Printed Documentation

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Whirl the World - Employee Care 3

"Whirl the World" is a fictional company created to assist authors using Adobe® RoboHelp®. It is for educational use only.
The content in this sample project should not be construed as being true or accurate with any real world application or scenario. Any names or other information appearing in this project are purely coincidental and do not refer to actual entities, living or dead.



These pages are designed to provide easy access to the Whirl the World Employee Care 3 knowledge base. The areas covered are shown below and also in the Table of Contents alongside.

This table has been created using the No Border table. In the source file you can see the table grid lines but in the output you will only see the content not excluded by the build expression. It is a useful way of adding information for your own use. Here the features used have been listed. Press CTRL W and you will see this information and both columns below, select a Conditional Build Tag Expression that includes Not Tip to see the topic as a user would.

Policies and Procedures

Attendance

Company Sick Pay

Dependants Leave

Disciplinary Procedure

Equal Opportunities

Flexible Working

Grievances

Harassment

Health and Safety

Company Benefits

Healthcare

Company Cars

Travel

These topics are also deployed to an eBook output.

Bookings

Expenses

All pages have the section below. This information has been set up as a snippet to allow it to be quickly changed across all topics. By using conditional build tags, in the output it only shows the details for the geographic location of the user. The email address has been defined as a variable within the snippet. That would be useful if you needed the email address to appear elsewhere in the topics. Here it is just shown as a concept.

Contacting Human Resources

Human Resources can be contacted at the following locations:

Mail

First Avenue, Anytown, U.S.A.

Email

hr.usa@whirltheworld.com

For Authors

About Employee Care 3

Reading this topic is key to understanding how to use this sample project.

This sample project updates the version that shipped with Adobe RoboHelp 11 and is designed to show some of the new features in Adobe RoboHelp (2015 release).

- About RoboHelp (2015 release) describes what is new in RoboHelp (2015 release).
- About RoboHelp 11 is for those upgrading from earlier versions.
- The topics in the Author Info folders include information to help you understand the project.
- The Employee Care SSLs (Single Source Layouts) topic explains the pre-configured outputs, how they have been set up and how to create the different types of help.
- There is a section describing various features of RoboHelp, old and new. See Explore Feature and Workflow Topics.
- If you prefer to read a printed version of all the topics in the Author_Info folder, a Printed Documentation layout has been set up for the purpose. Just generate the document from there.

Press Ctrl and click to open the links above topics in this Design Editor pod.

The scenario

The creation of Employee Care 3 can be likened to updating the help for a new release of software or a knowledge base, it takes what was there before and updates the content.

The Employee Care project is the knowledge base of the fictional US company, Whirl the World, a global travel company with subsidiaries in Canada and the UK.

- In Employee Care 1 for RoboHelp 10, the project used Content Categories so that users in different countries could select from all the content or just from the topics relevant to their country.
- In Employee Care 2 for RoboHelp 11, Whirl the World decided to only provide online help for US users with special topics for users in other countries being produced in printed format.
- In Employee Care 3 for RoboHelp (2015 Version) , Whirl the Word have backtracked and decided that online content is required specific to a user's country. However, instead of providing this using Content Categories they want to create one output and allow users to apply the new Dynamic Content Filtering.

Many of the topics are substantially the same for employees in each country. However, there are some differences because of the way the company operates in each country and because of legislation. Sick Pay in the UK is dealt with in a different way because of UK legislation so the Company Sick Pay topic has different content for employees in the UK. Also UK employees may be eligible for a company car under their employment contract and that topic will only be available to UK users.

The tip image

Tips and explanations will be indicated with the tip image shown above.

- Most source topics will display cross hatching behind the text showing that a conditional build tag has been applied so that the tip does not appear in the output.

- Some of the tips need to be in the output. They will be "hidden" by using DHTML Dropdowns. Only the icon will show in the output to minimize distraction and you will need to click the icon to reveal the information. In the Design Editor, double click the icon to see the content.

About Adobe RoboHelp (2015 release)

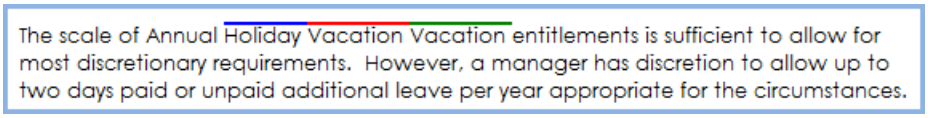
The Adobe RoboHelp (2015 release) features are summarized in this sample project.

The Adobe RoboHelp (2015 release) main product page on Adobe's site and the Starter page when you open Adobe RoboHelp (2015 release) will take you to the following important resources:



Feature	Description
Enable end-users to quickly find relevant content	
Dynamic Content Filtering	Responsive layouts allow your content to be viewed with ease on desktops, tablets and smartphones. The appearance adapts to suit the device, RoboHelp takes care of that. Now RoboHelp (2015 release) adds something extra for your end-users, dynamic content filtering. • You provide the filter options to suit the requirement be that geographical regions, trade specialization, equipment type and so on.

	• The end-user chooses what they want to see rather than having to wade through everything you have provided. Whatever options the end-user chooses, the results come from one output. Authors who have used Content Categories with its output for each category will welcome this reduced footprint. Authors can quickly see how the options will work by using the Tagged Output View. You can set this up so that the user can select just one of the options or so that they can multi-pick. If you have used Content Categories (Dynamic User-Centric Content) in an earlier version of RoboHelp you will welcome the greater options Dynamic Content Filtering brings, so will your end-users. Dynamic Content Filtering comes with URL support which means that you can embed the filters within a URL and then use that URL in CSH calls giving more targeted contextual help. How this is all done is described in Dynamic Content Filtering.
Make your content mobile ready with the best-in-class publishing	
New HTML5 layout	RoboHelp (2015 release) ships with brand new layouts that greatly enhance the end-user experience. In the new layout you can: • Configure the search results to appear in the content or topic panes • Use the Comments field in the Status tab of Topic Properties for Descriptions that appear in the search instead of the first few lines of the topic. • Show breadcrumbs and search context in the search results. • Easily show/hide widgets such as index/glossary/TOC and so on. • Add social widgets out of the box so that pages can be shared on Facebook or Twitter. • Choose to hide the branding bar on smartphones to give more screen space. • Convert to right to left layout with the click of a button. Note that you cannot create topics using right to left languages in RoboHelp. The content can be created by translation agencies or Technical Communication Suite users can link to FrameMaker content. The new layout remembers the state of the books in the TOC and two or more books can be expanded.
Embed custom fonts in ePub	In RoboHelp (2015 release) you can embed a custom font in the ePub output, which ensures that users see high quality typography irrespective of whether they have the font on their systems or not. You need to have the distribution rights for the embedded fonts.
Faster and better HTML5 output	The Responsive HTML5 outputs are faster and better than ever before. The HTML5 code for the desktop view was made cleaner in RoboHelp 11 to enable the pages to load faster with a 50% reduction in loading time and take less space with savings of ~20KB per topic. This improvement has now been extended to work with all devices.

Create apps for iOS, Android and Windows platforms	
Mobile app output support	Mobile app generation is greatly simplified in RoboHelp (2015 release) . You can generate mobile apps for your content for iOS and Android platforms in a seamless one click generation process. The workflow uses an integration with PhoneGap. If you need to generate multiple apps, you will need to purchase a Phonegap license separately.
A new ribbon based user interface and productivity enhancements	
Ribbon based UI	Now work in a modern Ribbon Based interface where all menu items are logically grouped in various tabs according to common workflows allowing easy accessibility and more productivity. Some tabs are context sensitive; the Table tab for example only appears when you are editing a table. Customize the interface by choosing one of four themes and select either colored or greyscale icons. Boost your productivity with the customizable quick access toolbar, contextual tabs, and much more. If your screen size is limited in depth you can set the ribbon to auto-hide when not needed.
Enhanced find and replace	Now work much faster with the revamped Find & Replace functionality. You now use the same pod whether you want to look in a single topic or search through all your topics. You can search in backward or forward direction and set the search scope to "current project", "current window", "specific folder", or all opened files. Multi line search is also supported and you can search in the TOC and Index pods. You can zip through search results to easily edit the topic by double clicking any line.
Named condition build expressions	If you work with complex build expressions you will know how difficult it can be to remember the purpose of each one. Now you can name the expressions making choosing the right one so much simpler. It eliminates the hassle of remembering and deciphering the logic every time you want to use an expression. You can see this in the Dynamic Content Filtering topic.
Enhanced conditional tag indicators	With enhanced conditional tags indicators in Adobe RoboHelp (2015 release) , the readability of the content is not compromised even if multiple tags are applied on any given content. Furthermore, it is easy to figure out which tags are applied and where conditions change within a topic. Cross hatching broke legibility, overlining means you can still read the content. 
Remember project state	In Adobe RoboHelp (2015 release) you no longer need to remember which topics and pods were opened the last time when you closed a project as the project state is automatically remembered Each time

	you a open a project, it opens in exactly the state in which it was closed. **Note: Which topics were open is held in the CPD file so if you delete the CPD, RoboHelp will not reopen the topics.**
Adobe Captivate support	Easily integrate HTML5 and SWF content created with Adobe Captivate. Enhance your help content with show-me demos, how-to movies, and interactive quizzes.
Locate in Project Manager	Need to locate a specific topic in the Project Manager? No problem, with just a single click on the topic, or in the TOC and topic list pod, you can locate and highlight the topic in the Project Manager. Click Locate Item in the View group on the Project tab or right click in a topic and select from the context menu.
Easily update styles	You can easily edit the style in a CSS by first applying inline styling and then click Update Style so that the CSS is updated.

See About RoboHelp 11 if you want to know what was added in that version.

About Adobe RoboHelp 11

Feature	Description
HTML5	
Responsive layouts	• Adobe RoboHelp 10 introduced Multiscreen HTML5 allowing you to create different layouts for different devices, one for desktop, one for phones, one for tablets, whatever you want to set up. Read more... • Adobe RoboHelp 11 introduces **Responsive** layouts where one design morphs according to the screen or window size. When you click New Responsive Layout, you will see a link to check for new layouts. A simplified editor has been introduced for responsive layouts. Read more...
Printed Documentation and Master Pages	
Enhanced Master Page Toolbar	The Master Page toolbar has been enhanced to make it easier to add placeholders to your master pages.
Headers and Footers	Using Master Pages that you create to meet your requirements, Adobe RoboHelp 11 introduces **headers and footers in your printed documentation**.

	Read more...
Page Numbering	Some users found the TOC displayed incorrect page numbers in Word unless it was refreshed. That has been fixed. Read more...
Multiple documents in the same folder	In previous versions, only one document could be in the target folder. Now you can have more, provided of course the name is different. Read more...
SWF files	SWF files will now survive the trip to Word and PDF formats. Read more...
Collaboration	
Cloud sharing for topics and resources	**You can now add cloud-based services to Resource Manager.** Adobe RoboHelp 11 ships with Dropbox, Google Drive, OneDrive pre-configured. You can either • Include the root folder of these services in Resource Manager so that all your resources are available to you. • Include just the sub-folder that you will be sharing. You specify which folder(s) will be shared using the settings on the service used. Your co-authors can do the same but they will only see the folders you have shared with them. You can right click individual topics or a bunch of topics in the Topic List or Project Manager and click Resource Manager > Share. It's that simple. RoboHelp will copy the topic to the cloud along with any dependent files such as images, style sheets and master pages. When the topic is taken into other projects, the dependent files will be downloaded as well. The shared topics can be moved to any folder in the other projects as can the dependent files, you don't have to keep the same relative path as in the original topic. The topic and the dependencies will remain synchronized or you can make certain changes: • You can apply a different Master Page. • You can have different Snippet content. • You can apply a different CSS file. • You can change the images. • The placeholder for UDVs will be retained allowing a local UDV to be created with the values needed in each project. Master pages linked to a topic will automatically by shared or you can share them independently in the same way. Read more...
Toolbar changes	There are new toolbar icons to make synchronizing shared resources easier. Read more...
New RoboHelp 11 User Interface	

Colors and contrast modernized	It is now easier to read the tab labels and to see which topic has focus. The colors have been changed to provide much better contrast.
Windows 8	
Windows 8 supported	Adobe RoboHelp 11 is supported on Microsoft Windows 8.
Office 2013	
Office 2013 supported	Microsoft Office 2013 (Office 15) is supported with Adobe RoboHelp 11.
Captivate 7 Integration	
 HTML5 support	You can enhance your help files with show-me demos created with Adobe Captivate 7 and its HTML5 output. This will make it easy to provide animated videos and tutorials. Read more...
Convert text to UDV	
Convert a string to a UDV	You can select a string of text and use a script to convert the string to a UDV throughout your project. There is an option to make the process case sensitive.

Explore Feature and Workflow Topics

Whether you are new to Adobe RoboHelp or one of the thousands of longtime users, it's always helpful to have an example to see how things work in a real project. Some are described in the general information about Adobe RoboHelp and in the topics that describe this sample project. Below you will find links to some of those topics as well as links to other features that are part of RoboHelp but that are not specifically featured in this sample project.

Although you will see or read about the feature, it is beyond the scope of this project to offer a detailed step-by-step tutorial for implementing the feature. The screenshots will not necessarily be from this project.

1. Dynamic Content Filtering
2. Content Categories (Dynamic User-Centric Content)
3. New Responsive HTML5 Layouts
4. The New User Interface
5. Creating Mobile Apps
6. Embedded fonts in eBooks
7. Find and Replace
8. Search Techniques

9. Adobe Captivate HTML5 Videos
10. Linking and Importing Word and FrameMaker Docs
11. SharePoint Integration - Version Control and Publishing
12. Sharing Topics and Other Resources using cloud-based storage
13. Acrobat PDF based Review
14. Master Pages
15. Scripts
16. Snippets
17. Bits and Pieces

The Employee Care 3 Outputs

In Adobe RoboHelp (2015 release) the term "Outputs" is used instead of "Layouts" to distinguish them from the layouts used in Responsive HTML5 and Multiscreen outputs.

The topics below provide information about each of the outputs that you will find in the Outputs pod. Press CTRL + Click to open them here in the Design Editor pod.

1. Responsive HTML5
2. Mobile Apps
3. Multiscreen HTML5
4. WebHelp
5. eBook
6. Microsoft HTML Help - CHMs
7. Printed Documentation
8. XML Output

RoboHelp Features

Dynamic Content Filtering

Responsive layouts were introduced in RoboHelp 11 to allow your content to be viewed with ease on desktops, tablets and smartphones. The appearance adapts to suit the device, RoboHelp takes care of that. Now Adobe RoboHelp (2015 release) adds new layouts with something extra for your end-users, dynamic content filtering.

- You provide the filter options to suit the requirement, be that geographical regions, trade specialization, equipment type and so on.
- The end-user chooses what they want to see rather than having to wade through everything you have provided.

You can set this up so that the user can select just one of the options or so that they can multi-pick.

If you have used Content Categories (Dynamic User-Centric Content) in an earlier version of RoboHelp you will welcome the greater options Dynamic Content Filtering brings, so will your end-users. There are some differences in the setup and these are described below.

How does it work?

To set up the content to work with Dynamic Content Filtering, you need to be familiar with the use of conditional build tags (CBTs) and build expressions. A CBT is applied to some text or an image or any part of the topic content so that you can create simple or complex build expressions to exclude or include that content when you generate an output.

Dynamic Content Filtering allows you to use the CBTs and / or build expressions so that the end-user can choose what they want to see.

Example

Objective

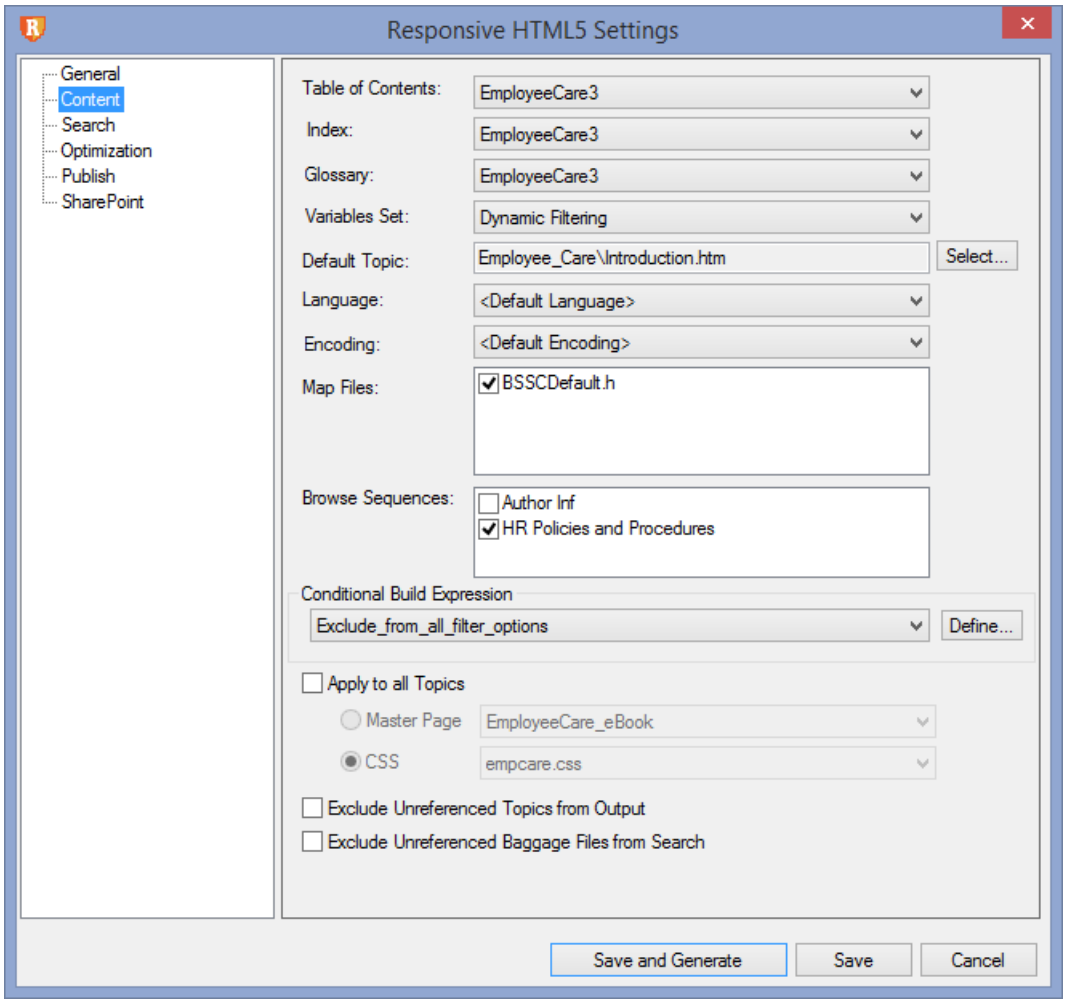
In Employee Care we want end-users to see content according to where they are based. This is shown in this table.

Topic	US	Canada	UK
Attendance	The term "vacation" is used in the last paragraph of the Types of Absence.	Uses the same term.	In the UK the term is "holiday".
Cars	Because of the distances to be travelled, journeys employees make will be by plane with the company reimbursing the cost.	Because of the distances to be travelled, journeys employees make will be by plane with the company reimbursing the cost.	This topic only appears in the UK category. The distances are less so a car is provided.
Introduction	Only Healthcare is listed under Company benefits.	Only Healthcare is listed under Company benefits.	Cars are also listed as a benefit.
Sick Pay	In Payment of Benefit it is stated that employees must have sick pay insurance.	In Payment of Benefit it is stated that employees must have sick pay insurance.	In the UK there is government funded insurance.

Setup - Global exclusions

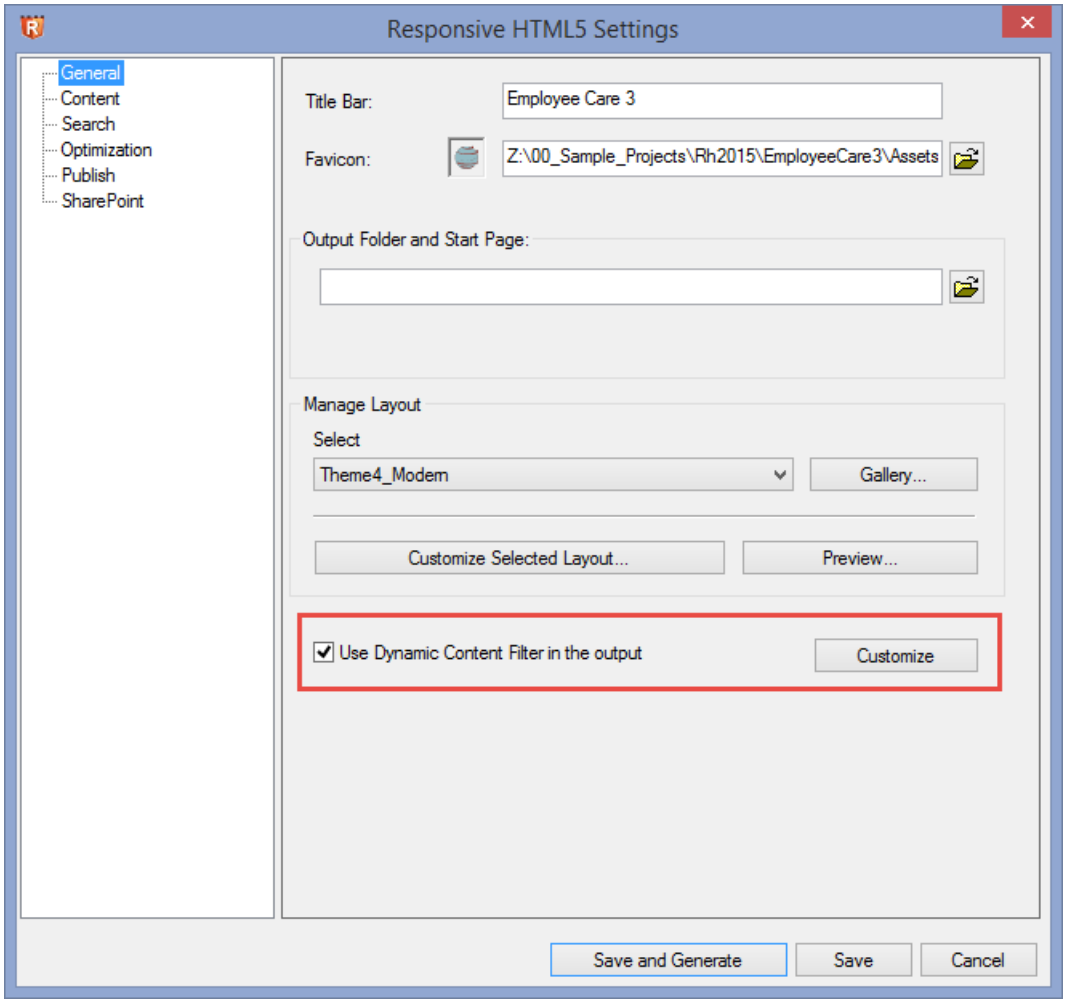
The first thing we need to do is exclude from the output any content that we do not want the end-users to see, no matter how they apply the filters that we make available. That is done in the Content configuration where you can see that we do not want any topics or content that has an eBookOnly, Print or AuthorContent tag applied.

The Conditional Build Expression below excludes them from the output so we do not need to worry about them when we apply the filtering options.

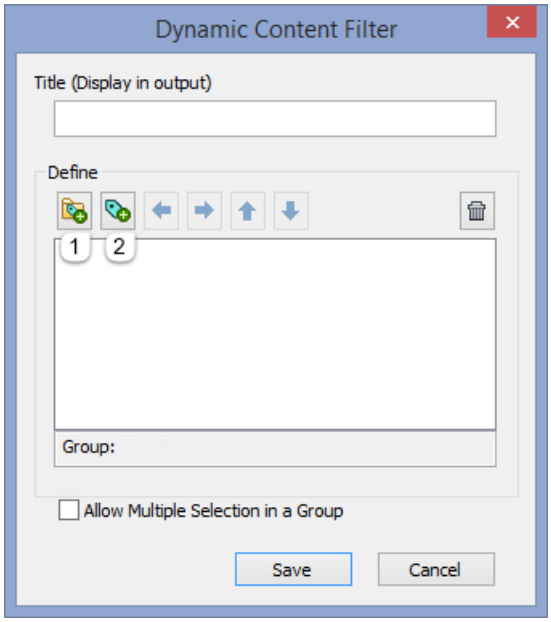


Setup - Filtering options

With the required content in the output, we now need to set up how it can be filtered. To do this the Use Dynamic Content Filter check-box is selected and the Customize button is then clicked.



Clicking Customize displays this dialog.

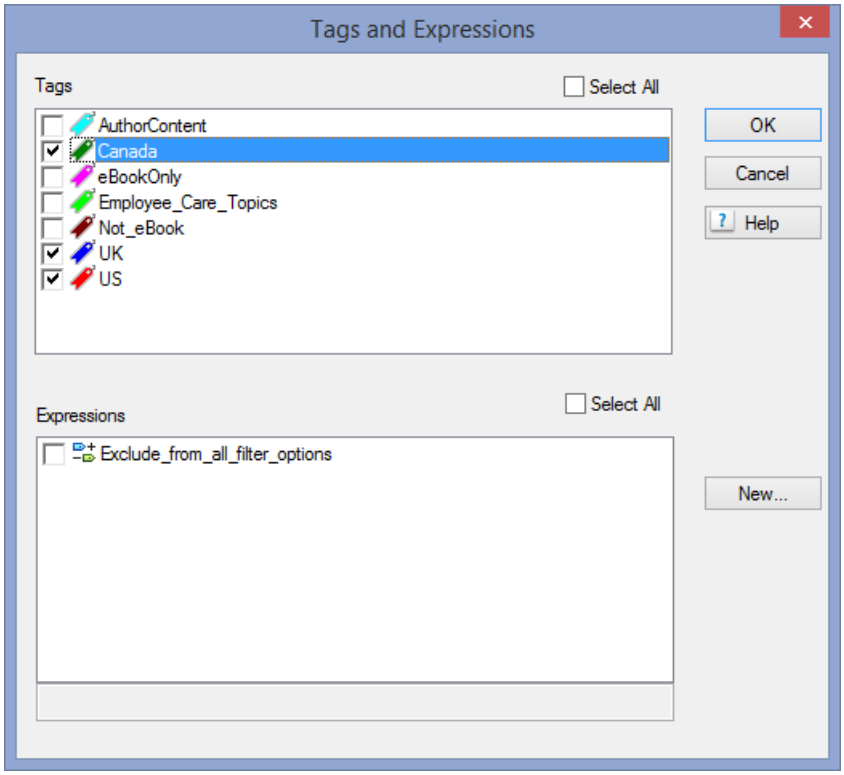


Icon 1 allows us to set up groups, in this example we only want one, Country.

Icon 2 displays the Tags and Expressions dialog that allows us to set up the options within that group.

In this project we want to set up US, Canada and UK as the filtering options. As shown below, the dialog initially shows all the tags and expressions that have been set up in the project. In RoboHelp (2015 release) expressions can be named making it much easier to deal with those complex expressions where you had to stop and work out what each one did.

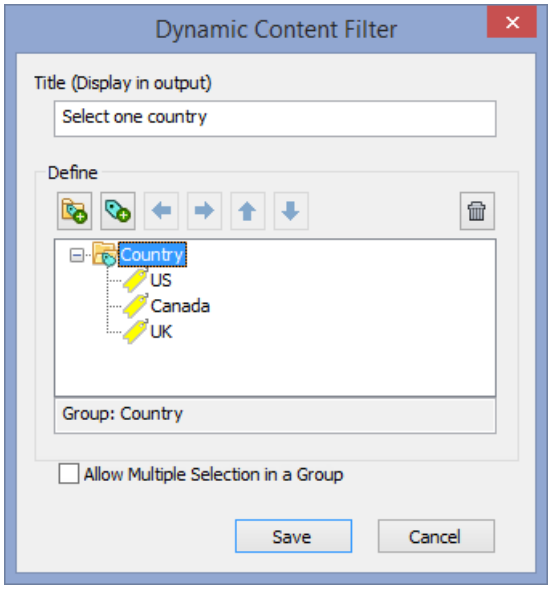
The expression shown below is to keep certain content from this output and that was selected in the Content Settings dialog above. Here we want to create the filter options so we select Canada, UK and US.



The title can be whatever you want so here we have used it to provide an instruction to end-users.

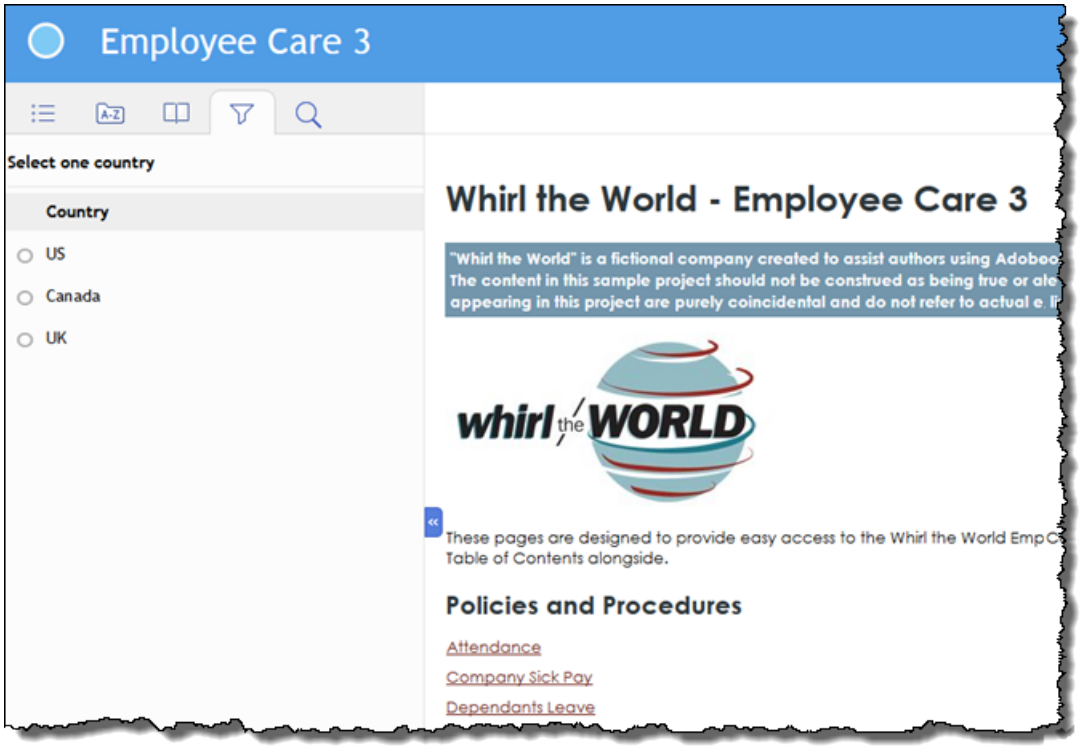
As we only want end-users to select one country at a time, we leave the Allow Multiple Selection option unticked.

The end result in the Dynamic Content Filter dialog will be as in the image below. By default RoboHelp will display the options selected in alphabetical order, here we have used the arrow keys to change the order and we have used a context menu to make US the default.



Output

When the end-user accesses the output they can click the filter icon and select from the options you have provided. In a different project you might want to provide further groups such as Region and so on.



Complex Filtering

If you want to see a more sophisticated example of Dynamic Content Filtering, see the Travel the Whirls sample project.

Changing from Content Categories to Dynamic Content Filtering

If you have previously used Content Categories in WebHelp and now want to use Dynamic Content Filtering with a responsive layout in the same project, there are some considerations.

- If you used a single TOC or Index with tags applied, you will be able to use that with Dynamic Content Filtering. If you used a different TOC or Index for each category, you will need to change to using a single TOC or Index with CBTs applied, as in this sample project.
- You can only use one glossary and it is not possible to apply CBTs to it.
- If you used variables only to allow quick name changes so that each variable only had one value, that will work with Dynamic Content Filtering. If you used variables so that each instance could have a different value in different outputs, then you will need to make some changes.
  In this project there are outputs that require selection of a particular variable set - for example in the Printed Outputs the US, Canada and UK sets are required. For that reason a new Dynamic Content Filtering set has been created for this project. To deal with the variables where different values are required according the filtering option, you will see that each value has been entered with a conditional build tag applied.

RoboHelp 11 Responsive Layouts

The responsive layouts that shipped with RoboHelp 11 will not support Dynamic Content Filtering. You will need to change to one of the RoboHelp (2015 release) layouts.

Content Categories

Dynamic Content Filtering is an HTML5 feature for responsive layouts as it relies on code not available in WebHelp. Instead for WebHelp you can use Content Categories (sometimes referred to as Dynamic User-Centric Content) to provide end-users with various options in a dropdown. The content is then filtered according to their choice.

The author can customize the content according to user roles, product types, geographical areas or whatever is preferred.

In this sample project the WebHelp Content Categories output is set up to show how this works. Generate that output and you can see the differences described below.

Topic	US	Canada	UK
Attendance	The term "vacation" is used in the last paragraph of the Types of Absence.	Uses the same term.	In the UK the term is "holiday".
Cars	Because of the distances to be travelled, journeys employees make will be by plane with the company reimbursing the cost.	Because of the distances to be travelled, journeys employees make will be by plane with the company reimbursing the cost.	This topic only appears in the UK category. The distances are less so a car is provided.
Introduction	Only Healthcare is listed under	Only Healthcare is listed under	Cars are also listed as a benefit.

	Company benefits.	Company benefits.	
Sick Pay	In Payment of Benefit it is stated that employees must have sick pay insurance.	In Payment of Benefit it is stated that employees must have sick pay insurance.	In the UK there is government funded insurance.

New Responsive HTML5 Layouts

Two new Responsive HTML5 screen layouts have been added with the new filter icon that enables end users to access the Dynamic Content Filtering.

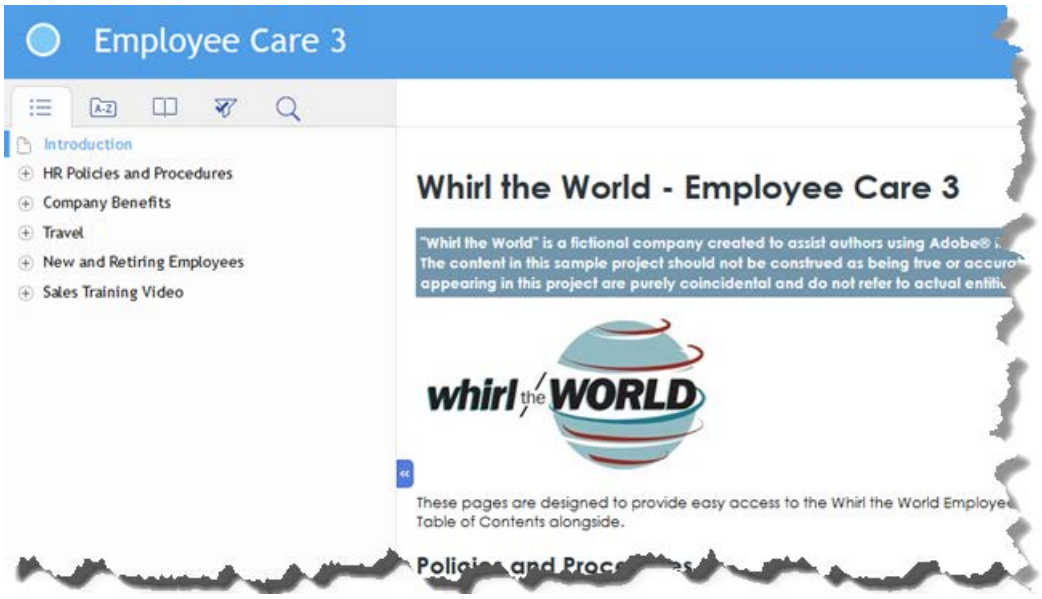
See the Responsive HTML5 Output topic that describes how to generate outputs using these screen layouts.

RoboHelp (2015 release) ships with a brand new layout that greatly enhances the end-user experience. In the new layout you can:

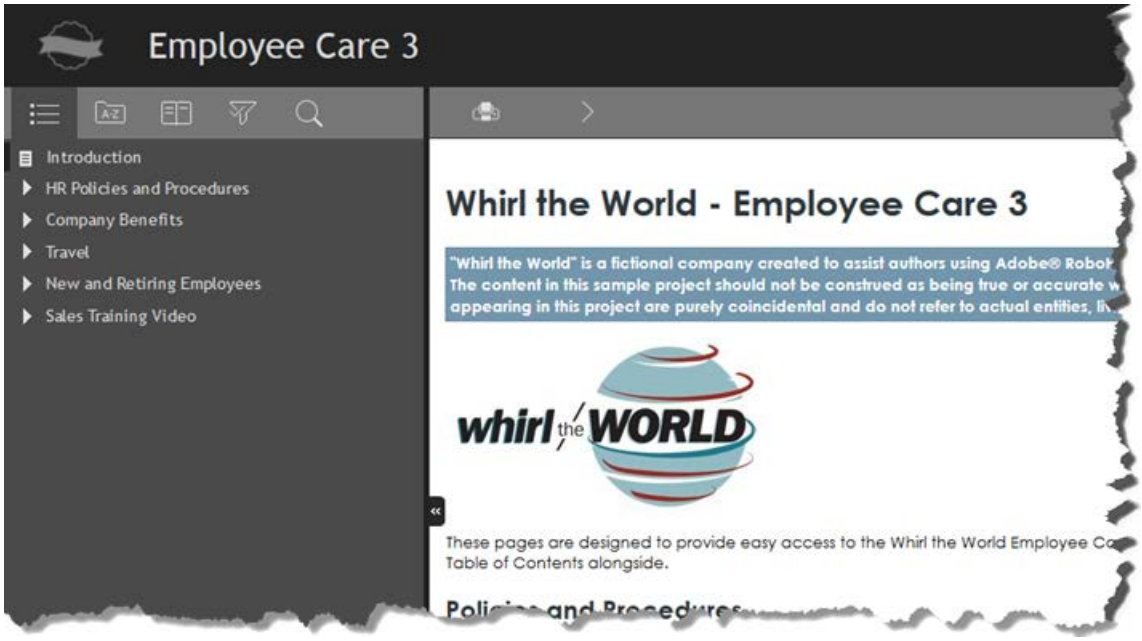
- Configure the search results to appear in the content or topic panes
- Use the Comments field in the Status tab of Topic Properties for Descriptions that appear in the search instead of the first few lines of the topic.
- Show breadcrumbs and search context in the search results.
- Easily show/hide widgets such as index/glossary/TOC and so on.
- Add social widgets out of the box so that pages can be shared on Facebook or Twitter.
- Choose to hide the branding bar on smartphones to give more screen space.
- Convert to right to left layout with the click of a button. Note that you cannot create topics using right to left languages in RoboHelp. The content can be created by translation agencies or Technical Communication Suite users can link to FrameMaker content.

The new layout remembers the state of the books in the TOC and two or more books can be expanded.

Azure Blue



Charcoal Grey

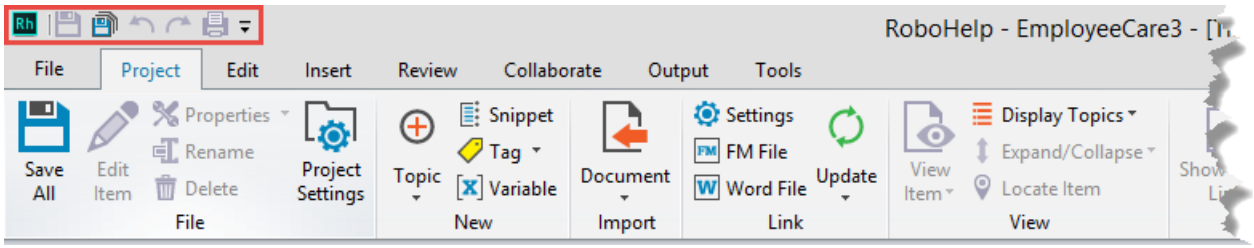


The New User Interface

As soon as you open Adobe RoboHelp (2015 release) you will see a major change. Gone are the old toolbars to be replaced with a modern ribbon, different themes, a quick access toolbar and a new Starter page.

The Ribbon

Whilst it may seem daunting at first, it was found to be quite intuitive when creating this sample project.

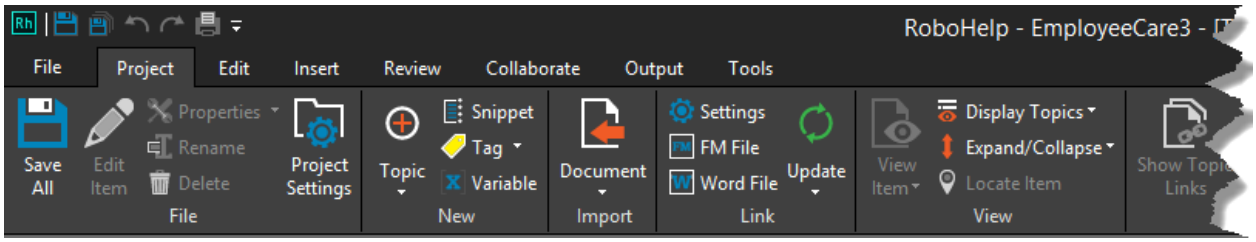


The Quick Access Toolbar

Highlighted above is the customizable Quick Access Toolbar where you can add your most frequently used items.

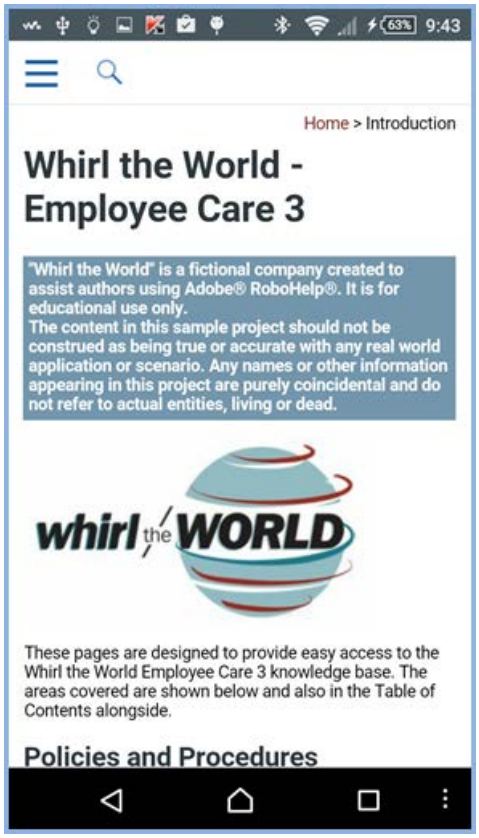
Themes

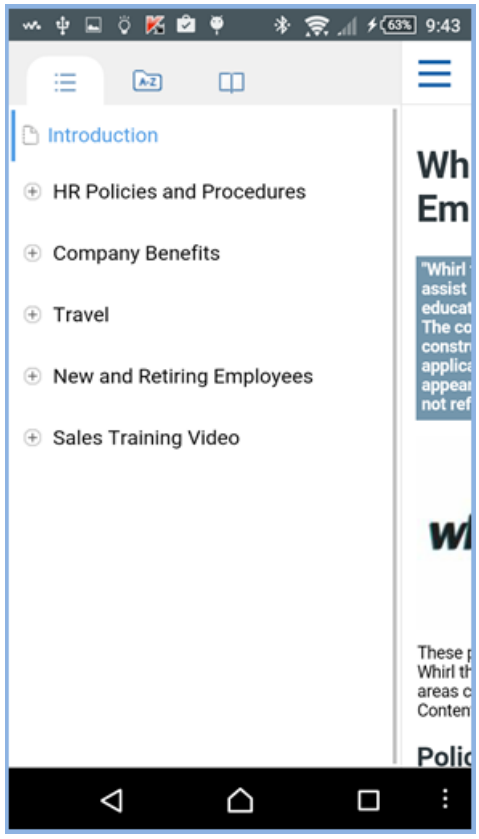
Shown above is the Light theme. If you prefer the trend towards darker themes, you can change to the Dark theme. Just click Customize on the Quick Access Toolbar and select More Commands.



Creating Mobile Apps

Now your content can be converted to an app on a mobile device with greater ease than ever before. How is described in the Mobile App Output topic. Below you can see some example screenshots taken from a smartphone.


9:43
Home > Introduction
Whirl the World - Employee Care 3
"Whirl the World" is a fictional company created to assist authors using Adobe® RoboHelp®. It is for educational use only.
The content in this sample project should not be construed as being true or accurate with any real world application or scenario. Any names or other information appearing in this project are purely coincidental and do not refer to actual entities, living or dead.
whirl the WORLD
These pages are designed to provide easy access to the Whirl the World Employee Care 3 knowledge base. The areas covered are shown below and also in the Table of Contents alongside.
Policies and Procedures

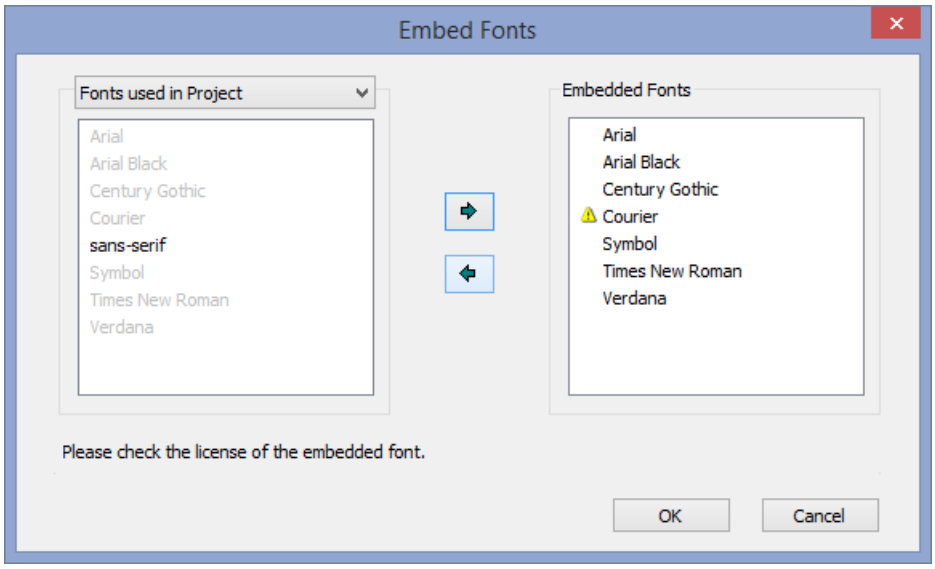

9:43
Introduction
HR Policies and Procedures
Company Benefits
Travel
New and Retiring Employees
Sales Training Video



Embedded fonts in eBooks

Adobe RoboHelp (2015 release) allows you to embed fonts in an eBook to ensure your readers see exactly the font you want.

It is important to note that you must have a licence to distribute any font you specify. Adobe RoboHelp will attempt to warn you if there is a licensing issue but you must not rely on that, the responsibility is yours.



Creating an eBook output is described in the eBook Output topic.

Find and Replace

Opening the Find and Replace Pod and Shortcuts

If you select some text and then press CTRL + F, the pod will open with that text entered as the Find string. It can then be used as described below.

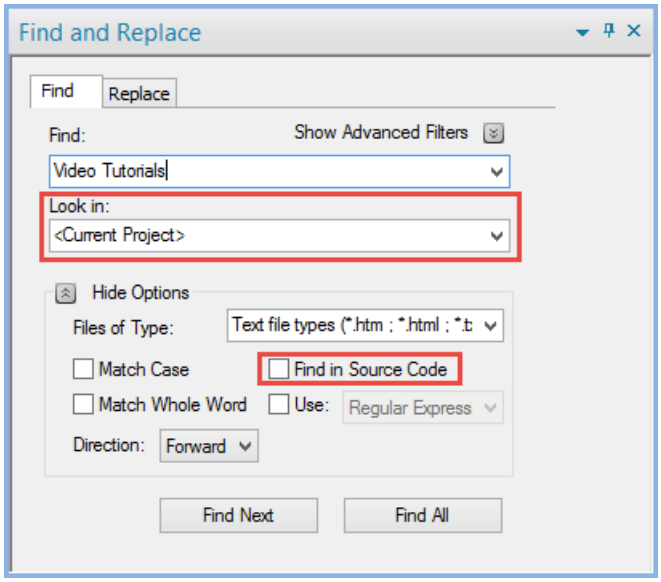
The CTRL + Shift + F shortcut opens the pod with your previous search string. It can then be used as described below.

Find - Basic Mode

Use Basic Mode for simple searches. You can search the Current Project, the Current Window, Opened Topics or a selected folder. Current Window can be a topic or other pods

Changed in Adobe RoboHelp (2015 release) is that you can now limit your search to just the topic content as seen by the end-user. If you want to search in the code as well, tick Find in Source Code.

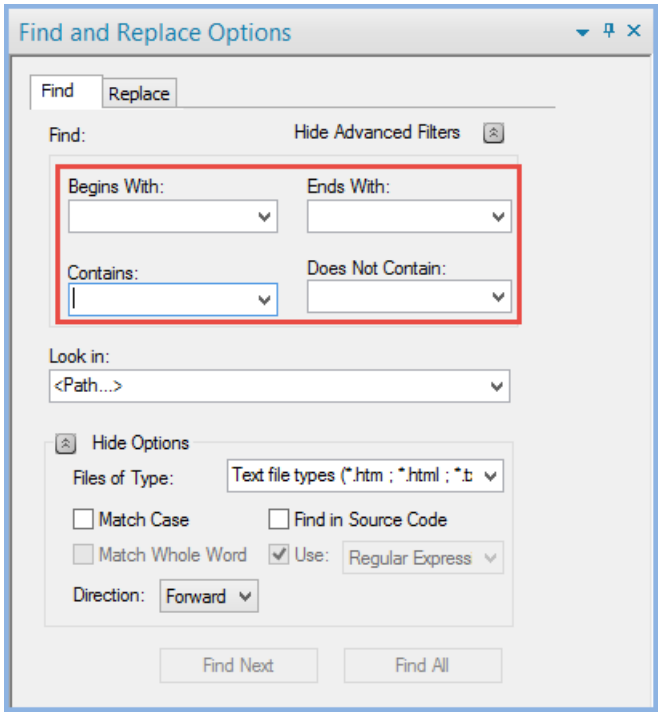
In Basic Mode you can use Regular Expressions.



Find - Advanced Mode

In Advanced Mode you can set parameters rather than a specific search.

Regular Expressions are disabled in this mode as the parameters are using regular expressions so there would be a conflict.



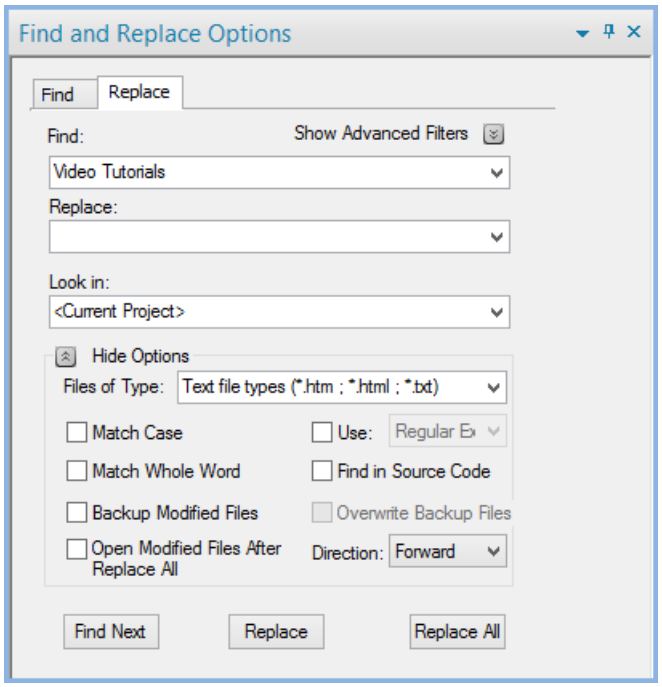
Find and Replace - Basic Mode

The Replace Tab has the same options as the Find Tab plus an additional field where you can specify a Replace string.

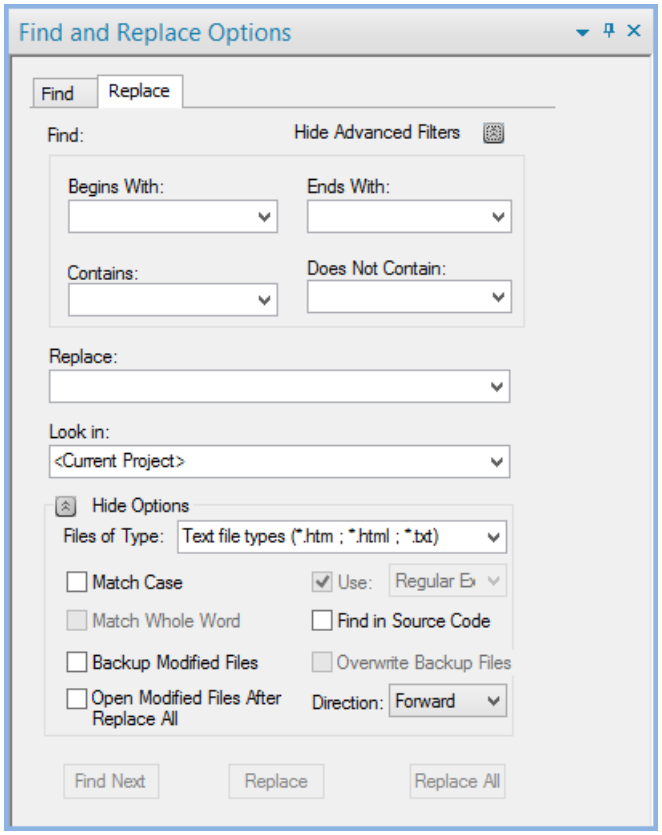
- Click Replace All to replace every instance without the option to leave or replace any specific instance. Do note the option to Backup Modified Files.

- Click Find Next to find the each instance of the Find. For each instance either click Find Next to continue searching without replacing or click Replace to update the string and locate the next instance.

As in the Find Tab, you can use Regular Expressions for the Find but you cannot use them for the Replace.



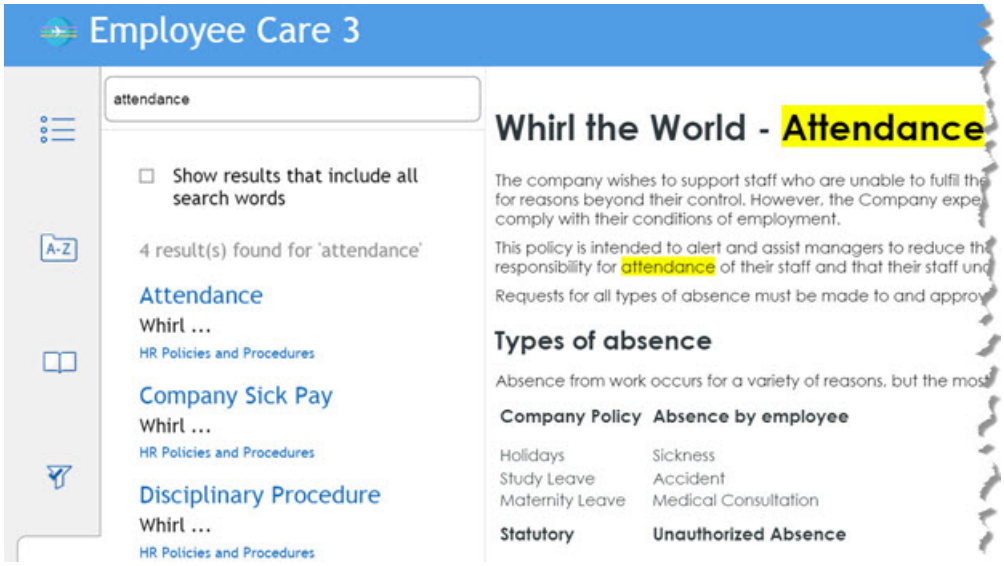
Find and Replace - Advanced Mode



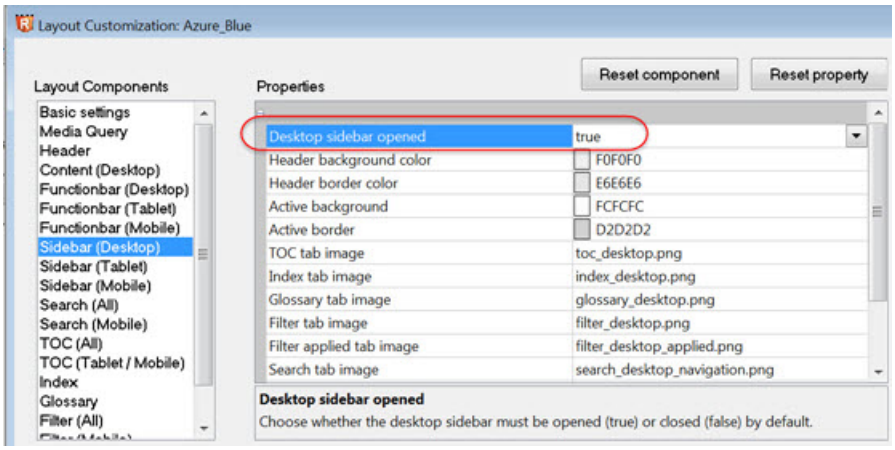
Search Technique Enhancements

Enhanced Search Results in Responsive Layouts

The author can now choose whether to open the search results in the main Topic pane, or the Navigation Sidebar.

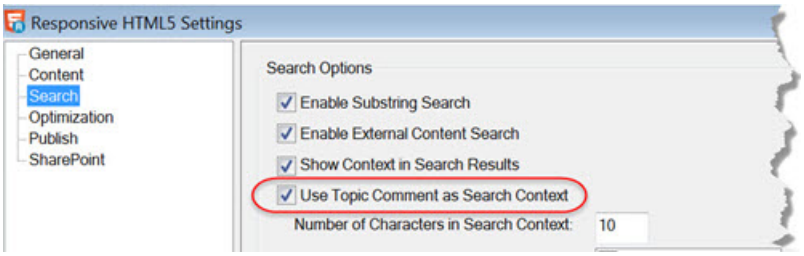


This is accomplished by selecting "true" in the Responsive Layout Customization Editor shown here.



Author-Customized Search Context

The Search Context (the text under the Topic Title) can be customized by the author. The default is a short amount of the first paragraph to give the reader a sense of what the topic is about.



Improving Search Ranking

One way to help your users find the most relevant results is with the Search Ranking capabilities Adobe RoboHelp. For WebHelp or WebHelp Pro, the author can control whether or not the Search Ranking column in the Search Results is presented.

To disable Search Ranking, examine the properties of the WebHelp or WebHelp Pro single source layouts and ensure the option labeled Hide Rank Column in Search Results is enabled.

Search Ranking is influenced by a number of factors including this hierarchy:

Search Keyword(s) appear in this order of importance:

1. **Title** of a topic
2. **Topic Keyword** - this is very powerful. (See Keywords on the General tab of Topic Properties)
3. **Headings** 1, 2, 3, 4, 5, 6 (in that order)
4. **Number of times** in topic text
5. **Project Synonyms** created from Output Tab > Synonyms.

Support for AND search

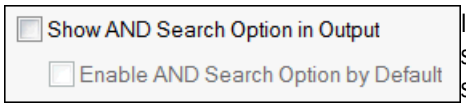
By default, RoboHelp performs OR searches when a user types multiple words without enclosing them in quotation marks. This means that RoboHelp finds all topics that have any of the words specified in the Search box. The end user may want to limit the search where specific words occur in the same topic. This can now be done with the new AND Search feature.

AND Examples:

Image AND photo finds topics containing both terms.

Image AND photo AND graphic finds records containing all three terms.

Enabling this feature for WebHelp and WebHelp Pro:



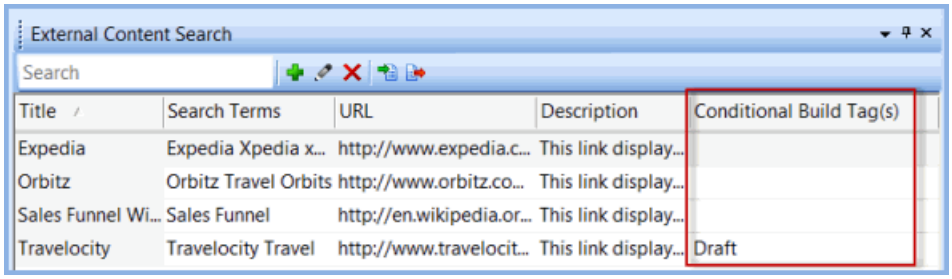
In the output settings, you can specify whether or not AND search should be enabled by default. In addition, when AND search is supported in the output, end users have the option to enable or disable it. For WebHelp and WebHelp Pro, select the Show AND Search In Output option in the output settings, RoboHelp performs AND search when a user types multiple words without enclosing them in quotation marks. Then, RoboHelp finds only the topics that have all the words specified in the Search box. AND search can be used in combination with phrase search.

To enable AND Search in Multiscreen HTML5 Screen Layouts place a Multiscreen HTML5 Widget - "Advanced Search Options" into your screen layout.

External Content Search metadata provides access to user-generated content

The help author may now be a "curator" of content that guides the end-user more precisely to the most relevant material. Today, help systems go beyond static help files. There are blogs, wikis, and other Web 2.0 communities that are happy to share information whether it relates to work or play. Your end-users may tap into this rich and dynamic repository to find information as well as contribute to the body of information themselves.

This is accomplished by using External Content Search. This makes it easy to enter the search metadata. The author may create keywords that are linked to a URL. When the end user uses RoboHelp's search facility and searches for these keywords, the links are listed among the search results and ranked in the top position. The resulting link presents a live site inside the topic pane.



Notice the Conditional Build Tag "Draft" has been added to the Travelocity search term.

What the External Content Search feature does

Example Scenario: An author wants to make it convenient for users to make travel arrangements. The company wants certain travel sites to come up in the search results for certain keywords that users may enter, such as

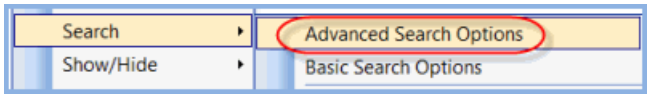
- Sales
- Funnel
- Expedia
- Xpedia
- xpeedia
- Travel
- Travelocity
- Orbitz
- Orbits

You can create a Google Advanced Search of a specific term (or terms) then capture the URL from the address bar of the browser and use this URL in order to allow pre-populating of a Google search. If you open the External Content Search pod you can see this in action and

note how the terms are associated with the link. The External Content Search keywords cause the associated Link to rank at the number one position.

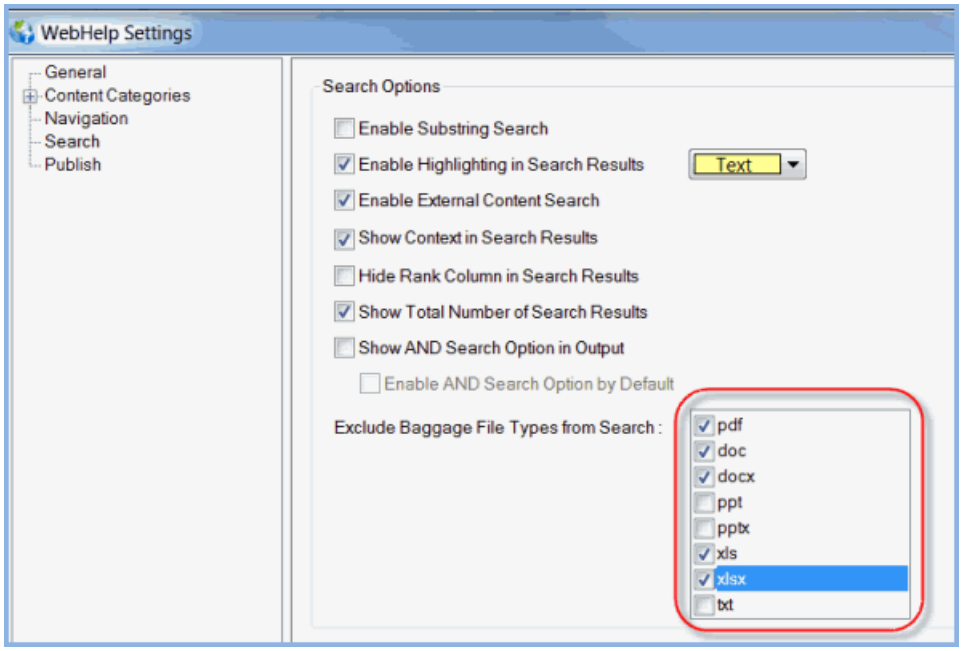
How to see the External Content Search feature in action

1. Generate one of the supported outputs with the External Content Search feature enabled.
2. The supported outputs for this feature are:
   - Multiscreen HTML5
   - Responsive HTML5
   - WebHelp
   - WebHelp Pro
   - FlashHelp
   - FlashHelp Pro
3. View the output.
4. Perform a search using one of the search terms programmed in the External Content Search dialog.
5. Click one of the resulting search result links.



Searching documents in their file native formats

Sometimes, a file must remain in its native format. So files such as PDFs, Docs, Spreadsheets and PowerPoints can be added to your project and be searchable. RoboHelp calls these "Baggage" files because they "go along for the ride" when you publish your project. Now you have your choice to include or exclude those baggage file types. This includes support for CJK (Chinese / Japanese / Korean) search as well.



Adobe Captivate HTML5 Videos

More and more authors are asked to include Adobe Captivate Animated Video tutorials into their Adobe Robohelp projects. RoboHelp then becomes a "launching pad" for eLearning.

You can see an example in the Sales Staff Video topic.

The Process of Importing:

First the Adobe Captivate project is published as both Flash (SWF) and HTML5 Output.

Then the author clicks the Captivate icon on the Insert ribbon to insert it right into the topic where they want it to display.

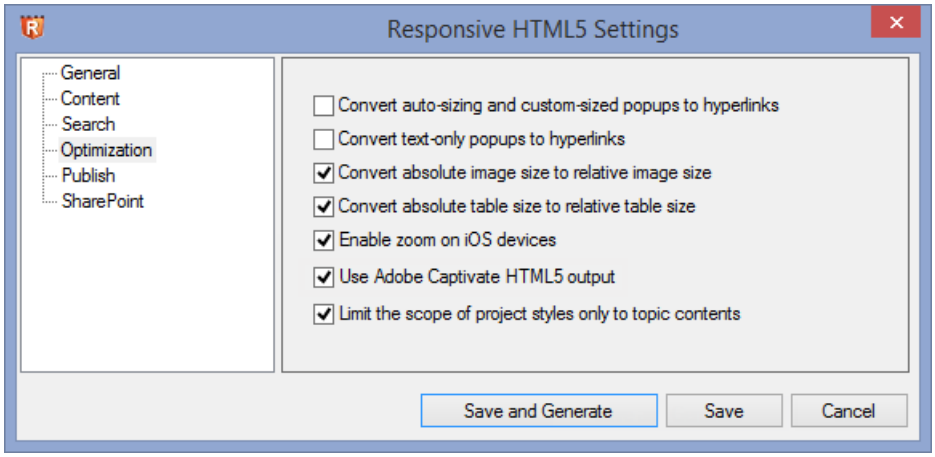
Insert the paths of the Adobe Captivate HTML5 output files

The next step is to locate the paths to the SWF and the Index.html from the Captivate output as shown here. Then click, OK.

Optimize Settings for HTML5 viewing of video

The video can now play in most any of the Single Source Layouts including, Microsoft Word and Adobe PDF formats!

You need to test the output against the browsers that you support and optimize the settings.



Linking and Importing Word and FrameMaker Docs

Linking provides a "synchronization" workflow between Subject Matter Experts (SME) who retain authorship of the FrameMaker or Word document and authors who need that content in their project.
Importing allows content to be created from existing documents but with no ongoing link. The workflow is otherwise very similar.

Link or Import?

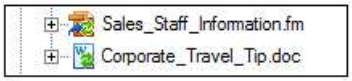
Many authors choose to Import content from Microsoft Word or Adobe FrameMaker into their RoboHelp projects. This is perfect for workflows where the original document is no longer necessary and importing is a one-time action.

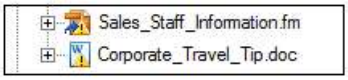
However, there are scenarios where SMEs retain "ownership" of the original document and because it changes frequently, it would help the RoboHelp author to "Link" rather than Import the document.

- If you are using the Adobe Technical Communication Suite, you can *Link* FrameMaker documents to your RoboHelp projects as described below under Linking.
- If you have RoboHelp as a standalone application you still have the *Import* workflow available. With that, you can take advantage of the same style mapping and topic-splitting features as the FrameMaker file is imported and converted. Read more below in this topic.

Linking

The "live linking" process is the same for both Microsoft Word or Adobe FrameMaker documents. Below, you can see both Word and FrameMaker documents have been linked to the project. The originals may be on a network share, SharePoint, or other location that can be shared between SME and author.





The green icon in the first screenshot shows the two documents are up to date. The next image shows a yellow "caution" icon which tells the RoboHelp author that the SME has made a change and the project needs to be updated to remain "in sync".

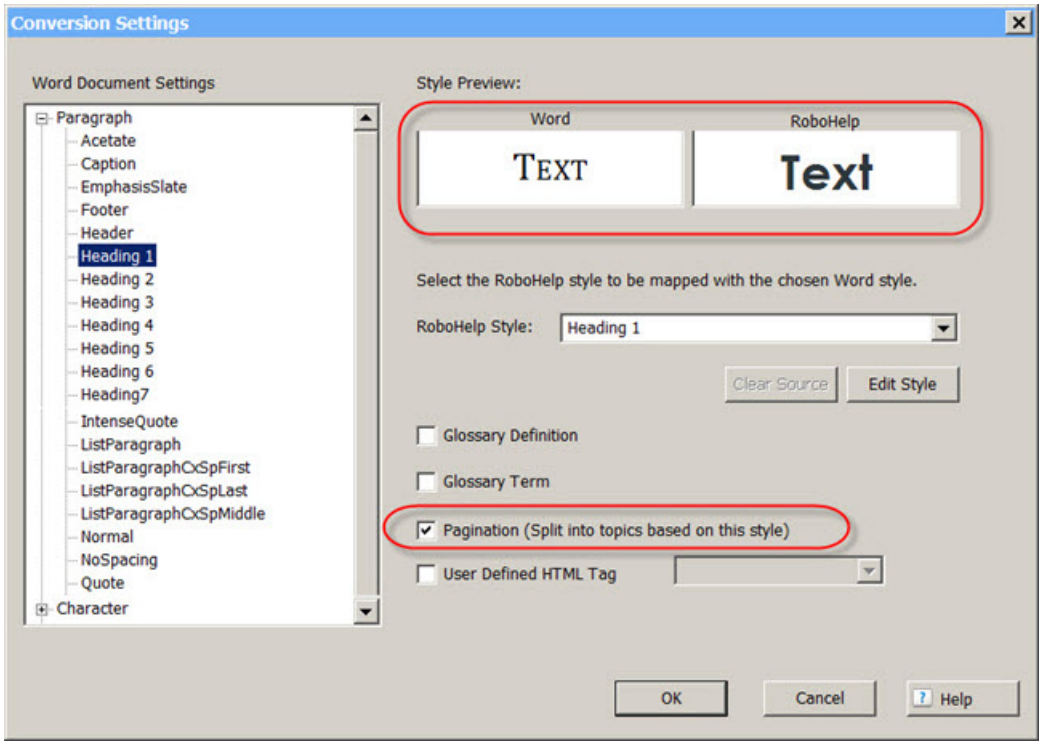
Try it yourself, with the linked Microsoft Word document in this project

1. Right-click the New Employee Checklist.docx file in the Project Manager pod and choose Edit.
2. RoboHelp will open the document in Word.
3. Make some changes to the document, then close and save.
4. Once Microsoft Word closes you should notice the icon representing this document changes to yellow.
5. Then right-click the icon and choose Update. This will cause the associated topics in RoboHelp to update with the latest content.

To map the Microsoft Word or Adobe FrameMaker files to Adobe RoboHelp

In brief, on the Project ribbon click Settings in the Link group and then click Edit for Word or FrameMaker.

- Here you see how the Word Style for Heading 1 is being mapped to the RoboHelp CSS style sheet Heading 1.
- As many styles as you like can be mapped in this way, saving a lot of repetitive time.
- The Pagination checkbox means that the author can split a long Word document into separate topic files "in one go" - all based on styles.



SharePoint Integration

Your RoboHelp project can be integrated with Sharepoint to provide source control and you can publish your outputs to SharePoint. Also it can be used for sharing topics and other resources with your co-authors.

Source Control

SharePoint is a growing platform for teams of multiple authors who need to keep their content synchronized. Version and source control with the integrated RoboHelp and SharePoint workflow allows project team members to check files in or out and maintain history records all from a convenient toolbar right within RoboHelp.



Sharing Topics and Other Resources

SharePoint can also be used as the repository for shared resources such as images, snippets and topics. Read how in Topic Sharing with cloud-based options.

Publishing

You can publish Multiscreen HTML5, Responsive HTML5 and WebHelp outputs directly to a SharePoint site from within RoboHelp.

SharePoint Configuration in RoboHelp

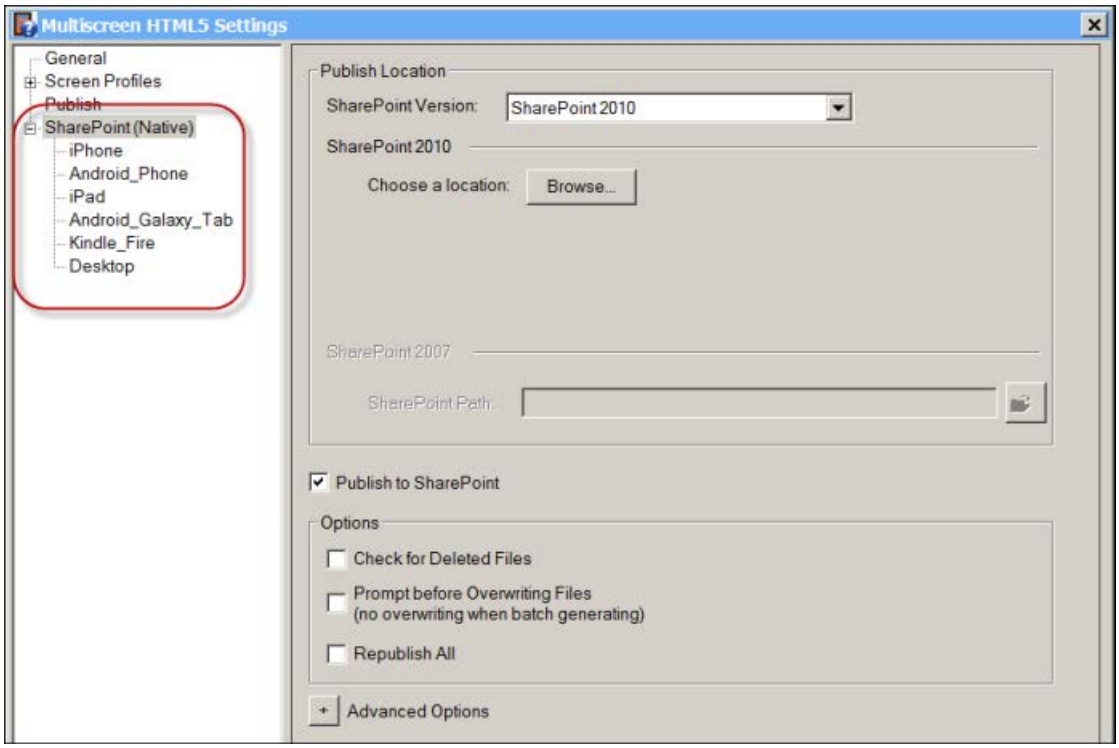
To access this dialog, create or click on any Multiscreen HTML5, Responsive HTML5 or WebHelp Single Source Layout

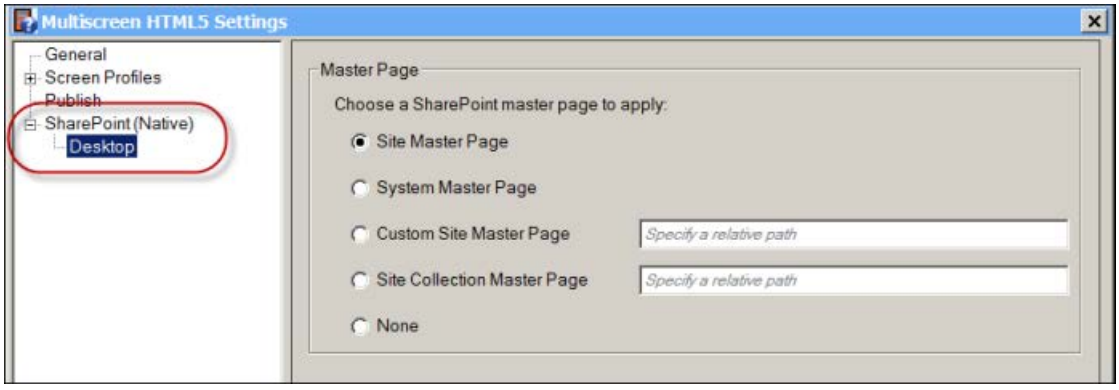
In **Multiscreen HTML5**, click the SharePoint (Native) settings as shown below. For Multiscreen HTML5,yYou can also choose different Master Page to apply as shown in the second image below.

In **Responsive HTML5**, click the SharePoint settings.

Both HTML5 layouts include the ability to publish in the .aspx format for better security and compatibility with SharePoint sites.

In **WebHelp**, click the Publish option and then you can choose Sharepoint.



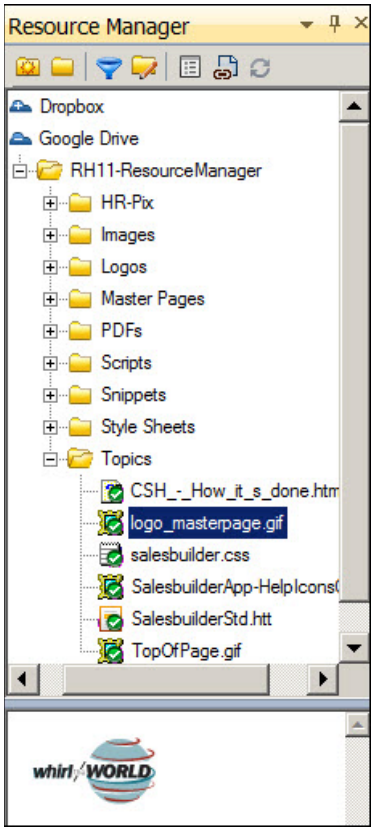


Sharing Topics and Other Resources

Resource Manager allows you to share images, snippets, master pages, topics and multimedia files such as SWF with other authors and other projects, even if they are stored in cloud-based locations such as Dropbox, One Drive and Google Drive.

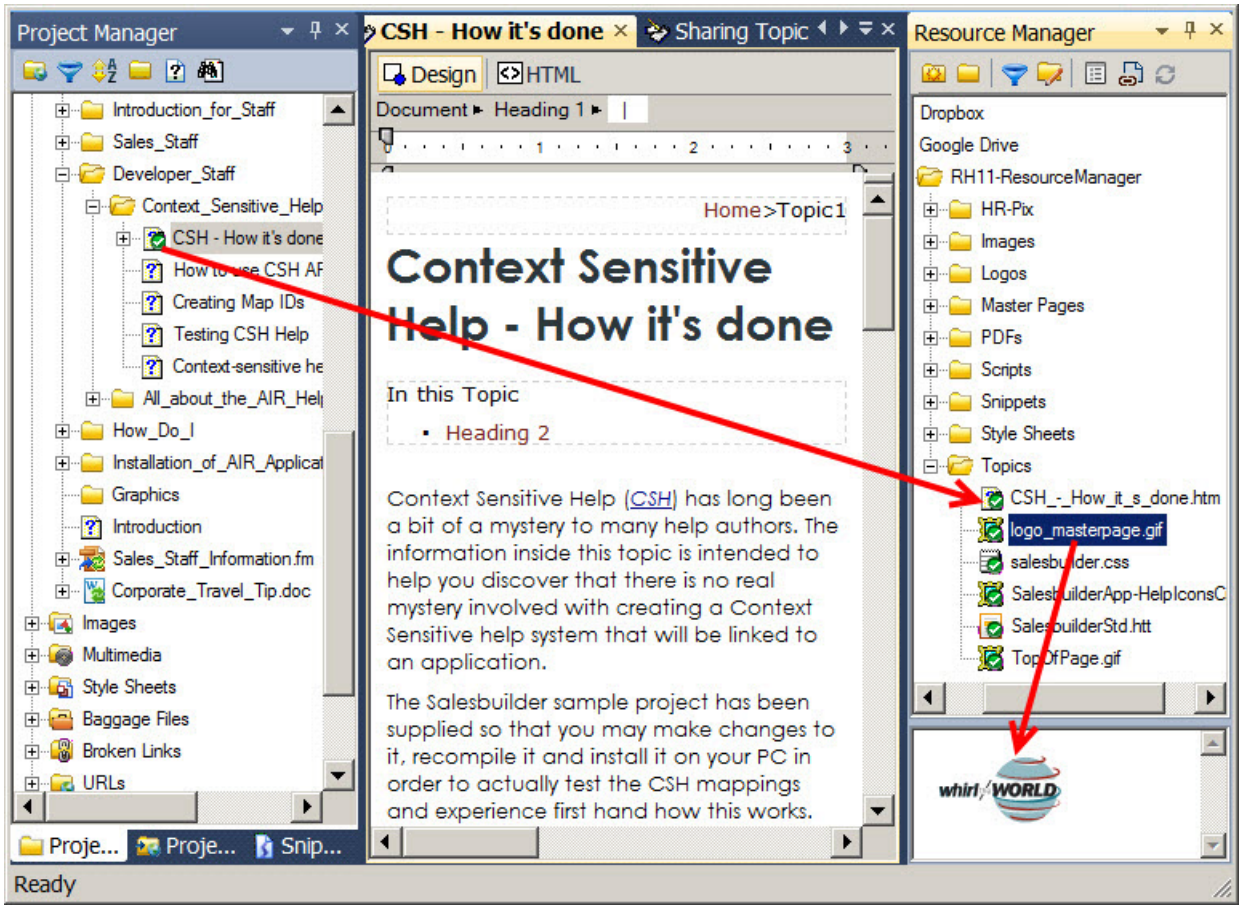
You can make the Resource Manager pod work in various ways:

- You can define a single common location where all resources would be shared.
- You can define multiple locations for your resources.
- You can define different locations for storing each resource type.
- The locations can include the popular cloud storage services, **SharePoint** sites as well as **network shares**. In the example below, both **Dropbox** and **Google Drive** have been added as Shared Locations.

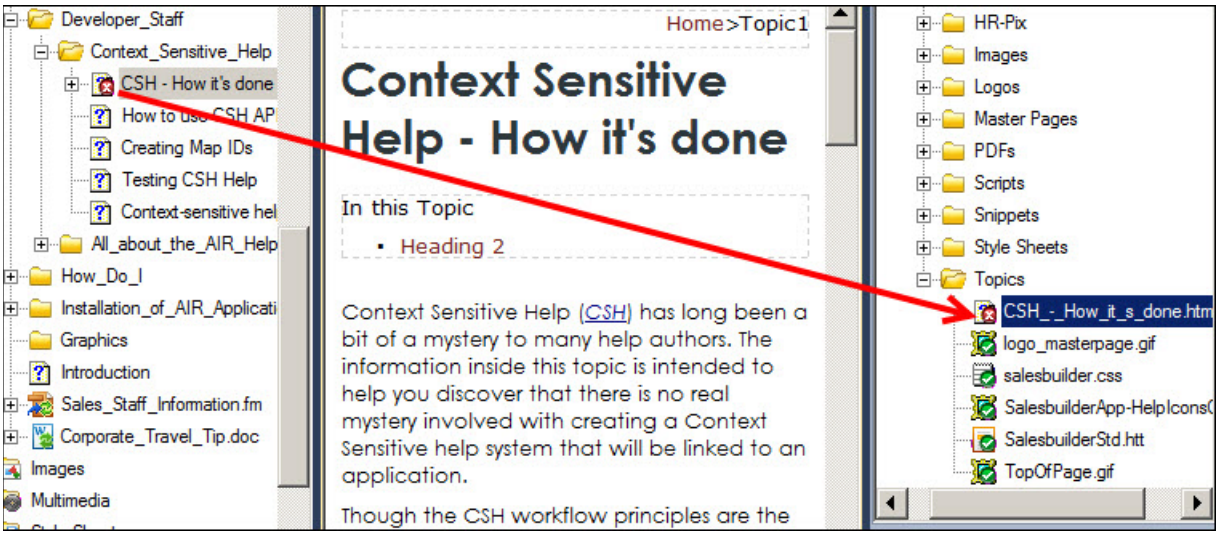


RoboHelp establishes a link between any resources in the project and the Resource Manager and scans both the Project and Resource Manager locations periodically to see if anything has changed. If an asset is changed in some way, RoboHelp notifies you of the change.

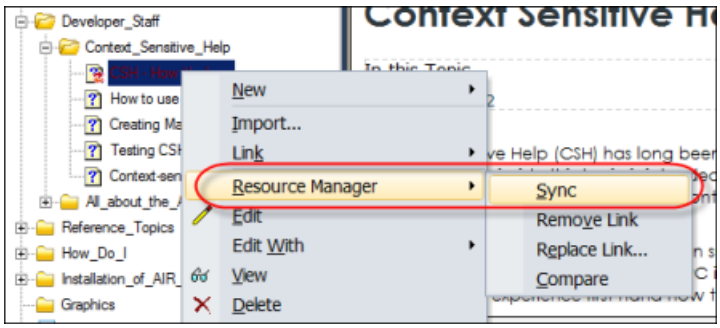
Shown below is the path of a drag of a topic from the Project Manager to the Resource Manager. Note that the color turns green as the link is made. There is also a visual preview of the graphic which happens to be included in the topic.



When the author makes a change in the topic and saves, the icons and topic title turn red to indicate they are out of sync.



You are able to easily update shared resources in the project by selecting them and clicking Sync. Additionally, you are able to control the frequency for comparing any linked resources and comparing what is shown in the Resource Manager with the location it points to.



Resource Manager is specific to each installation of Adobe RoboHelp. To see this in actual use you will need to configure the Resource Manager to point to one or more folders where common content is located. Then use an asset presented inside the Resource Manager pod by dragging from the pod to the project.

To add a location:

1. Click the Add Shared Location icon in the Resource Manager toolbar.
2. Navigate to the location and click OK.
3. Type a name to represent the location in the Resource Manager pod and click OK.

To insert a resource from the Resource Manager pod

1. Locate the resource in the Resource Manager pod.
2. Click and drag the resource from the pod to the topic where you want it to appear.

Share a Dropbox, or other cloud-based service, link with other authors

Go to dropbox.com and authorize sharing with your co-authors.

Acrobat PDF-based SME Content Review

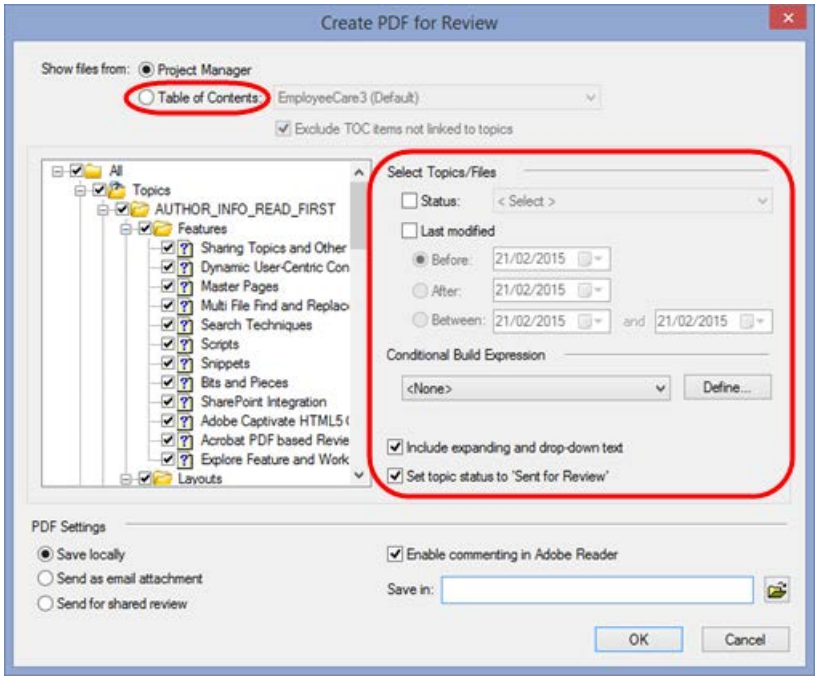
Among the features:

- Expand the scope of PDF-based reviews by filtering topics based on the table of contents (See screenshot)
- Include dynamic HTML content in the workflow
- Review expanding and drop-down text and import comments related to them
- Track changes

A crucial need for writers is to keep their authoring colleagues and Subject Matter Experts "in the loop" so that requested changes can be synchronized during development. Review and Collaboration workflows using Adobe technology make this possible. All the reviewers need is the free Acrobat Reader software.

A major benefit is that you can send all or just a few of the topics in the project for Subject Matter Expert review.

The Create PDF for Review is accessed from the Review menu.



There are three ways to create a PDF Review.

Create A Local PDF

Creates a PDF and saves it to a location you specify. You then distribute the file by your preferred means.

Attach For eMail Review

Creates a PDF and attaches it to a new email message opened in your email client. You can complete the message and send it to the reviewers.

Send For Shared Review

Creates a PDF and uploads it to an internal server or network location for shared review. This option requires that the initiating RoboHelp author has Acrobat XI Pro or higher installed. The reviewers need only have the free Acrobat Reader.

After all the reviewers have made their comments, the author then uses the Review > Import Comments from PDF command. A Review Pane opens and shows a list of reviewer names and the particular comments or changes they are suggesting. By double clicking the comment, the author can conveniently go to the particular topic and elect to accept or reject the comments either all at one time or one by one.

To keep your content synchronized, after creating the PDF you must not make any changes to the topics being reviewed until you have imported the reviewer's comments.

PDF based review is described in more detail in the RoboHelp online help.

Master Pages

Creating Headers and Footers

You can create headers and footers in single topics or include them in Master Pages and apply them to many topics at once. Master Pages can be created for both online help and to provide headers and footers for your Printed Documentation. Whilst you can use a single Master Page for both purposes, it is more likely you will want to use specific pages for each.

Master Pages for online help

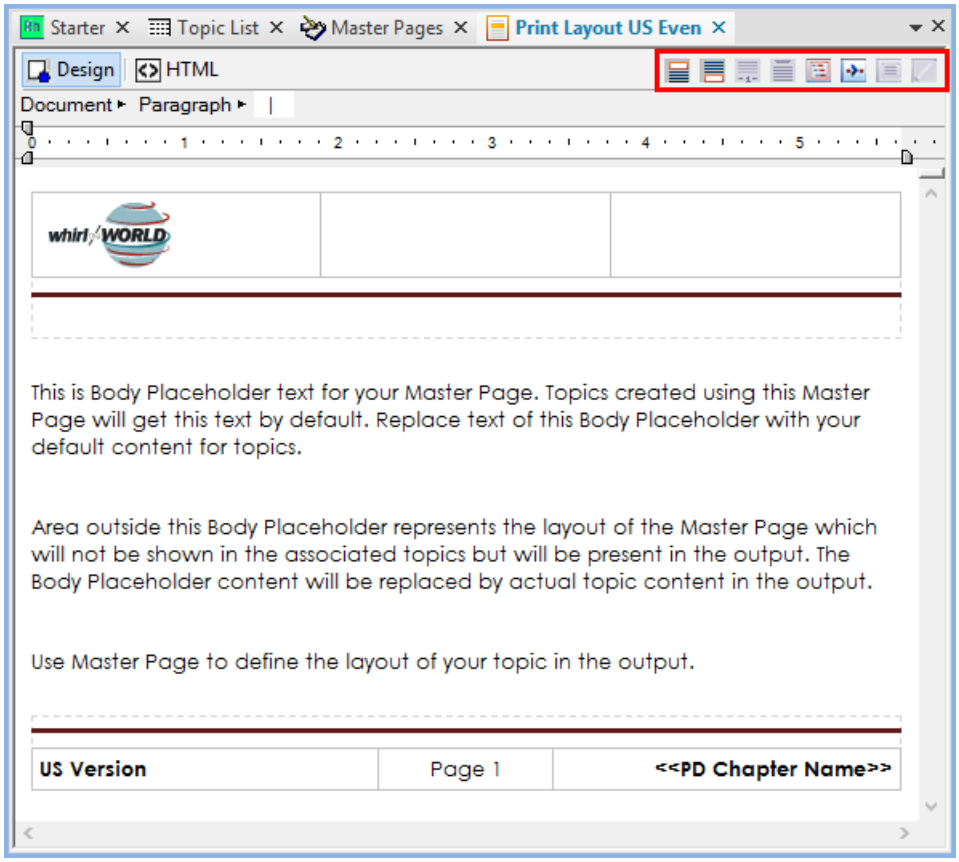
The Master Page can also include body content that will default into new topics when created.

It is a cause of common confusion to think that a change to the content in the Body Placeholder will update previously created topics, it will only affect subsequently created topics. It is only changes to the header and footer in the Master Page that will affect existing topics.

Master Pages for printed documentation

Any text in the Body PlaceHolder section will be ignored when using the Master Page for Printed Documentation.

An example of a Master page appears below showing the United States Even Pages version of the Headers and Footers for Printed Documentation as seen in the Design Editor.

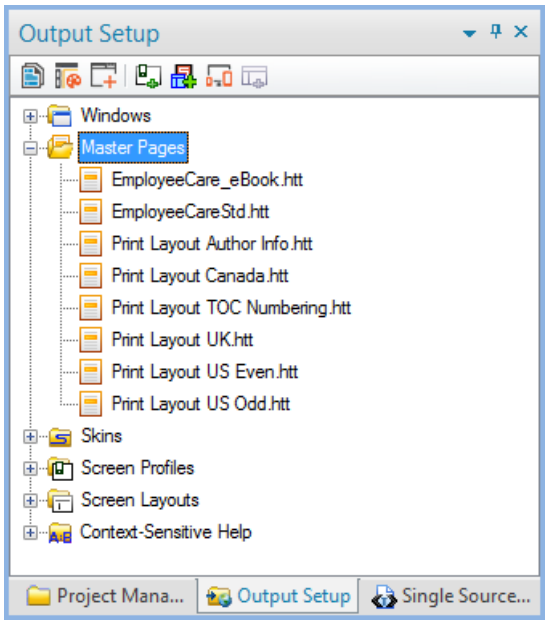


Note you can include many resources in Headers/Footers including tables, links, graphics and variables but not snippets. A new shortcut toolbar makes it easy to add items to the Master Page.

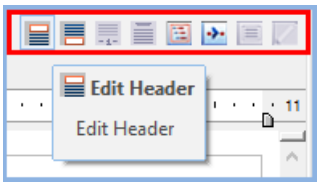
How to use Master Pages with your printed documentation is described in the Printed Documentation topic.

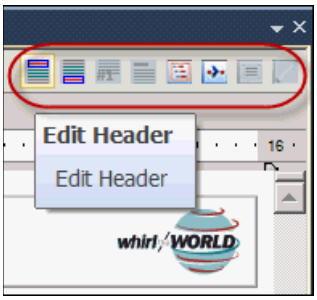
Creating Master Pages

First go to the Output Setup pod, right-click Master Pages > New Master Page. (The Output Setup pod was called the Project Setup pod in earlier versions of RoboHelp.)



Then use the shortcuts in the toolbar above the Master Page. You can also use Insert > Fields to insert various options such as the Date or Project Title.





From left to right, the icons represent:

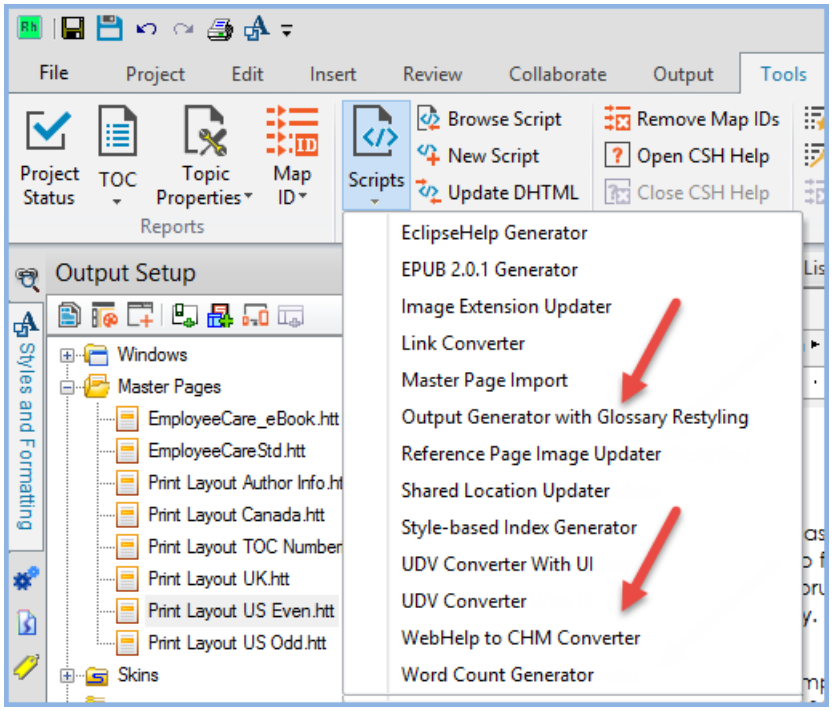
- Edit Header
- Edit Footer
- Insert Page Number
- Insert Chapter Name
- Insert Topic TOC Placeholder
- Insert Breadcrumbs Placeholder
- Insert Body Placeholder
- Format Placeholder

Scripts

Adobe RoboHelp has a powerful scripting capability and comes with a number of prepared scripts. You can also find more on various websites and many are free, you will find links on the Adobe RoboHelp forums. Scripts can automate procedures that might otherwise take time to

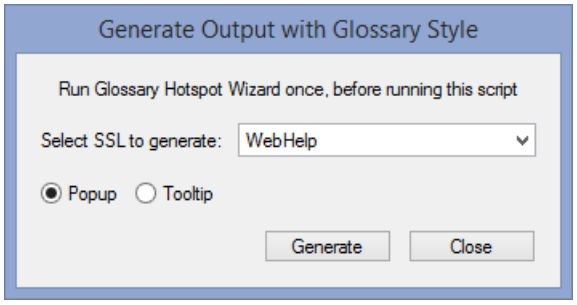
undertake manually. Writing scripts is for advanced users and may require the assistance of your developers.

Below are two examples of the scripts that ship with Adobe RoboHelp.



Glossary hotspot options

The **Output Generator with Glossary Styling** script allows you to choose a Popup or Tooltip instead of the traditional expanding hotspot for glossary terms.

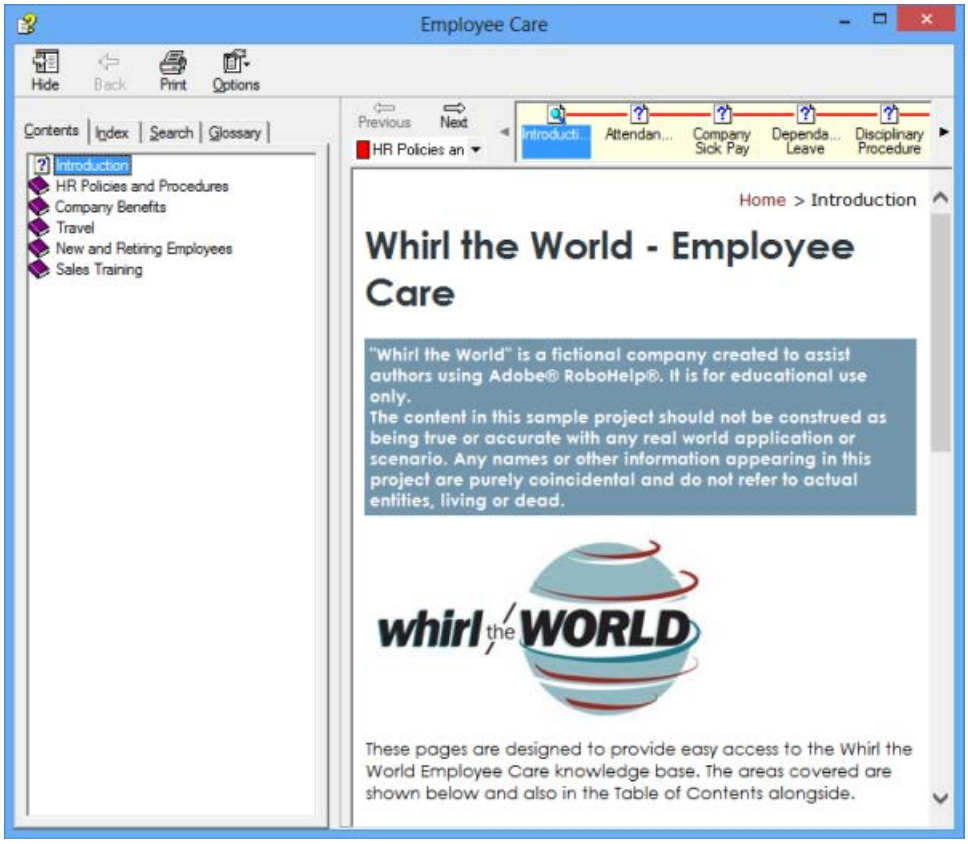


Skinning a CHM file

CHMs are still a useful method of providing user assistance but Microsoft have not updated the compiler for many years. As a result they now look a bit dated. With the aid of a RoboHelp script they can look very similar to WebHelp.

You just create WebHelp with the skin of your choice. Then you run the **WebHelp to CHM Converter** script.

Without a skin


Employee Care
Hide
Back
Print
Options
Contents
Index
Search
Glossary
Introduction
HR Policies and Procedures
Company Benefits
Travel
New and Retiring Employees
Sales Training
Previous
Next
HR Policies an
Introducti...
Attendan...
Company Sick Pay
Dependa... Leave
Disciplinary Procedure
Home > Introduction
Whirl the World - Employee Care
"Whirl the World" is a fictional company created to assist authors using Adobe® RoboHelp®. It is for educational use only.
The content in this sample project should not be construed as being true or accurate with any real world application or scenario. Any names or other information appearing in this project are purely coincidental and do not refer to actual entities, living or dead.
whirl the WORLD
These pages are designed to provide easy access to the Whirl the World Employee Care knowledge base. The areas covered are shown below and also in the Table of Contents alongside.

With a skin



Snippets

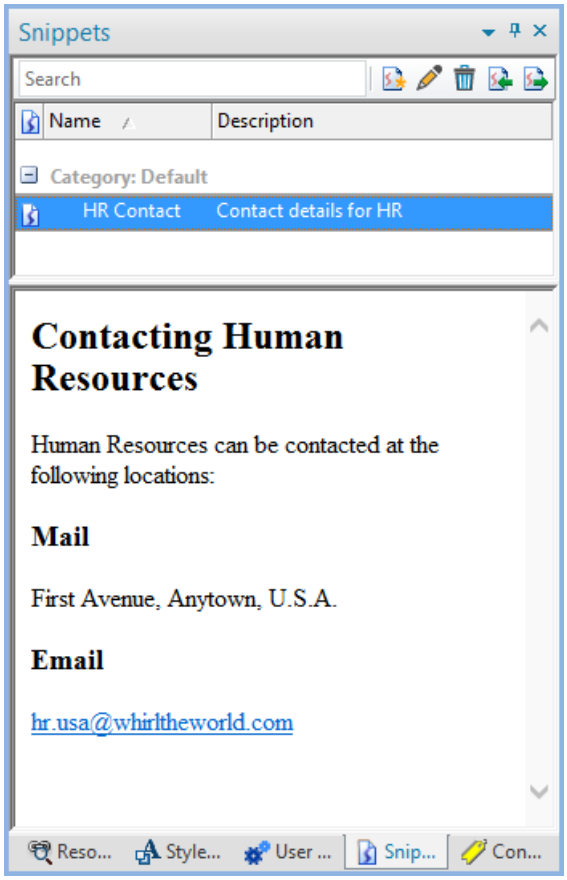
Content Reuse for Images, Tables, Text and More

Snippets are blocks that can contain text, variables, images and suchlike to form a complete paragraph. They are especially useful where you need to repeat the same content in many topics as any change only has to be made once.

Snippet Management

The Snippets pod supports creating categories and organizing many different Snippets into different categories. This will help simplify the management of Snippets.

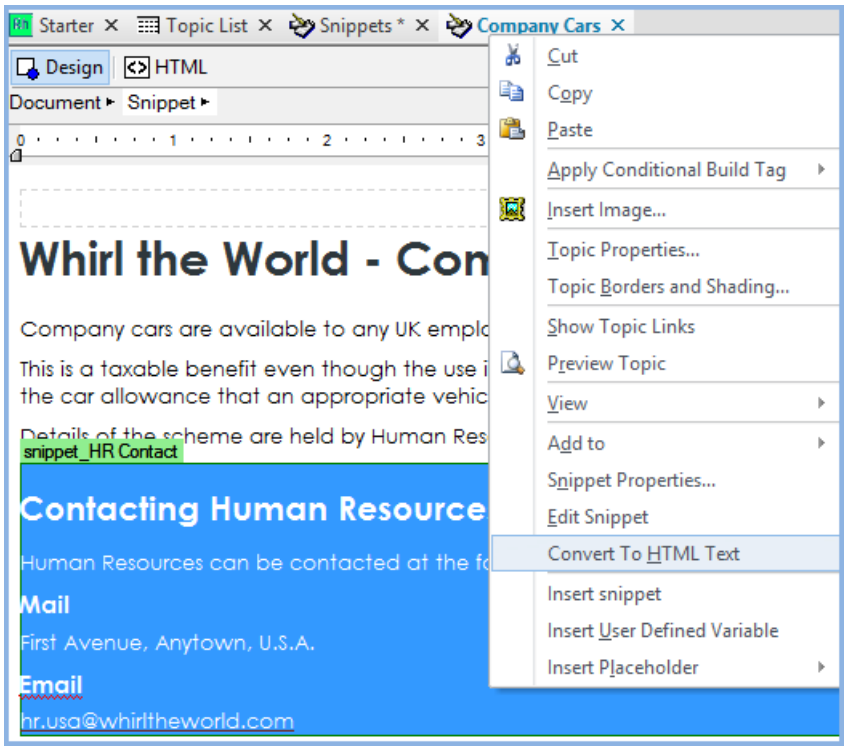
Some Adobe RoboHelp authors have developed quite a number of Snippets. For an Adobe RoboHelp author that has created a large number of snippets, they will find a field at the top of the Snippets pod that allows them to search for Snippets.



Snippet Conversion

Occasionally the Adobe RoboHelp author has a need to convert a snippet appearing inside a topic to become part of the actual topic content. This may be where the snippet has to be different in one topic.

Adobe RoboHelp allows the help author to right-click a snippet inside a topic and convert the content from a Snippet to topic content.



Bits and Pieces

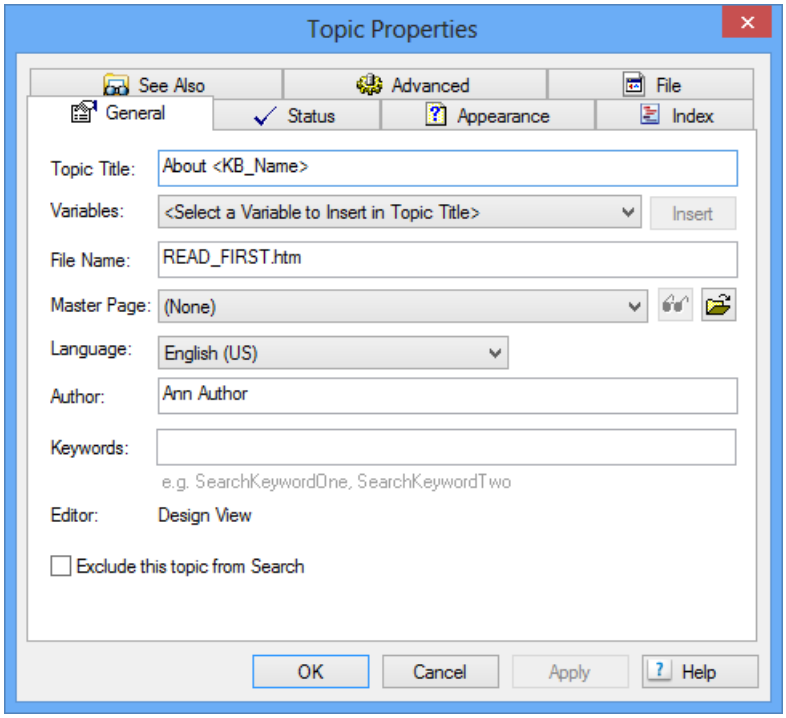
There's always something that doesn't warrant a full topic or fit neatly somewhere else! Here are some of those.

Expanding and Dropdown Hotspots with Dynamic HTML (DHTML)

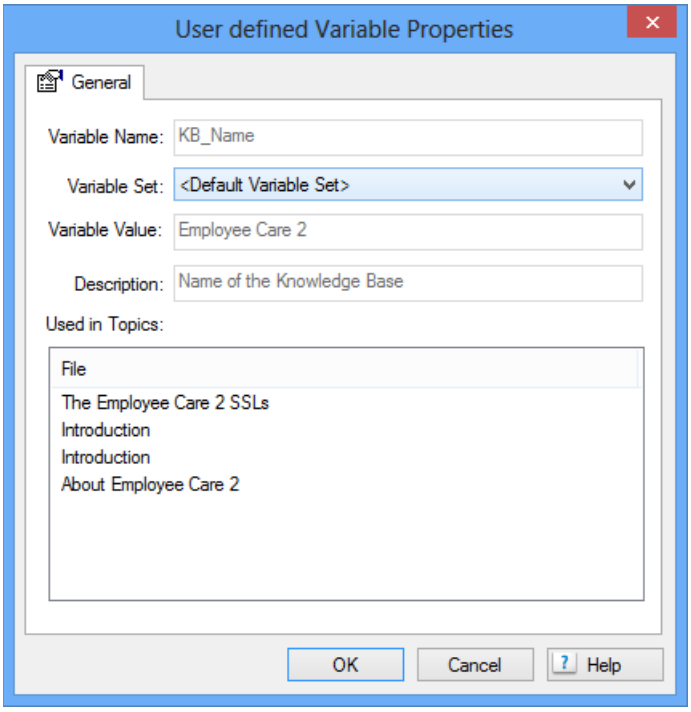
The idea of "progressive disclosure" is something authors are using in order to layer content especially with smaller screens on mobile devices. In this way, the end-user self-selects the information they are interested in. You can access DHTML on the Insert ribbon.

Topic Titles can have User Defined Variables assigned

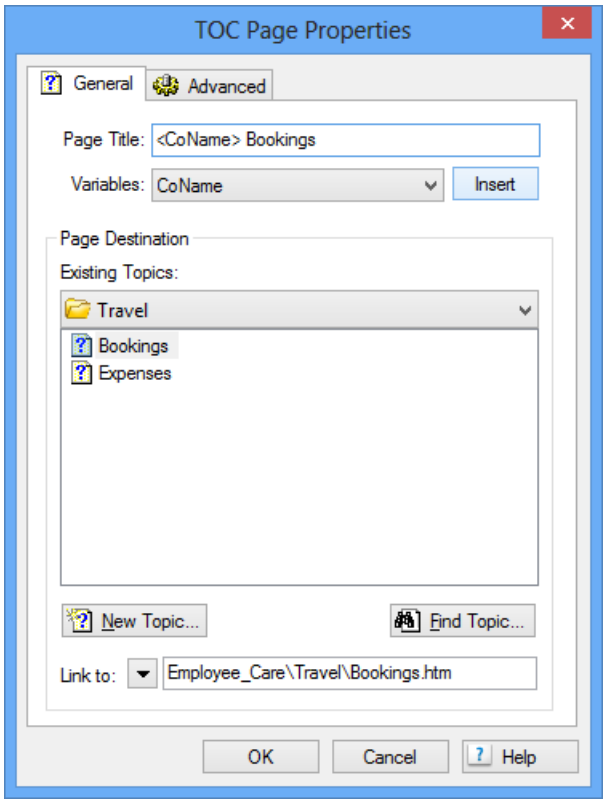
Control and customize content better by applying a User Defined Variable to a wider range of content, including the Topic Title and Table of Contents. Automate updates by simply making a single change to the UDV value in the UDV pod. To see this in action, go to the About Employee Care 3 topic, right click on the topic and choose "Topic Properties." You will see that the Knowledge Base Name User Defined Variable has been inserted in to the Topic Title.



The UDV Properties tell you where the each UDV has been used...



... and that can include the Table of Contents.



Control + Click jumps you to your target topic in Design Editor

Try control + click on this link to jump to the About Employee Care 3 topic.

Clear Formatting and Reset Style

One constant frustration for authors is importing content from documents written without proper styling. When imported into RoboHelp, "inline styles" or "overides" can defeat your hard work in designing a proper CSS. Clear Formatting and Reset Style are commands that let your CSS control the styling without inline styles getting in the way.

- Make a selection and click Format > Clear formatting. All styling is cleared.
- Reset Style is done from the Styles and Formatting pod. In this scenario, resetting a style resets both CSS and inline styles from a single HTML element by removing style related attributes like "class" and "style" from selected HTML element tag. Other CSS code remains.

Enhanced CSS3 management

Create CSS styles either using a built-in visual style editor or choose a new HTML code editor for those who like to edit directly. View and modify attributes, edit the <img> tags, and format hyperlinks, text boxes, and block elements.

Close All But This

When the help author has elected to use the Allow Editing of Multiple Topics function, they are also able to right-click any tab in the editor and choose to close all other open tabs.

Remember Project State

From RoboHelp (2015 release) whichever topics you have open in the Design Editor when you close it will reopen when you return.

Note: Which topics were open is held in the CPD file so if you delete the CPD, RoboHelp will not reopen the topics.

Generating Help

Responsive HTML5 Output

Responsive HTML5 outputs are easier to work with than Multiscreen HTML5 as there is only "one" output.

- With Multiscreen HTML5, you specify a different screen layout for each device. Some authors will prefer that approach as they can use different layouts with different content on different devices.
- With Responsive HTML5, one screen layout is used on all devices. What happens here is that if the user is viewing on a desktop, they will see one arrangement of the components of the screen, if they are viewing on say an iPhone or Android phone, they will see the components resized and rearranged in a layout to better suit that device. Your Adobe RoboHelp output takes care of all that. View on a desktop and resize the window to see it happening. Notice how the images get resized on the fly.

New in RoboHelp (2015 release)

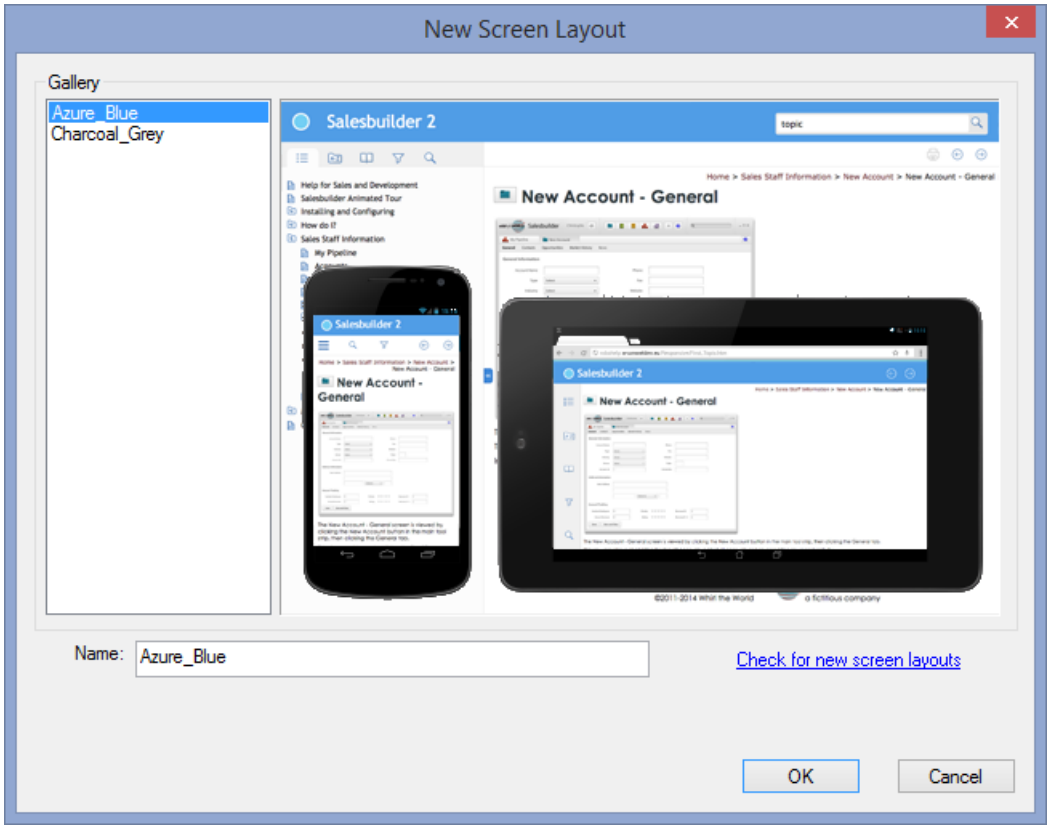
The new layouts in this release greatly enhance the end-user experience. In the new layouts you can:

- Configure the search results to appear in the content or topic panes
- Use the Comments field in the Status tab of Topic Properties for Descriptions that appear in the search instead of the first few lines of the topic.
- Show breadcrumbs and search context in the search results.
- Easily show/hide widgets such as index/glossary/TOC and so on.
- Add social widgets out of the box so that pages can be shared on Facebook or Twitter.
- Choose to hide the branding bar on smartphones to give more screen space.
- Convert to right to left layout with the click of a button. Note that you cannot create topics using right to left languages in RoboHelp. The content can be created by translation agencies or Technical Communication Suite users can link to FrameMaker content.

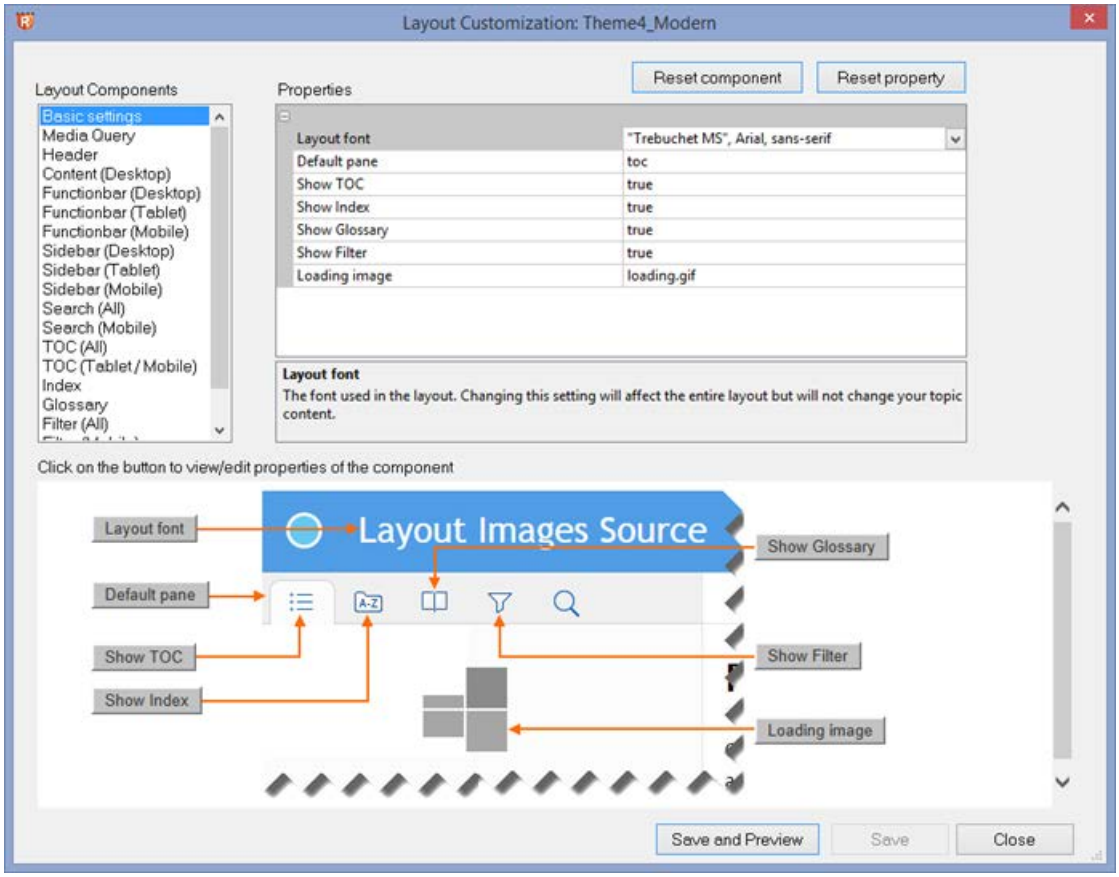
The new layout remembers the state of the books in the TOC and two or more books can be expanded.

Setting Up

In the Output Setup tab, you will see a Screen Layouts option. Right click that to open this dialog. Note the Check for new screen layouts link. This dialog can also be accessed from the Responsive Layout dialog.



Having picked your preferred layout, expand it to see its parts. As with Multiscreen HTML5, you can right click any of the resources it uses but there is now a much easier way to edit selected items. Right click the layout name itself and click Edit to open the simplified layout editor. It provides the options that most authors will want.

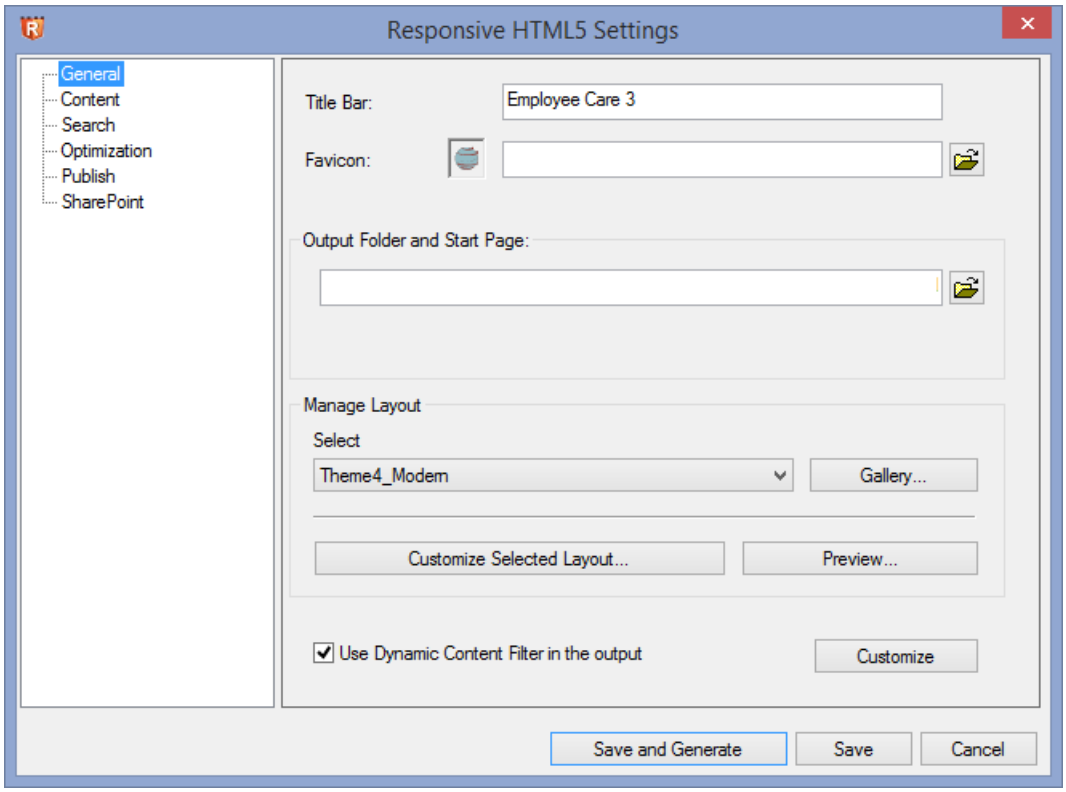


That's it, your Responsive HTML5 layout is ready to be integrated into your project.

Generating the Output

The General settings allow you to select the screen layout to be used in this Responsive Single Source Layout.

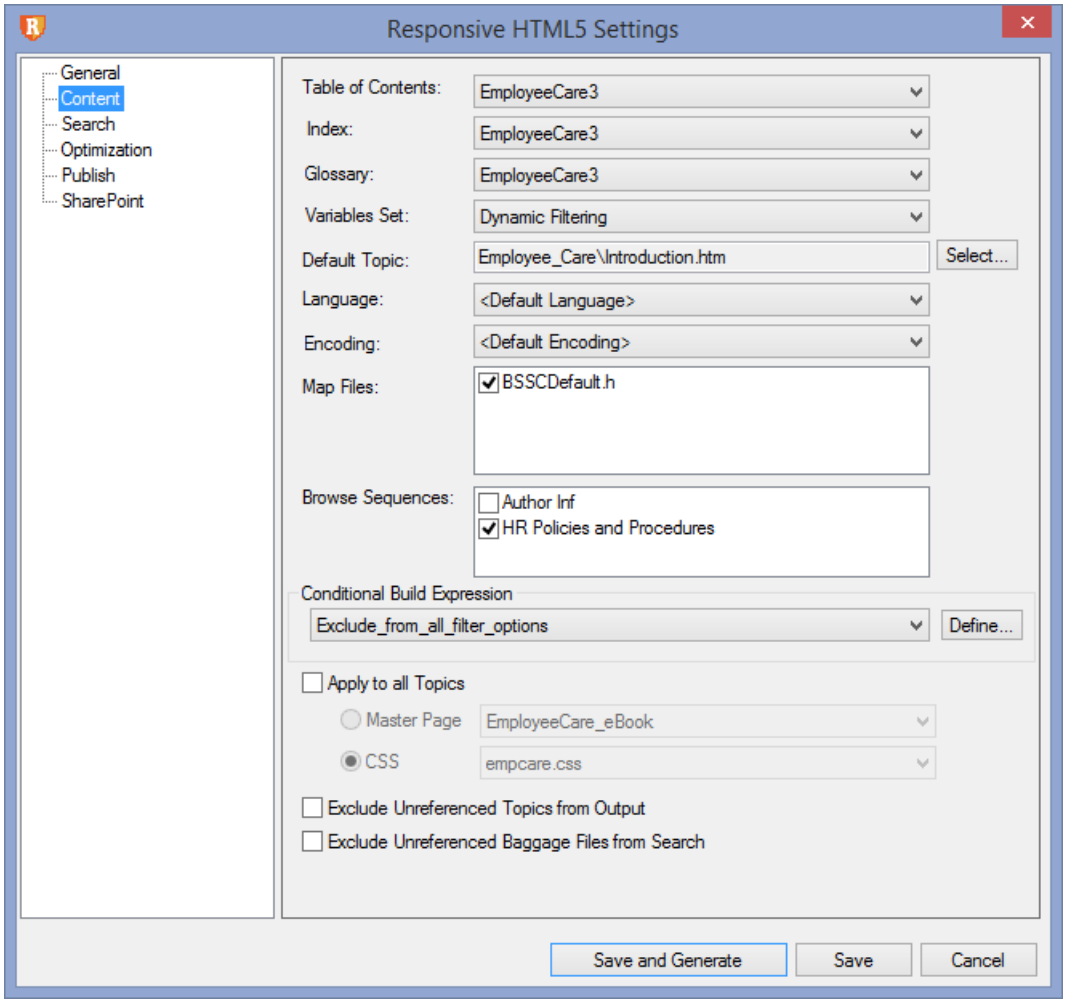
- If you change your mind about what you set up earlier, you can select a different one from the dropdown.
- You can add to the list by clicking Add from Gallery.
- You can make final edits by clicking Customize.
- You can check the appearance by clicking Preview.
- Note the new Dynamic Content Filtering option in Adobe RoboHelp (2015 release).



Content

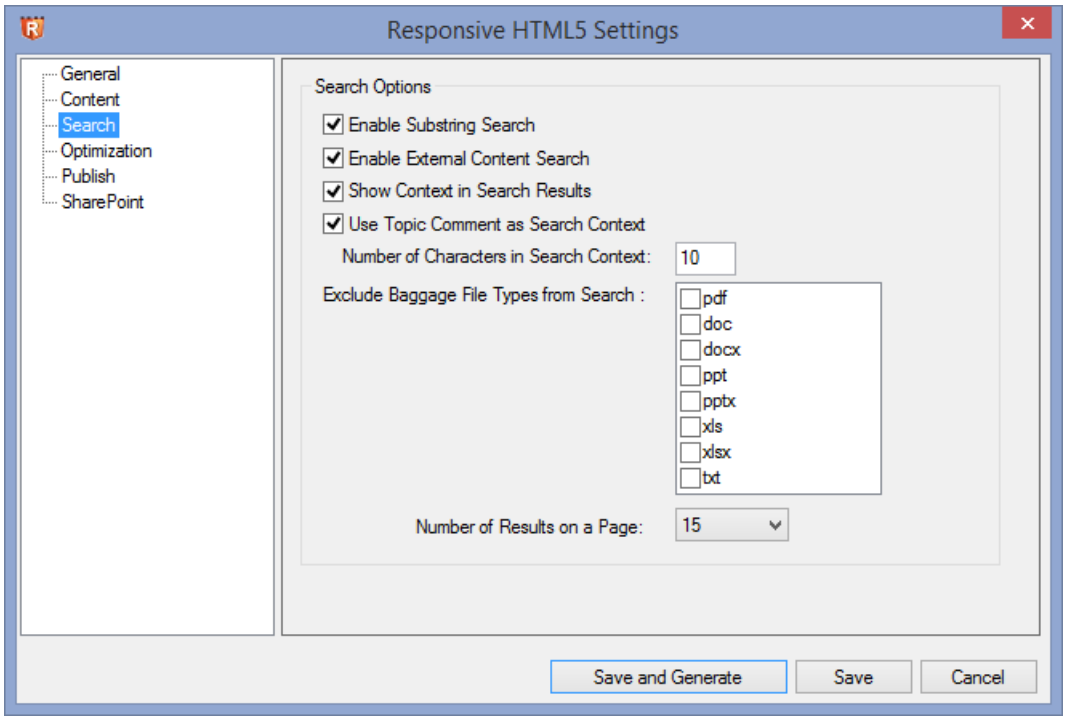
The Content settings are the same as with WebHelp. With Responsive HTML5, the content will be the same on all devices. Use Multiscreen HTML5 if you need to have different content on different devices.

If you are using Dynamic Content Filtering, the build expression should only exclude content that you do not want to be included anywhere.



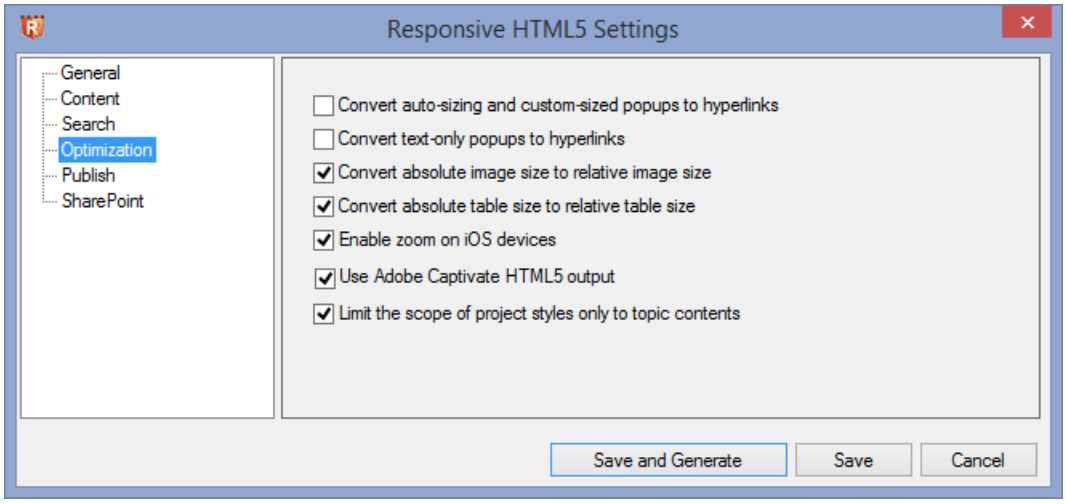
Search

The Search settings are also the same as with WebHelp.



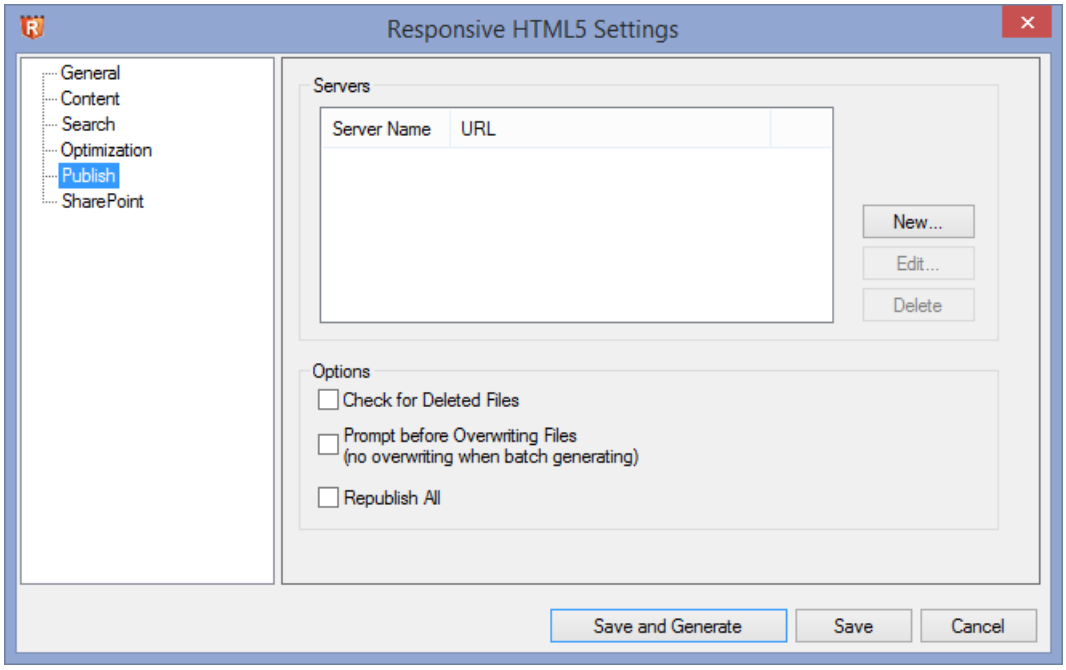
Optimization

The Optimization settings are the same as with Multiscreen HTML5 and need to be defined for the range of devices you will be supporting. For most authors, the settings will be as shown below.



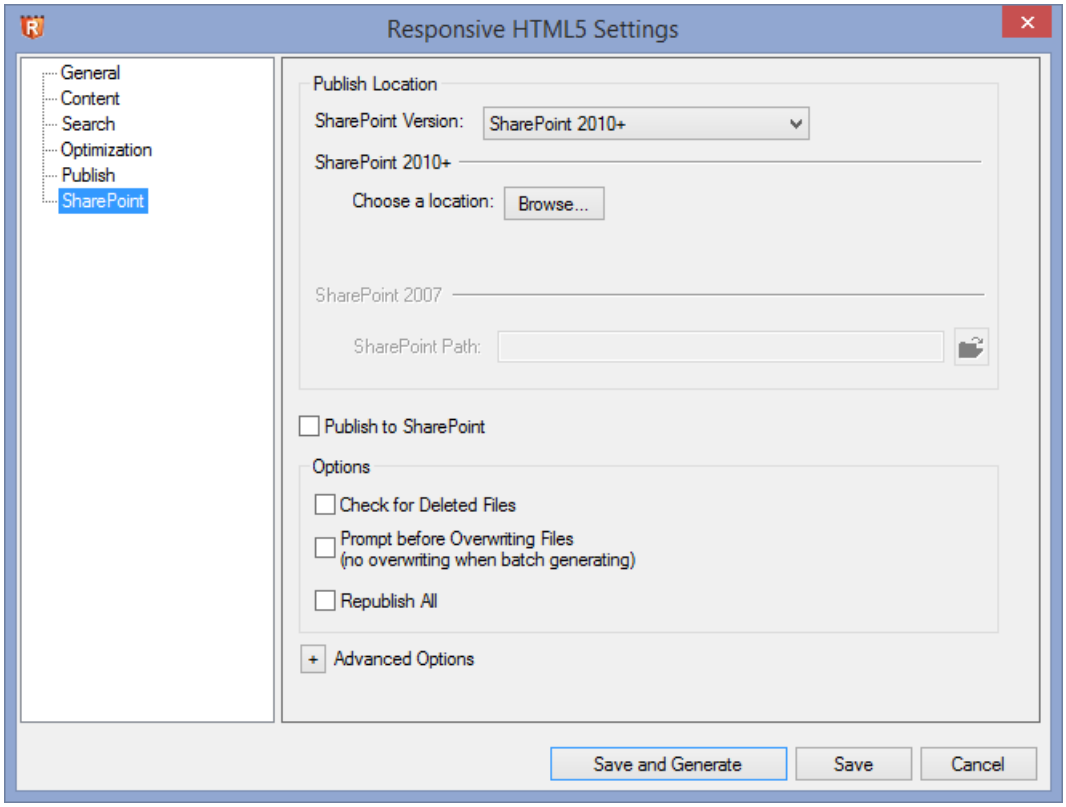
Publish

The Publish settings enable you to place your output directly onto a server. Use these or just give your developer everything that is in your Generate folder.



SharePoint

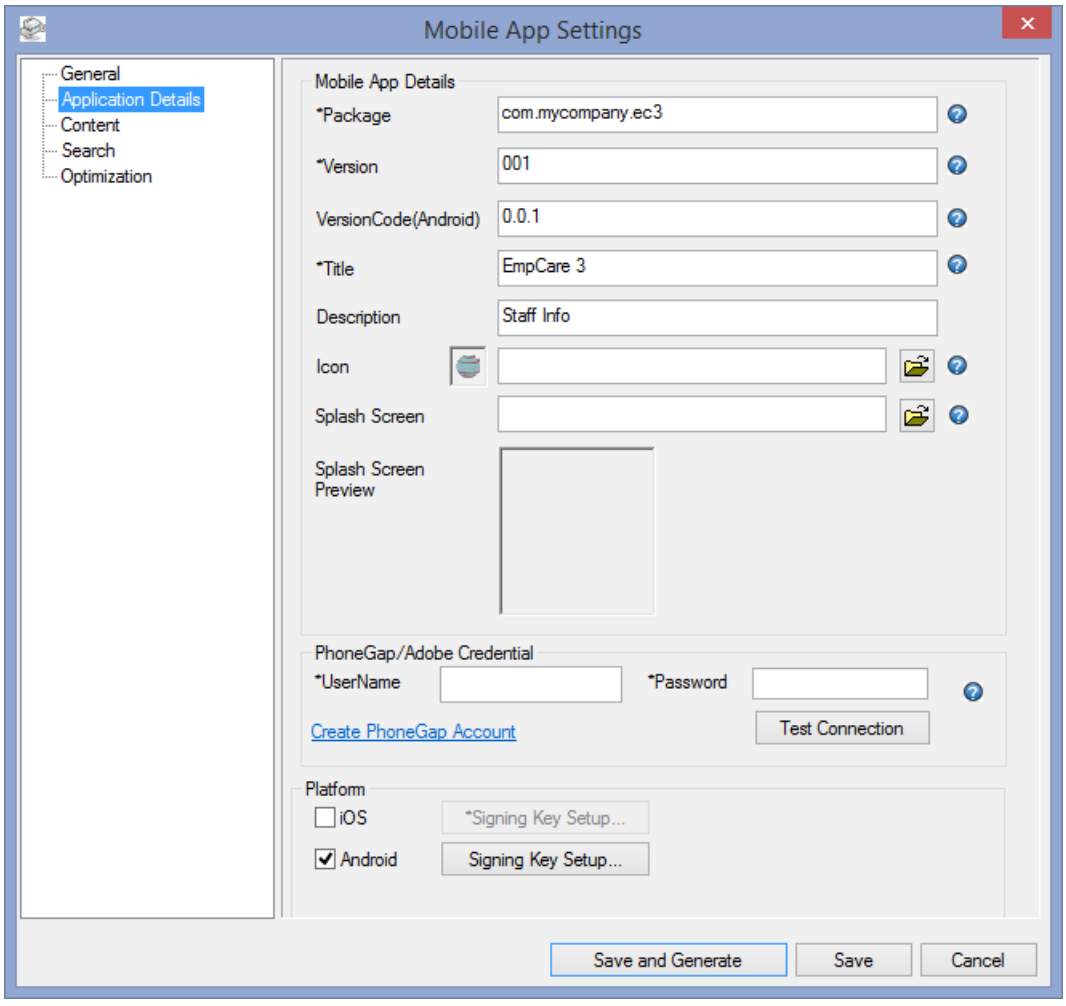
If you use SharePoint, the settings will need to be defined here. See SharePoint Integration for more information about SharePoint.



Mobile App Output

In RoboHelp 10 and 11 you could generate an Android app in debug mode. That allowed authors to create an app that could be installed on an Android device but it could not be uploaded to Google Play as it lacked the necessary signature. Also it did not allow the creation of an iOS app for the same reason. Adobe RoboHelp (2015 release) introduces a new Single Source Layout specifically for the creation of mobile apps for both Android and iOS devices that can be installed from Google Play or the Apple Store.

Most of the settings are the same as for other outputs, it is the Application Details fields that enable the app creation.



Field	Description
Package	This is effectively the filename. It is recommended you use only A-Z characters and the underscore. Use dots to separate the elements.

Version	Enter your version number.
Version Code (Android)	Enter the version of PhoneGap to be used.
Title	This is what will appear below the icon on the device.
Description	This will display on the PhoneGap apps page.
Icon	The icon that will display on the device to open the app.
Splash Screen and Preview	A splash screen that appears while the app opens.
Phone Gap Credential	Generation of the app is done online using the PhoneGap site. You need to register and select one of the options. The free PhoneGap plan allows you to create one app free. You can either register with PhoneGap direct and use that ID or you can use your Adobe ID. Alternatively you can opt for a paid plan. See https://build.phonegap.com/ for more information. Essentially you can create 25 apps in a private repository or you can create more if you store the output as open source. Check first to see if one of your developers is already registered. If they are, you could use their credentials.
Platform	Tick either iOS or Android or both. The Signing Key Setup button will then be enabled. The details in that screen will need to be completed for apps that are to be available on Google Play or the Apple Store. Check first to see if one of your developers is already registered. If they are, you could use their credentials. If you are generating for Android, you can create an app in Debug mode and that does not require completion of the Signing Key Setup dialog. In Debug mode the app generated can be installed directly onto an Android phone but it cannot be uploaded to Google Play. The same option is not permitted on iOS devices, a Signing Key is required.

Multiscreen HTML5 Output

If you have not previously created any HTML5 outputs, you may find it easier to start with the new Responsive HTML5 output introduced in Adobe RoboHelp 11.

Multiscreen HTML5 allows you to create different designs and publish different content for different devices from the same source material. The configuration for each device can be optimized to suit the operating system, be it Windows, Android or iOS.

The steps are quite straightforward.

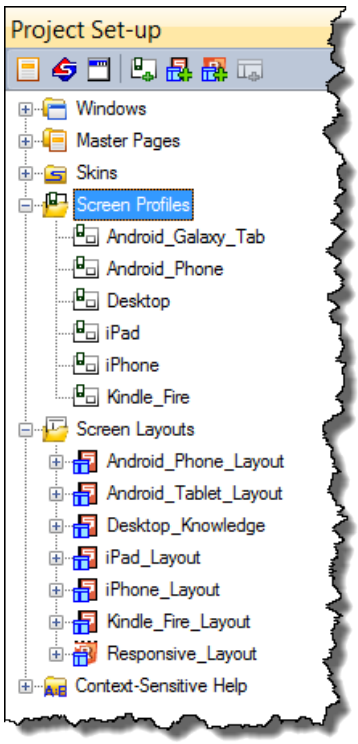
1. In the Output Setup you use the supplied profiles and screen layouts or you can set up your own. Screen Profiles set out parameters to identify a device by screen size and / or the browser used. For example you can set up one profile for Android devices, one for iPhones, one for iPads and a catch all for browsers such as Internet Explorer, Firefox and Chrome.

You can also set screen size parameters for each of the browsers so provide more than one layout per browser.

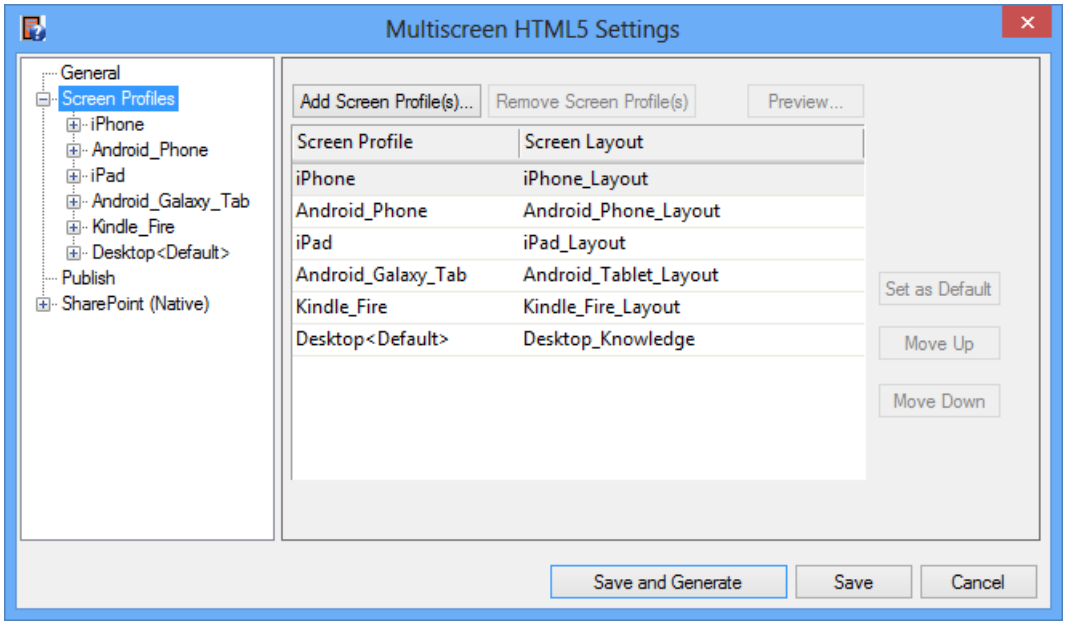
2. In the Multiscreen HTML 5 layout you map those profiles to the layouts you have chosen. By that means the smaller screen devices can use one layout while the devices with larger screens can use a different layout.

Screen Profiles and Screen Layouts

The screen profiles and screen layouts are shown in Output Setup. Here you will see all the profiles and layouts available to the project. You can add and delete as required.



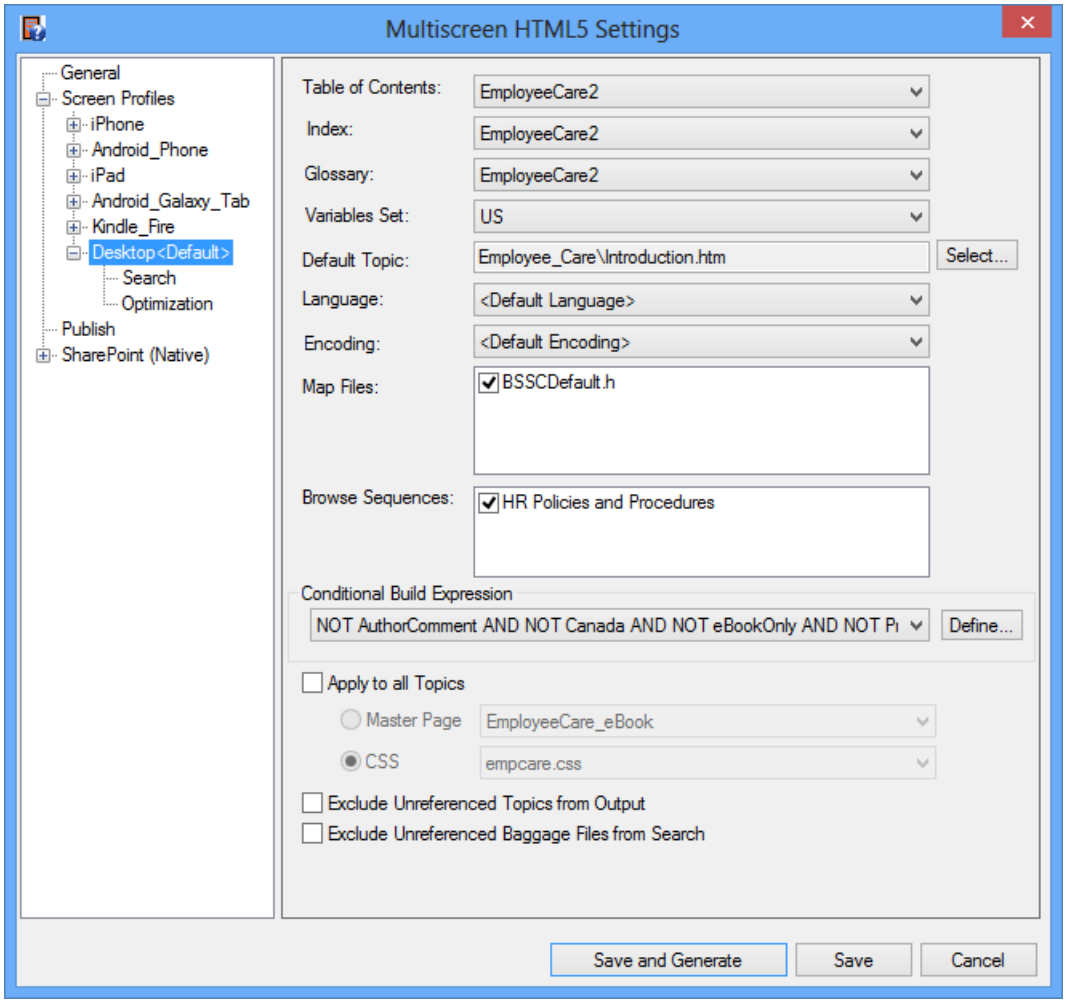
The profiles are mapped to the layouts within the Multiscreen HTML5 Single Source Layout. On first accessing the layout, all the screen profiles in the project will be listed on the left. They will also be listed on the right and be mapped to a screen layout. If you don't want an output for all the devices, simply highlight them on the right and use the Remove Screen Profile(s) button. They will be removed from both lists and the order will reflect whatever you set using the Move Up and Move Down buttons. If you add new profiles later, they will not automatically appear on the left, you need to use the Add Screen Profile(s) button in any layout where you want the new profile to be included.



Content

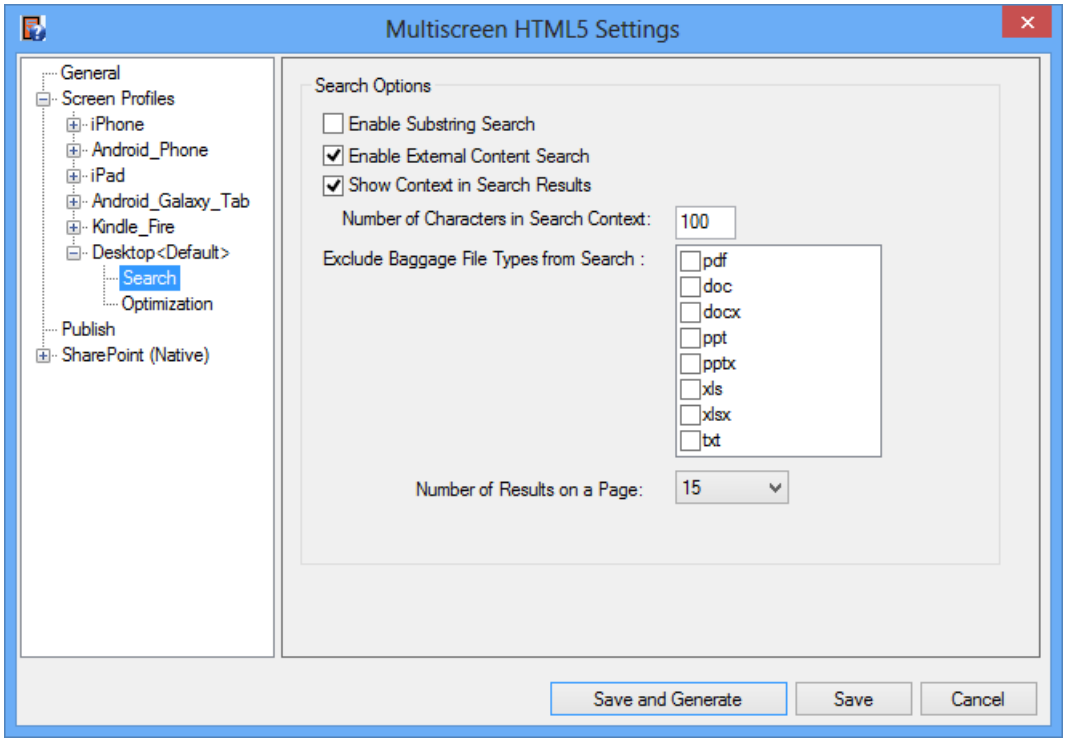
The familiar options for defining the content for each profile are shown below and you need only complete those details for the profiles you retain above.

Because you can select different settings and apply different Conditional Build Expressions to each profile, you can have different content for each device. For example, by using different User Defined Variables, you can use the word "Click" on desktop devices and "Tap" on smartphones and tablets.



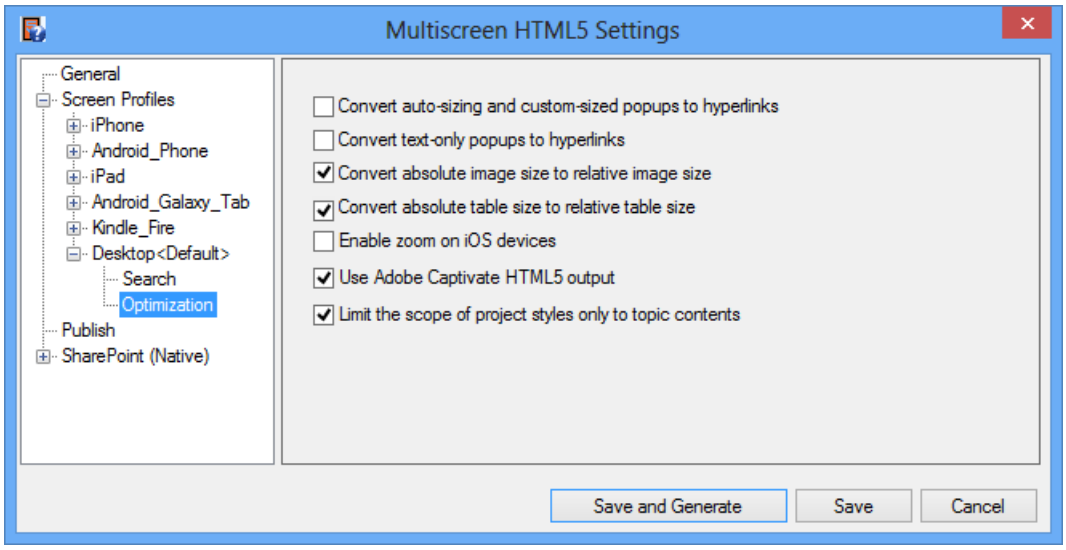
Search

The Search settings allow you to define different search parameters for each profile. You may want to show a smaller number of characters on devices with small screens. Note that RoboHelp allows you to exclude specific file types from the search results.



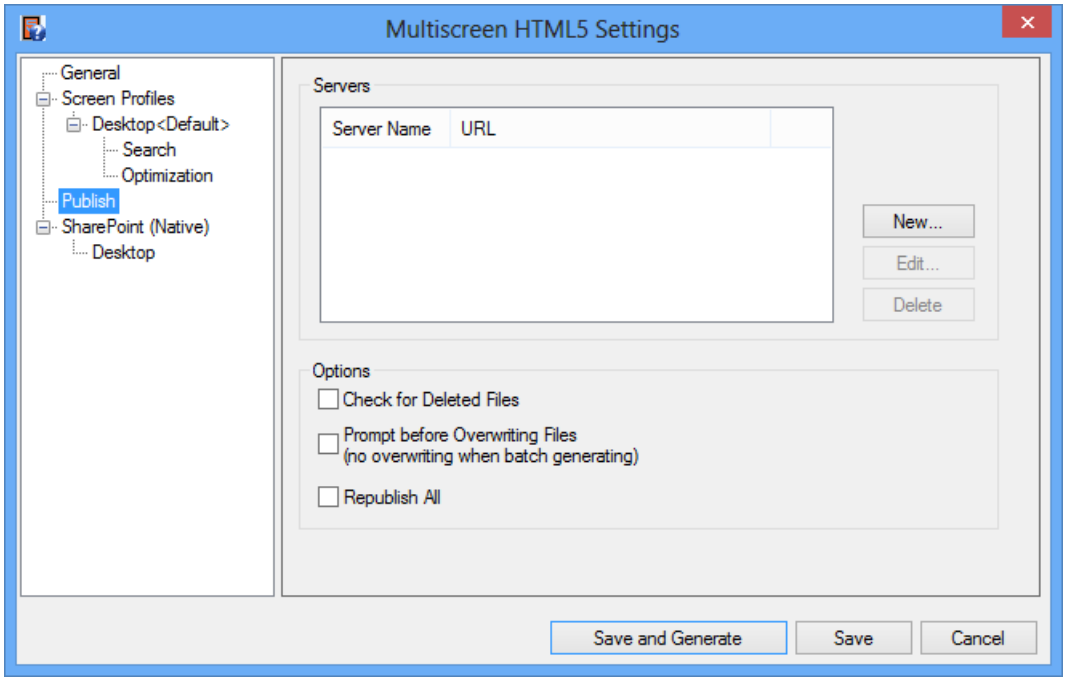
Optimization

The Optimization settings allow you to optimize the output for each device.



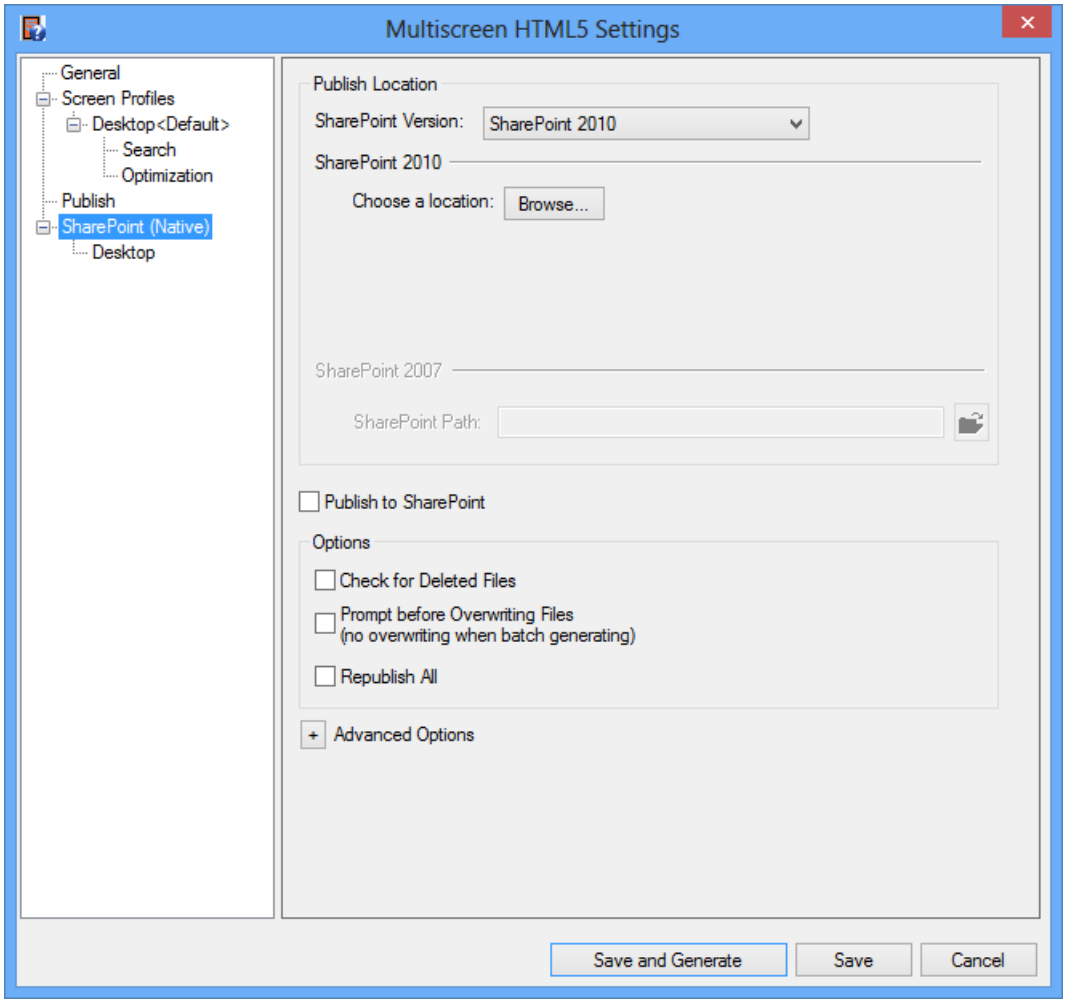
Publish

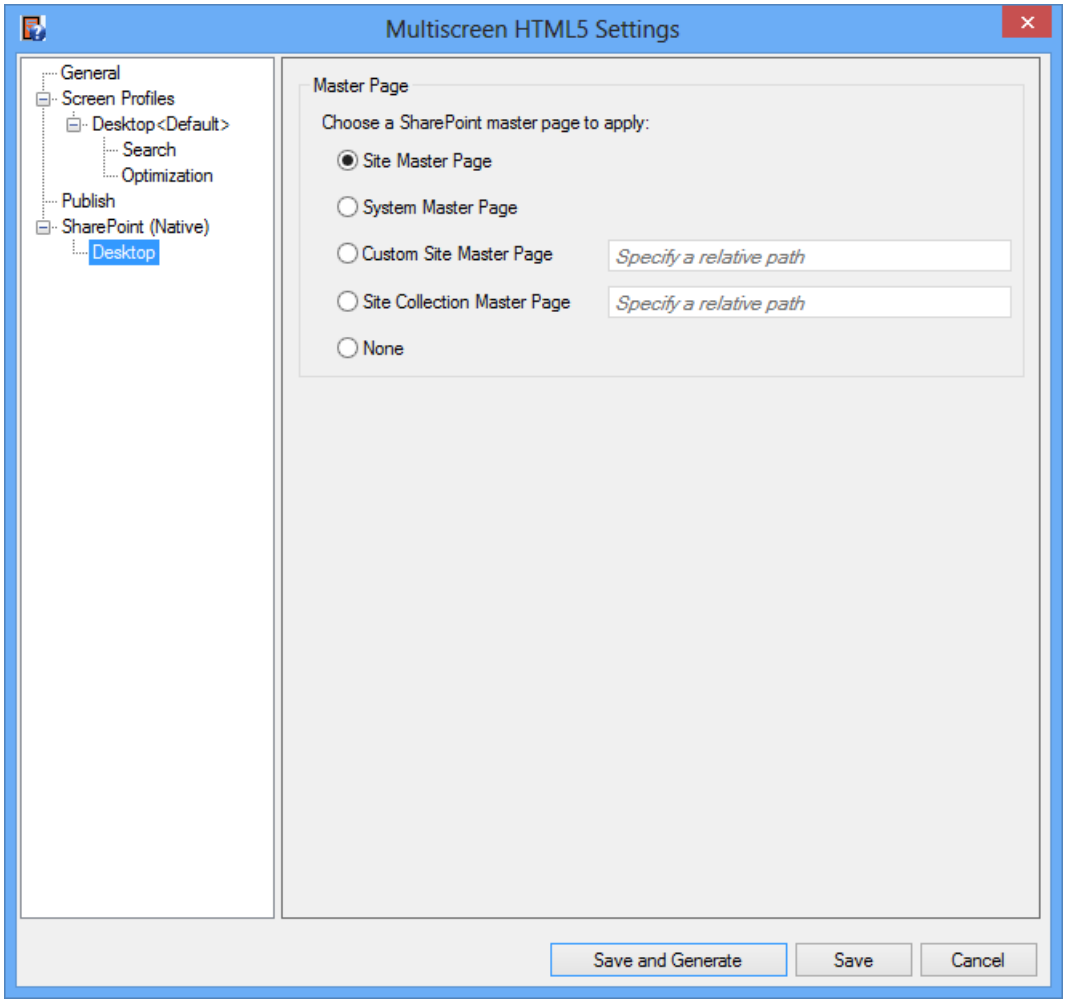
The Publish settings enable you to place your output directly onto a server. Use these or just give your developer everything that is in your Generate folder.



SharePoint

If you use SharePoint, the settings will need to be defined here. See SharePoint Integration for more information about SharePoint.


Multiscreen HTML5 Settings
General
Screen Profiles
Desktop<Default>
Search
Optimization
Publish
SharePoint (Native)
Desktop
Publish Location
SharePoint Version:
SharePoint 2010
SharePoint 2010
Choose a location:
Browse...
SharePoint 2007
SharePoint Path:
Publish to SharePoint
Options
Check for Deleted Files
Prompt before Overwriting Files
(no overwriting when batch generating)
Republish All
Advanced Options
Save and Generate
Save
Cancel

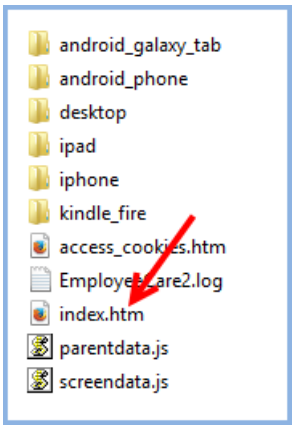


Generating

When you start the generation process, you will see RoboHelp creating an output for each of the profiles you included. What you will find in the !SSL! folder is shown below. The index.htm file is not the start page that you are familiar with in WebHelp. In each of the output folders you will find the familiar structure with an index.htm file that is a start page for that layout.

Your developers have four options.

1. They can put all the outputs on a server and point all devices to the index.htm page shown below. That is a "sniffer" and will detect what it needs to know about the end user's device and serve up the appropriate help.



2. They can put the content for a specific device on the server and link to the index.htm file found in the output folder for the device.
3. For other devices, your developers can take the HTML5 output and convert it using their preferred tool.

You do not have to create multiple outputs. You can use this layout to create help just for a tablet or you can use the Desktop layout to create "WebHelp" in HTML5 format.

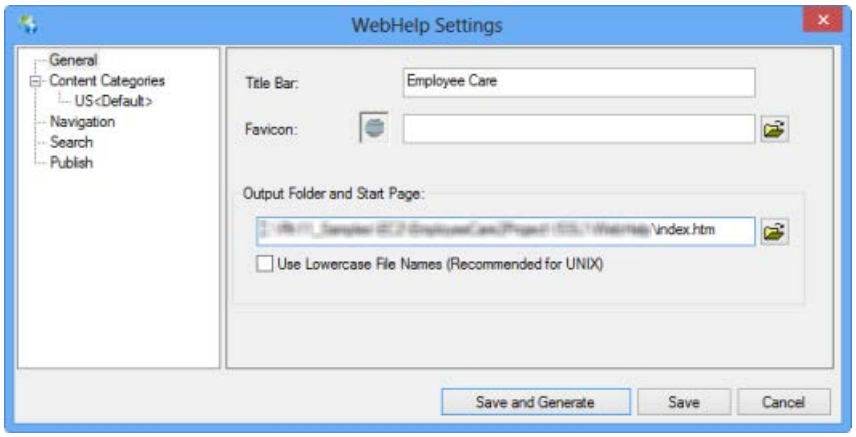
WebHelp Output

WebHelp, as its name suggests, is primarily intended to be viewed by users accessing files stored on a web server. It can and often is installed on the user's desktop but for Internet Explorer you will need to apply what is known as the Mark of the Web (an option that can be applied when configuring the layout). Some users have also found links to Word and PDF files troublesome when WebHelp is installed locally. These are Windows issues, make sure you test thoroughly. For locally installed help the better option will be the HTML5 outputs or Microsoft HTML Help (CHMs).

Below you will find some tips on this output relating to this project and WebHelp generally.

General Settings

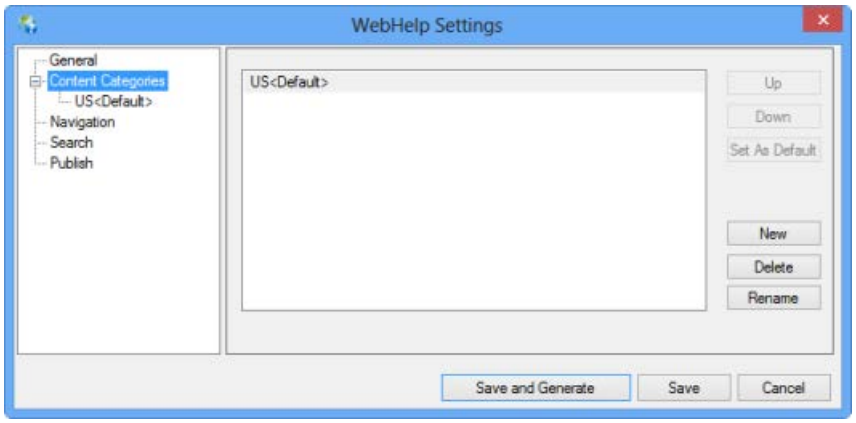
You can define a Favicon that will then appear in the browser tabs. The start page is the three frame page that shows the user the toolbar, the navigation pane (the table of contents and index) and the default topic. In this project the Favicon is stored in the Assets folder.



Content Categories

Highlight Content Categories to see the categories you have set up. If you are not using Dynamic User-Centric Categories (Content Categories) you will only need to set up one

category. Here it has been named US to note that its content is based on the US content in the topics.



Highlight a specific category to see its configuration. You choose which Table of Contents, Index and so on that you want to use if you have more than one option.

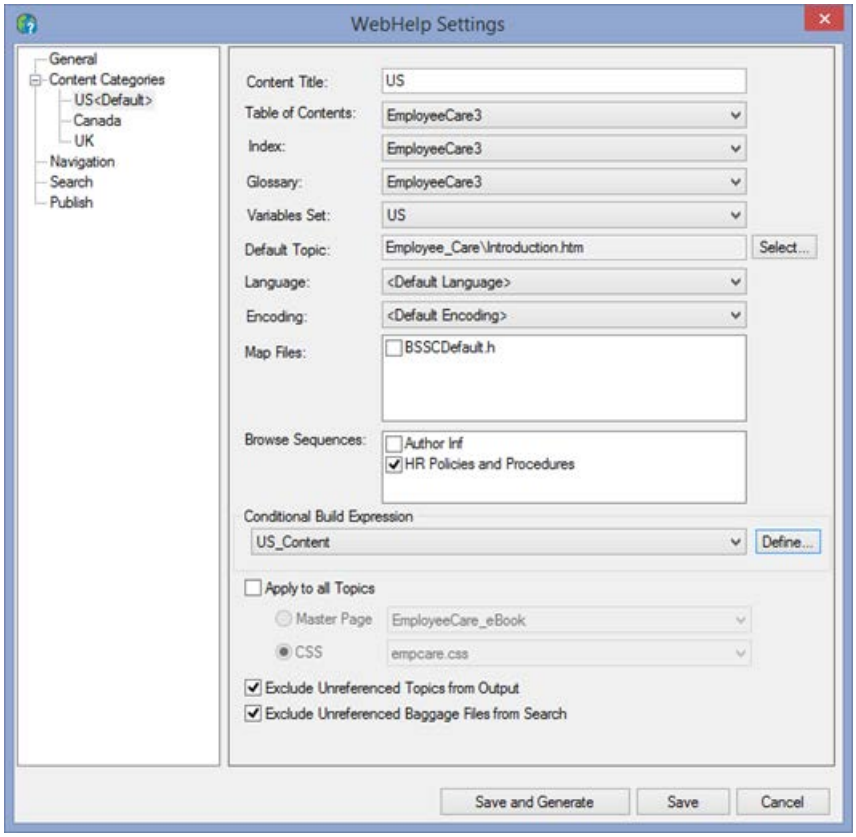
You also choose the default topic. Do make sure you understand the difference between the start page, which you defined in the General Settings, and the default topic. Show me.



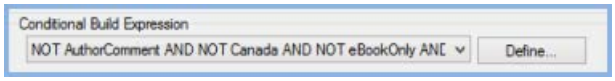
- The start page is the one that opens the three frames, all that you see above in the blue border.
- The default topic is the first topic that users will see.

You have the option to configure using a different CSS for the output to override the CSS you used in the Design Editor when creating the topics. This can be useful if you want to have a different appearance, perhaps in different markets. If you are using Content Categories, you might want each category to be different.

In this example, the topics contain content that is specific to certain countries so the Conditional Build Expression has been set to exclude all content not required in the online help for the US based users.



Note how much easier it is to select the build expression. In older versions you would have seen the expression and had to work out what would get included. The name makes it obvious.

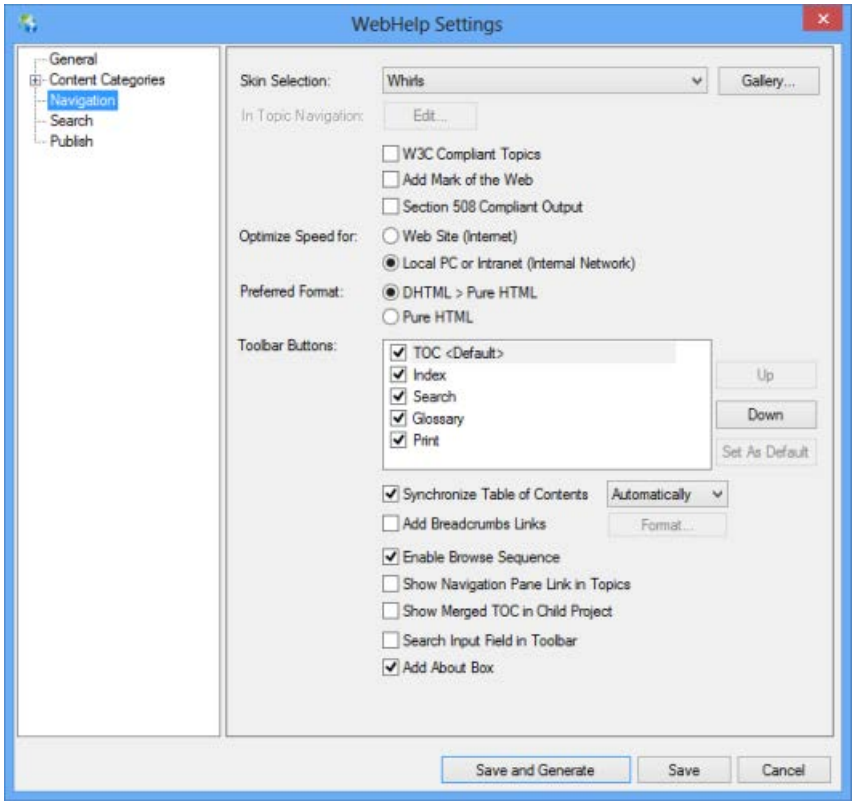


Navigation

Most of the options here are fairly self explanatory and described in Adobe RoboHelp's online help.

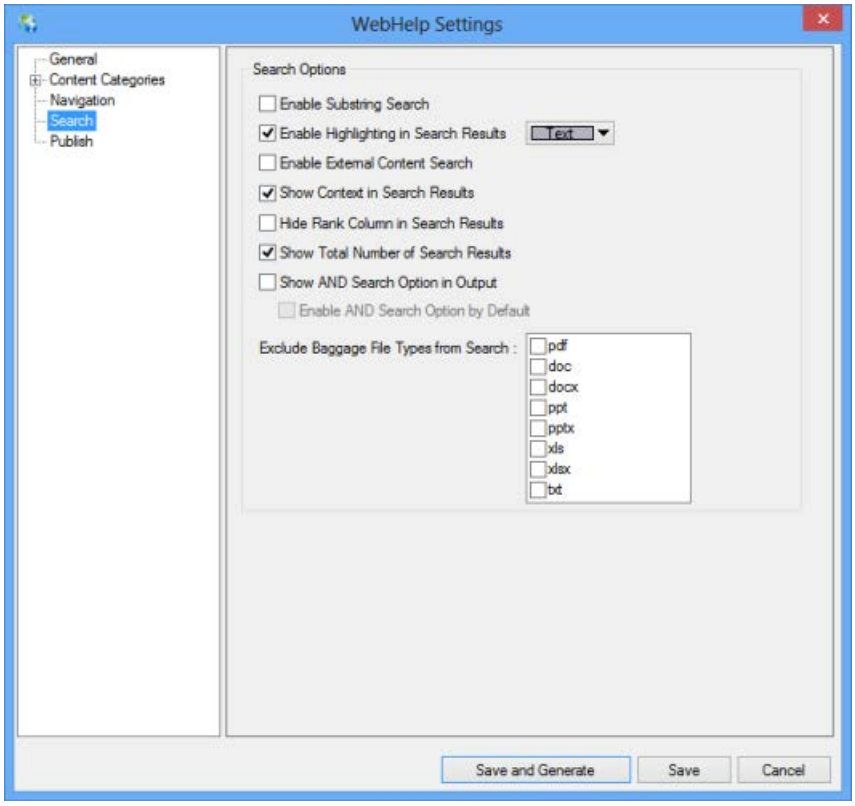


Breadcrumb links have been deselected in this sample as the alternative method of including them in a Master Page has been used. Sometimes authors use both methods and wonder why they are seeing two sets of breadcrumbs. That's why!



Search

Most of the options here are fairly self explanatory and described in Adobe RoboHelp's online help.



Publish

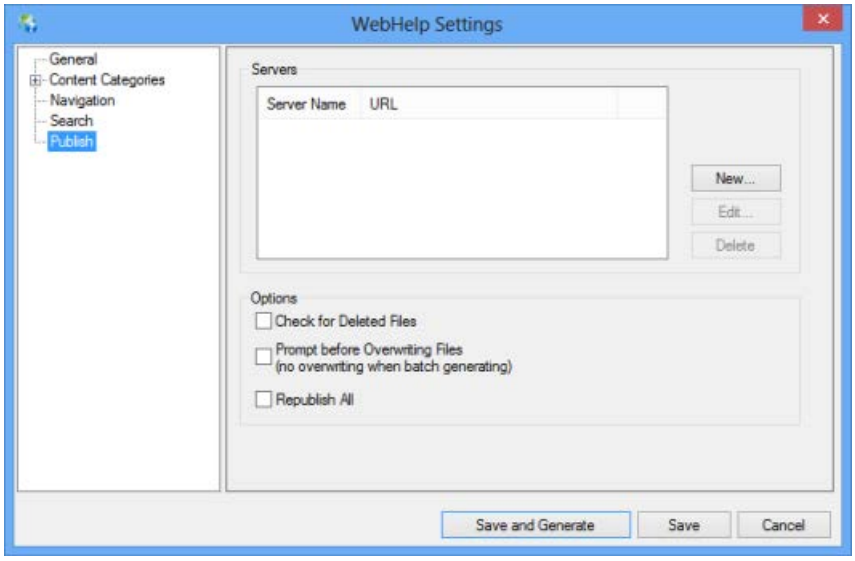
Once your help has been generated, you need to make it available to users. This may be done by installing it on the desktop (please note the warning at the beginning of this topic) or by publishing it to a server,

How this is done depends on certain factors and how your developers have chosen to operate.

When you generate the help, Adobe RoboHelp deletes all previous files in the target folder.

- In most scenarios that is fine and all the files will be generated to that folder automatically. In that scenario, you can either zip the contents and pass the zip file to your developers or you can additionally publish direct to the server.
- Advanced users may have modified the standard output in ways that require dependent files that Adobe RoboHelp is not aware of and will not be in the generated content. Publishing does not delete anything from the server so once the files have been upload uploaded, they will remain there until they are deleted manually. That avoids having to remember to upload them every time.

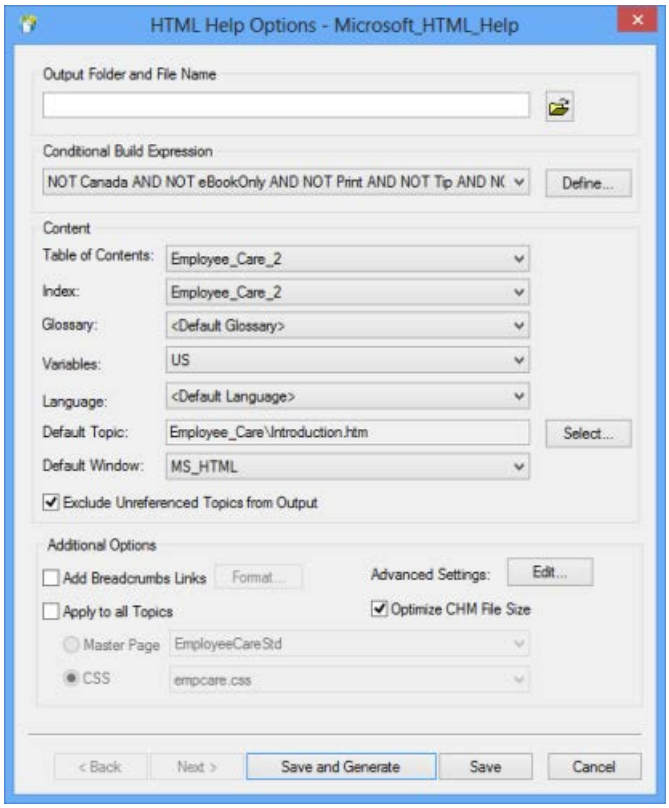
See Adobe RoboHelp's online help for details of how to set up Publishing.



Microsoft HTML Output - CHM

Microsoft HTML Help - CHMs - are limited by the Microsoft Help Compiler (last updated by Microsoft in 2004). Because of a potential security risk, Microsoft patched Windows in 2005 to prevent CHMs being run from a network location. There are solutions to this but essentially the answer is that CHMs are now really intended for Desktop installation only.

The appearance of Microsoft HTML Help is limited by the Microsoft compiler. However you can now create WebHelp using a skin and then convert it to a CHM to get a more modern appearance. See Bits and Pieces.



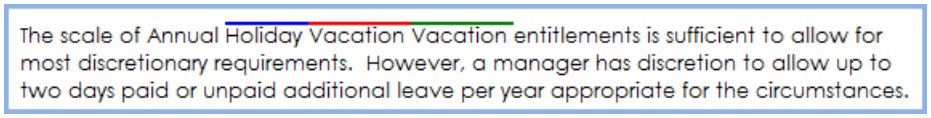
Printed Documentation Output

Notwithstanding the trend to online information, many users still require printed documentation. A major change introduced in Adobe RoboHelp 11 was the ability to include your own headers and footers in the printed outputs. You can define which sections have headers and footers. Each section can be different and you can customize the formatting.

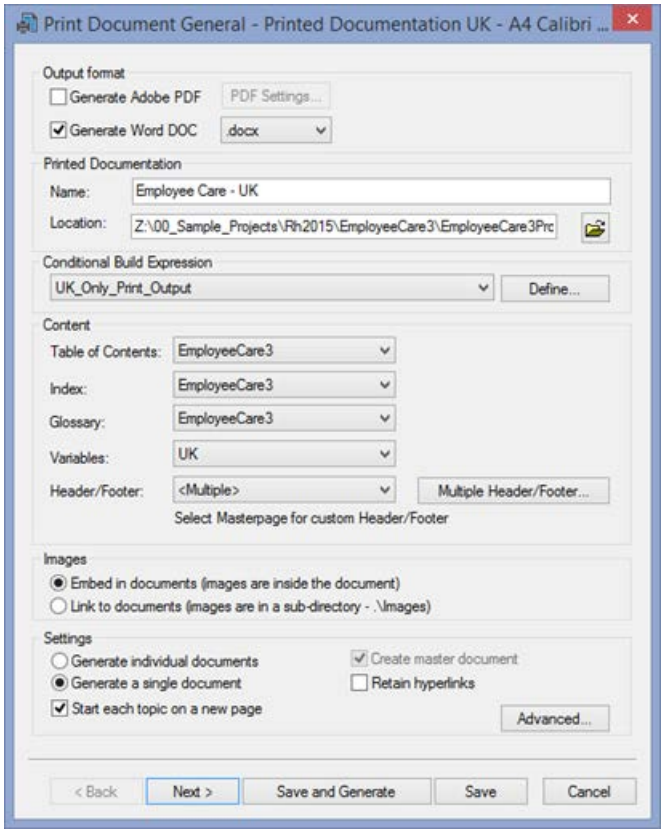
In About Employee Care it is explained that whilst the online help is for the US audience, printed documentation is required for the UK and Canadian users. This sample project shows how the different content is created to allow those documents to be produced, in addition to a printed document for the US users.

General Settings

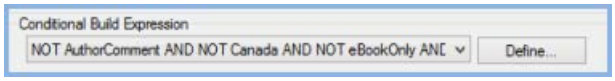
By applying build tags to content, different text will be entered for each of the three countries. When generating any output, the build expression will define what text is included and what is excluded. See the text options in this first image and see the build expression in the second image.



Since Adobe RoboHelp 11 you can generate multiple documents to the same folder provided, of course, that they have different file names. Also any links you have in your topics to popups will appear in your printed documentation, provided the target topic is in the printed document.



Note how much easier it is to select the build expression. In older versions you would have seen the expression and had to work out what would get included. The name makes it obvious.



Headers and Footers

Adding your own headers and footers can now be achieved using Master Pages that you set up for the purpose. You can use existing Master Pages but it is likely they will not quite meet your requirements.

- You create a Master Page that has the headers and footers that you want. The Master Page Editor has some icons to add pre-configured options such as page numbers and chapter names. You can click Insert > Fields to add other field level information such as the project title and / or date. You can apply formatting to any part of the header and footer. See Master Page Enhancements.
- In the Header / Footer dropdown shown above, you can choose whichever Master Page you want. By default that will be applied to every page in your printed document.
- You may want to have different headers and footer in different sections or you may want to only have headers and footers in the content section, with nothing on the title page, the table of contents and suchlike. Click the Multiple Header/Footer button to access the dialog below where you can define your options.

In this project the Master Pages for use with the Printed Documentation Layouts have been set up with different options. Note how the US Master Pages include different odd and even pages so that the image is always on the outside when printing double sided.

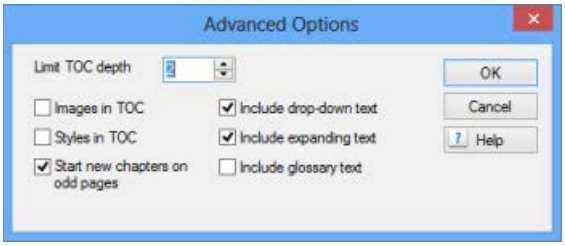


Other Topics are topics added in the Section Layout as described below.

Word Documents refers to any Word documents that you add in the Section Layout.

Advanced Options

The Advanced button allows you to set a few more options.



Content Settings

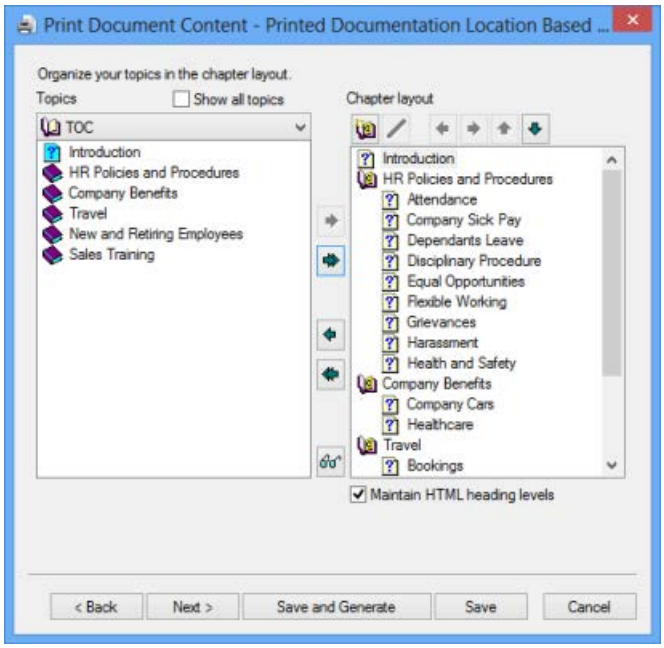
When you first set up the content for your printed document, you will see the Table of Contents you selected in both panes below and the books will have the turquoise highlighting. In the Chapter Layout pane you can change the order and you can delete topics if required. When you delete topics, the turquoise highlighting will be removed to show that not all its topics will be in the printed document.

Any changes you make later to the Table of Contents selected in the General Settings will be made to the pane on the left. Note however that the Chapter Layout will not reflect those changes. That is deliberate as you may not want the printed document to include everything that is in the Table of Contents.



The quick way to keep the two panes in sync is to click the left facing double chevron and then click the right facing double chevron.

The TOC dropdown also allows you to select topics not in the Table of Contents. If you add them here, they will have the same headers and footers as other topics in the Chapter Layout.



Section Layout Settings

This page shows the default structure of your printed document. You can rearrange the order and remove sections as well as adding other Word documents into the layout.

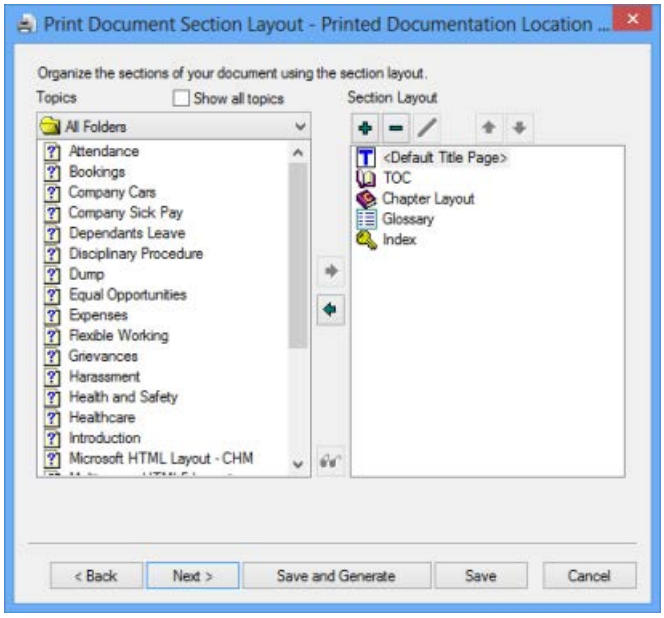
You can also add topics to the section. You might want to do this to add a topic right at the end of the document about how to contact your organization, rather than it being part of the Chapter Layout.

The default title page can be deleted and you can substitute a cover page that you have created in Word or Adobe RoboHelp for the purpose. That's especially useful if you have to apply a corporate design. See the Printed Documentation US Century Gothic layout which uses a different cover page and a different Word template.



If you do design your own cover page in Word and you are going to apply a Word template to the output (as described below in Appearance Settings), it works best if both have been created from the same Word template. If they are not from the same template, then do at least make sure the two have the same settings for Word's Normal style. Otherwise you may get some additional line spacing on the cover that needs to be removed.

In this sample project there are cover pages for both Letter Size paper and A4 with different fonts and each of these can be mapped to a matched Style Mapping template. Try creating different documents with different cover pages and templates. The necessary files are in the root of the project. They have also been copied to the Assets folder and you can import them into your own project if they suit your needs.



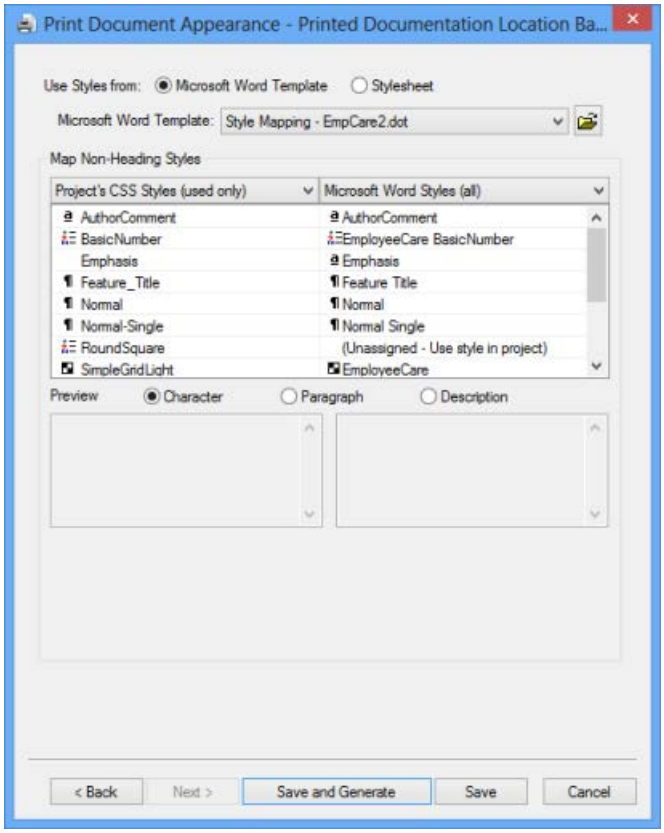
Appearance Settings

The final page before you generate your document defines the appearance settings.

The options are to choose a Microsoft Word Template or a CSS Stylesheet. Neither one is better than the other, it is dependent on various factors.

- You may already have a corporate Word template that you are required to use.
- You may already want the same styles as in your project but with a green theme rather than a blue theme. It might be easier to create that by tweaking your CSS.

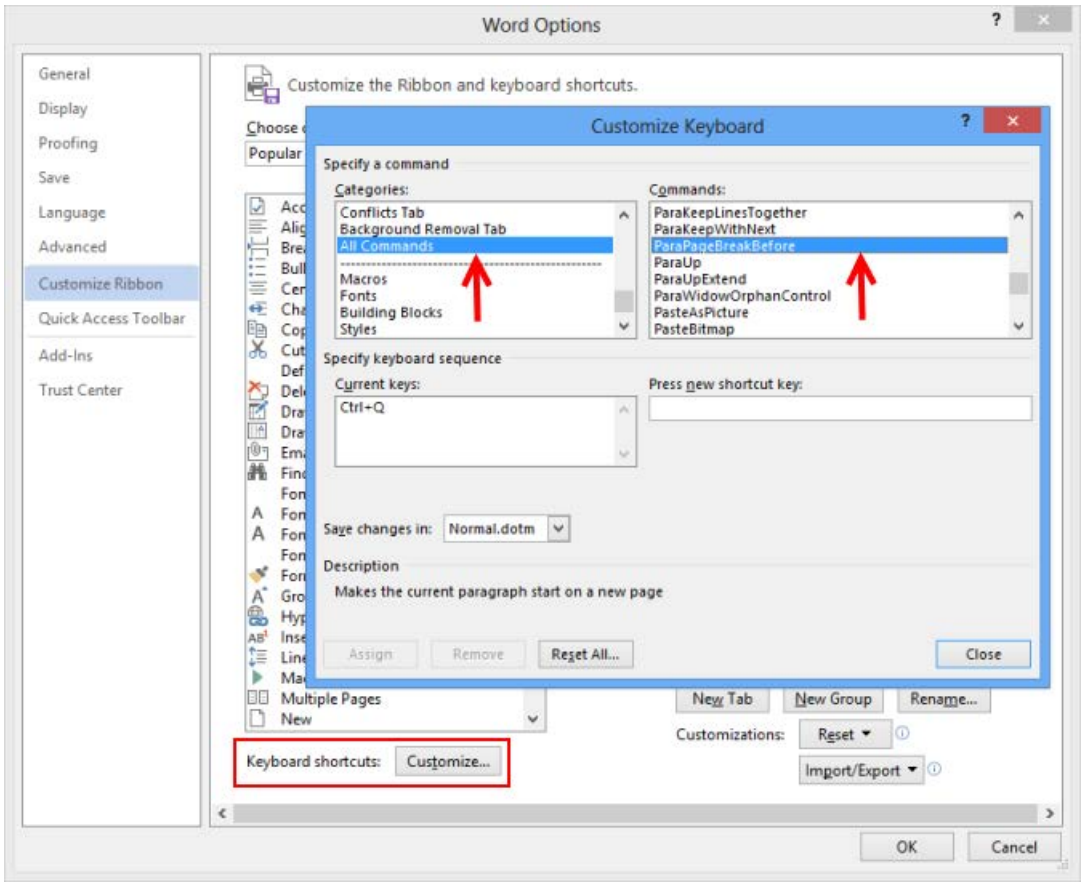
In this example, the mapping is to a Microsoft Word template to show how tables and multi-level list styles can be mapped using a Microsoft Word template.



If you want to design your own cover pages, you need to set the paper size, margins and so one to the same settings as the Adobe RoboHelp Style Mapping templates. In the Assets folder, you will find two blank templates, one set to Letter Size and US English and one set to A4 and UK English.



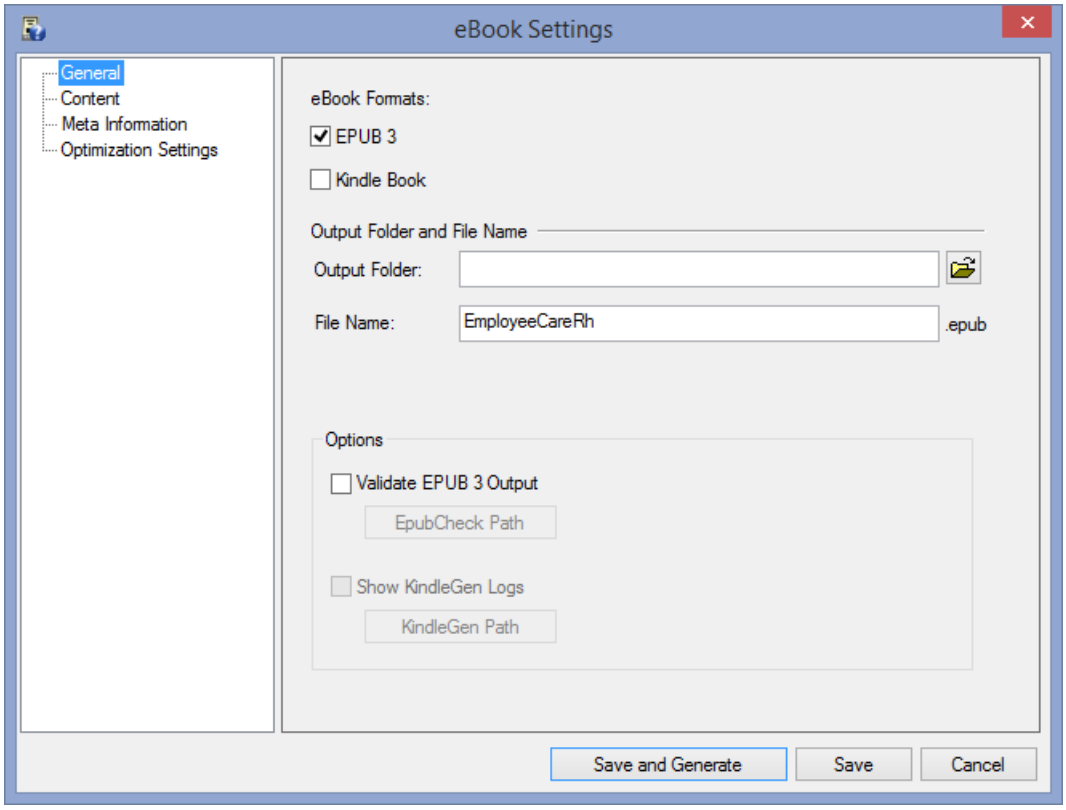
You may want to break topics at various points in Word. Set up the customization below with your preferred keyboard sequence. CTRL + Q is useful as you can thumb CTRL and finger Q easily while you scroll through. Click anywhere in the paragraph you want to start on the next page and use the command. It also works nicely in the first paragraph in the first column of a table to split it at that point.



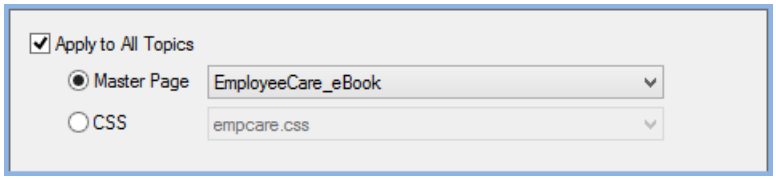
eBook Output

The settings for this output are shown below.

- If you are generating a Kindle book, when you select that option, the Kindle Gen Path button will allow you to define where the Amazon Generator is installed or take you to Amazon's site so that you can download it.
- For EPUB 3 you can validate your output and clicking the EpubCheckPath button will allow you to define where the validator is installed or to download it.
- For EPUB 2.0.1 you need to use the XML Layout option and then go to File > Generate > EPUB2.0.1 Output.



The eBook topics require a different Master Page without a link to the Whirl the World website. This has been achieved by applying a different Master Page in the Content options.

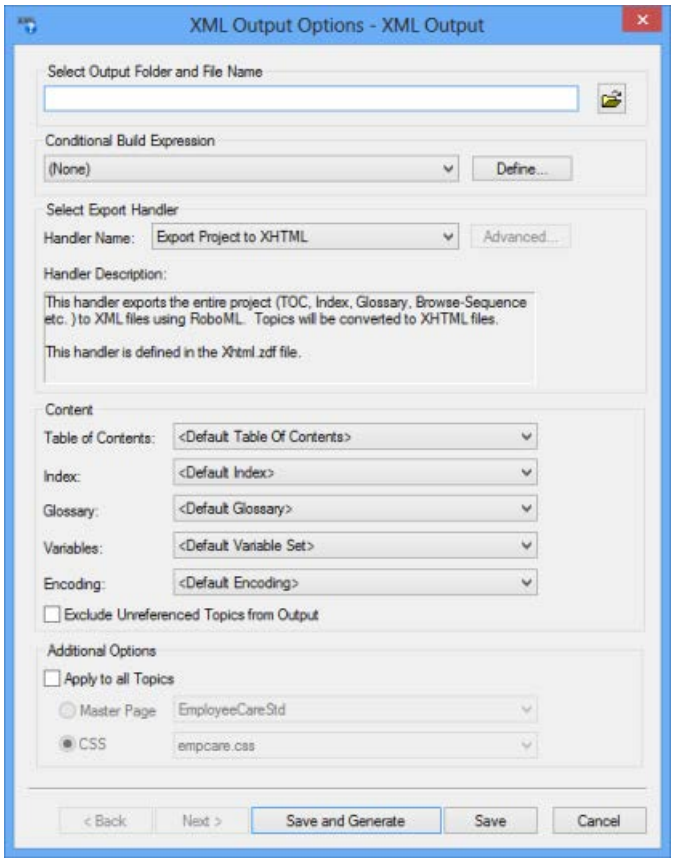


You will need an eBook reader such as Adobe Digital Editions. The available devices vary in their support of different features so thorough testing is required.

RoboHelp (2015 release) gives you the ability to embed any font in the topics. Note that you must have a licence to distribute the font.

XML Output

An XML output is easily generated using this dialog.


XML Output Options - XML Output
Select Output Folder and File Name
Conditional Build Expression
(None)
Define...
Select Export Handler
Handler Name:
Export Project to XHTML
Advanced...
Handler Description:
This handler exports the entire project (TOC, Index, Glossary, Browse-Sequence etc.) to XML files using RoboML. Topics will be converted to XHTML files.
This handler is defined in the Xhtml.zdf file.
Content
Table of Contents:
<Default Table Of Contents>
Index:
<Default Index>
Glossary:
<Default Glossary>
Variables:
<Default Variable Set>
Encoding:
<Default Encoding>
Exclude Unreferenced Topics from Output
Additional Options
Apply to all Topics
Master Page
EmployeeCareStd
CSS
empcare.css
< Back
Next >
Save and Generate
Save
Cancel

HR Policies and Procedures

Whirl the World - Attendance

The company wishes to support staff who are unable to fulfil the terms of their employment contract regarding attendance at work for reasons beyond their control. However, the Company expects this support to be reciprocated by all employees so that they comply with their conditions of employment.

This policy is intended to alert and assist managers to reduce the incidence of absence. It is essential that managers have specific responsibility for attendance of their staff and that their staff understand that the policy will be enforced.

Requests for all types of absence must be made to and approved by the employee's manager.

Types of absence

Absence from work occurs for a variety of reasons, but the most common are:



This table was added by copying and pasting a table from a Microsoft® Word® document. This is a feature introduced in Adobe RoboHelp 9.

- If your source has the same styles that you want in your topic, you simply copy and paste the table. Adobe RoboHelp 9 will bring in the content formatted as it was in Word along with any images.
- If you need to change the appearance, you can apply one of the RoboHelp tables, remove inline formatting and apply your own styles.

Company Policy	Absence by employee
Holidays	Sickness
Study Leave	Accident
Maternity Leave	Medical Consultation
Statutory	**Unauthorized Absence**
Jury Service	Lateness of over two hours
	Non-conformance with the Policy

The scale of Annual Holiday Vacation Vacation entitlements is sufficient to allow for most discretionary requirements. However, a manager has discretion to allow up to two days paid or unpaid additional leave per year appropriate for the circumstances.

Procedure for Unauthorized Absence

This procedure is concerned with unauthorized absences that have NOT been approved by an employee's manager.

To be eligible for sick pay, an employee must comply with the procedures for the notification and certification of absence set out below. Full details of the benefits available can be found in Company Sick Pay Policy.

Stage	Action
Unavailable to work	If an employee is unavailable for work, he/she must inform his/her manager, and give an estimated date of return to work. The manager must be informed as soon as possible, and in any event not later than the commencement of Core time [10.00 am] on the day of absence.
Unable to telephone	If the employee is unable to telephone to advise they will be absent, a member of the household should make the call. Information must not be left with the Call Centre operator or another employee - if the employee's manager is not available, the Human Resources Administrator must be notified and they will ensure the employee's manager is advised.
Recording absence	All absence, irrespective of the reason, must be recorded on the employee's time-sheet so that the reason[s] and duration of absence[s] are accurately reflected.
Failure to report absence	If an employee fails to report to his/her manager, or cannot be located within three working days, the Company reserves the right to withhold pay for the period of the absence and to take any other relevant action.
Return to work	On return to work, managers must interview the employee to confirm the reason for the absence. If the employee has a recurring medical problem, and there is no medical advice to support frequent self-certified absences, the Company may require his/her consent to an examination by a Company nominated doctor.

Procedure for dealing with poor attendance

The company has control procedures to monitor unacceptable levels of absence because of their adverse impact on the Company's business objectives. In determining what constitutes an excessive level of absence and therefore whether to commence disciplinary action, the following will be taken into account:

- The reasons for any absence
- The severity of the problem
- The number of absence events
- Any apparent pattern
- The impact on the department and/or employee's workload
- Other circumstances.

Managers must identify employees with poor attendance records and discuss these with them. Human Resources must be advised of this action. The employee must be informed of the facts and records of unauthorized absence and warned that if there is no improvement in attendance, the Company's Disciplinary Procedures may be initiated.

Contacting Human Resources

Human Resources can be contacted at the following locations:

Mail

First Avenue, Anytown, U.S.A.

Email

hr.usa@whirltheworld.com

Whirl the World - Company Sick Pay

It is the Company's policy that employees should neither suffer loss of basic income nor increase their income during personal illness. Employees who are unable to work because of personal illness will normally be granted paid sick leave within time limits related to length of service.

Unless agreed otherwise, qualifying days will be the employee's normal working days - Monday to Friday for the majority of employees.

Policy and scale of benefits

<table>
<tr><th>Item</th><th>Policy / Procedure</th></tr>
<tr><td>Entitlement</td><td>For permanent employees, paid sick leave entitlement within any one continuous period of sickness absence, or in any one Company Sick Pay year, will be as follows, based on the start period of the sickness:
<table>
<tr><th>Completed years of continuous employment</th><th>Maximum paid sick leave entitlement</th></tr>
<tr><td>Less than 1 year</td><td>4 weeks</td></tr>
<tr><td>1 to 5 years</td><td>13 weeks</td></tr>
<tr><td>More than 5 years</td><td>26 weeks</td></tr>
</table></td></tr>
<tr><td>Payment of benefit</td><td>Pay for the above periods will be paid automatically by the Company for any single or linked periods of incapacity.
After expiry of the Company Sick Pay period, the Finance Department will reduce the rate of pay to the maximum statutory weekly rate. it is the responsibility of employees to have appropriate insurance in place. it is the responsibility of employees to have appropriate insurance in place.</td></tr>
<tr><td>Company sick pay year</td><td>The Company Sick Pay Year is from 1st January to 31st December. Where one continuous period of sickness absence runs into a second Sick Pay year, the total amount of Company Sick Pay payable in that continuous period of absence will not exceed the balance of the entitlement of the sick pay year in which the absence started.</td></tr>
</table>

Days per year	All days of sickness absence in any one year for which Company sick pay is paid, whether continuous or discontinuous, will count towards the maximum entitlement of paid sick leave in that year.
Frequent absence	In the event of frequent absences, or absences for long periods, the Company may call for confirmatory medical evidence and reserves the right to treat such cases as outside the scope of this Policy. The employee may also be asked to agree to an examination by a general practitioner or specialist nominated by the Company.
Sickness preventing holiday being taken and sickness on holiday.	If an employee's sickness prevents him/her taking a pre-authorized holiday, it will be treated as a period of sickness and not count against holiday entitlement provided the sickness is properly certified. Sickness while on holiday will however count as holiday entitlement.
Self-certification	Self-certification must be completed on the company intranet for every absence even if for half a day.

Statutory Sick Pay (SSP) eligibility and guidelines

It is not intended to reproduce here all the regulations and provisions of Statutory Sick Pay, the information is a guide to the main points.

Item	Eligibility / Guidelines
Qualification	Most employees who pay National Insurance contributions are entitled to SSP if the sickness has lasted for four or more consecutive days, which may include days on which the employee does not normally work. This is called the period of incapacity for work. SSP will be paid only for qualifying days, which are days on which the employee is normally required to work. SSP will not be paid for the first three qualifying days of any period of incapacity for work, which are called waiting days.
Certification	SSP requires that, if a period of sickness absence has lasted for seven days or less, a self-certification form must be provided by the employee. If the sickness absence is more than seven days, the employee's doctor must provide a standard NHS certificate. Further certificates must be received for each additional week of absence.
Failure to notify absence	SSP may be withheld from an employee who has failed to observe the notification procedure without good reason.
SSP not payable	Statutory Sick Pay will not be payable if the employee: 1. Does not pay National Insurance Class 1 contributions 2. Is receiving Maternity Allowance 3. Is over State Pension Age

	4. Is working outside the European Community when he/she becomes sick.
State Sickness Benefit deduction	Where there is entitlement to SSP, Company Sick Pay will be basic salary less any State Sickness Benefit [SSB] to which the employee is entitled.
Cessation of entitlement	Entitlement to SSP ceases after a period of 28 weeks of a single or linked absence. After 28 weeks, employees may be eligible for state incapacity benefit.

Employees who need further details should contact Finance Department.

Procedure for eligibility - Company Sick Pay

Notification

Should you be too ill to come to work, you should telephone your manager as soon as possible after the start of the working day and explain:

- Why you are unable to come to work
- How long you think the sickness absence might last
- What action you are taking to mitigate the effects of the illness - for example, visiting the doctor
- Where you can be contacted during the day should the company need to get in touch with you.

If you are not able to talk to your manager, then you should contact the HR Department. If your incapacity lasts for more than one day, unless you have submitted a doctor's certificate, you should telephone every other day to keep the organization abreast of progress, unless agreed otherwise.

On your return to work

When you return to work, you should report to your line manager before you begin work. Your manager will ask you about your illness and how well you have recovered. Your manager will also ask you to complete a self-certificate for the first seven days of illness.

Please note: the seven days includes those days on which you do not normally work, such as weekends and public holidays.

If you have been absent for more than seven days (including weekends and public holidays), you should bring with you a certificate from your doctor. This should explain the nature of your illness and confirm that you are fit to return to work.

If the organization has cause to be concerned about your health - for example, you have had a number of periods of sickness for the same reason in a short period - then your line manager may suggest that you visit your doctor for a check-up. In certain circumstances, especially if your long-term employment is in doubt because of your sickness record, then the organization may ask you to see a medical practitioner of its choice.

Your sickness absence will be marked on your personnel record.

Abuse and unacceptable levels of absence

The Company may, at its discretion, discontinue sick pay for failure to adhere to the above procedures or if there is doubt about the integrity of a sick pay claim.

Contacting Human Resources

Human Resources can be contacted at the following locations:

Mail

First Avenue, Anytown, U.S.A.

Email

hr.usa@whirltheworld.com

Whirl the World - Dependants Leave

This policy details the Company's responsibilities toward its employees and the arrangements relating to an employee in respect of unpaid time off to care for dependants.

Scope

Dependants are defined as an employee's husband, wife, parent, child, or any other family member who lives in the employee's home but not tenants, lodgers or people employed by the employee. Partners and elderly relatives living with the family are included.

Policy and Procedure



In this topic instead of showing the various items in a table as in other topics, the content has been placed in the dropdowns below so that you can see an alternative way of presenting information. In a real project you would more likely use one method as a consistent approach makes it easier for your users.
You should consider this when creating content on devices with small screens. Whilst tables make it easy for the reader to locate an item, they may take up valuable space needed by another column with more text to display.

Entitlement

Employees are entitled to take a reasonable amount of time off during working hours when it is necessary:

- To provide care when a dependant falls ill, gives birth or is injured
- To make arrangements to provide care for a dependant who is ill or injured
- When a dependant dies
- To deal with unexpected disruption or termination of arrangements for the care of a dependant
- To deal with an unexpected incident involving the child of the employee when the child's school has responsibility for him/her.

This entitlement does not apply to domestic emergencies such as a water leak. There is no minimum period of employment with the company to qualify for time off to care for dependants.

Procedure

Time off to care for dependants is unpaid, including pension contributions.

The amount of time off must be reasonable for the circumstances, with an expectation of one or two days in most cases.

The employee must notify his/her manager of the reason for requiring time off, and its expected duration, as soon as practical, in advance if possible. Employees must complete the

Dependants Care form and pass it to Human Resources or the local administrator after his/her manager has signed it.

Click this link to print the Dependants Care application form.

Disputes

The company expects that differences about refusing a request for leave or an unreasonable postponement can be resolved by discussion with their Manager and Human Resources. The Company does have a formal Grievance Procedure.

Contacting Human Resources

Human Resources can be contacted at the following locations:

Mail

First Avenue, Anytown, U.S.A.

Email

hr.usa@whirltheworld.com

Whirl the World - Disciplinary Procedures

These procedures are designed to help and encourage all employees to achieve and maintain standards of conduct, attendance and job performance. The procedures apply to all employees. The aim is to ensure consistent and fair treatment for all in the company.

Principles

- Informal action will be considered, where appropriate, to resolve problems.
- No disciplinary action will be taken against an employee until the case has been investigated.
- For formal action the employee will be advised of the nature of the complaint against him or her and will be given the opportunity to state his or her case before any decision is made at a disciplinary meeting.
- Employees will be provided, where appropriate, with written copies of evidence and relevant witness statements in advance of a disciplinary meeting. At all stages of the procedure the employee will have the right to be accompanied by a union representative, or work colleague.
- No employee will be dismissed for a first breach of discipline except in the case of gross misconduct, when the penalty will be dismissal without notice and without payment in lieu of notice.
- An employee will have the right to appeal against any disciplinary action.

Policy and Procedure

Item	Policy / Procedure
Informal Warnings	1. Minor breaches of discipline, misconduct, poor time-keeping and so on may result in an informal oral warning given by the employee's immediate manager. 2. It is expected that in most cases an informal oral warning will resolve most difficulties. Where an employee commits a

	more serious act of misconduct or fails to improve and maintain that improvement with regard to conduct, behavior or job performance, the formal steps detailed below may be taken.
Formal Warnings	TIP! The lists below have been created using a multi-level list style. 1. A disciplinary hearing conducted by an appropriate management representative will be held. A reasonable time before the hearing the employee will be advised in writing of the reason(s) for thinking that the employee is guilty of misconduct or unsatisfactory job performance, provided with any evidence such as copies of witness statements and informed of the right to be accompanied at the hearing by a work colleague of his or her choice, or a union official. A union official means a full-time official or a lay official certified by the union as having experience of, or having been trained in, acting as a companion at disciplinary hearings. It should be noted that neither spouse/partner nor solicitor are suitable companions. 2. At the disciplinary hearing, the employee will be invited to state his or her case and to answer the allegations against him or her. If, following the hearing, it is decided that disciplinary action should be implemented; the employee will be told of the decision and given a letter in confirmation of this as soon as practicable. 3. In the case of minor offences the employee will be given a formal verbal warning. Employees should be advised of the reason for the warning, that it constitutes the first stage of the disciplinary procedure and of their right of appeal. This warning will be recorded and retained in the employee's file and will remain active for disciplinary purposes for six months. 4. In the case of a more serious offence or if a further offence occurs within the currency of a prior warning, the employee may be given a formal written warning or, where the offence is sufficiently serious, a final written warning. The written warning will state: a. Details of the misconduct or complaint that has occasioned the warning b. Details of the action necessary to remedy the situation and any period of review c. The period of time the warning will remain active on the employee's file for disciplinary purposes d. That the employee has the right to appeal against the warning e. That any further misconduct of any kind will result in: i. Dismissal with appropriate notice in the case of a final written warning, or ii. A further disciplinary hearing and a final written

	warning which, if unheeded, may result in dismissal with notice. 5. Alternative disciplinary actions short of dismissal may be considered. These are: a. Suspension without pay up to a maximum of seven days b. Demotion to a suitable job, if one is available c. Transfer to another section or department or to another unit or branch of the company d. Loss of seniority, pay increment or discretionary bonus.
Summary Dismissal	1. Employees may be summarily dismissed if it is established, after investigation and hearing the employee's version of the matter, that there has been an act of gross misconduct, major breach of duty or conduct that brings or might bring the company's name into disrepute. 2. Gross misconduct includes (but is not limited to): a. Serious acts of insubordination b. Serious breaches of health and safety rules c. Theft d. Fraud and deliberate falsification of records e. Being under the influence of alcohol or drugs during working hours f. Serious negligence (even a single error where the actual or potential consequences are extremely serious), which causes, or is likely to cause, unacceptable loss, damage or injury g. Flagrant failure to follow the company's documented procedures and regulations h. Breach of duty regarding non-disclosure of confidential information i. Deliberate or negligent damage to the company's property j. Disorderly or indecent conduct k. Fighting or threatening physical violence on the company's premises or at events organized or sponsored by the company l. Acts of incitement or actual acts of discrimination or harassment on the grounds of sex, trans-gender status, marital status, civil partnership status, pregnancy, color, race, nationality, national origins, ethnic origins, religion or belief, religious practices, sexual orientation, disability or age. m. Serious misuse of the employer's computer systems, including misuse of e-mail and internet access.
Suspension	1. The employee may, at the employer's discretion, be suspended with pay while the circumstances of any complaint or allegation are investigated. 2. In cases of potential gross misconduct, suspension with pay

	will be automatic. 3. Such suspension does not constitute a disciplinary sanction but is instigated in order to allow the company to investigate the conduct in question properly.
Appeal	1. The employee may appeal in writing to Human Resources against any disciplinary action within seven days of receipt of the letter confirming the action taken. 2. An appeal hearing will be held. 3. The employee will have the right to be accompanied at the appeal hearing by a work colleague of his/her choice or a union official. A union official means a full-time official or a lay official certified by the union as having experience of, or having been trained in, acting as a companion at disciplinary hearings. It should be noted that neither spouse/partner nor solicitor are suitable companions 4. Following the hearing, the appeal decision will be confirmed in writing. 5. The decision at the end of the appeal is final. 6. The decision may include: a. The original decision is upheld b. The original decision is overturned c. Suspension without pay d. Demotion e. Re-instatement where the employee has been dismissed.

Contacting Human Resources

Human Resources can be contacted at the following locations:

Mail

First Avenue, Anytown, U.S.A.

Email

hr.usa@whirltheworld.com

Whirl the World - Equal Opportunities

The Company is an Equal Opportunities employer.

The aim of this policy is to ensure that no job applicant or employee receives less favorable treatment on the grounds of gender, race, disability, color, nationality, ethnic or national origin, marital status, sexuality, responsibility for dependants, religion or belief, trade union activity and age.

Selection criteria and procedures will be kept under review to ensure that individuals are selected, promoted and treated on the basis of their relevant merits and abilities. All employees will be given equality of opportunity within the company's service and will be encouraged to progress within the organization. To ensure that direct or indirect discrimination is not occurring,

recruitment and other employment decisions will be regularly monitored in conjunction with records of job applicants and existing employees. The company is committed to an ongoing programme of action to make this policy fully effective.

Policy and Procedure

Equal opportunity is about good employment practices and efficient use of our most valuable asset, our employees. Every manager and employee has personal responsibility for the implementation of the policy. Any instance of doubt about the application of the policy, or other questions, should be addressed to Human Resources, as should any requests for special training.

The company will not discriminate on grounds of sex, marital status, ethnic origin, color, nationality, disability or other grounds of discrimination not prohibited by legislation.

The policy applies to the advertisement of jobs, recruitment and appointment to them, training, conditions of work, pay and to every other aspect of employment. The policy also applies equally to the treatment of our customers/clients. Staff involved in recruitment in particular should request training if they have any doubt about the application of this policy.



Note how the table below uses valuable screen space when viewed on a phone. If you are looking at this topic on a desktop, reduce the window size to see the effect.

You may need to consider using headings with the detail below.

Item	Policy / Procedure
Attracting applicants	**The aim of the company is to recruit employees on a fair and non-discriminatory basis.** In order to achieve this:  A multi-level list has been used here to provide round bullets at the top level and square bullets for items that need to be indented. 1. Recruiting only by word of mouth will not be practised by the company because this may restrict applications from groups who may be under-represented in the workforce. 2. When advertising the company will: a. Seek to use a wide range of organizations and / or publications to advertise its vacancies with the aim of attracting interest from a wider community. b. Ensure that the wording of job adverts does not place unfair restrictions or requirements on a particular group or groups. Employees should also note that the imposition of a condition or requirement which has an adverse impact on someone, because his or her sex, race or marital status is more likely to be affected by it, will be unlawful unless it can be justified on grounds of business need. By way of example, a height requirement of 5' 10" will eliminate some men but proportionately more women and so be unlawful. In all such situations Human Resources should be consulted. c. Include in all advertisements a statement on Equal

	Opportunities and where necessary encourage applications from under-represented groups for jobs with the company.
Selection	**The aim of the company is to select employees on a fair and non-discriminatory basis.** In order to achieve this: 1. The suitability of each applicant/candidate will be measured against the requirements for the job. 2. The use of selection tests will be regularly examined to ensure that they are related to job requirements and are not unlawfully discriminatory.
Promotion	**The aim of the company is to promote employees on a fair and non-discriminatory basis.** In order to achieve this: • The promotion criteria will relate specifically to the individual's ability and aptitude to do the job. • The company will periodically review the promotion procedure.
Transfer	**The aim of the company is to (where necessary) transfer employees on a fair and non-discriminatory basis.** In order to achieve this: • The company will not automatically transfer employees who complain of discrimination. • The company will periodically review its criteria for transferring employees.
Training	**All persons responsible for recruitment, selection, promotion and transfer of staff will receive training in equal opportunities.** Training will achieve two objectives: 1. Enable employees to recognise the company's and their own legal obligations under legislation. 2. Develop the necessary skills to translate the equal opportunities in employment policy into practice. The company will also ensure that all its employees have equal access to training and development opportunities.
Dismissal (including redundancy) and other detriment	**The aim of the company is to ensure that it does not unlawfully or unfairly discriminate in dismissal, redundancy or other detriment to an employee.** In order to achieve this the company will continually examine its procedure and criteria to ensure that they do not directly or indirectly discriminate against a particular group or groups.
Discipline	Any employee who harasses any other employee on the

	grounds of race, sex or disability will be subject to the organization's disciplinary procedure. In serious cases, such behavior will be deemed to constitute gross misconduct and, as such, will result in summary dismissal in the absence of mitigating circumstances.
Monitoring and positive action	The composition of the workforce and of job applicants will be monitored on a regular basis. Should inequalities become apparent, positive action will be taken to redress the imbalance.
Grievance	Any member of staff may use the grievance procedure to complain about discriminatory conduct. If the matter relates to sexual or racial harassment or harassment on the basis of disability then the grievance may be raised directly with Human Resources. **The company is concerned to ensure that staff feel able to raise such grievances and no individual will be penalized for raising such a grievance unless it is untrue and made in bad faith.**

Contacting Human Resources

Human Resources can be contacted at the following locations:

Mail

First Avenue, Anytown, U.S.A.

Email

hr.usa@whirltheworld.com

Whirl the World - Flexible Working

The policy and procedures relating to Flexible Working do not form part of your terms and conditions of employment.

The company's Flexible Working Policy outlines the company's commitment to consider flexible working arrangements for employees to meet their childcare or adult care needs.

The company recognizes the contribution of all its employees and also understands that at some time in their working lives, employees may find it difficult to fulfil domestic, family and working commitments due to having a young family, adopting, having a disabled child or caring for an adult. Where this occurs, the company will always consider practical help through this flexible working policy.

No employee will be treated less favorably, suffer detriment or be dismissed because they request, or take, flexible working.

Flexible working is about considering the way work is organized to see whether it is possible to have different arrangements. The result must always be, however, that the company achieves its core business purpose as efficiently as is possible.

Employees should also be aware that if they request and are given agreed flexible working conditions this is a variation of their terms and conditions of employment and is a permanent

change. If their circumstances change in relation to the need for flexible working there is no statutory right for a return to their terms and conditions as they were prior to the flexible working.

The company:

- Will consider requests for flexible working by those who are eligible to put in a written request
- Recognizes that the initial onus of making an application is with the employee
- Will follow the correct procedure as outlined here
- Will reject an application where it is considered that on the grounds of business it cannot allow the flexible working as it will be detrimental to the company achieving its business
- Will meet with the employee within 28 days of the application to discuss the application and will write to the employee outlining its decision within 14 days.

Policy and Procedure

Item	Policy / Procedure
Eligibility	To be able to request flexible working, an employee must: 1. Have a child under seventeen years of age or under 18 years of age if he or she is disabled 2. Be responsible for the child as its parent and be either a biological parent, guardian, adopter, foster-carer or be married to or be the partner of such a person 3. Have responsibility for the upbringing of the child 4. Be caring or expect to be caring for an adult where the flexible working request is made in relation to caring for that adult 5. Be making the application to enable them to care for the child or adult 6. Have worked for the company continuously for 26 weeks at the date of the application for flexible working 7. Not be an agency worker 8. Not have made another application to work flexibly under the right during the past 12 months. 9. Be able to prove that he or she meets the above criteria, in particular with regard to his or her relationship with the child or the adult.
Definition of a parent	A Parent is defined as the child's mother, father, adopter, guardian, special guardian or foster parent; or someone who is married to, or the partner/civil partner of the child's mother, father, adopter, guardian, special guardian or foster parent.
Definition of a carer	The right to request flexible working also covers employees who are caring or expect to be caring for an adult (ie a person aged 18 years or over) who is a spouse (or partner/civil partner), relative or someone else living at the same address.
Application	An application to work flexibly must be in writing and specify the following: 1. That the request is made under the terms of the flexible

	working legislation 2. State whether a previous application has been made to the employer and, if so, when 3. Specify the flexible working pattern applied for and the date on which it is proposed the change should come into effect 4. Explain what effect, if any, the employee thinks the proposed change would have on the employer and how, in their opinion, any such effect might be dealt with 5. Explain how he or she meets the eligibility criteria An application must be made in writing. However, it can be submitted via letter, email or fax. Click here to see the suggested wording.
Consideration of the request	The organization will give serious and full consideration to all requests to work flexibly from eligible parents. If a request cannot be agreed without further discussion, a meeting will be arranged within 28 days to discuss this and consider alternative flexible options. The employee is entitled to be represented at that meeting by a work colleague. If the employee or his or her representative is not available for the meeting then an alternative time suitable for all parties should be agreed upon and held within seven days. If the organization cannot meet the employee's request it will be on one or more of the following grounds: 1. The burden of additional costs. 2. The detrimental impact on meeting customer/service demands. 3. An inability to re-organise or re-distribute work among other existing staff. 4. An inability to recruit additional staff (this may particularly be the case where the request leaves unusual hours to be filled by another employee). 5. A detrimental impact on quality or performance. 6. There is insufficient work available during the hours the employee is requesting to work. 7. Other structural changes are planned. Whatever the outcome of the meeting, the result will be confirmed to the employee in writing within 14 days of the meeting, unless an extension is agreed. If the requested change of working arrangements is accepted, the new terms and conditions that apply are permanent. The employee has no right to return to his or her old terms and the employer has no right to enforce a return unless a trial of the new terms has not proved successful.
Trial Period	The organization may decide to offer the new way of working on a trial basis initially if it is not sure what the impact of it will be

	on the business. In such circumstances, the change to the employee's terms and conditions of employment during the trial period is a temporary change to his or her terms and conditions of employment. If the trial is not successful, the employee will revert back to his or her previous terms and conditions of employment. If the requested change of working arrangements is accepted at the end of the trial then the temporary terms and conditions will become permanent.
Appeal	The employee has the right of appeal if his or her application to work flexibly is declined and must put his or her appeal in writing within 14 days of receipt of the employer's decision, unless an extension is agreed. The letter of appeal must clearly state the grounds for appeal and a further meeting will then be arranged in the same manner as the original hearing giving the employee the right to be accompanied. Following the appeal hearing, the employer will confirm the outcome in writing within a further 14 days (unless an extension has been agreed) detailing any agreement that has been met or an explanation of the grounds for dismissing the appeal. The decision at the appeal hearing stage is final. Where an employee appeals, another person may accompany him or her. This may be another employee of the company. An appeal may be requested and must be submitted in writing setting out the grounds, within 14 days of the decision.
Extension of time limits	There is an allowance for the extension of time limits within the procedure where the manager and the employee agree. This may occur in the following two circumstances: 1. Further exploration of work patterns – at the request meeting it may be agreed by the manager and the employee that there needs to be further research into the possibilities – a record should be made of this agreement in writing, by the manager, with the extension of the time limit noted. 2. Absence of the manager – this may apply where he or she is taking annual leave or sick leave. In either case, the time limit will be extended where the manager is absent. In this case, the manager will have 28 days to arrange the meeting from the day of his or her return to work. There is no provision for any other circumstances to justify an automatic extension.
When an application may be treated as withdrawn	The company will consider an application as being withdrawn and will no longer have a duty to consider the request when: 1. An employee gives written notification to the manager that he or she is withdrawing their application. Where the written information is not forthcoming, the manager will write seeking clarification that the employee has withdrawn their

	application. 2. An employee fails to meet their responsibilities under the procedure and, therefore, it is fair in the circumstances for the manager to assume that the application is no longer being pursued. The two areas where this may occur are: a. Failure to attend the application meeting or the appeal meeting, more than once b. Unreasonably refusing to provide the manager with information that he or she needs in order to assess whether the contract variation can be granted. An employee who withdraws his or her application will not be eligible to make another flexible working request for a further twelve months
Where management does not respond	Where the employee does not get a written response within the time-frame provided within the procedure, the employee should refer to the company's grievance procedure.

Contacting Human Resources

Human Resources can be contacted at the following locations:

Mail

First Avenue, Anytown, U.S.A.

Email

hr.usa@whirltheworld.com

Whirl the World - Grievances

The company recognizes that from time to time employees may wish to seek redress for grievances relating to their employment.

In this respect, the company's policy is to encourage free communication between employees and their managers to ensure that questions and problems arising during the course of employment can be aired and, where possible, resolved quickly and to the satisfaction of all concerned.

To this end, the following procedure should be adopted where an employee has a grievance arising from his or her employment, except where the matter constitutes an appeal against a disciplinary decision which should be taken up in accordance with the company's separate disciplinary appeals procedure.

The grievance procedure will be carried out in confidence, unless otherwise agreed with the parties involved, and will not prejudice the aggrieved employee's current employment or future career prospects. Some grievances may be of a sensitive or controversial nature and therefore a balance must be drawn between the need to preserve this confidentiality and the need for informed discussion of the issues raised.

It is anticipated that most grievances will be resolved through informal discussion and the normal management channels without the need to invoke the formal grievance procedure.

Raising a grievance informally

Any employee who has a grievance relating to his or her employment may raise the matter informally with his or her manager during the course of normal work. This is not part of the grievance procedure. Only if the matter is not resolved between them should the formal grievance procedure need to be used.

The formal grievance procedure

Stage	Policy / Procedure
Stage 1 Meeting	Employees should put their grievances in writing to their immediate manager. However, employees should put their grievances in writing to Human Resources if they are raising a grievance against their immediate manager. The employee may at this meeting (or a stage 2 or 3 meeting), if he or she wishes, request to be accompanied by another employee/work colleague from the company or a union official or representative. Once an employee has fully set out his or her grievance in writing and sent the statement or a copy of it to the employer, the employer must invite the employee to attend a meeting to discuss the grievance. All grievance meetings and appeal meetings should be held without unreasonable delay while allowing the parties to have reasonable time to prepare for those meetings. The timing and location of the grievance meeting must be reasonable. The manager is required to: 1. Record full details of the matter or accept signed written details of the matter 2. Provide an answer in writing, normally within five working days after the meeting, to the employee with a copy to the representative, if any 3. Inform the employee in writing of his or her right to appeal and to be accompanied at the Stage 2 Meeting. If the employee wishes to appeal, he or she must appeal in writing, normally within five working days after he or she has received the manager's written answer. The employee's appeal must set out the grounds of his or her appeal.
Stage 2 Meeting	The Stage 2 management representative will arrange to meet the employee concerned and/or, at the latter's wish, his or her representative. At this meeting the employee may be accompanied as at Stage 1. The employee's manager may, if practicable, be present at the request of either party. Following the meeting, the management representative is required to despatch an answer, in writing, normally within five working days after the meeting to the employee and, if applicable, to the representative. The written answer must also inform the employee of his or her right to appeal and to be accompanied at the Stage 3 meeting.

	If the employee wishes to appeal, he or she must appeal in writing, normally within five working days after he or she has received the management representative's written answer. The employee's appeal must set out the grounds of his or her appeal. Where possible, the employee's appeal at the Stage 2 meeting must be heard by a manager (eg a more senior manager) who has not previously been involved in the case.
Stage 3 Meeting	The Stage 3 management representative will arrange to meet the employee concerned. At this meeting the employee may be accompanied as at Stage 1. The management representative at Stages 1 and 2 may, if practicable, be present at the request of either party. A written answer to the grievance will be despatched to the employee normally within five working days after the meeting and, if applicable, to the representative. Where possible, the employee's appeal at the Stage 3 meeting must be heard by a manager who has not previously been involved in the case - for example, a more senior manager. The decision of the Stage 3 management representative will be final.
Time limits	If the employee's chosen companion (fellow worker or union official or representative) is not available on the day of the meeting the employee may reasonably request that the meeting be held on another day within five working days of the selected date. A working day is a day other than a Saturday, a Sunday or a bank holiday. In the absence, for any reason, of the appropriate management representative, the procedure authorizes any other executive of the company to take the necessary action on his or her behalf. At the request of the employee, however, consideration may be deferred until the return of the appropriate management representative. Although there are time limits within which answers to grievances are to be given, it is important that grievances are dealt with as quickly as possible.

Contacting Human Resources

Human Resources can be contacted at the following locations:

Mail

First Avenue, Anytown, U.S.A.

Email

hr.usa@whirltheworld.com

Whirl the World - Harassment

Harassment in any form, whether based on sex, color, religion, national or ethnic origin, age, marital status or handicap, will not be tolerated and can lead to disciplinary action, up to and including termination.

It is the company's policy that sexual harassment of employees is strictly prohibited. Sexual harassment includes verbal, physical, and visual forms of harassment. No employment benefit shall be conditioned on the granting of sexual favours, and no employment decision shall be made on the basis of submission to or rejection of unwanted sexual advances. Any perceived violation of this policy should be reported directly to a Manager. If the results of an investigation confirm the offence, immediate disciplinary action, up to and including termination, will be taken against the employee violating this policy.

Contacting Human Resources

Human Resources can be contacted at the following locations:

Mail

First Avenue, Anytown, U.S.A.

Email

hr.usa@whirltheworld.com

Whirl the World - Health and Safety

The Company is keen that our offices and work practices do not cause harm to the environment. In addition to meeting legal health, safety and environmental policies we have adopted a number of measures to ensure that we contribute to a sustainable and healthy environment. These measures include but are not limited to:

1. Recycling waste paper.
2. Recycling other office waste such as toner cartridges.
3. Using re-usable plates, cups and suchlike instead of disposable items where practical.
4. Donating surplus promotion items such as pads and pens to local charities or schools.
5. Use of energy saving facilities on machines such as copiers and printers.
6. Where possible trying to provide information electronically or though our website to save production of unnecessary waste.

Policy

1. The Company policy is to provide and maintain safe and healthy working conditions, equipment and systems of work for all employees, and to provide such information, training and supervision as they need for this purpose. Furthermore, it regards the promotion of health and safety matters as a mutual objective of every manager and employee.
2. Consistent with the Company's commitment to safety, health and the environment it will ensure that arrangements will comply with legislation and best practice and involve all employees in the improvement.
3. The Company also accepts responsibility for the health and safety of other people who are affected by its activities, and keeps under review the arrangements for health and safety of non-employees on its premises.

4. This policy and the arrangements apply to all wholly owned companies; other associated companies are required to adopt this or an equivalent policy. It applies at all Company buildings, in accordance with the relevant local legal requirements.
5. The Company will require contractors and suppliers to demonstrate an acceptable standard of performance.
6. The Company will measure and review its safety, health and environment performance and audit arrangements as a means of planning continual improvements in performance.
7. This policy will be reviewed annually.

Procedure

Item	Procedure
Health & safety	The Company has a legal duty to ensure, as far as is reasonably practicable, the health, safety and welfare of all its employees while at work. In general the Company must: • Ensure that the working environment is maintained in a condition which is safe, free from risks to health and that adequate welfare facilities are provided. • Ensure that Managers assess risk with the assistance of "competent persons" and devise systems of work where significant risks to health are identified and reduced to an acceptable level. • Provide employees with information, instruction, training and supervision necessary to enable safe performance of work activities. • Ensure that equipment and machinery used at work is suitable for its intended purpose and that any hazardous substances used or produced are assessed and adequately controlled. A guide is displayed on notice boards throughout the Company's buildings.
Environment	Implementation of an effective environmental policy to complement the Company's health and safety activities is essential for the welfare of the community and employees. Consistent with this policy, the Company's specific environmental policy is: • To comply with environment protection laws and regulations. • To conduct business according to recognized standards of the industry, including those relating to people. • To market products without unreasonable risk to safety, health or the environment. • To acknowledge that environmental, health and safety policies are of equal importance with other key operational objectives. There are plans for continuous improvement in this area to support the various environmental initiatives already in place.
Accountabilities	The CEO is ultimately responsible within the Company for health,

	safety and environment. Directors and Managers also have delegated responsibility for the implementation of the Company's policy and have personal responsibility for safety, health and the environment within their functional or geographical responsibilities.
CEO	The CEO is ultimately responsible for safety, health and the environment in the Company and must: • Demonstrate commitment and leadership in all matters related to safety, health and the environment. • Ensure that directors are aware of their obligations and carry them out in accordance with the Safety Health and Environment Policy. • Ensure that adequate financial and other resources are made available to implement the Safety, Health and Environment Policy. • Review policy implementation and performance annually and ensure improvement strategies are planned.
Directors	Directors and in particular any specific Director designated with accountability for safety, health and the environment must: • Demonstrate commitment and leadership in all matters of safety, health and the environment. • Ensure the Safety Health and Environment Policy is communicated to all employees and implemented. • Appoint a designated safety coordinator and ensure that all employees with delegated health and safety responsibilities have the necessary training and resources to fulfil their obligations.
Location Manager	The Location Manager must: • Ensure the premises, plant and equipment are maintained in a safe condition, in good repair and effective working order. • Manage and monitor the building operational arrangements such evacuation procedures. • Where designated, ensure requirements are incorporated into plans and local operating arrangements. • Ensure that resources are provided for activities and that 4 fire evacuation drills are undertaken annually. • Ensure all reported defects are rectified promptly. • In addition to the Location manager's responsibilities, the obligations of line managers may also be added.
Line Managers	The responsibility of Line Managers is to: • Ensure safety, health and environment risk assessment activities are carried out, documented and plans developed and implemented. • Where designated, ensure safety, health and environment requirements are incorporated into plans and local

	operating arrangements. • Ensure that resources are provided for safety, health and environment activities.
Health & Safety Representatives	Health and Safety Representatives are to assist managers by: • Undertaking assessments. • Where required by law, reporting accidents to enforcing authorities. • Assisting managers to carry out workplace safety inspections. • Investigating complaints by employees relating to health, safety, or welfare at work and reporting findings to the Facilities Manager and Location Manager for appropriate action.
Employees obligations	All employees have a duty to: • Take reasonable care for their own safety, health and environment and for all persons they come into contact with at work. • Cooperate with management to enable them to carry out their statutory duties in relation to safety, health and environment. • Report all incidents that led, or may lead to injury. • Not misuse anything provided for their safety, health and environment. • Non-compliance with any safety, health and environment instruction will be considered a disciplinary offence and will be treated under the Company's Disciplinary Procedures.

Contacting Human Resources

Human Resources can be contacted at the following locations:

Mail

First Avenue, Anytown, U.S.A.

Email

hr.usa@whirltheworld.com

Company Benefits

Whirl the World - Company Cars

Company cars are available to any UK employee who covers more than 10,000 miles on company business where it is anticipated this will continue year on year.

This is a taxable benefit even though the use is for business purposes. Where preferred, the employee can opt for a car allowance. It is a condition of accepting the car allowance that an appropriate vehicle is purchased to meet the business needs.

Details of the scheme are held by Human Resources and they will advise you of the monthly lease payment that will be sanctioned.

Contacting Human Resources

Human Resources can be contacted at the following locations:

Mail

First Avenue, Anytown, U.S.A.

Email

hr.usa@whirltheworld.com

Whirl the World - Healthcare

Private healthcare plans are available to all employees. Each plan is salary related and for this purpose salary includes any commission that is part of the employee's contract.

Some schemes include family cover. Where this is not part of the scheme, employees can opt to fund such cover themselves at rates that are less than the scheme provider would offer generally.

Details of the schemes are held by Human Resources.

Contacting Human Resources

Human Resources can be contacted at the following locations:

Mail

First Avenue, Anytown, U.S.A.

Email

hr.usa@whirltheworld.com

Travel

Whirl the World - Bookings

All bookings for travel must be made via the Internal Bookings Department of Whirl the World.

Train / Bus / Coach Travel

Please book via the company intranet at least seven days in advance.

Where this is not possible, telephone or email using the details shown on the company intranet.

Air Travel

Please book via the company intranet at least one month in advance.

Where this is not possible, telephone or email using the details shown on the company intranet.

Whirl the World - Expenses

Expenses incurred while undertaking normal duties can be reclaimed at the end of each calendar month. An advance payment can be made to assist employees meeting significant expenses.

To minimise the amount that employees have to incur before receiving reimbursement, company credit cards will be issued to employees who regularly incur expenses exceeding US$400 per month.



User defined variables have been used for the expense limits. This simplifies updating when the rates change. By using Variable Sets, different amounts can be simply entered for each country so that if exchange rates fluctuate, the rate for just one country can be changed.

Limits

The limits below apply in most circumstances but can be exceeded where prior sanction has been obtained from the authority shown.

Expense	Amount	Comment	Excesses
Breakfast - Staff	US$15 per day	When staying at a hotel or leaving home before 7am.	Line Manager.
Lunch - Staff	US$0	Lunch expenses are only payable in exceptional circumstances.	Line Manager.
Dinner - Staff	US$45 per day	When staying at a hotel or would arrive home after 8pm.	Line Manager.
Lunch or dinner with customers / suppliers	US$75 per person	A customer / supplier should not be entertained more than once per quarter without prior sanction.	Line Manager.
Car Mileage	60 cents per mile	Mileage over 1,500 miles per month must be pre-sanctioned.	Line Manager.

Train / Bus / Coach Travel	US$750 return	First class travel only authorized for directors.	Finance Director.
Air Travel	US$1500 return	Economy Class unless flight exceeds four hours, then Business Class.	Finance Director.
Entertaining	US$0 per occasion	All entertaining other than lunches or dinner must be pre-sanctioned.	Line Manager up to US$300. Finance Director above.

Claims

In normal circumstances expenses must be claimed via the Finance Secure Server. Where this is not possible, a postal submission should be made.

Please keep copies of any receipts sent in case the original is not received.

New and Retiring Employees

New Employee Checklist

EMPLOYEE INFORMATION	
Name:	Start date:
Position:	Manager:

FIRST DAY
Provide employee with New Employee Workbook.
Assign "buddy" employee(s) to answer general questions.

POLICIES		
Review key policies.	• Anti-harassment • Sick leave • Leave of absence • Holidays • Time and leave reporting • Overtime • Performance reviews • Dress code	• Personal conduct standards • Progressive disciplinary actions • Security • Confidentiality • Safety • Emergency procedures • Visitors • E-mail and Internet use

ADMINISTRATIVE PROCEDURES		
Review general administrative procedures.	• Office/desk/work station • Keys • Mail (incoming and outgoing) • Shipping • Business cards • Purchase requests	• Telephones • Building access cards • Conference rooms • Picture ID badges • Expense reports • Office supplies

INTRODUCTIONS AND TOURS			
Give introductions to department staff and key personnel during tour.			
Tour of facility, including:	• Restrooms • Mail rooms • Photocopiers • Fax machines	• Bulletin board • Parking • Printers • Office supplies	• Kitchen • Coffee/vending machines • Cafeteria • Emergency exits and supplies

POSITION INFORMATION
Introductions to team.
Review initial job assignments and training plans.
Review job description and performance expectations and standards.
Review job schedule and hours.
Review payroll timing, time cards (if applicable), and policies and procedures.

COMPUTERS			
Hardware and software reviews, including:	• E-mail • Intranet	• Microsoft Office System • Data on shared drives	• Databases • Internet

Whirl the World - Retiring Employees

Note the size of this image. When you generate Multiscreen HTML5 outputs, note how it resizes to the device.



Whirl the World wishes to ensure that the transition from work to retirement is as simple as it can be. The following checklist is designed to cover most of the matters that need to be dealt with. If you identify anything else that would help you, then please let Human Resources know.

Advance matters

Item	Action
Pension arrangements	You need to consider whether you want to receive your pension immediately or defer it until some future date. It is strongly recommended that you consult your own financial advisor before making this decision. The company needs to know your decision no later than one month before your retirement date.
Leaving events	Normally all employees will be taken to dinner by their line manager. A social occasion will also be funded by the company for all employees with over five years service. It is recognized that some people prefer not to have such events. The company asks that two months notice is given of

	your wishes. In the event that you do not wish to have such an event, a donation can be made to a charity of the employees choice.
Meetings with Line Manager	Meet with your line manager three months and two months before you leave to discuss what information needs to be known by whoever will take over your responsibilities. Start preparing suitable documentation. At one month before you leave, the meetings should become weekly. At this meeting you should also discuss any matters that are concerning you so that the company can address these matters.
Customers	If your role involves close customer contact, you should liaise with your line manager regarding when your retirement is announced.

On the day

Item	Action
Computers / phones / other company property	Return to the appropriate department or your line manager. Ensure that you are given a receipt indicating the item was returned in good condition or noting any damage.
Building / car park passes	Return to Facilities Department.
Expenses	Ensure that you have submitted a claim for all outstanding expenses.
Work station	Clear all personal items.
Phone message	Ensure the message is changed by your successor. If no one has been appointed, leave a message advising who callers should contact.
Email	IT will ensure your emails are forwarded to your successor if appointed or a person nominated by your line manager.

After you leave

It is not the end of our association! We really would like to assist where we can so do contact us where you think there is something that can be done to help you.

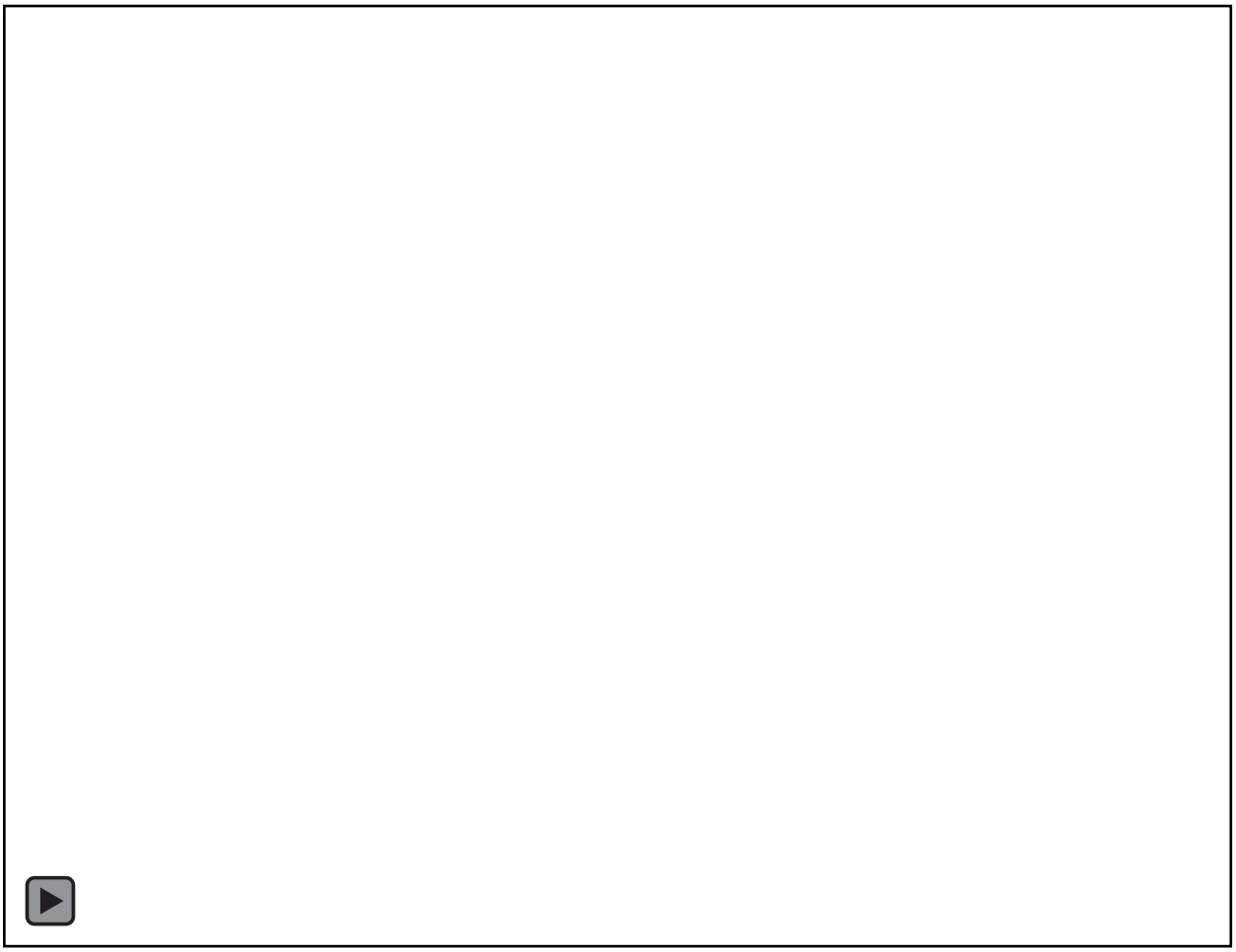
Employees who have worked for the company for more than ten years will continue to receive the full travel discounts enjoyed by working employees. This applies to your spouse / partner and is lifetime for both of you.

Sales Training Video

Sales Staff Video

Highly recommended for new Sales Employees! An animated demonstration shows some of the material presented in the one-day Salesbuilder Tour course.

If you are viewing this document on a desktop you will be able to view the video below. If you are reading a printed version, you can find the demo on the company intranet.



Glossary

C

CEO: [Chief Executive Officer]

Core time: [The hours between which office based employees must be in the office.]

E

Entitlement: [The amount of sick pay to which an employee is entitled]

N

NHS: [National Health Service - UK]

S

Self-certification: [A certificate signed by an employee giving the details of illness]

SSB: [State Sickness Benefit - UK]

SSP: [Statutory Sick Pay - UK]

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