CREATING ONLINE DOCUMENTATION FOR MICROCOMPUTER-BASED LIBRARY OPERATIONS

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LIBRARY SOFTWARE REVIEW, 7(6):408-410, Nov-Dec 1988

The use of microcomputer software for library operations frequently involves referral to documentation by library staff and library users. The software being used has its own printed documentation and there is usually library-generated documentation for the task being done. Too frequently all of this documentation becomes a mass of manuals, guide sheets, and "post-it" slips in relaxed orbit around the microcomputer. Human nature is such that printed manuals and instructions are sometimes misplaced and frequently ignored. A more beguiling approach would be to make this documentation permanently resident on the microcomputer so that it can called up for display on the microcomputer's monitor screen at any time. Library staff and users might refer to documentation more frequently if it was readily available onscreen.

Polaris Rescue software provides for the creation and usage of onscreen documentation. Polaris Rescue is really two software: a screen editor for creating a file of help screens and a popup utility software for accessing that online file of help screens. Polaris Rescue's screen editor (entitled PRED) is used to create or enhance a file of help screens; Polaris Rescue's popup utility software (entitled PR) is loaded into the microcomputer and is used for one-keystroke access to the file of help screens. The help screens created can be text screens, menu screens, or a combination of both. Screens can be linked to each other thus creating simple or complex systems of menu and help screens. Each file of help screens can contain up to one thousand screens and files can be linked to one another; therefore virtually no limit exists on the total number of help screens. For complex multifaceted documentation, a hierarchical branched system of menu and help screens can start from one main screen and lead to submenus which lead to text screens. A sequential system of tutorial help screens can be created by setting individual screens to display a specific time period before moving on to the next screen.

To access Polaris Rescue's file of help screens, the user

simultaneously presses hot keys prespecified by the Library; hotkeys consist of function keys, numbers, or letters combined with the ALTernate, ConTRoL, or SHIFT keys. Password security for access to the help screens can be established if desired. When hotkey accessed, Polaris Rescue's main screen immediately pops up over the software being used; the main screen can be text, menu, or a combination. From the main screen, the user can follow linked menu and help screens in order to arrive at a help screen with the specific information desired. In addition to menued access to specific help screens, function keys can be assigned to lead directly to those specific help screens. At any time, the user can back up and display the previous help screen by pressing the F9 (function nine) key. After viewing Polaris Rescue's help screens, the user exits Polaris Rescue by pressing the F10 (function ten) key. The monitor screen display then returns to the original software being used.

Step-by-step procedures for completing a task can be spread out over many Polaris Rescue help screens. Long multiscreen procedures can be frequently referred to without losing one's place in the procedures. By simultaneously pressing the SHIFT key and the F10 key (instead of the F10 key by itself), the Polaris Rescue help screens are exited while Polaris Rescue remembers the screen location where the exit occurred. When Polaris Rescue is re-entered, the screen location at last exit is remembered and one's place in the procedures was not lost. Staff or user can complete tasks and read along with procedure at the same time.

Since Polaris Rescue overlays a software being used with a Library-designed file of help screens, Polaris Rescue offers opportunity for establishing documentation associated with the work being completed on the original software. Polaris Rescue can be used to communicate library-generated information to library staff or users. Opportunities can be found in technical service, public service, and administrative environments. Polaris Rescue could document technical services information like local cataloging procedures, call number practice, MARC codes, and treatment of multiple volumes. Public services applications could include circulation or interlibrary loan policy and procedure, compact disk database documentation, and library-generated online database or local catalog documentation. Administrative applications could include policy, procedures, account numbers, codes, or any documentation that has to be referred to occasionally. Polaris Rescue's permanent residence in the microcomputer's

temporary working memory --its RAM memory --gives it the ability to overlay a software in use. This RAM-resident nature also presents a caveat (as discussed later in more detail); Polaris Rescue must be experimented with in order to assess its workability with local equipment and software; do not assume that it will work. Microcomputers, software, memory usage, and keyboard control are not totally standardized so that Polaris Rescue cannot be assumed to work for all situations.

Think of Polaris Rescue as supporting menued access to help screens as well as page-based scrolling through a continous document. Polaris Rescue's best feature is the menued access to help screens. By accessing screenfulls of documentation with menus, Polaris Rescue presents small amounts of easily digestible information to staff or user in the midst of doing something else. Information is not dumped in a large unwieldy mass and a long document does not have to be scrolled through in order to find a small amount of information embedded within it. Whenever a microcomputer operation has a body of knowledge that is considerable and unwieldy in printed format, then Polaris Rescue may be a solution.

Creating help screens with Polaris Rescue is very simple but should follow text creation with wordprocessing software. The text of the help screens is best written with wordprocessing software and not Polaris Rescue's own editor entitled PRED. PRED is a bare-bones text editor while wordprocessing software has more powerful text editing features (eg right and left justification, line centering, word find-and-replace) which make screen writing and layout easier. PRED is best used to enhance wordprocessed help screens; it can draw single and double lines and boxes and other IBM screen graphic characters and can assign fifteen colors to text, symbols, and lines. In addition to editing functions, PRED also has utility functions for manipulating files and screens and creating menus. When wordprocessing, each help screen is written to be no longer than 22 lines and is headed by a separate line comprising two vertical lines (||) and an assigned help screen name. Help screens names should be less than or equal to 15 characters. Screen names over 15 characters will cause PRED to crash later (this 15 character limit is undocumented in the manual). When wordprocessing help screens, plan ahead and map out screen linkages -- which screens menu to which. Planning ahead is important because it is easier to compose screens with wordprocessing software than with PRED. Leave out a help

screen during wordprocessing and it will have to be created later with the more awkward PRED editor.

The wordprocessed help screens are saved as an ASCII text file. An ASCII text file is not the same as the normal file saved with wordprocessing software; check the wordprocessing software documentation for instruction on creating ASCII or DOS text files. PRED is then used to convert the wordprocessed ASCII file into a Polaris Rescue file of named help screens by chopping the ASCII file up at the vertical line characters. After conversion, PRED is used to assign the opening Polaris Rescue help screen; this is the first screen that will pop up when the user presses the specified hot keys, eg ALT and H. This can be an opening menu screen linked to other menu screens and text screens. PRED is used to mark menu selections (called "pointers") on a screen and to establish their linkage to other screens. Menu selections (pointers) will display in reverse video highlight (light background surrounding black characters) when the user moves through them with the cursor arrow keys; the user selects a pointer by pressing the "enter" key. Polaris Rescue then displays the help screen that PRED linked to that pointer. After PRED is used to link the entire file of help screens and their pointers, PRED is then used to compress the file of help screens into the actual file that will Polaris Rescue will access on the microcomputer. Future edits of the file of help screens after compression are made on the uncompressed file which is then recompressed into a new file.

PRED is used to draw single and double lines and also assign fifteen text colors on the help screens. Line drawing and screen colors are best added during a second phase with the first phase being the creation of unadorned menu and text screens. Before putting too much time in adornment, look at an unadorned file of help screens in action. Modifications will become apparent and are easiest on simple screens. After a shakedown period, PRED line drawing and text coloring can begin since the screens will be fairly stable. Line drawing with PRED is more basic than linedrawing with some wordprocessing software. PRED linedrawing operates awkwardly and does not automatically substitute tees and crosses at line intersections. Tees and crosses and other IBM graphics characters are available within PRED by pressing the ALT key and numeric keys.

Polaris Rescue is a RAM-resident or TSR "terminate and stay resident" software; adding a memory-resident software may be unacceptable to other software. Some software are intolerant

of other RAM-resident software (notably, SIDEKICK which is itself a RAM-resident software) or may need as much RAM memory available as possible (notably Lotus 1-2-3 spreadsheet). In one of the author's applications, Polaris Rescue consumes 25K of RAM memory; the file of help screens is 38K and the popup PR utility is 16K. Generally a commitment of 25K of RAM will not be noticed.

Polaris Rescue Version 2 operates on COMPAQ, IBM PC, PC-XT, AT or other 100% IBM compatible microcomputers; a hard disk is not required. Polaris Rescue displays in monochrome or color and runs under DOS 2.0 or higher. A Polaris Rescue command can be placed in the microcomputer's AUTOEXEC.BAT file so that Polaris Rescue is automatically loaded into RAM memory when the microcomputer is switched on. Polaris Rescue is not copy protected. Polaris Rescue can be sensitive to IBM compatible microcomputers. IBM compatibility is primarily determined by the microcomputer chip controlling the operating system's basic input-output system -- the BIOS chip. Only IBM makes a truly 100% IBM compatible BIOS. Other BIOS producers make their BIOS as close to IBM as possible (with IBM's mistakes) so that microcomputers with their BIOS function exactly like an IBM microcomputer with an IBM BIOS. No one can copy IBM's BIOS without violating IBM's patents; thus no one can be fully 100% IBM compatible. The degree to which an IBM-compatible BIOS works exactly like an IBM is the acid test of its IBM-compatibility. Microsoft FLIGHT SIMULATOR is considered to be a good test of IBM compatibility; the author discovered Polaris Rescue to be another. The author successfully used Polaris Rescue on an IBM PC-XT and an AT clone with a PHOENIX BIOS. When Polaris Rescue was tried on a microcomputer with a MIART BIOS, the original screen display did not return after exiting the Polaris Rescue help screens. Instead a screenfull of question marks and triangles displayed. After swapping in another microcomputer with an AMI (Access Methods Inc) BIOS, the problem was resolved.

Polaris Software offers a 30-day money-back guarantee which should be used as a trial period. Upon receipt of the software, try it on the equipment and with the software with which it will be concurrently used. Create a simple test file or use the Polaris Rescue test file. Try various functions like pointers and line drawing. Do not assume Polaris Rescue will work on any equipment or with any software. Expose problems while the software can be returned.

The Polaris Rescue software manual presents an unusual and unfamiliar process as clearly as it can. After toughing it out through a brief learning period with a trial file, the PRED editor is very simple to use. PRED is menu-operated and quickly becomes intuitive. Screen creation becomes fun.

Polaris Rescue is sold by Polaris Software, 613 West Valley Parkway, Suite 323, Escondido, California 92025, 1-800-338-5943 or 619-743-7800. Polaris Rescue Version 2 costs $149 plus $6 shipping and handling; a demonstration disk is available for $10. Add California sales tax if the sales transaction occurs in California. The author thanks Polaris Software for providing Polaris Rescue for review; please mention this review when contacting Polaris Software.