab of the ToolBook Instructor Startup dialog box and the New Book dialog box.

? **To save a book as a template:**

1. From the File menu, choose Save As Template.
2. Enter the template title, description, file name, and directory, and then click OK.

After developing a template, you may want to provide guidance about the template to the course authors who will use the template to create applications. To describe the purpose of a page in a template or guidelines for its use, you can write descriptive text that will appear in the ToolBook Coach when the page is selected. For more information about assigning your own descriptive text, see "Adding Coach Text to Objects" later in this document.

Preparing Templates for Internet Delivery

If you are developing a template for learning applications that will be distributed over the Internet, include graphics that work well with the type of Internet connection that the learners are likely to have. A template for a book that will be distributed over the Internet to users with a high-bandwidth connection can include full-size backdrops and graphics with a large number of colors. When the typical learner has a low-bandwidth connection, use a tiled bitmap for the backdrop and limit the color

depth of your graphics to 256 colors to reduce the size and download time for the exported HTML files.

The title that you assign to a template gives authors a clue about the delivery method for the template. When you prepare a template that is intended for delivery over the Internet via a high-bandwidth connection, add these words at the end of your title: (HTML High Bandwidth). Set the title by choosing Properties for Book from the Object menu, and enter a name for the template on the General tab in the Book title box. Use the word (HTML) after the title of any templates which are intended for delivery over the Internet via a low-bandwidth connection.

Delivering Custom Templates

If the file size of a template is small, you can send it to other ToolBook authors as an e-mail attachment. Copy larger files to a shared network drive or an FTP site.

Authors who receive a template file should place the file in the Template directory of the ToolBook Assistant program directory. That way, when they start Assistant or choose New from the File menu, the custom template you've created appears on the Templates tab of the ToolBook Assistant Startup dialog box and the New Book dialog box. The Templates tab displays a short description of each template to help authors to choose from among the offerings. Text describing your template will appear on this tab if you enter a book description on the General tab of the Properties for Book dialog box.

Customizing the Catalog

Presenting authors with a category of objects dedicated to a project or a specific corporate look can efficiently group together the components for creating new content. This section describes how to create a new category or catalog that you can deliver to other ToolBook authors.

There are many ways to modify the categories shown in the Instructor Catalog.

? To modify the Instructor Catalog:

- Right-click a category in the catalog and choose **Customize Catalog** from the menu.

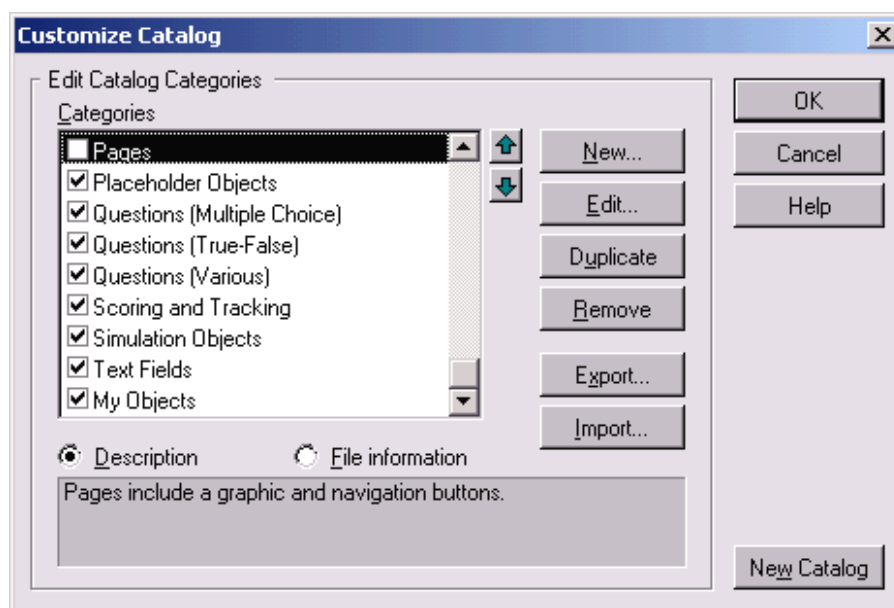


Figure 1: Customize Catalog dialog box

Creating and Exporting a Category

One way to distribute custom objects to other ToolBook authors is to add them to a new category in the catalog. By exporting a category and sending it to other users, anyone can open the category by using the Import button shown in Figure 1. An example of a new category with custom objects is illustrated in Figure 2.



Figure 2: Custom category named Corporate Objects

? To create a new category in the catalog:

1. Right-click a category in the catalog.
2. From the shortcut menu choose **Customize Catalog**.
3. Click **New**.
4. Enter a name for the category and other appropriate information.

After you add a category, the next step is to place objects in this category. See the section titled "Adding Customized Objects to the Catalog" for detailed information.

? To export a category from the catalog:

1. Right-click a category in the catalog.
2. From the shortcut menu choose **Customize Catalog**.
3. Click **Export**.
4. Enter a name and location for this exported file (do not export to your existing Catalog folder).

Before sending the exported category to ToolBook authors, you may want to reduce the size of the file by creating a zip file for the exported .wbk file. The people who receive your exported category can save the file in any location. When a ToolBook author clicks the Import button shown in Figure 1 to locate your category file, it will be automatically installed in the proper location.

You can deliver an exported category file by posting the file on a shared network drive or an FTP site, or by placing the file on a CD.

Building a New Catalog

A new catalog can contain any categories and objects you want. Providing ToolBook authors with a custom catalog is a handy way to focus their attention on selected categories, such as the ones needed for a particular project.

Authors choose which catalog to use by clicking the Object menu and choosing Properties for Book.

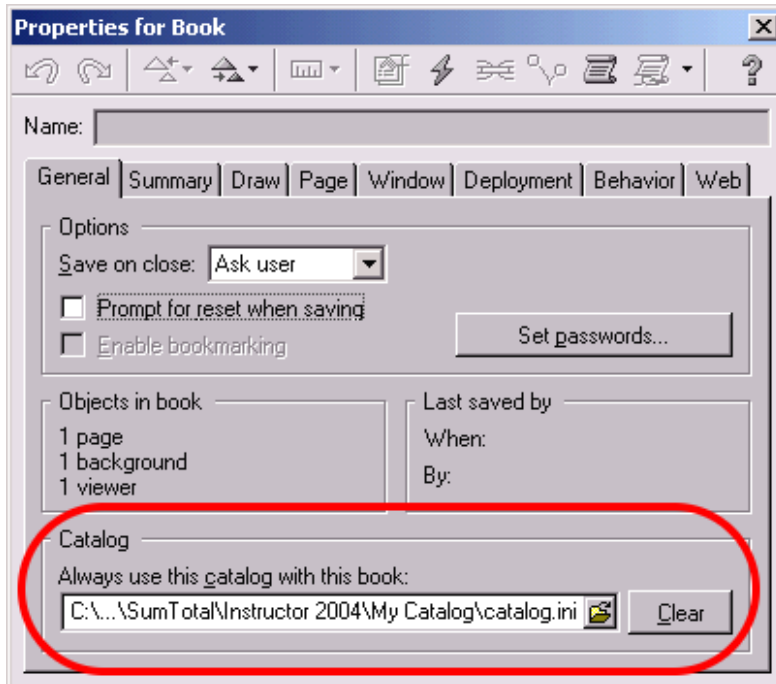



Figure 3: Catalog selection option

If you deliver a custom catalog to ToolBook authors, be sure to tell them how to choose which catalog to use as shown in Figure 3.

? **To create a new blank catalog:**

1. Right-click a category in the catalog.
2. From the shortcut menu choose **Customize Catalog**.
3. Click 
4. Enter the location for the new catalog (save it in a different folder from the Instructor Catalog).
5. Add categories and objects to the new catalog.

Before delivering a custom catalog to other ToolBook authors, create a .zip file that contains the folder with your custom catalog to reduce the file size. The .zip file can then be extracted on a local drive or a shared network location. Just make sure to tell the recipients of your custom catalog how to locate and access your catalog file.

Adding Custom Objects to the Catalog

A custom object can be as simple as a button in a corporate color. You can add any type of object that you have modified to the Instructor Catalog to make it easy to reuse.

Often a custom object that you want to share with others will have some type of functionality that is not already available in the Instructor Catalog. You can use the Actions Editor to assign behavior to a button, for example, and then add this button to the Instructor Catalog. Another way to create a custom object is to group together several component objects, with behavior assigned to the group.

? **To add an object to the catalog:**

1. Select the object you want to add.
2. Right-click a category in the catalog.
3. From the shortcut menu choose **Add Selected Object to Catalog**.

Example of a Customized Object

One way to create a custom object is to start with an existing object from the Instructor Catalog. In the following example, new behavior is added to the answer field for a fill-in-the-blank question. Entering an incorrect response to the question causes this field to turn red.

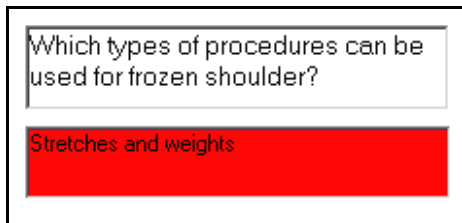
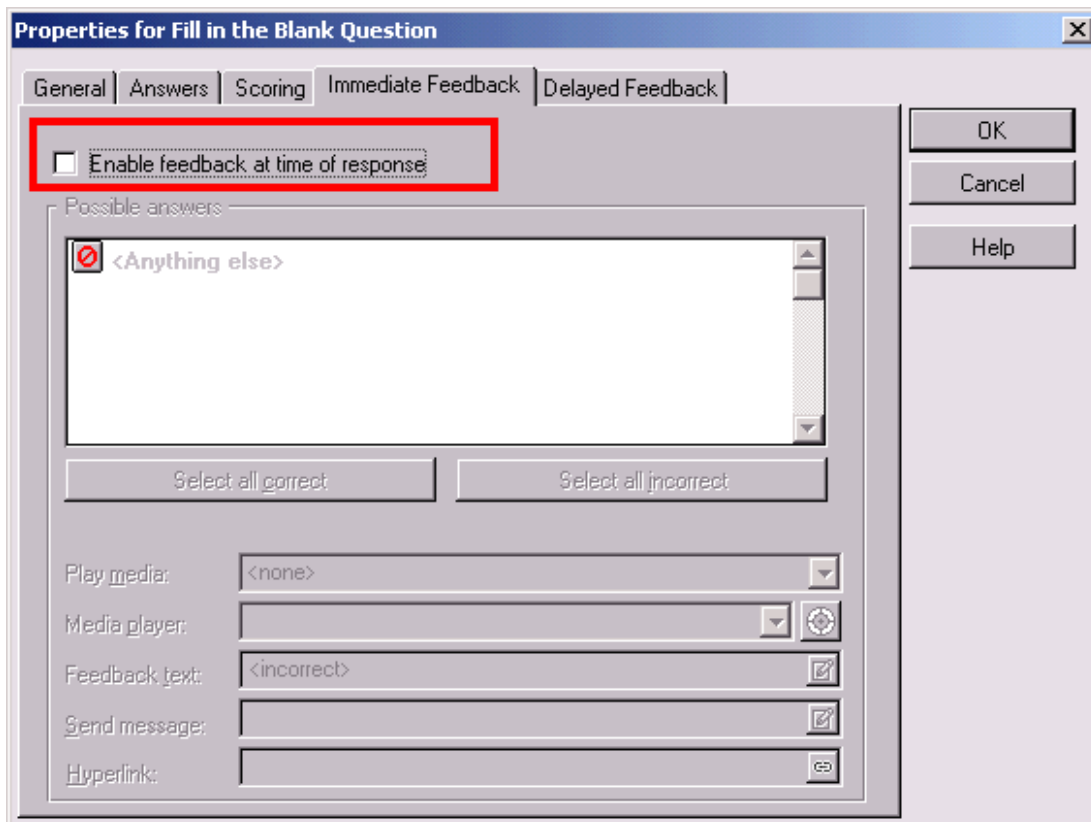


Figure 4: Answer field turns red when response is incorrect

This red indicator for an incorrect answer replaces the default setting for immediate feedback. There are just a few steps necessary to modify the default behavior. First, open the properties for the fill-in-the-blank question and clear the check box shown below: “Enable feedback at time of response.”



Next, assign the color red to the answer field if the fill-in-the-blank question is not answered correctly. Select the answer field, open the Actions Editor, and choose the “On question answered” event shown in Figure 5.

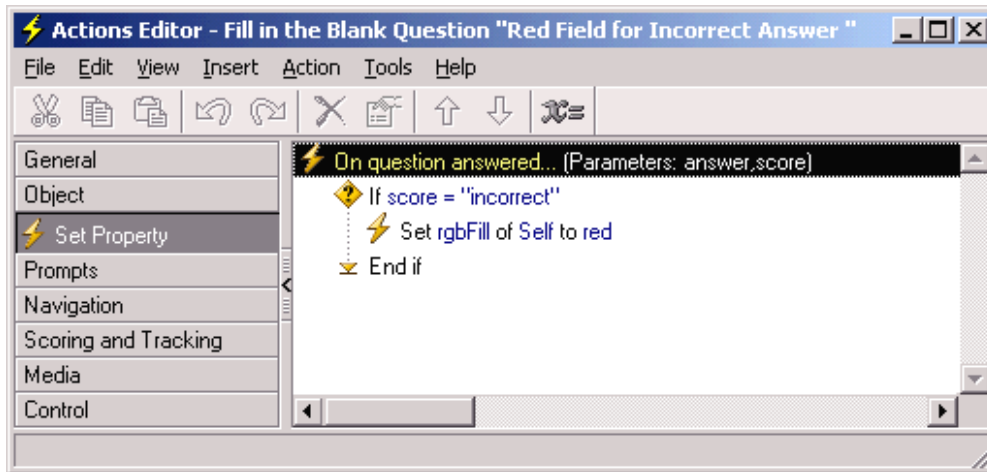


Figure 5: Color of the answer field changes if a user enters the wrong answer

The action sequence shown in Figure 5 causes the answer field to turn red immediately after an incorrect answer is entered (when the user presses the Enter key, Tab key, or moves the focus to another object). To return this red field to the original white color each time the question is reset, choose the “On reset” event and set the color as illustrated in Figure 6.

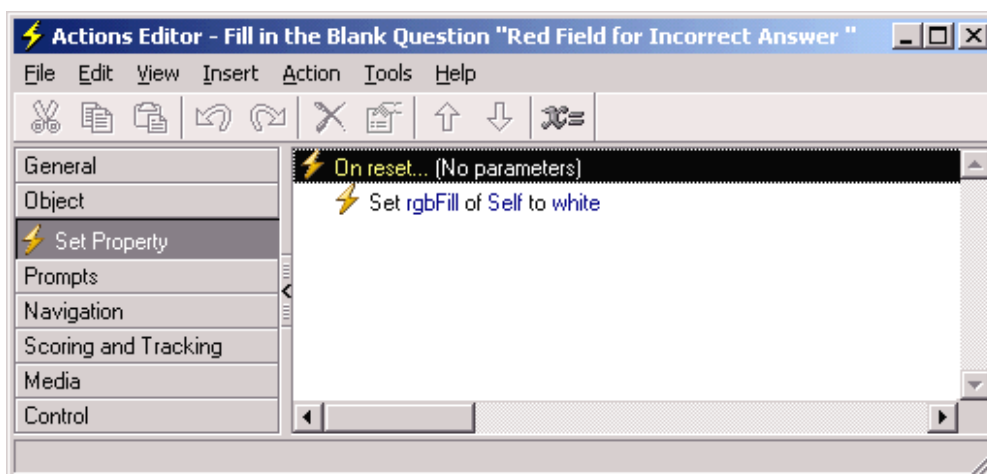


Figure 6: Fill color of the answer field turns white when question is reset

Saving the actions shown above will complete the task of modifying the fill-in-the-blank question. Now it could be added to a category in any catalog along with an explanation of how to use it. A convenient way to provide a description of an object is to assign text that will appear in the Coach window, as described in the next section.

Adding Coach Text to Objects

The ToolBook Coach is a convenient reference tool that provides context-sensitive information as you're authoring. For any object you select, the Coach displays guidance by providing a description and step-by-step procedures. It is included with Instructor and Assistant.

? **To open the Coach:**

- Click the Help menu and choose Coach.

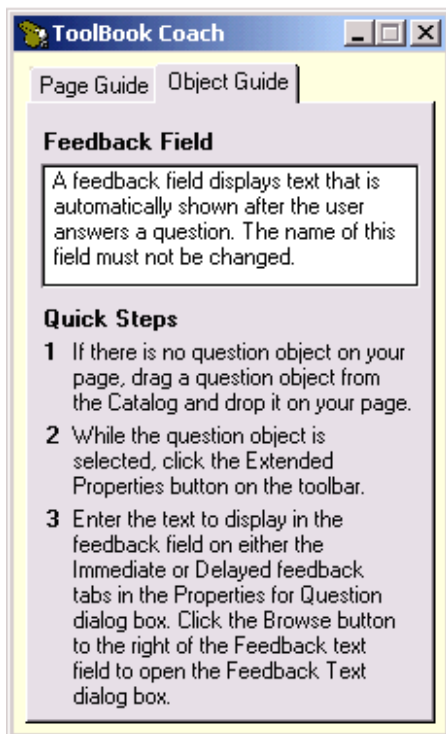


Figure 7: Coach shows a description and steps

You can write your own Coach text to accompany custom catalog objects. This custom Coach text will help Assistant authors to include the objects that you create using Instructor in their own applications. In addition, by following the techniques we'll explore in this section, you can change the existing Coach text for any catalog object.

Using the Property Browser in Instructor, you can assign text that will appear in both the Coach and in the pop-up description box that appears when the user points at an object in the catalog.

? **To assign descriptive Coach text to a custom object:**

1. Select the object to which you want to assign Coach text.
2. From the View menu, point to Browsers, and then choose Property.
3. In the Property Browser click the User tab.
4. In the Name column look for the INFO_Description property. Do one of the following:
 - If the INFO_Description property exists, double-click the name of this property to open the Edit Property dialog box. Enter the description for this object as it will appear in the Coach, and then click OK. Note that changing the value for the INFO_Description property will overwrite the existing Coach text for this individual object. If you add this object to a catalog, your Coach text will appear whenever the object is selected.
 - If the property does not exist, scroll to the bottom of the list. Double-click the <Add New> link. Under Property name, type *INFO_Description*. Under Property value, enter your Coach description for this object.
5. Close the Property Browser.
6. To view the description you wrote, be sure the appropriate object is selected and look in the Coach window.

Quick Steps appear below the description of an object in the Coach. Using a procedure like the one above, you can assign text for either the INFO_BasicStepsText or INFO_AdvancedStepsText properties in the Property Browser. The names of these user properties refer to Basic mode and Advanced mode—the two authoring levels in Assistant. When Assistant is open in Basic mode, the steps assigned to the INFO_BasicStepsText property appear in the Coach. In Advanced mode, the steps assigned to the INFO_AdvancedStepsText property appear in the Coach.

Creating New Options for the Quick Specialist

If an author plans to build a book with multiple sections of repeated pages, using one of the Book Specialists can be faster than starting a book from a template. Book Specialists are a type of wizard that prompts an author for information. ToolBook uses this input to build a book based on the author's specifications.

The Quick Specialist is one of the Book Specialists available when you open ToolBook. The following information about creating options for Quick Specialist also applies to the Full Specialist and Lesson Specialist also.

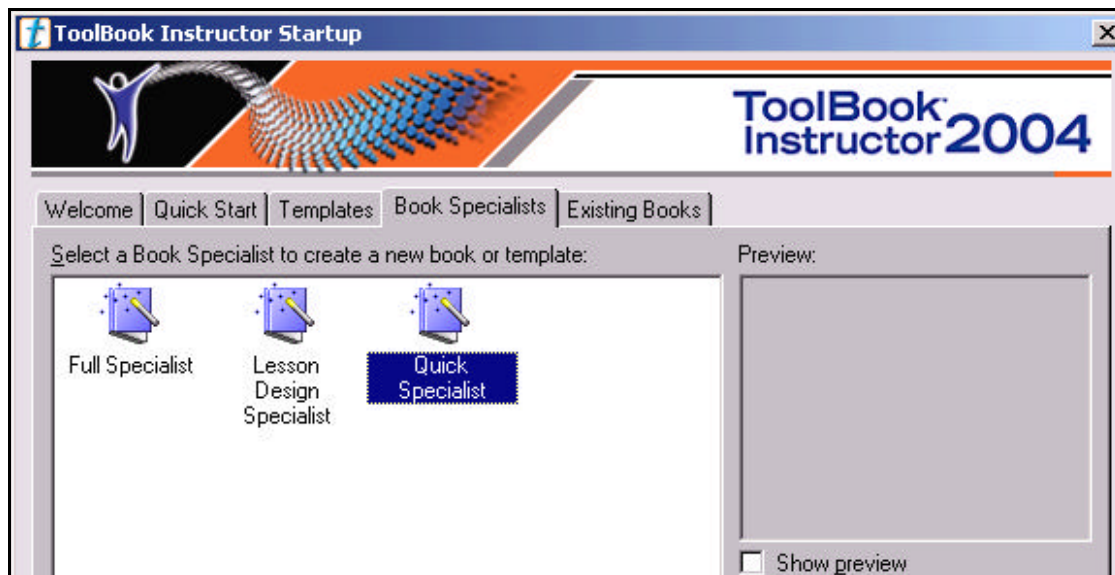


Figure 8: Quick Specialist provides choices for building a new book

In this section, you will learn how to make new pages available through the Quick Specialist to allow ToolBook authors to access the custom page designs that you have created. After you design custom pages in Instructor and deliver them to other ToolBook authors, these pages are visible when using the Quick Specialist, as shown in Figure 7.

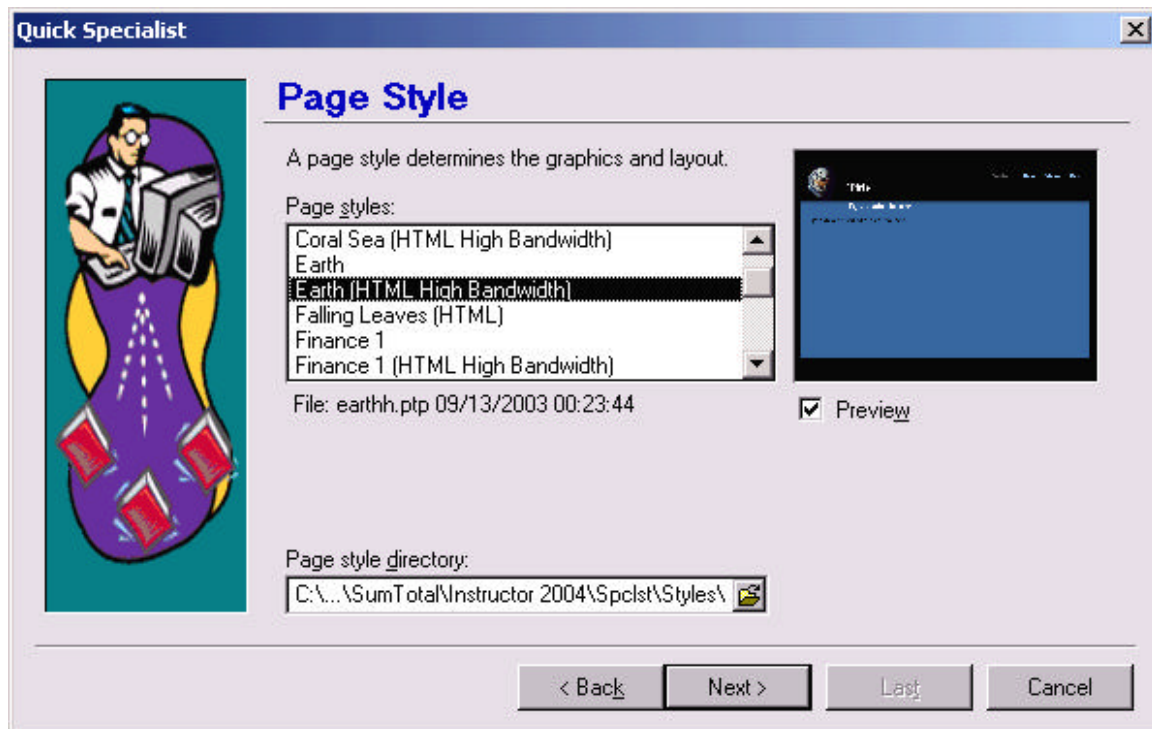


Figure 9: List of available page styles

To make your own custom pages available in the Quick Specialist, first build a new page style book in ToolBook. A page style book contains uniquely named pages that you design; it is the source book from which ToolBook authors will choose individual pages in the Quick Specialist. On the pages of this book you can include objects from the catalog, navigation controls, backdrop graphics and any features that you want authors to have at the ready.

When creating a new page style book:

- Create a new background for each page.
- Assign each background a unique name by selecting Properties for Background from the Object menu and entering a name in the Name field.
- Each page must have the same name as its background. Assign a page name by selecting Properties for Page from the Object menu and entering a name in the Name field.
- Save the file with a .ptp file extension.

When you have finished designing your book of custom pages, assign a title for your page style that will appear in the Quick Specialist on the Page Style page.

? **To enter a title for a page style that will appear in the Book Specialist:**

1. From the View menu, point to Browsers, and then choose Property.
2. In the Property Browser, select Current Book.
3. Click the User tab. In the Name list, look for the INFO_Title property. Do one of the following:
 - If the INFO_Title property appears, double-click the property name. Enter two or three words to describe this page style book.
 - If the property does not exist, scroll to the bottom of the list and double-click the <Add New> link. Under Property name, type *INFO_Title*. Under Property value, enter a title of two or three words that describe this page style book.

4. Click OK and then close the Property Browser.

When you choose the HTML option on the Distribution Method page of the Quick Specialist, you'll notice that the page style titles that appear on the Page Style page are followed by (Internet) or (Internet High Quality). These page styles are drawn from source books that are optimized for delivery over the Internet via a low-bandwidth connection or high-bandwidth connection, respectively. If you develop page styles for distribution over the Internet, append (Internet) or (Internet High Quality) to the page style title you enter as a value for the Info_Title property.

In order for the Book Specialist to recognize your page style book and display the name you've entered, save this ToolBook file with a .ptp file extension and place the book in the Spclst\Styles directory of the ToolBook Instructor program directory.

Creating a New Outline File

After you select a page style in the Quick Specialist, the next step is to choose an outline for the types of pages that will appear in the book that will be created by the Quick Specialist. You can select one of the existing outlines or choose the Custom link at the end of the Defined book outlines list to choose pages. If you want to provide others with a different outline, you can create a new outline file.

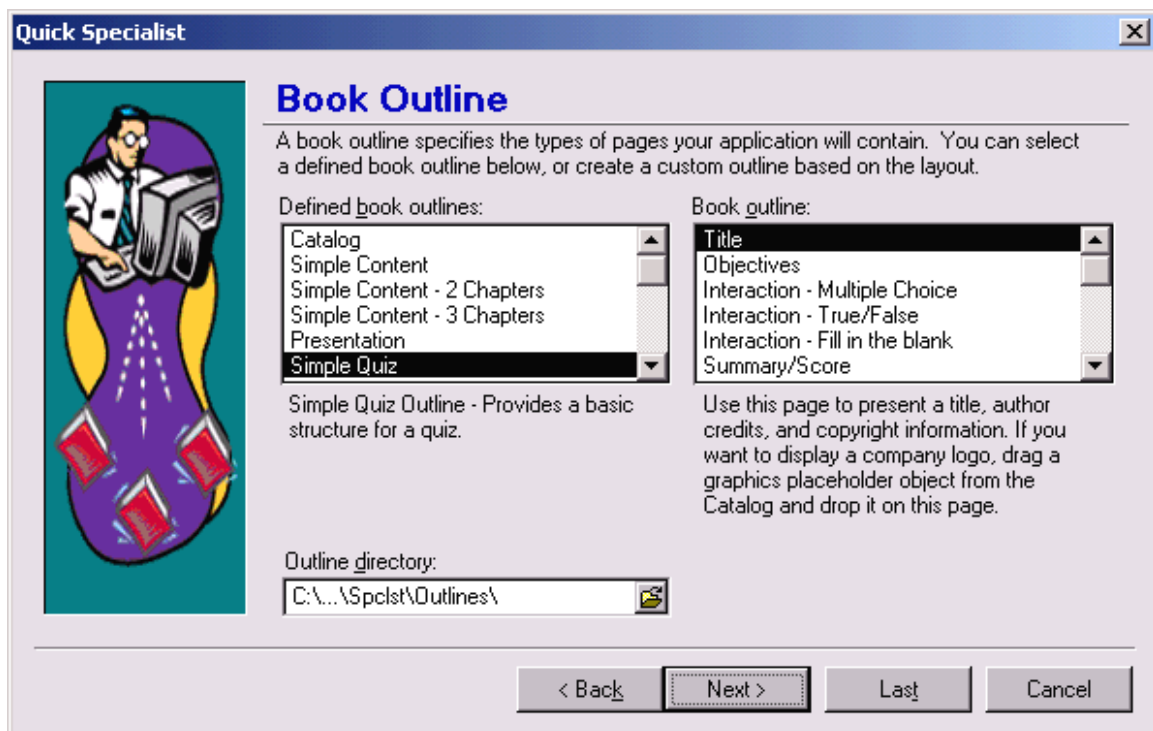


Figure 10: A book outline displays the names of individual pages

An outline file allows the Quick Specialist to recognize the individual pages in your page style book. The names of these pages appear in the Book Outline list shown in Figure 8.

You can create an outline file in any text editor that can save a file in a simple text format, such as WordPad. An outline file is a text file saved with an .aof extension as shown in Figure 9.

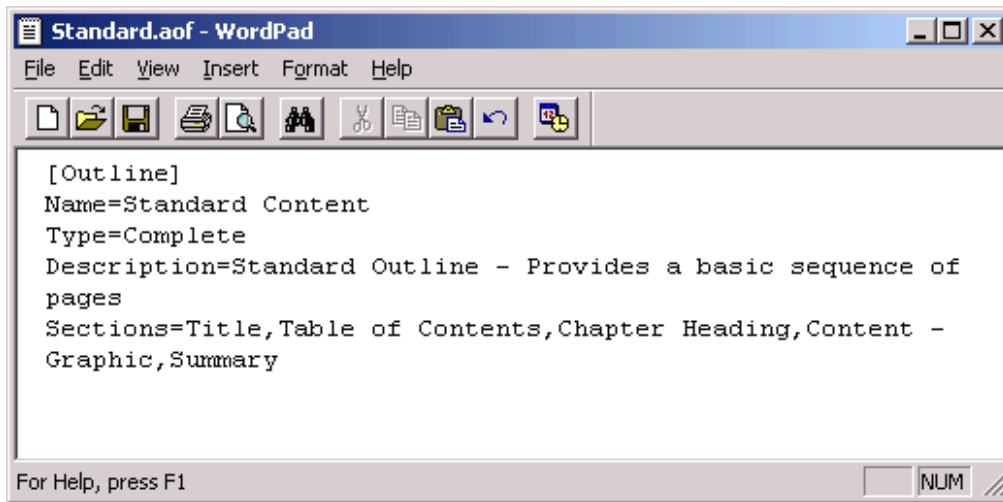


Figure 11: Example of an AOF file

A fast way to create your own outline is to open an existing .aof file from the \Spclst\Outlines folder of your Instructor program directory and save the file with a different name. Replace the text that appears to the right of an equal sign (=) with your own information, as described in the table below.

Item in outline file	Description
Name	The name you enter appears on the Book Outline page under Defined book outlines (see Figure 8).
Type	Enter the word <i>Complete</i> .
Description	The description appears on the Book Outline page when this outline is selected.
Sections	Enter the name of each background in your page style book, with each name separated by a comma.

The outline that appears in the Quick Specialist can contain repeating sets of pages, illustrated in Figure 6. If you want to include repeating sets of pages, in the outline file designate the number of times the section should be repeated. For example, the following line copies a page named Interaction ten times:

```
Sections=Introduction,[repeat 10 times],Interaction,[end repeat section],Summary
```

A section that is repeated will be displayed to the user in blue text as shown in Figure 10.

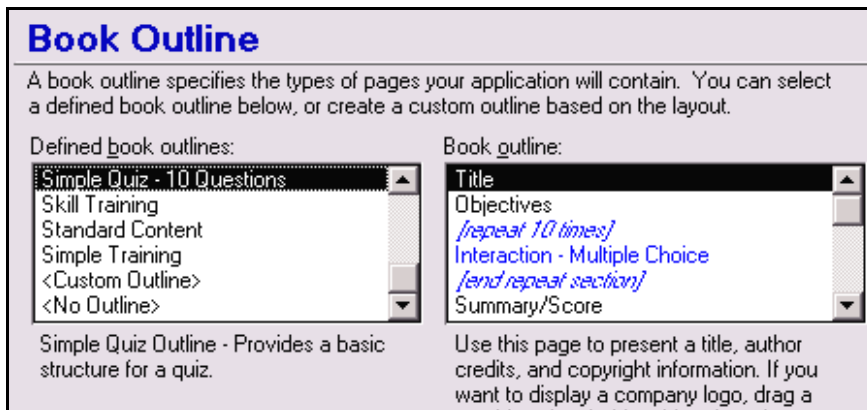


Figure 12: Book outline with repeated set of pages shown in blue text

A book outline file allows the Quick Specialist to recognize the individual pages in a page style file. You can take a look at a custom page style file with a .ptp extension and an outline file by following the steps in the next section.

Installing a Sample Page Style Book and Outline

As an example of using custom styles in the Quick Specialist, you can download a .zip file that contains a custom page style file and outline file from this location:

http://www.toolbook.com/documents/ToolBookSP2_800x600i.zip

After you download the .zip file, extract the contents and copy the files to your ToolBook folders which store these types of files. Place the file named *ToolBook SP2 800 x 600i.ptp* in this ToolBook folder:

```
C:\Program Files\SumTotal\Instructor 2004\Spclst\Styles
```

Place the file named *SP2.aol* file from the downloaded .zip file in this folder:

```
C:\Program Files\SumTotal\Instructor 2004\Spclst\Outlines
```

? To view the example page style and outline:

1. Open ToolBook Instructor.
2. Click the Quick Start tab in the Startup dialog box.
3. Double-click the Quick Specialist icon.
4. When the Quick Specialist opens, click **Next**.
5. Enter information in the General Information fields, and then click **Next**.
6. In the list of page styles, choose *ToolBook Sp2 800x600 (HTML)*.
7. Click **Next**.
8. Click **Yes** when prompted to confirm the deployment method, and then click **Next**.
9. Click the **Build Your Template** button.