USER MANUAL

For use with the CoL8

Document Collation Software

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Date: March 2005

Version: 1.0

**Content Management Software
That Saves You Time and Money**

NOTICES

PROPRIETARY NOTICE

DISCLAIMER

The information contained in this manual is accurate to the best ability of Quasar Software Developments Limited. However, as with all software products, **CoL8** is subject to upgrade, change, modification and alteration that may mean that this manual does not reflect the features and functions of the current **CoL8** system. This may include, but not be limited to, new features not detailed in this manual, features detailed in this manual that no longer function and features that function in a way different to that described in this manual.

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Table of Contents

1. Welcome to CoL8

Welcome to CoL8. This manual will explain how **CoL8** works and how you can configure this innovative document collation and content management solution to provide you with the optimum services in your business. **Just like any computer system CoL8 is controlled by the parameters you set up and will act accordingly. We recommend that you take few minutes to review this user manual, then print it out and use it as you reference manual for your CoL8 system.**

Every business has Standard Documents - be they sales proposals, contracts, product manuals, customer correspondence, price lists, method statements, company profiles, procedure guides, operations manuals, training material, etc... in fact the list is endless. All of these are likely to be distributed across a network, or even an intranet. **CoL8** also has the bold guarantee that it will save its customers time and money in creating these documents.

CoL8 is a high speed Document Collation Software product that integrates seamlessly with Microsoft Office to generate highly impressive Business Critical Documents in seconds.

However, maybe the best thing about **CoL8** is the price, **CoL8** will cost your organisation less than most professional PC graphics packages and similar business packages. **CoL8** is one of the most cost effective content management systems available. **CoL8's** document collation technology will change the way you do business – literally at the touch of a button. **CoL8** allows you to select these through a simple, easy-to-use interface and link the components of documents together to form an upto date document in any order you choose. **CoL8's** advanced templating schema formats the new document automatically to conform to your business image and **CoL8** allows you to change the format literally at the touch of a button. The emphasis is on speed and flexibility. **CoL8** leaves the original components where they are, completely untouched, and creates a brand new document at an amazing speed - saving both time and stress.

There is already a comprehensive customer list that includes some of the largest and smallest companies in the world.

CoL8 is a simple to use yet sophisticated document collation software tool that allows **anyone** to create great looking professional documents quickly and easily.

Most **mission critical** material created in 'day to day' business life has a tendency to be hybrids of other documents held across your network. These may be standard elements of text, products & services, price lists etc. that get used over and over again.

Working Without CoL8

Without **CoL8** users have to recall similar documents and then modify the content to suit the situation at hand with unnecessary time being spent:

Checking to see that the new document doesn't contain any non-relevant information.

Making sure that any new text flows with the old.

Ensuring that it's formatted the way you want it - checking headings, page numbers, table of contents, headers & footers etc.

This process may take hours and, even then, the risk of quality of content and message being diluted by doing this same operation over and over again is very high.

Working With CoL8

With **CoL8** all of this is carried out automatically and at amazing speed. **CoL8** will pick up your selected text from anywhere on your network or your intranet and from then on.

CoL8 SmartFields will allow you to quickly customise your document.

- Front & Back Covers can be attached.
- Pages will be correctly numbered.
- Portrait and Landscape text will be dealt with, with ease.
- Seamless integration with Microsoft Word allows the full functionality to be maintained.
- Pictures, Tables, Charts, Graphs and Hyperlinks are all incorporated automatically.
- Table of Contents will be generated.
- **CoL8** Templating Schemas will allow you to format and reformat your document so that it looks exactly the way you want it.

Intelligent Document Collation all in less than 60 seconds with guaranteed Accuracy.

If this manual does not provide you with all of the information that you require or you have questions that are not addressed by the manual please email us at **CoL8@CoL8.com**.

2. Getting Started

2.1. Download CoL8

Download CoL8   The very first thing to do is download a copy of **CoL8** and install it on your local computer system.

CoL8 may be downloaded from the **CoL8** web site at the downloads section or from any authorised **CoL8** download site.

2.2. Installation

To start the **CoL8** installation, run the setup.exe program. Depending on the distribution media, this will either be located on your **CoL8** CD or in the directory the **CoL8** zip file that you downloaded has been extracted to.

If you do not have installation key codes, you must contact an authorised **CoL8** Distributor in order to obtain these before installation can continue. Details of CoL8 Distributors can be found on the CoL8 web site (www.col8.com)

2.3. Licensing

Full licensing

Continued use of CoL8 requires purchase of a licence key from one of QSD's **authorised distributors**. Details of your local QSD authorised distributor may be found on the CoL8 web site (www.col8.com). They will be able to inform you about pricing and can further advise you

Trial license

You may have the opportunity to take advantage of CoL8's 30 day trial license. Depending on where and when you downloaded CoL8, either the 30 day trial license keys will be pre-installed in the product or you can contact one of QSD's **authorised distributors** to receive a full set of trial license keys. Details of your local QSD authorised distributor may be found on the CoL8 web site (www.col8.com). They will be able to inform you about pricing and can further advise you

If you have received a set of full or trial license keys and a unique Client ID you will need to install these to activate **CoL8**. First run **setup.exe** on the CoL8 CD or in the downloaded zip file.
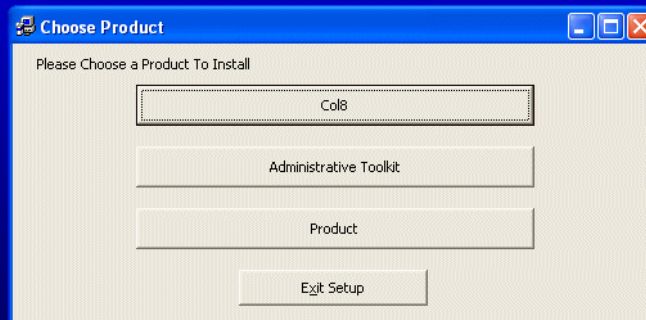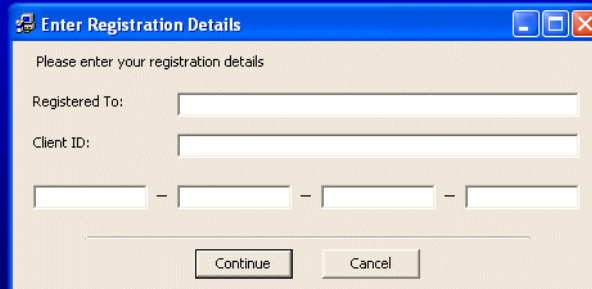
You must now decide on the component you are installing. The choices are "**CoL8**" (which is the **CoL8** engine), Administrative Toolkit (the **CoL8** administrator) or "Product", which in this initial installation are various demonstration documents, templates and sample data already setup as **CoL8** "products".

Continuing with the installation procedure.

1. Enter your name/company name and your unique Client ID.

2. The four boxes at the bottom of the window are for your unique key code which is available from your authorized distributor. Please ensure that you contact them when you reach this point in the installation as the key codes are time specific and may not work if you delay your installation.

3. Click on Continue to accept the key code. To accept the default directory, click on the large install button to the left of the window. To change the default directory, click the Change Directory button.

4. Next select the program group that you want the **CoL8** icon installed to.

5. Clicking on Continue will install the software.

6. Click on OK when installation is finished to complete setup.

Note:
Ensure that you install all of the demonstration products available to you (these can include: an example Storybook (product ID 800), the CoL8 Authorised Reseller Agreement (801), a sample Business Proposal (802), the CoL8 User Guide (803) and an example very large document to demonstrate the speed of CoL8 (804).   Please refer to the next section of this manual for further details.

2.4. CoL8 Demonstration products

Within the installation of **CoL8** are a selection of demonstration products, templates and samples. These may also require installation keys to be entered to activate.

2.5. CoL8 SmartFields

CoL8 SmartFields requires an additional license key to be installed within CoL8. When you have finished installing CoL8 as detailed above, enter the CoL8 engine and select the options tab.
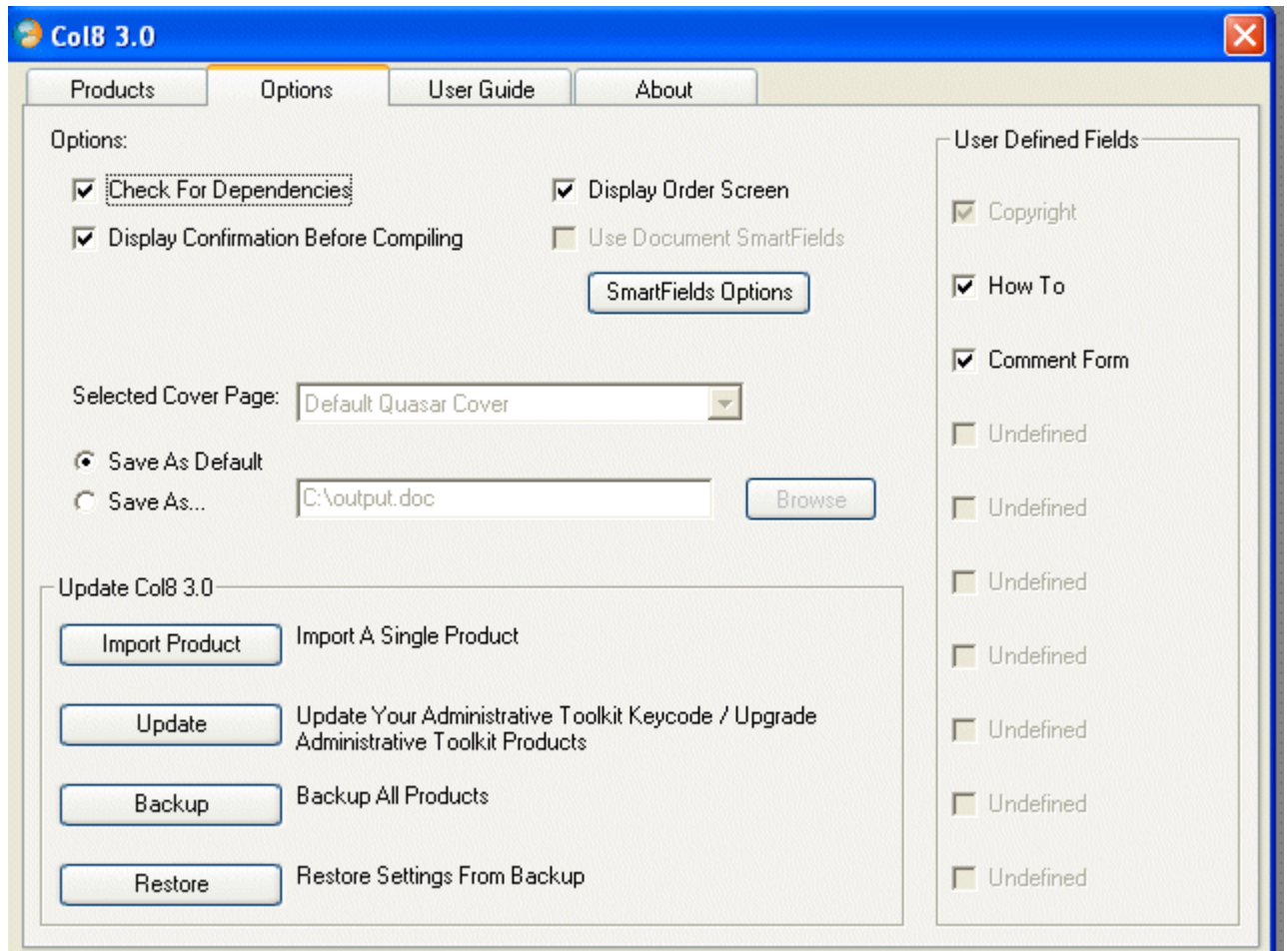
Select the "User Document SmartFields check box and you will be prompted to enter the SmartFields license key. If you do not enter this license key then the SmartFields options within CoL8 will not be available to you.

2.6. Realtime help

This is the **CoL8** User Manual. A significant portion of the information contained in this user manual may be accessed via the user guide section in **CoL8**. Simply selected the User Guide Tab in **CoL8**, see below:

Figure 1.3 - Additional Components To Your Product

Selecting any of these additional components will insert the relevant item. The Product Name will appear on the Cover Page of your Product.

To start compiling your Product, you simply click on the Build Product button. You must have specified at least one Topic to include in your Product in order to continue.

The Options Tab

3. Administration Functions

This section of the **CoL8** User Manual is intended to be used by **CoL8** System Administrators and other managers of the system. It contains information relevant to the administrator functions of **CoL8** and management of your **CoL8** system.

The **CoL8** Administrative Toolkit is the software which you will be using to create all your new "products".

It is important to understand the following principals before attempting to create a product:

1. The Administrative Toolkit works only with Word documents

2. Before attempting to create a product, you need to have your "topics" and your standard documents (library files) already created – **CoL8** is not an authoring tool – it is a collation tool.

3. As well as your topics (chapters) you will need several library files. You can use the sample ones provided with **CoL8** or you can create your own library files. Some of these files are optional and others are vital to the operation of the product.

   The files vital to the operation of **CoL8** are:

   - At least one Template
   - A Cover Document

   The optional files are:

   - A Table of Contents Document
   - A Summary Document
   - A Conclusion Document

   Once you have all of the above available to you, either on your C drive, your network or any other computer to which you have access, you are ready to create your product.

3.1. Using the CoL8 Administrative ToolKit

On opening the Administrative Toolkit, the first screen (Figure 3.1) you will see provides you with 3 tasks:

Create a New Product

Edit an Existing Product

Delete an Existing Product

There is also an Exit button. Clicking on the Exit button will close The Toolkit.

The Exit button is available on all **CoL8** Administrator Toolkit screens and can be used at any time.

Figure 3.1

Note: If you click on the exit button during the process of creating a new product your settings will not be saved.

3.2. Create a New Product

Creating a New Product is Wizard driven – providing you with an easy to follow Step by Step process.

Clicking on Create a New Product will open a Welcome Screen (Figure 3.2), reminding you that your modules need to have been previously created before you go any further. If you have not already created your modules, click Exit to close the Toolkit.

The Next button will take you to the Initial Product Set Up Screen (figure 3.3).
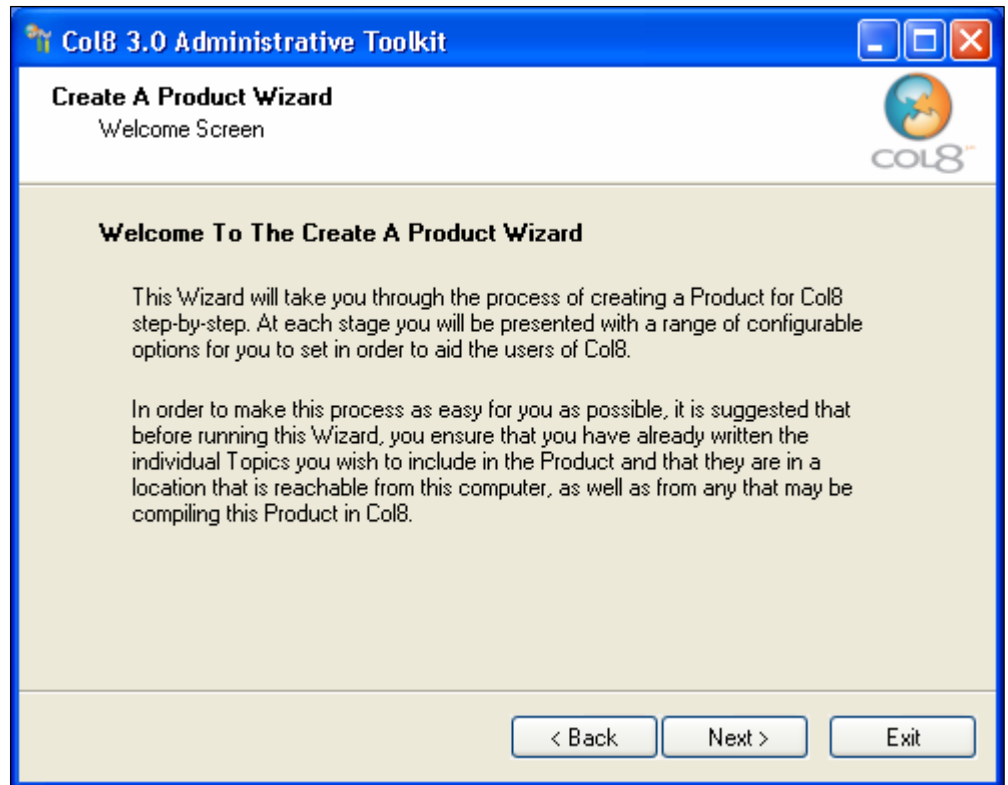
Figure 3.2

3.2.1. Enter a Name for your Product

Your Product name can be anything you like – type in a name which is suitable for the product you are creating e.g. 'Sales Tender Document' or 'Induction Manual'.

The Product name will be seen by users of the **CoL8** engine and will appear in the pull down list of available products.

You will note that as you type in the Product Name, the name is repeated automatically in the box below which contains the Unique Identifier for your Product.

Figure 3.3

It is possible to change this Unique Identifier in the future using the edit features described later in this manual. As the name implies the Identifier must be unique; if you already have another Product with the same Identifier you will have to change the Identifier for this new Product. Although **CoL8** will allow you to have two products with the same name, it will not allow you to have two products with the same Identifier.

For example you may have two products called Induction Manual but they must have something that differentiates them from each other – the Unique Identifier.
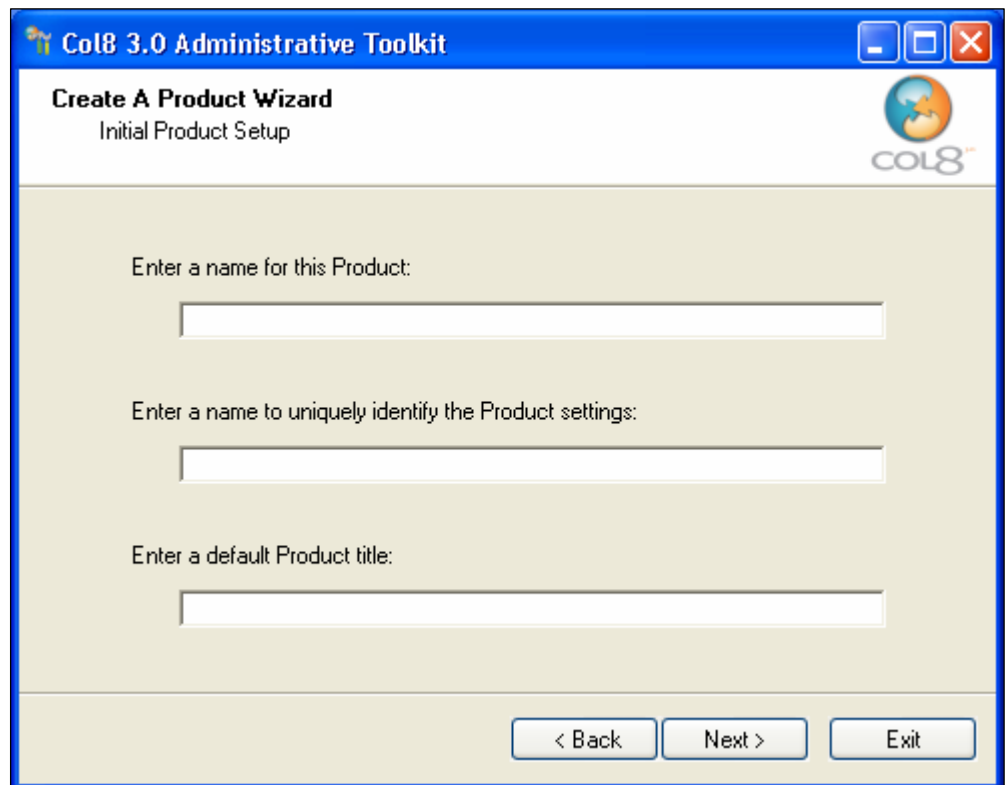
If you choose a Unique Identifier which already exists and try to continue, **CoL8** will display the following warning:

To continue, click on OK and amend the Unique Identifier so that it is acceptable.

As a final step on this Initial Product Screen, you have the option of entering a default Product Title. This fill in box is optional and can be left blank. Any Product title you insert will appear on the **CoL8** screen, when you have selected your Product from the Pull Down List.
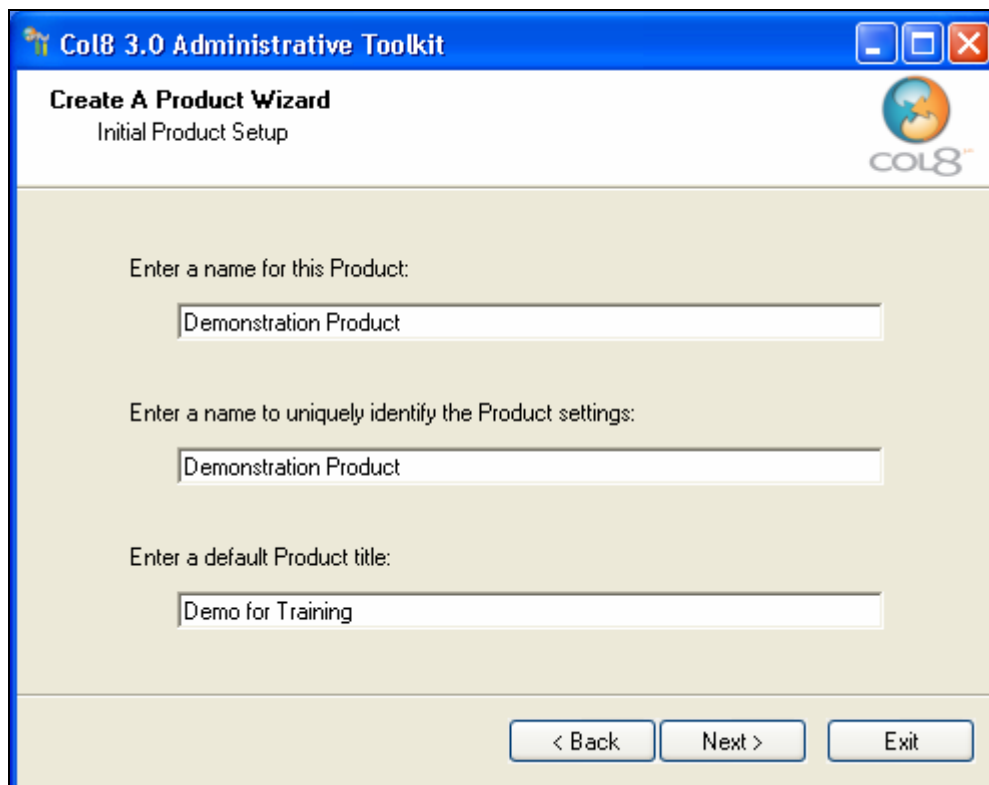
If you enter a Product Title you can, at a later stage, make the title editable.

Click on Next to continue.

Having named the Product, given it a unique identifier and a title you can begin the process of creating the Product starting with the Cover Page.

3.2.2. Creating a Cover Page

This screen offers the option of up to 3 different Product Covers.

You cannot create a Product without a Cover Page. On this screen you must select at least one. If you do not select a cover **CoL8** will not let you continue (see screen example below).
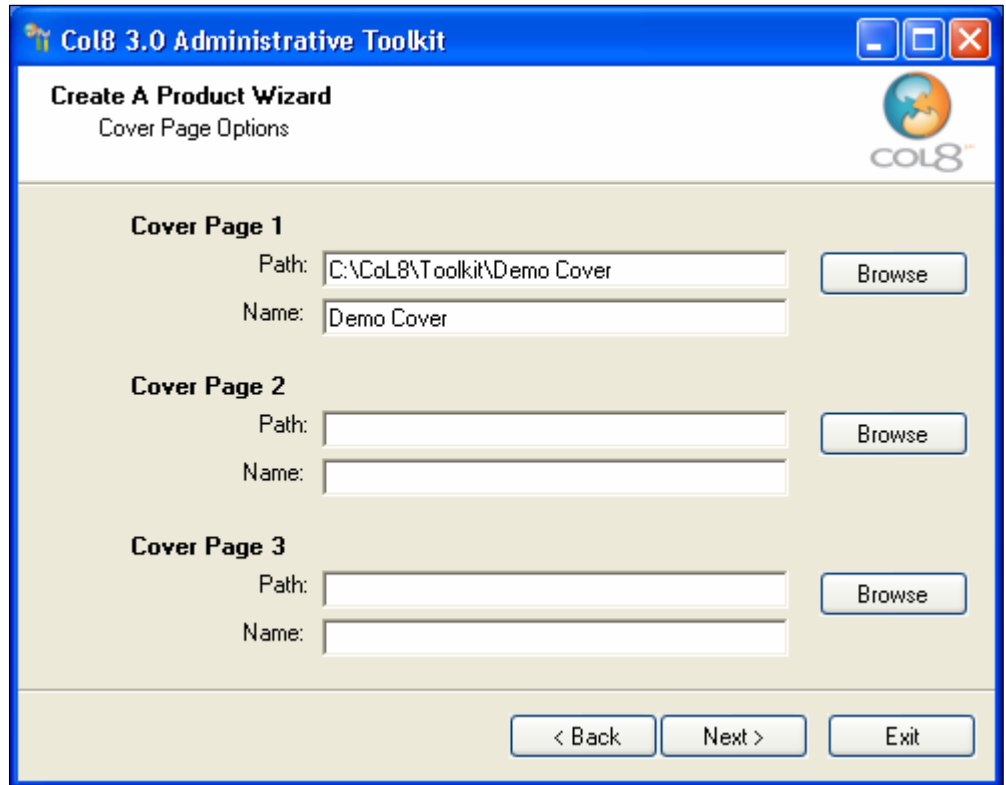
Click on OK to return to the Cover Page Options

To select your Cover Page simply position the cursor in the Path box.

Click on the Browse button this will open the Windows Explorer screen.

Scroll through your drives or network until you find the folder and file which you wish to use as a Cover.

Select the file and either double click on the file name or click Open. **CoL8** will place the path to the file in the Path box.

Click in the Name box and enter a name for your first cover, for example "*Front Page*" or "*Sales Tender Cover*".

The Cover Page contains two bookmarks which are used by **CoL8** during the document build process. Any new covers that you create **MUST** also contain these bookmarks. Please use the sample covers provided, these will give you a base cover document with the bookmarks already. The Bookmarks are:

Cover1   This will be replaced with the Product Name
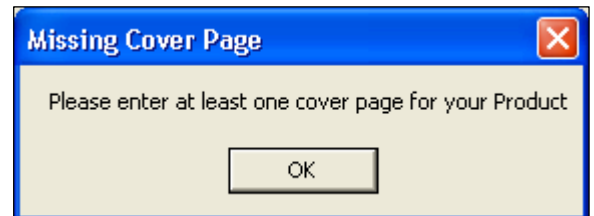
Cover2   This will be replaced with the Product Title

Note: You must give your Cover Page a name, **CoL8** will not allow you to continue without it.

If you wish to have alternative covers available for use within your product, repeat the steps above for Cover Page 2 and Cover Page 3.
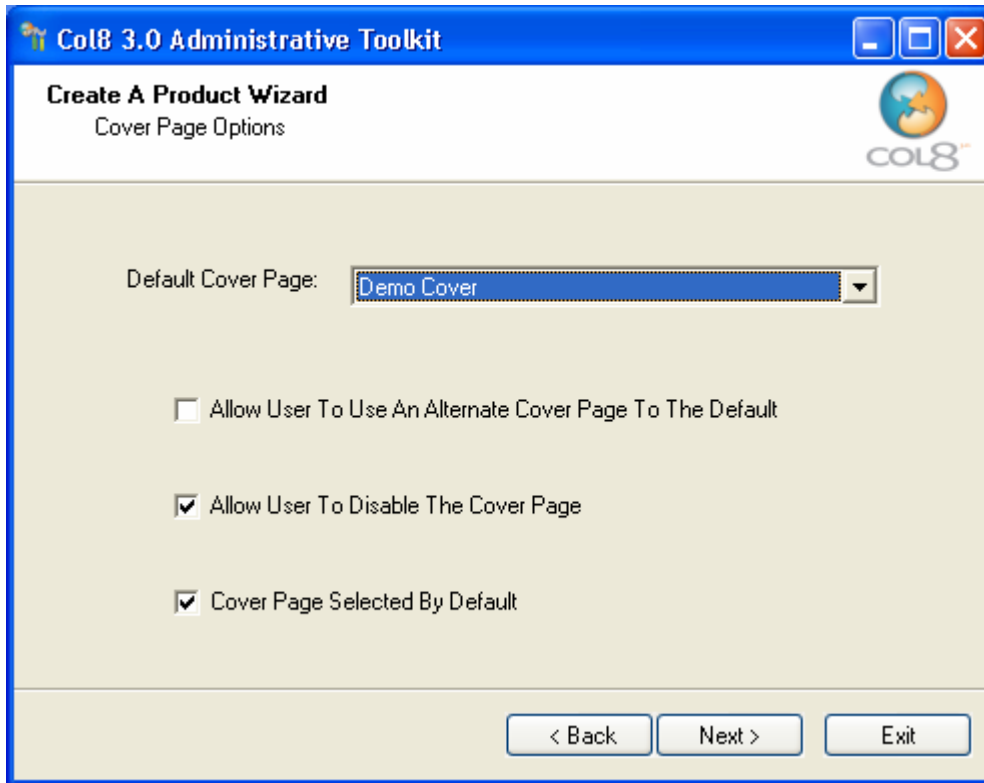
You Cover Page names will appear on the Product screen of the **CoL8** engine.

Having selected and named all the cover Pages for the Product click Next to continue.

3.2.3. Cover Page Options

The next screen displays the Cover Page Options:

If you have named only one Cover Page, the name will show in the Default Cover Page box. If you have named more than one cover page, each one will be listed in the pull down list of Cover Pages.

Having selected your Cover Page there are three further options available displayed as 3 check boxes.

The first gives you the option of allowing the User (that is the User of the **CoL8** engine) to use an alternate cover. This option will only be available if you have more than one cover created for your product.

Note: If you have created only one cover page, this box will not be checked.

The second checkbox, which will be selected by default, gives the user permission to disable the cover page – if you wish to ensure that the users always use a cover page this can be de-selected.

The third checkbox, which will also be selected by default, sets the use of the Cover Page as a default in the **CoL8** engine – this means that the user of the engine has one less task to carry out – the cover will already be selected for them.

Note: If you do not give your users permission to disable the cover page, you must always have it selected by default.

Once you have selected the options for each of your cover pages, click next to move to the next screen.

Note: If you have more than one cover page available you need to set the options for each one.

3.2.4. Content Summary File

The Content Summary is an optional feature. The following section details how to include it in your Product.
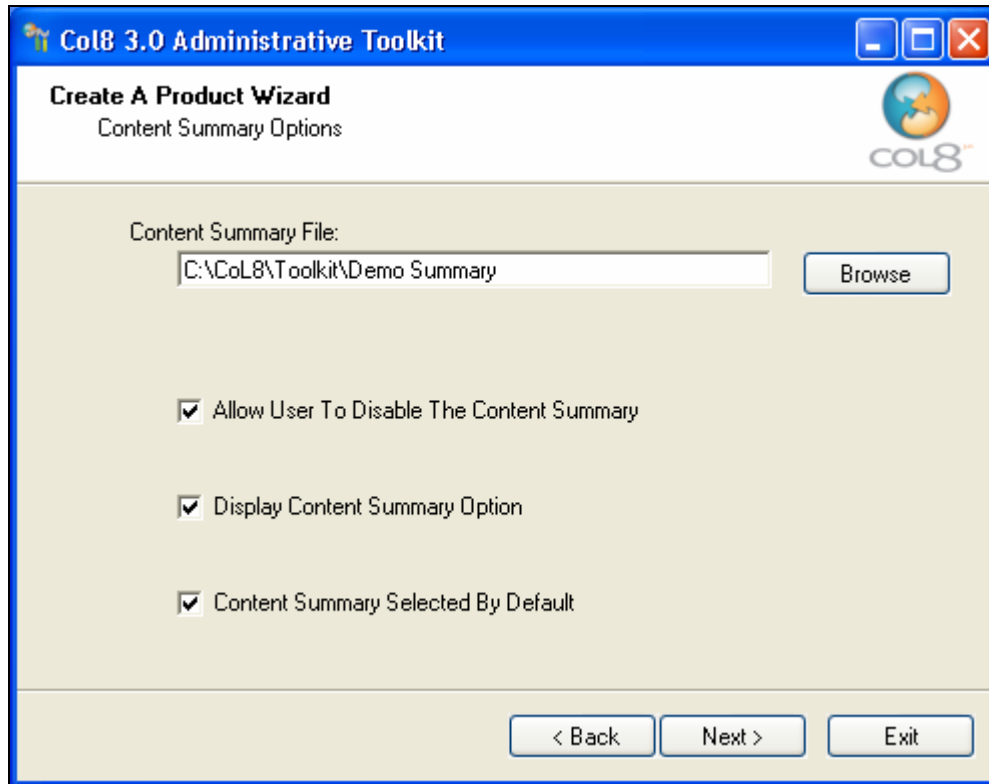
The Content Summary is relevant to Administrators creating materials such as training materials, policies and procedures or product guides. It can be used alongside, or instead of, a Table of Contents and consists of a bulleted list of the topics included in the product, without page numbers.

The content Summary is created from a word document which is stored with your library documents and should be called Summary.doc. The text within this document can be changed to meet your specific needs but it is important to remember that you must have a bookmark present at the start of the bulleted list.

The bookmark should be called "Summary" and is placed at the point where the topic names will start.

Note: You have complete flexibility with the names you give your topics however these names will be repeated both on the "front end" of the **CoL8** engine and also in the Content Summary. It is important therefore to ensure that the names you give your topics can be read and understood by other users.

For example, calling a module Chapter One might be fine for the Administrator who is confident and familiar with the product he or she is creating but will not provide any information for the user of the **CoL8** engine or the reader of the product. It would be far more beneficial for example to call the topic "Chapter One – An Introduction to Creating Manuals"

An example of the Summary.doc is shown here:

To select your content Summary File, place your cursor in the box and click on Browse – use the Windows browse feature to find the file which you have already prepared.

Once you have browsed for your Content Summary File and the path has been entered in the box, there are 3 more boxes to be completed.

The first gives you the option of allowing the User (that is the User of the **CoL8** engine) to disable the Content Summary.
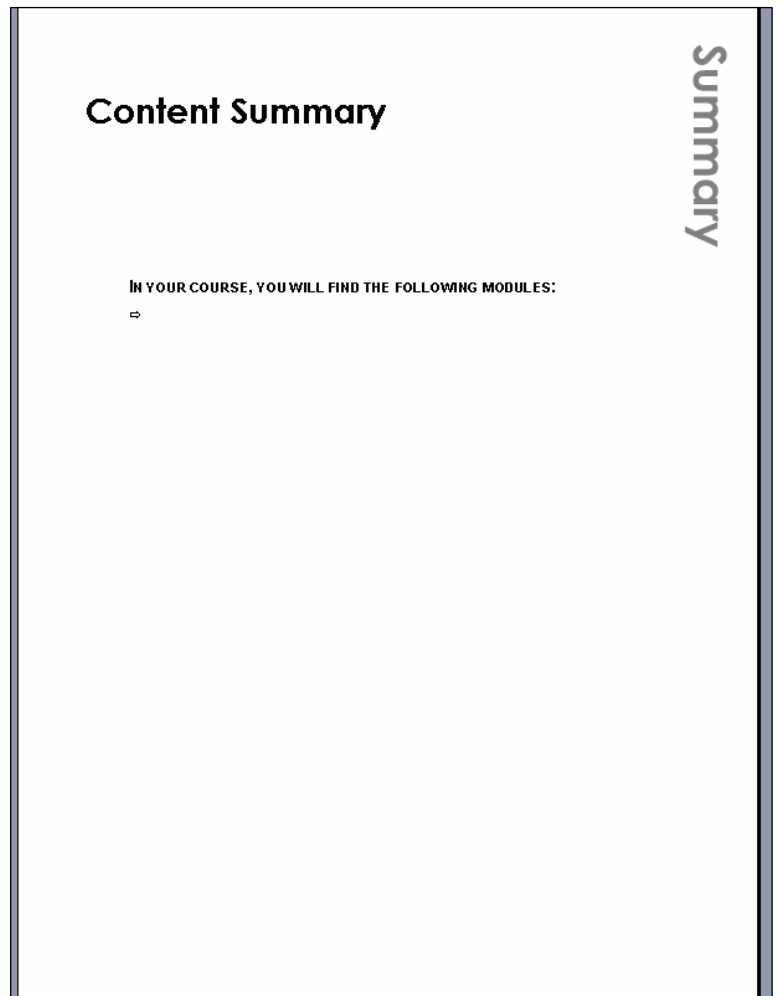
The second box, allows you to determine whether the User will be able to see the Content Summary – in other words, it is possible for the Administrator to incorporate a Content Summary, select it by default and include it automatically without the User of the Engine being able to see it on their interface and consequently be unaware as to how this section is included in their completed product.

The third box enables the Content Summary to be selected by default in the **CoL8** engine – this means that the user of the engine has one less task to carry out – the Content Summary will already be selected for them.

Content Summary

Summary

IN YOUR COURSE, YOU WILL FIND THE FOLLOWING MODULES:

Remember, that if you choose to select the 2nd option, you must also select the 3rd option otherwise your content summary will not appear in your final document.

Once you have selected your options, click on Next to move to the next screen.

Note: If you do not want a Content Summary, you can ignore this complete screen and go directly to Next.
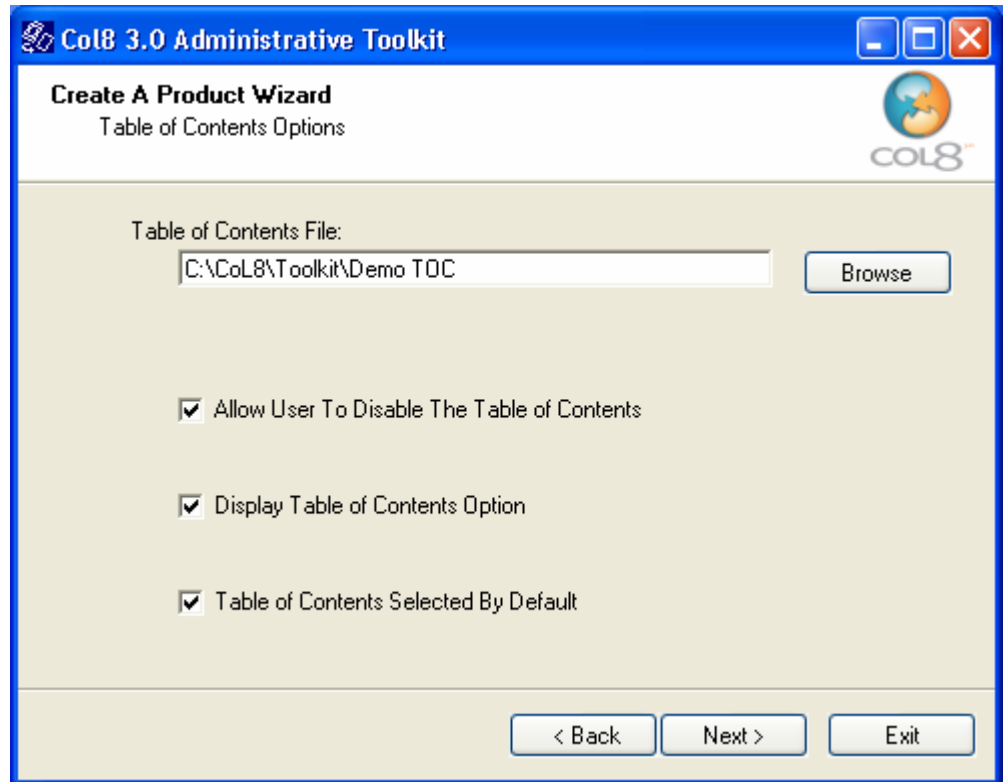
3.2.5. Table of Contents

The TOC is an optional feature. The following section details how to include it in your Product.

The TOC is created from a Word document which is stored with your library documents and should be called TOC.doc. The title text within this document can be changed to meet with your specific needs but it is important to remember that you must have the TOC field present, ready to include the TOC when your product is built.

In a **TOC.doc** file, because the TOC has not been built, you will always see the error message **"Error No table of contents entries found"**, this is nothing to be concerned about, when CoL8 builds your product, the TOC will be generated automatically.

To select your TOC, place your cursor in the box and click on Browse – use the Windows browse feature to find the file which you have already prepared.

Once you have browsed for your TOC and the path has been entered in the box, there are 3 options available.

The first gives you the option of allowing the User (that is the User of the **CoL8** engine) to disable the TOC.

The second box, allows you to determine whether the User will be able to see the TOC – in other words, it is possible for the Administrator to incorporate a TOC, select it by default and include it automatically without the User of the Engine being able to see it on their interface and consequently be unaware as to how this section is included in their completed product.

The third box enables the TOC to be selected by default in the **CoL8** engine – this means that the user of the engine has one less task to carry out – the cover will already be selected for them.

Remember, that if you choose to select the 2nd option, you must also select the 3rd option otherwise your TOC will not appear in your final document.

Once you have selected your options, click on Next to move to the next screen.

Note: If you do not want a TOC, you can ignore this complete screen and go directly to Next.

3.2.6. Conclusion File

The CONCLUSION is an optional feature; this section details how to include a Conclusion.
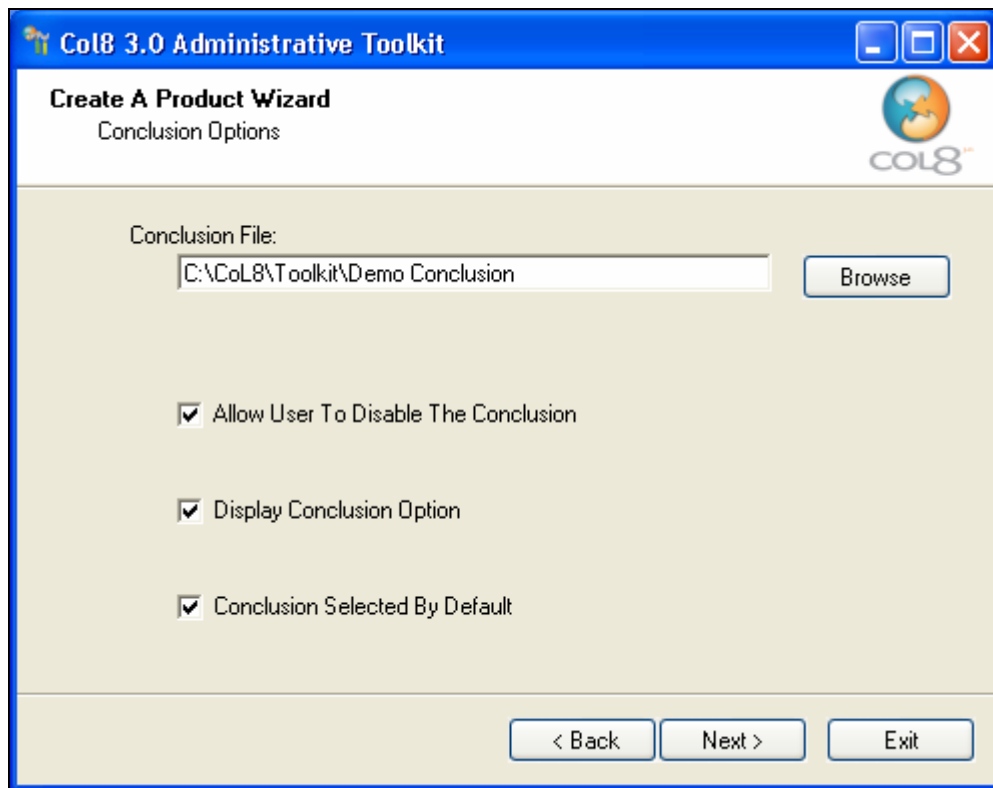
In a similar way to the Content Summary document, The Conclusion is relevant to Administrators creating materials such as training manuals. It can be used instead of an index and consists of a bulleted list of the topics included in the product. The conclusion does not have page numbers.

The Conclusion is created from a Word document which is stored with your library documents and should be called Conclusion.doc. The text within this document can be changed to meet with your specific needs but it is important to remember that you must have a bookmark present at the start of the bulleted list.

The bookmark should be called "Conclusion" and is placed at the point where the topic names will start.

Note: As with your Content Summary, your Conclusion will incorporate a complete list of your Topic Names - therefore it is important to ensure that the names you give your topics can be read and understood by other users.

An example of the CONCLUSION.doc is shown below

Conclusion

This concludes the training course materials. The following sections will review what you have done, what you can now do with your new knowledge, and what courses are available to enable you to continue learning about your software product(s).

You have covered

This course has taken you through the following topics:

-

To select your CONCLUSION, place your cursor in the box and click on Browse – use the Windows browse feature to find the file which you have already prepared.

Once you have browsed for your CONCLUSION and the path has been entered in the box, there are 3 options available.

The first gives you the option of allowing the User (that is the User of the **CoL8** engine) to disable the Conclusion.

The second box, allows you to determine whether the User will be able to see the Conclusion – in other words, it is possible for the Administrator to incorporate a Conclusion select it by default and incorporate it automatically. The User of the Engine will not to see it on their interface and consequently will be unaware as to how this section is included in their finished product.

The third box enables the Conclusion to be selected by default in the **CoL8** engine – this means that the user of the engine has one less task to carry out – the Conclusion will already be selected for them.

Remember, that if you choose to select the 2nd option, you must also select the 3rd option otherwise your Conclusion will not appear in your final document.

Once you have selected your options, click Next to move to the next screen.

Note: If you do not want a CONCLUSION, you can ignore this complete screen and go directly to Next.

3.2.7. Topics

Having set up the shell of your Product you can begin to add topics – these will form the main bulk of the product.
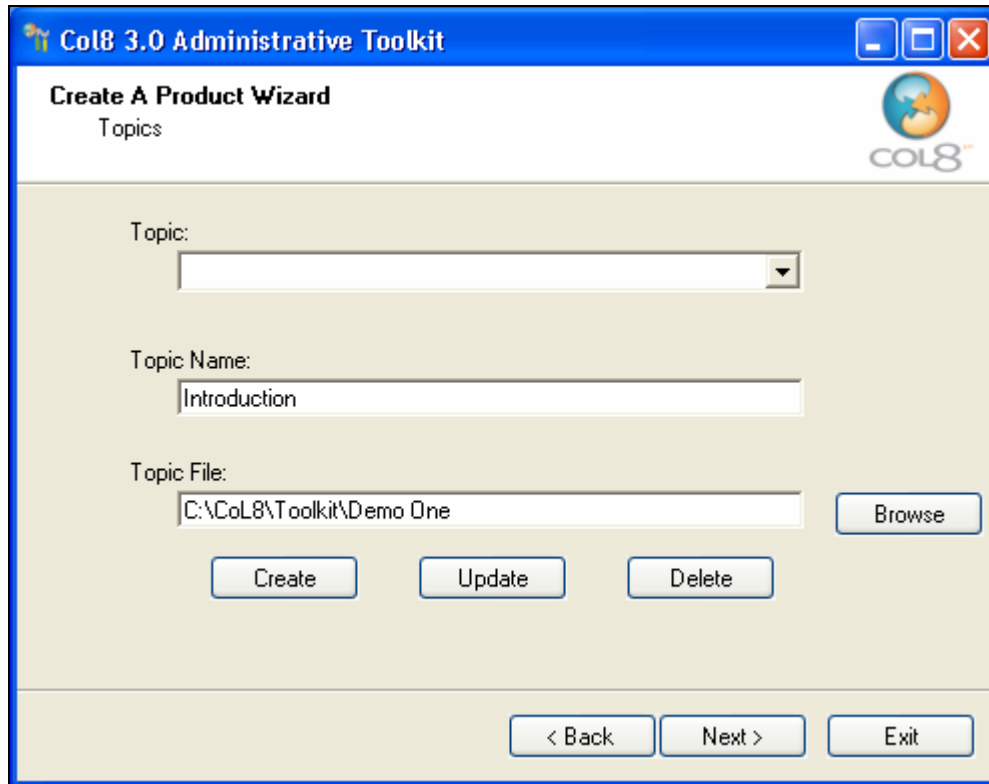
Position the cursor in the **Topic File** box and select Browse.

This will take you to the Windows Explorer screen.

Scroll through your drives or network until you find the folder and document which you wish to use as your first topic.

Select this file and either double click on the file name or click on Open. **CoL8** will place the path to the file into the Topic File box.

Position the cursor in the Topic Name box and type in your topic name. Remember this is the name which will appear on the Front screen of the **CoL8** engine so should be a name which can be easily understood by other users.
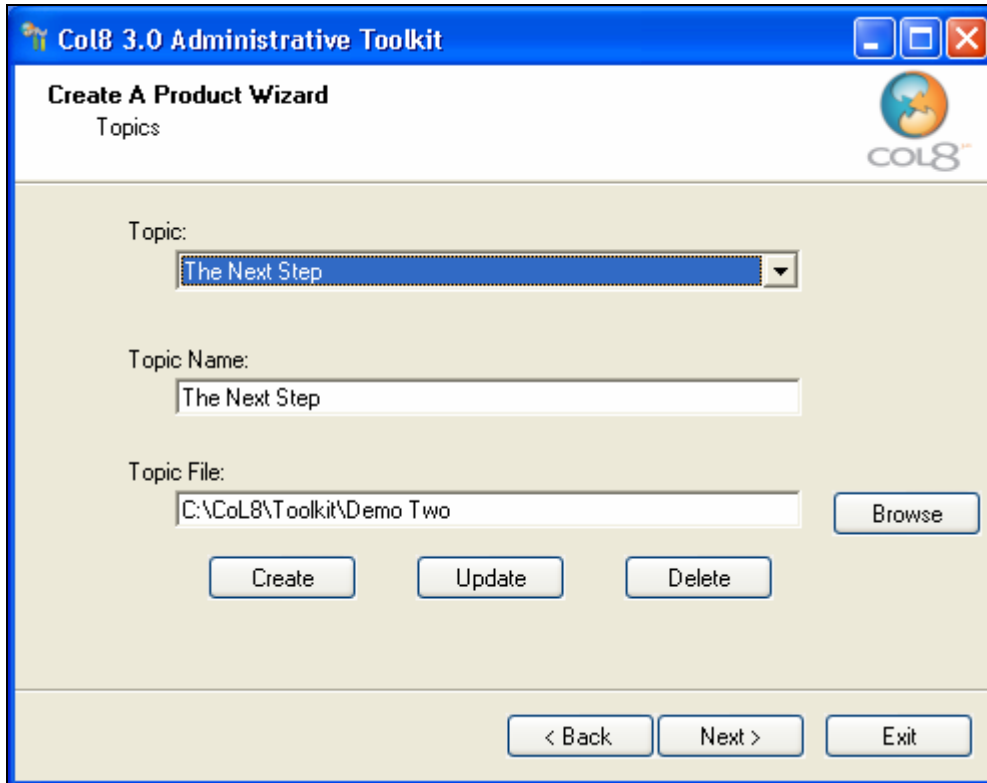
Once you are happy with the name of your topic, click on the Create button – the topic name will be added to the topic list at the top of the screen.

You must give your topic a name in order to continue; otherwise the following warning will be shown:

If you make a mistake with the name (either spelling or other) the topic name can be corrected using the update button. Select the topic containing the error, make the amendments in the topic name box and click on update to confirm these amendments.

The topics should be added in the order that you would like them appear within the **CoL8** engine; within **CoL8,** topics will always be listed in the order that they were created. This order cannot be changed through the administrator toolkit although there is a feature within the **CoL8** engine which will allow the topic order to be changed. This is covered in the **CoL8** Uuser guide

Continue to add topics until the product is complete. There is no limit to the number of topics you can add. The **CoL8** engine will show 18 topics on each page with an unlimited number of pages available.

So that topic names can be seen on the Products Tab of the **CoL8** engine it is advisable to restrict then to a maximum of 60 characters (including spaces), this will vary depending on the length of individual words. **CoL8** will truncate rather than hyphenate.

To check the list of topics at any time use the pull down arrow on the topic list.

If you add a topic that you later decide you do not require, simply delete it by highlighting the topic in the topic list and clicking the delete button.

Once you have completed your list of topics click the Next button to continue to the Topic Dependencies screen.
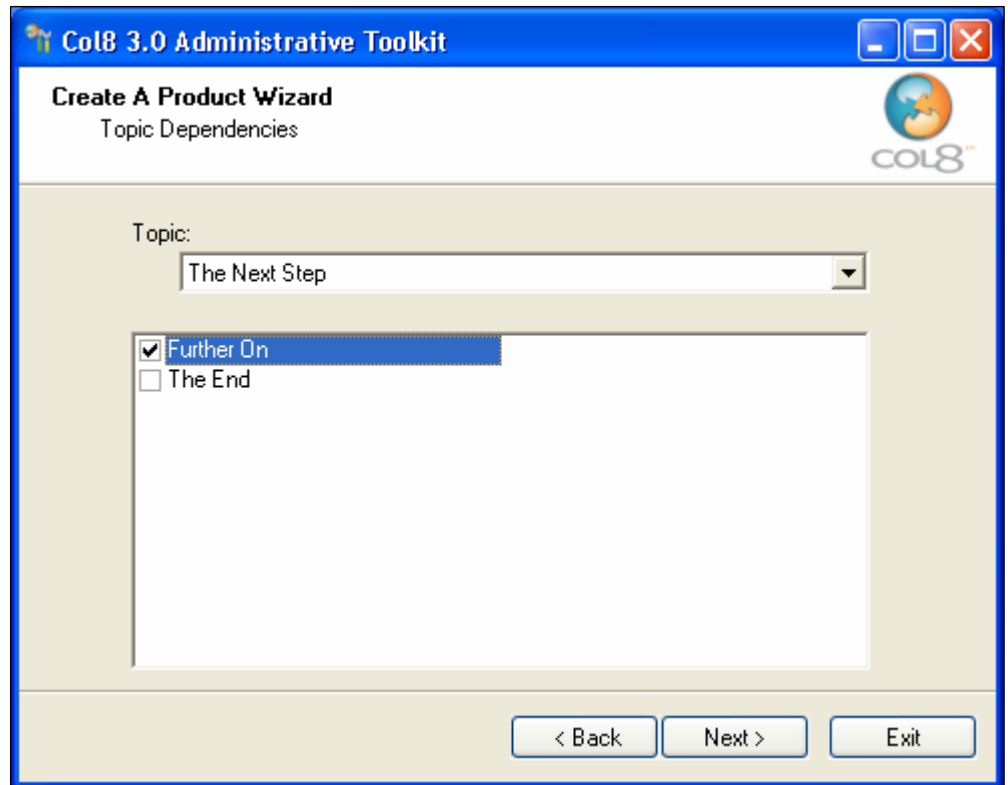
Note: If you have only one topic in a product, you will automatically skip this stage and be taken straight to the User Defined Fields.

3.2.8. Topic Dependencies

CoL8 will allow you to make any topic dependant on any other. This means that when a product is being built using the **CoL8** engine, if a topic is selected without its dependencies, the user will be prompted to select the additional topics as well.

To create a dependency, use the pull down arrow to select the topic on which you wish to make something dependent, in the box below tick those topics which you wish to make it depend.

Repeat this procedure for all the topics to which you wish to attach dependencies. When you have completed selecting your dependencies, click on the Next button to continue.
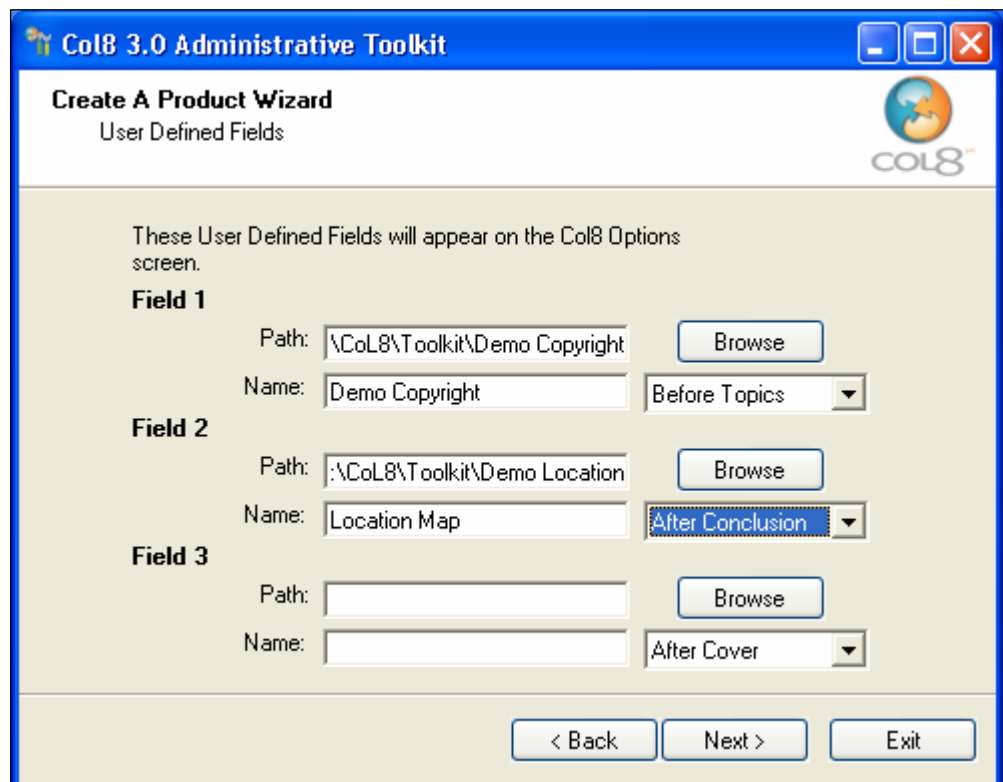
3.2.9. User Defined Fields

The **CoL8** Administrative Toolkit gives you the ability to incorporate up to 10 User Defined Fields (UDF) within each product you create.

A UDF is a document which you wish to have incorporated into the document but which is not one of the topics. An example of a UDF would be a Copyright document, Terms and Conditions or a Location Map.

UDF's are inserted in exactly the same way as topics – position the cursor in the Path box, use the browse button to find your document, and select the

document name.

Move the cursor into the Name box and give your UDF a name. Finally, use the pull down list to select where in your finished document you would like the UDF to appear – select from the following:

- After Cover

- After Content Summary

- Before Topics

- After Topics

- After Conclusion

Continue to incorporate as many, up to a maximum of 10, UDF's as you need by repeating the process. Use the next button to move through the pages once you have completed your UDF's.

Having inserted the required User Defined Fields the options for the fields can be determined.

There are 3 options to set for each UDF, the first determines whether you wish to give Users of the **CoL8** engine permission to disable each of the fields.
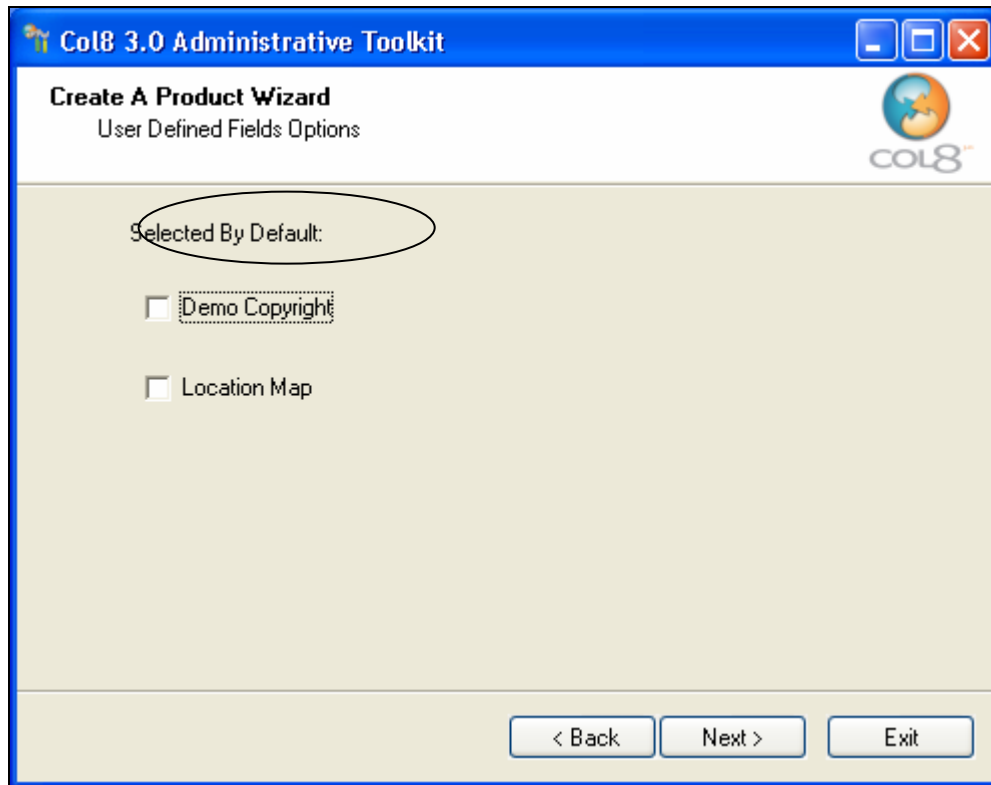
In the illustration below two UDF's, have been created, one for 'Demo Copyright' and one for 'Location Map'. In this example the user will **not** be able to disable either because neither of the boxes has been checked.
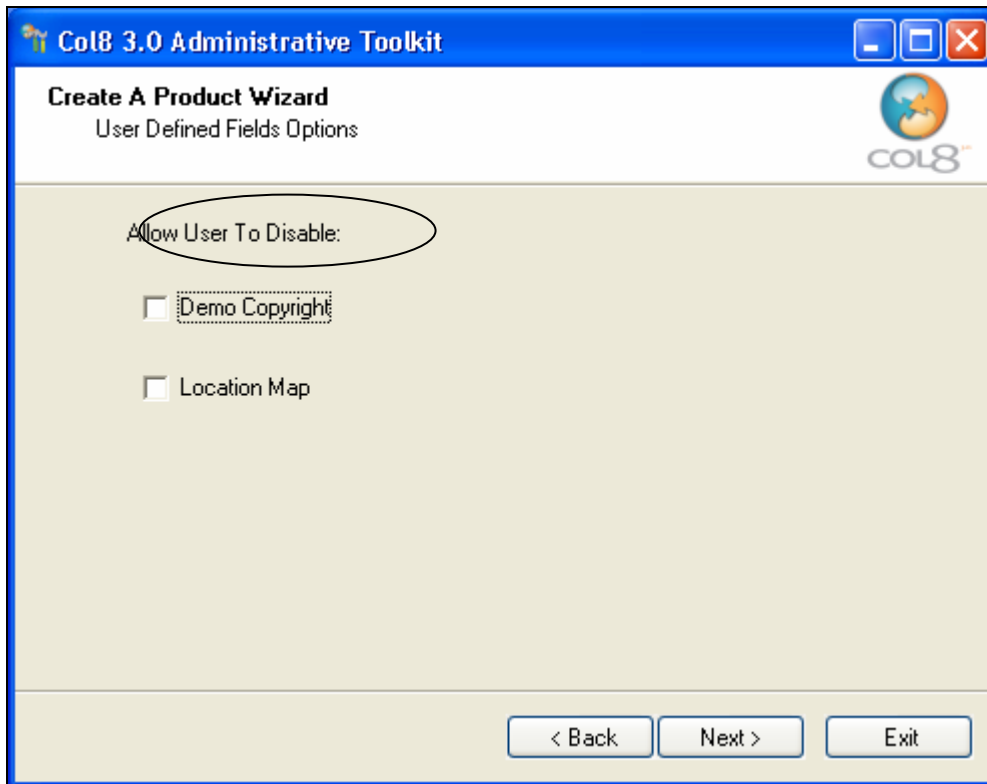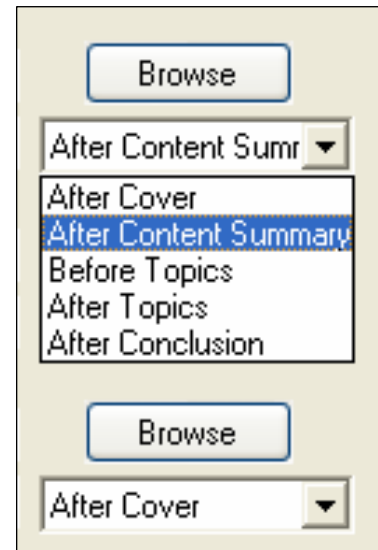
Click Next to continue.

The second option allows you to set whether you wish to have you UDF selected by default. Simply select the settings you require.

In this example the fields will not be automatically selected.

The third option determines whether or not you wish the User to be able to see the UDF options. This means that you can insert a topic into a completed document without the User knowing how it got there.

Once you have determined the User Defined options click Next to continue.
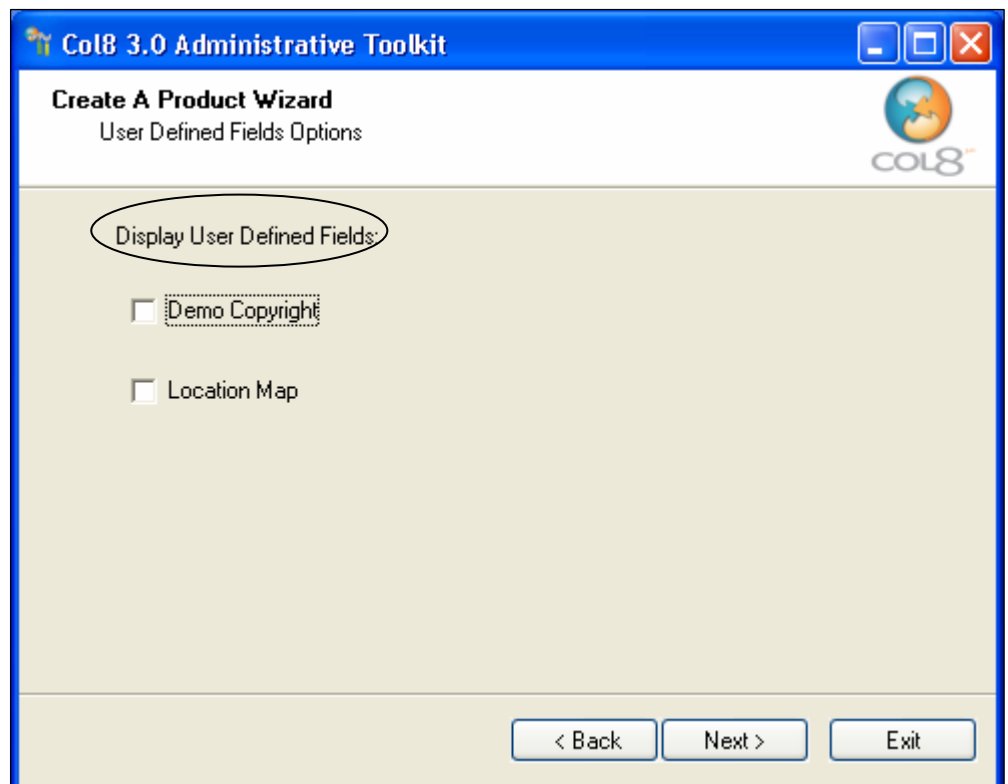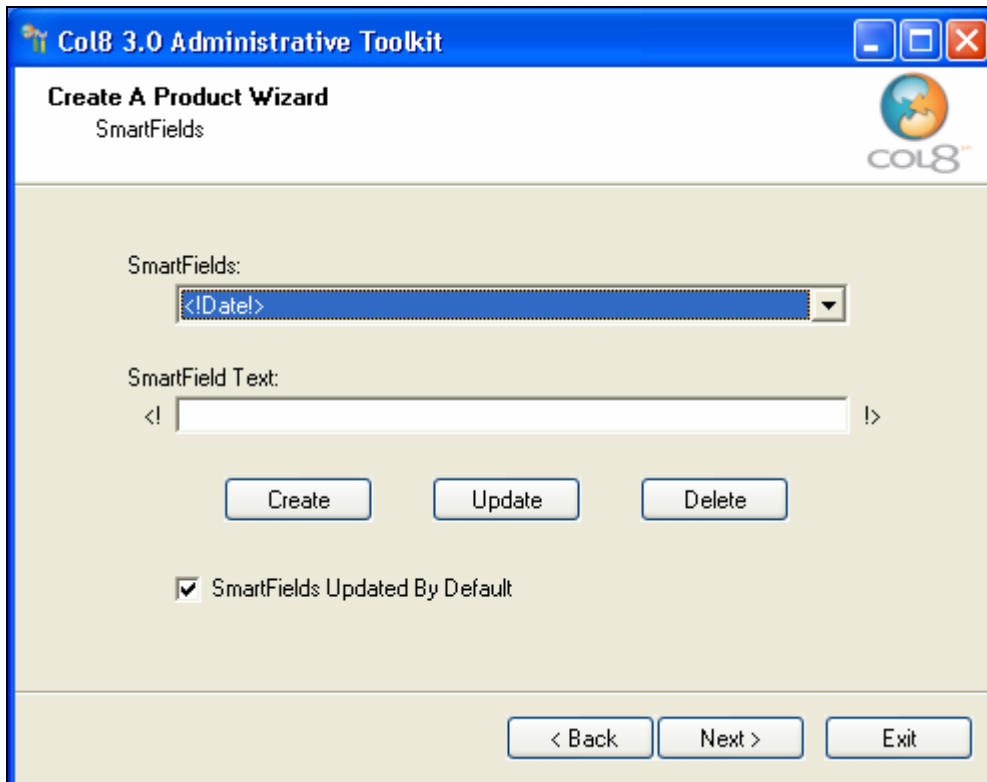
3.2.10. SmartFields

SmartFields are items of text which can be placed anywhere within a document and which work in a way that is similar to Find and Replace. When collating a document the **CoL8** Engine finds the SmartField and replaces it with input text defined by the User when they are building a product.

Uses of SmartFields include:

Document Personalisation with
Dates
Times
Locations
Names
Version Control

Note: SmartFields should not be used in Headers and Footers when collating a document with Word 2003 or in any version of Word when the document contains text boxes.

To create a Smartfield, insert the text in the **SmartField Text** box and click create. Continue in this way until all the SmartFields have been created.

Note: SmartFields are updated and deleted in the same way as Topics.

Once you have created all the SmartFields, click Next to continue.

3.2.11. Document Control

The penultimate screen in the **CoL8** Administrative Toolkit is the Document Control screen. This allows the administrator to determine the final look of the finished collated document. It is where you add your Template and Styles to the product and determine the Output File.

CoL8 works in conjunction with Word Styles and Templates to create the final document and the Document Control screen is where you identify the Word Template to use for a Product. It is also where if, in the future, you wish to change the look and feel of your finished document, you can do so by simply changing the controlling template; either by selecting a new template and attaching it to the product or by making changes to an existing style or styles on the original template.

Provided you have used styles within the topics, your final document can be changed easily in this way.

Position the cursor in the Product Template box, click the Browse button, this will take you to Windows Explorer. Then, scroll through the drives or network until you find the folder and file that you wish to use as the document Template. The **CoL8** Administrative Toolkit is set to show files with a '.dot' extension (Word Templates). Select this file by either a double click on the file name or click Open, **CoL8** will place the path to the file into the Path box.

Position the cursor into the "Default Output File" box. If you wish to give your product a specific Output name, type the path and file name.

Note: When **CoL8** builds a product, it will automatically be saved to the C: drive as "Output.doc". If you do not enter a document name and path in this box, either by typing the name or by browsing, **CoL8** will save your products using the default Output.doc. This means that when you build a second product, it will automatically overwrite the first, saving it again as "Output.doc.

By using the **Default Output File** and typing a filename you can give a specific output name to each product, alleviating the problems of overwriting.

The last two check boxes on this screen are selected by default. The first allows the User of the **CoL8** engine to change the title of the product and the second ensures that this title is displayed on the front end screen for the User to see. You have the option to de-select either or both of these boxes. This will further limit the changes that the **CoL8** Engine user can make.

Click on Next to continue to the final screen.
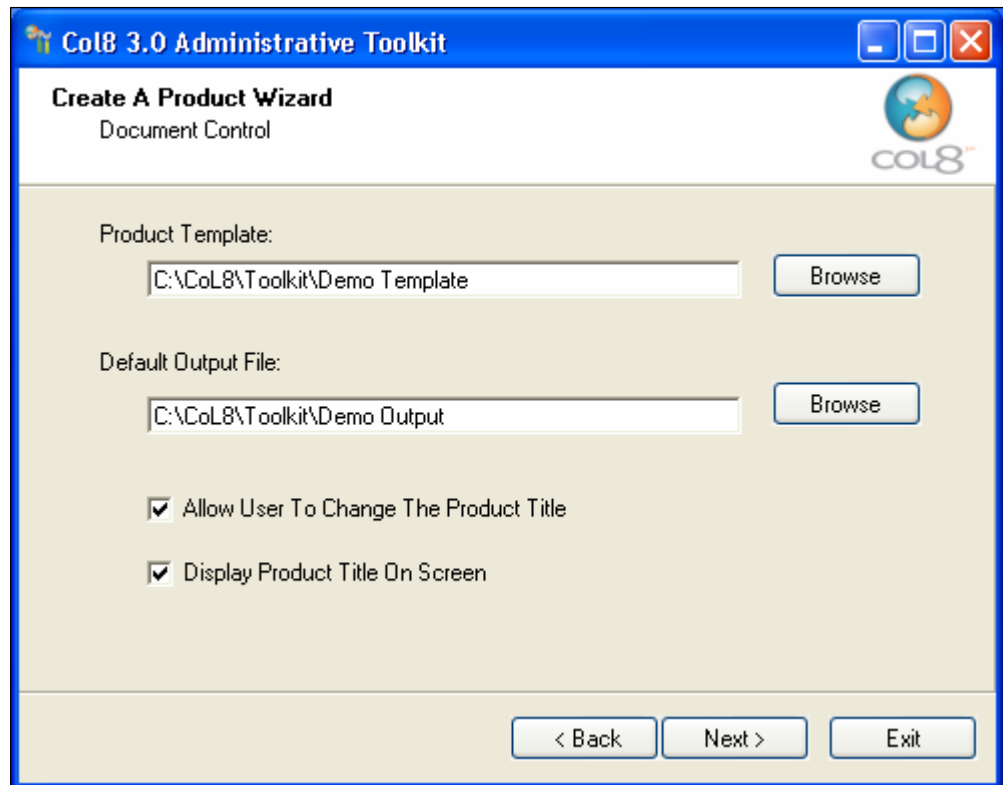
3.2.12. Export Settings

Having completed the Product you will be able to view and build it from your own copy of the **CoL8** engine on your PC. However, in order to get the new product to another **CoL8** Engine User on another PC you will need to 'export the product with settings'.
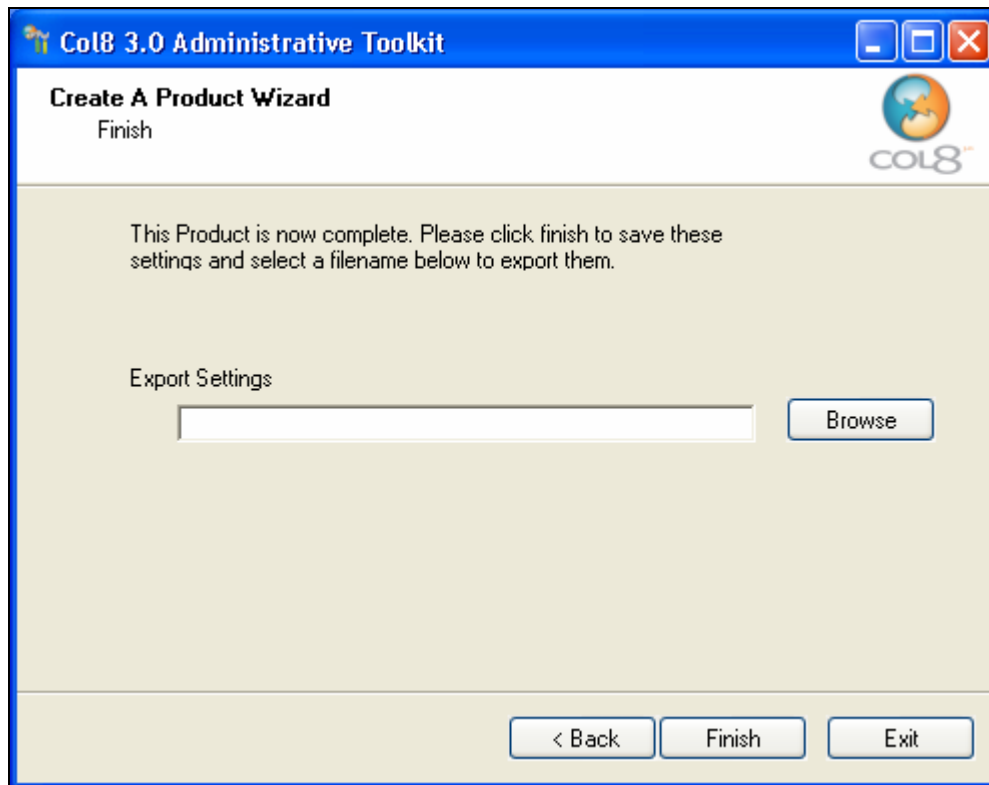

To export a Product use the browse button to access a network folder, give your file a recognisable name and click on Save. **CoL8** will attach the extension '.mbs' to the file e.g. *myproduct.mbs.*

For details relating to importing this product into another **CoL8** engine please see the next section in this manual regarding the functions of the **CoL8** Engines.

If you do not wish to create an export file immediately, for example if you are creating a test product or have further editing to do on the product at a later stage, do not enter an export file name at this time. Simply click on "Finish" to complete your product.

CoL8 will display a warning that you have not created an Output file – simply click on OK and you will be taken to the Main Administrative Toolkit Screen.
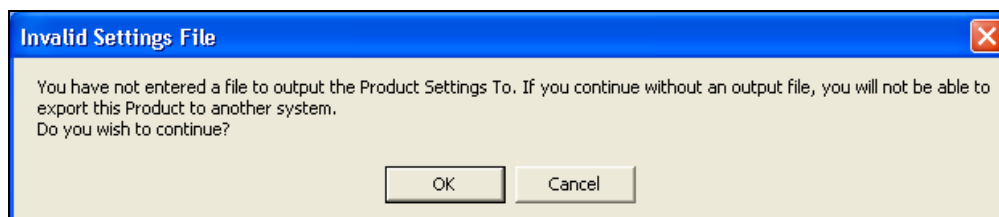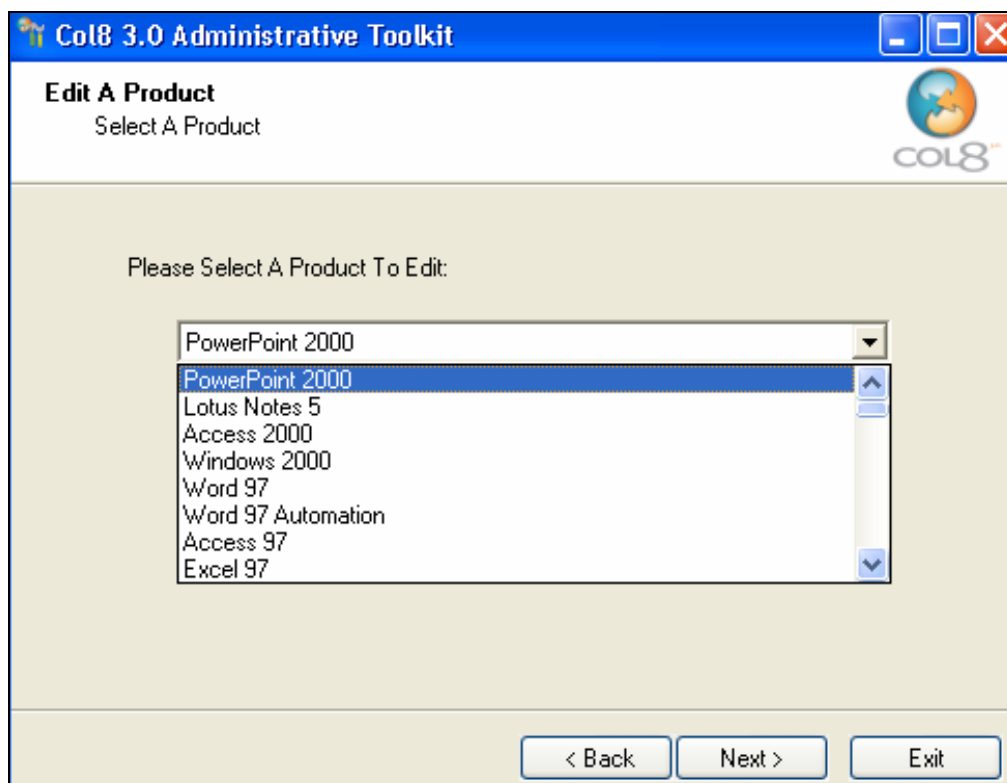
3.3. Editing a Product

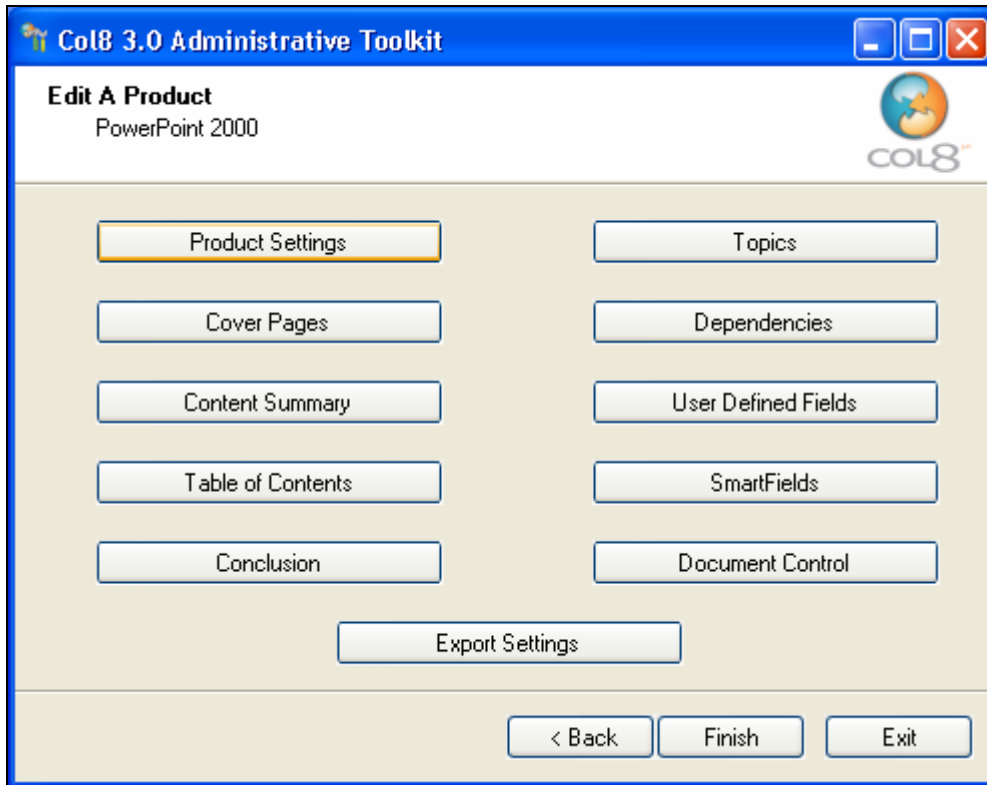All Products created with **CoL8** can be edited at a later date.

To edit a product open the Administrative Toolkit and click on **Edit an Existing Product.**

The Edit an Existing product Window will open

From the pull down list select the product you wish to edit and click on Next to continue.

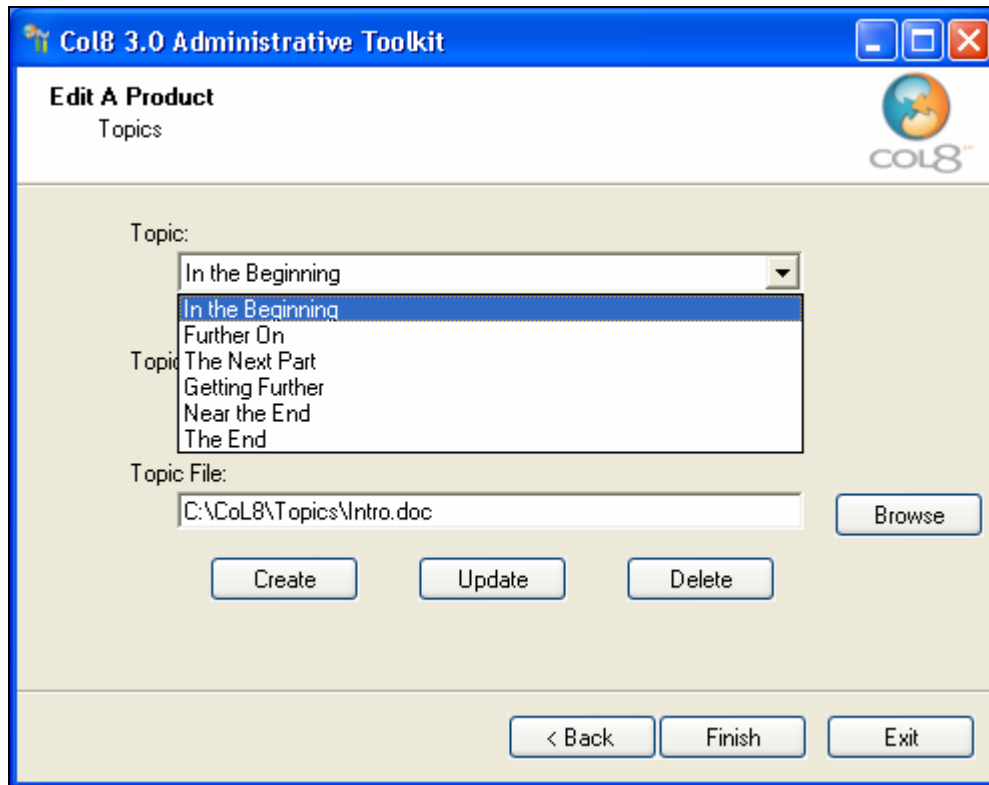From the Edit screen, select the feature you wish to Edit:

Each of the Edit buttons will take you into the relevant screen of the selected option.

For example, if you wish to edit your Product Settings you will be taken to the following screen:
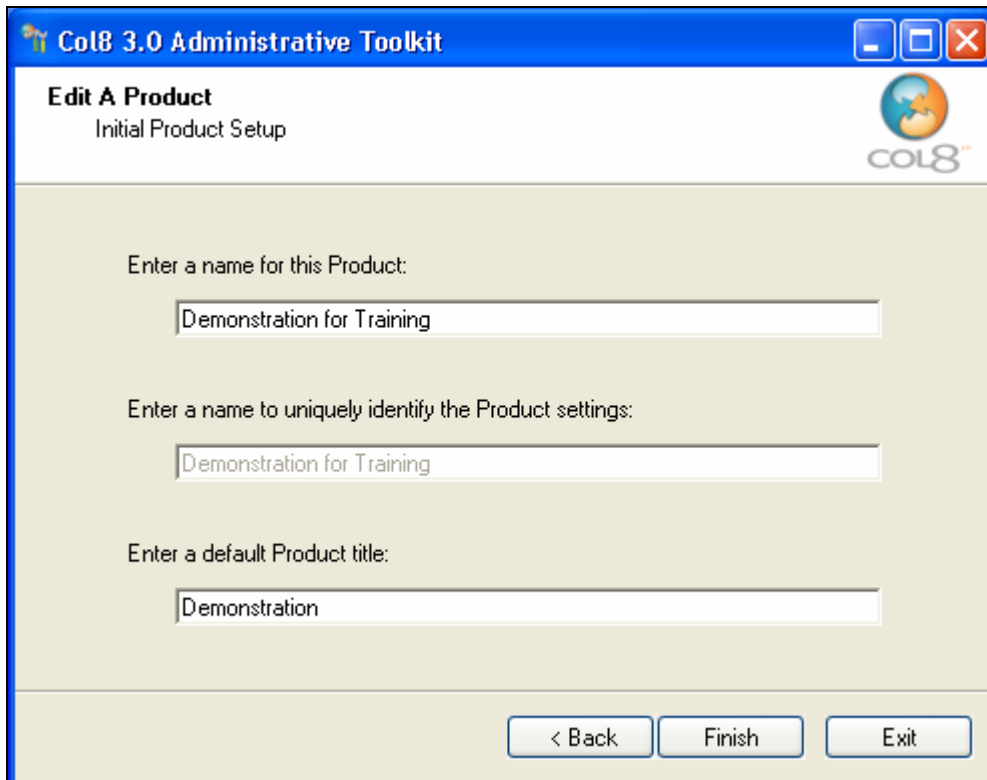
If you wish to Edit (or add) to your Topics select the Topic button and you will be taken to the following screen:
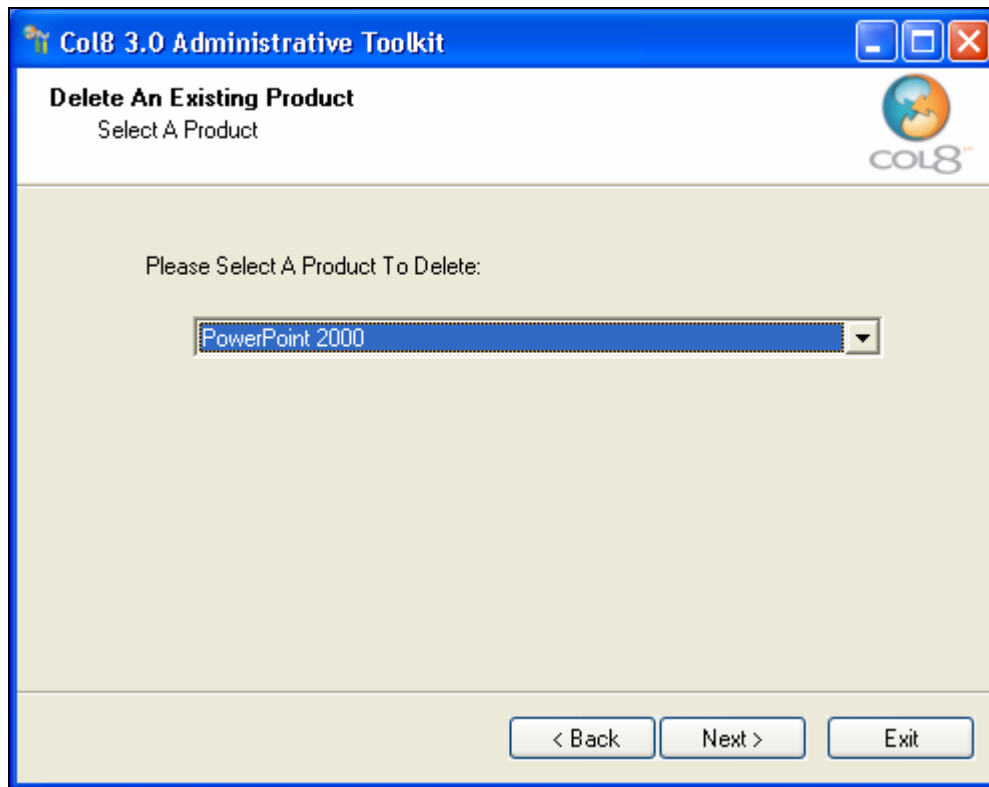

All edit screens have the same options and functionality facilities as when creating a product.

3.4. Deleting a Product

From the front screen, the third and final option is to Delete an Existing Product:
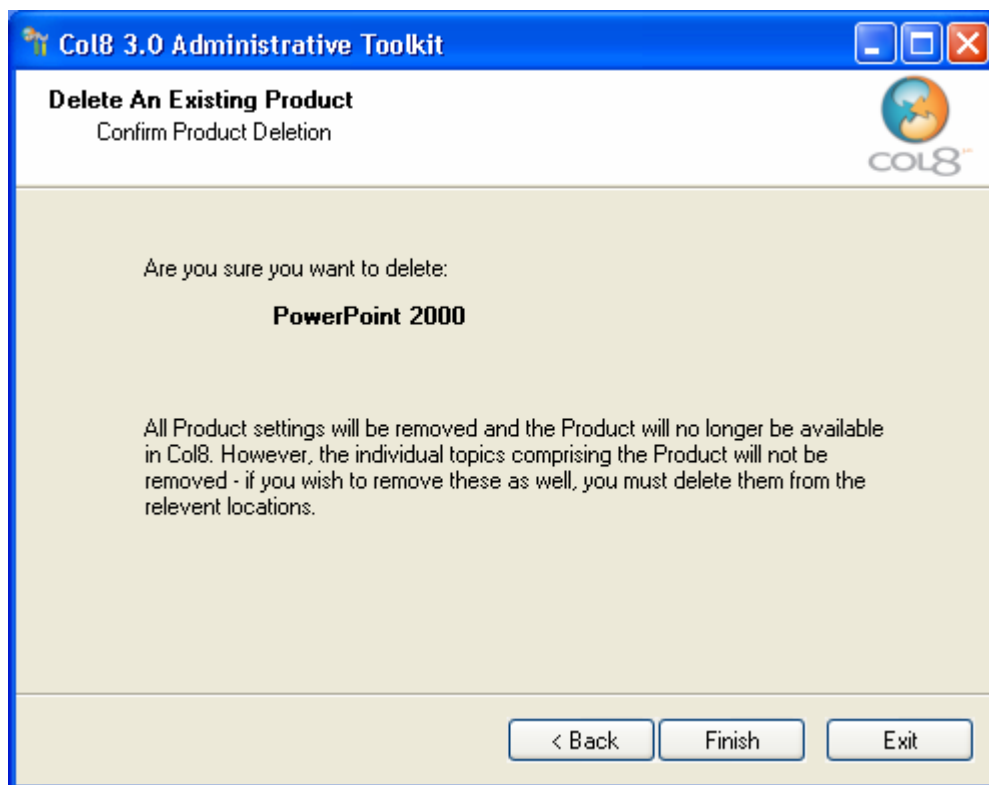
To delete a product from your **CoL8** Engine, click on the "Delete An Existing product" button.

Select the product from the pull down list and click on Next.

A confirmation screen will appear, asking you if you are sure you wish to delete the product.

If you are sure that you wish to proceed, click on Finish to complete the deletion. The product settings will be deleted and you will be taken back to the main **CoL8** screen.

4. User (CoL8 Engine) Functions

CoL8 is a two part product, the **CoL8** engine and The **CoL8** Administrative Toolkit. The **CoL8** engine is the part of the software that allows you to build your products from a selection of documents that have been created using the Administrative Toolkit. This section concentrates on the use of the **CoL8** engine, the use of the Administrative Toolkit is covered in a previous section.

4.1. The Welcome and Home CoL8 Screens

On launching **CoL8**, you are presented with the copyright screen before moving immediately to The Main (Home) Screen.

Across the top are a number of tabs, which allow access to the different areas and options with **CoL8**.
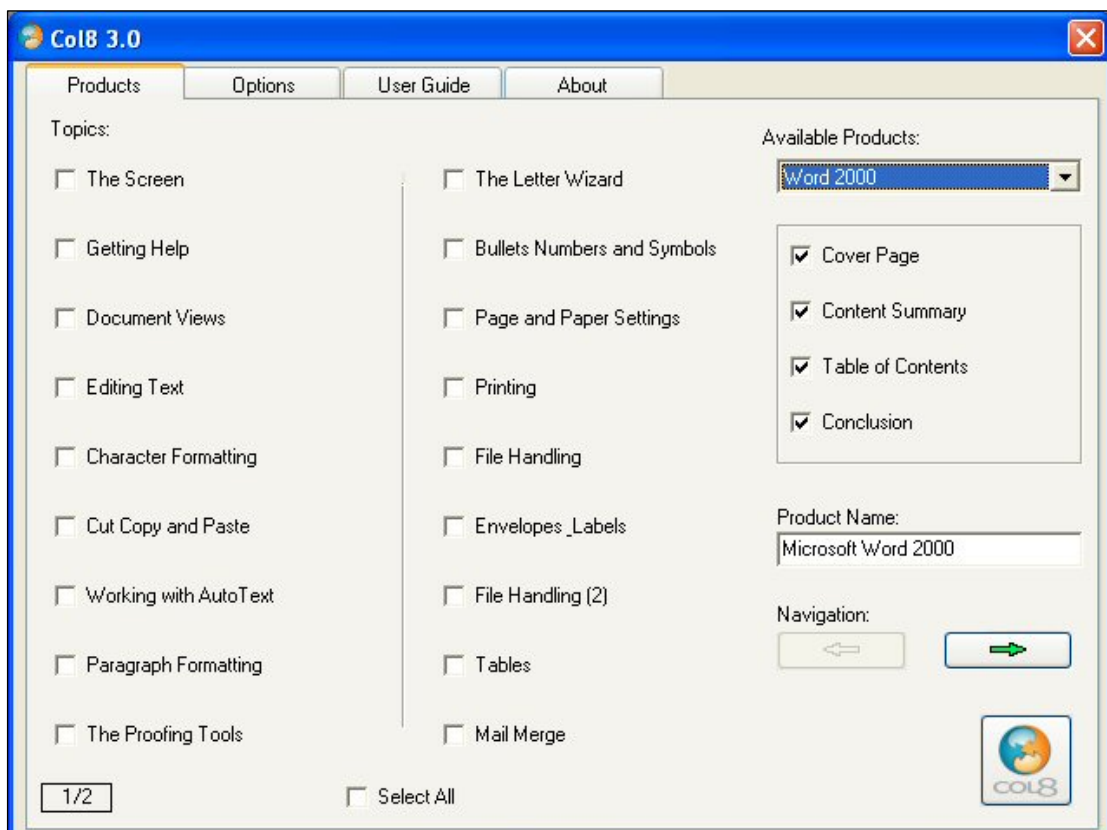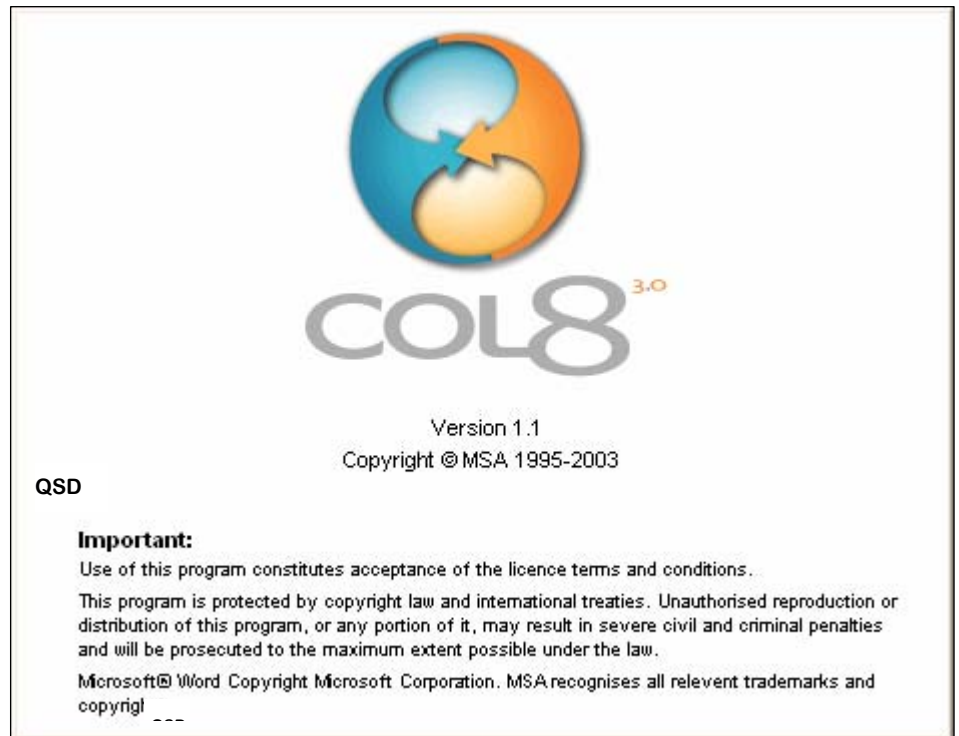
4.2. The Products Tab

At the top right corner of this tab is a drop down box labelled Available Products. This allows access to a list of all the Products that are currently installed on your system.

A product can be thought of as a single document created by assembling several smaller documents together with a set of instructions, all of which are customisable within the Administrative Toolkit.

When a Product is the selected the checkboxes that make up the rest of the screen will change to reflect the Topics within the selected Product.

To select the Topics required for a document check the box alongside the topic.

Below the Topics list is a **Select All** checkbox. This is used when you need to compile a complete Product quickly.
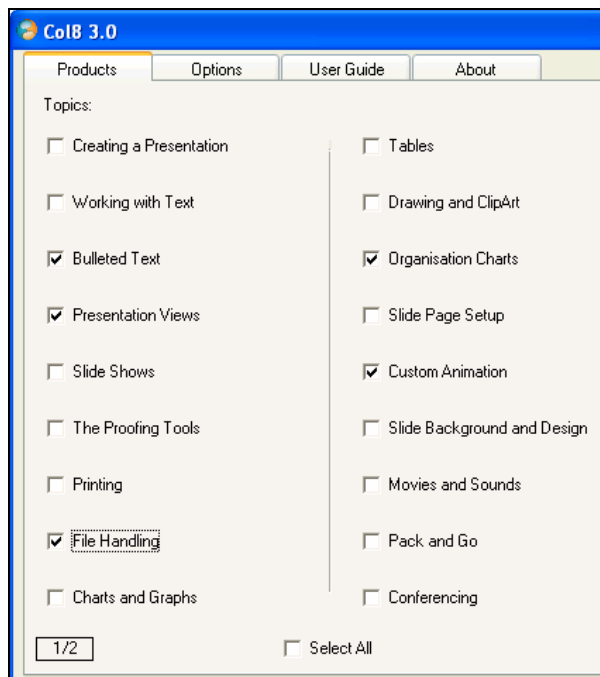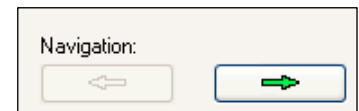

If the topic list is long, it may need more than one page to display fully. The Page Indicator at the bottom left of the screen will indicate which page is currently displayed.
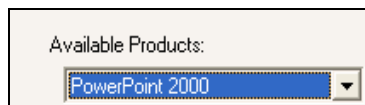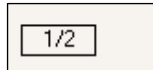

Lists the available products

To move through the pages use the navigation buttons.

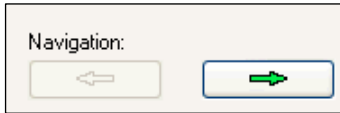Lists the available topics in the chosen product

Those marked ✓ will appear in the final document

1/2 Indicates which page is displayed, and how many pages are needed for the full topic list.

Select All Allows the selection of all topics within the product

Navigation: Allows movement through the available pages as shown on the page indicator

In addition to the topics that make up the document, there are some additional items that may also be included. These additional items are:

- Cover Page
- Content Summary
- Table of Contents
- Conclusion

The system administrator will determine when creating the elements with the Administrative Toolkit which options are available within each product.

☑ Cover Page

☑ Content Summary

☑ Table of Contents

☑ Conclusion
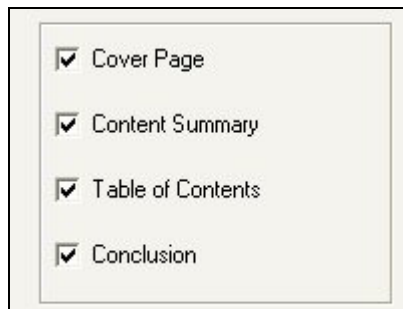
As with any Windows based software if an option is not available the option is greyed out on the screen
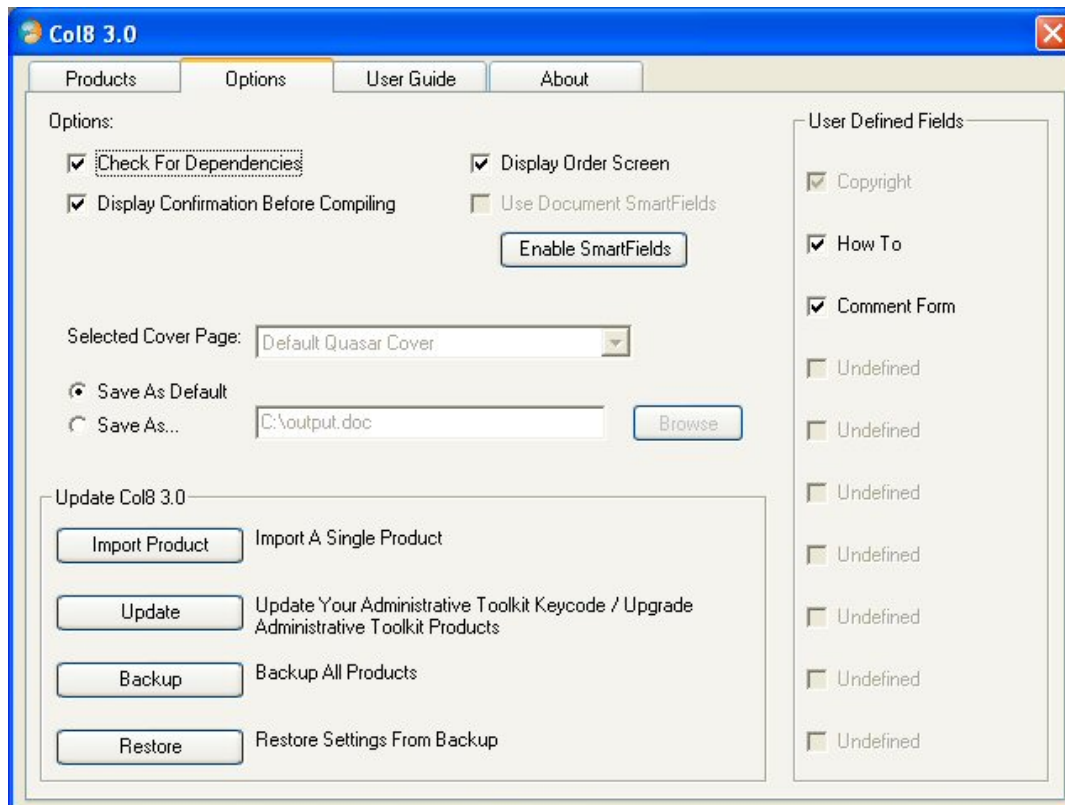
Selecting any of these additional components will insert the relevant item into the finished collated document.

Once the selection of the elements and topics is complete; the final document is collated by clicking the Build Product button.
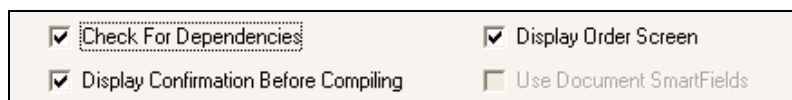
Note: At least one Topic must be specified in order to compile a document.

4.3. The Options Tab

The Options Tab offers a number of settings for use in creating the final Document. The first four items control the screens that will be presented when compiling a document.
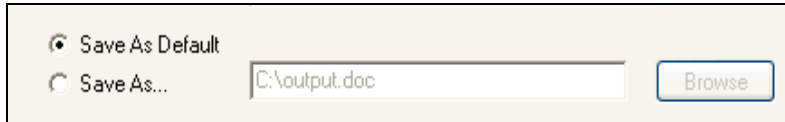
Each of these areas is covered in detail later in this section.

If the option to include a Cover Page has been checked on the Products Tab, it is the options tab that allows you to select the specific Cover page for your document. The **Selected Cover Page** drop down on the Options Tab allows you to choose the file that contains your specific Cover Page. When creating a product with the Administrative Toolkit the Administrator can prepare up to three per product from which you can choose.
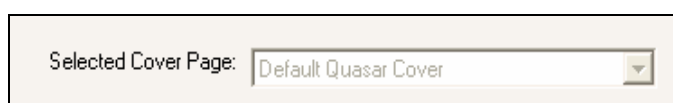
To select the required Cover choose from the drop-down list.

The Save As option allows you to specify the output file or the filename that is given to the completed document. When creating a product with the Administrative Toolkit this is set to a default. This can be overridden if necessary each time a product is collated.

Note: Every time you save as default you will overwrite any previously saved default files.

To save the document to a different file simply check the **Save As** radio button and type the file name and drive path in the text box.

4.3.1. User Defined Fields

User Defined Fields found on the Options Tab, are a very useful feature, they allow you to include specific information that is relevant to some but not all of the recipients of your final document. For example you may be preparing a document that requires feedback from a selected pilot group.

For this small sub-group you want to include a comment form together with instructions on how to complete the form, for the rest of the group you only need to send them the document.

If you have several groups of people that are required to comment on different sections of the document, you can create a comment form for each group and include the appropriate form for each group when compiling the document.

User Defined Fields are created using the Administrative Toolkit and are specific to each Product; in the same way that a Table of Contents or Content Summary is specific to a particular document.

Other uses of User Defined Fields include:

- Best Practice Guides
- Copyright Notices
- Health & Safety information
- Evaluation Questionnaires
- Departmental Specific Information

The position of the User Defined Fields within your compiled document is determined during Product creation by the Administrator using the Administrative Toolkit, but if desired, in conjunction with the Administrator, these can be changed by the Administrator to suit specific requirements.

4.4. The User Guide Tab

The User Guide Tab displays a rich text version of a much simplified User Guide.

4.5. The About Tab

The About Tab contains your **Licence Agreement** together with details pertaining to **Support**, **Training** and **How to Renew your Developer License**. Please note that use of **CoL8** constitutes an acceptance of this Licence Agreement.

The Registration Information section provides the details entered at setup. They give both the unique Client ID, details of who the software is registered to and the key codes provided at Setup.

NOTE: You will be unable to re-install the software with these key codes. You must contact your **authorised distributor** in order to obtain new key codes for a reinstallation.

Also included are details of when your Administrative Toolkit Licence will expire, should this also be installed.

4.6. Collating a document
4.6.1. The Dependencies Screen

Having given **CoL8** the command to build a document, **CoL8** will check for any **dependencies** that have been created within the Product.

Put simply**, when your Administrator** created a dependency, a link was created that says….

"Topic F should ordinarily only be included if Topic C is included".

This is to ensure that the recipients of your finished document will have all the necessary data. It also acts as an aide memoir to anyone compiling a product. (For a specific document, the User has the ability to reject a dependency.)

Any dependencies are shown in a tree format, with the Topics selected as the root of the tree and the Topics they depend on as the branches.
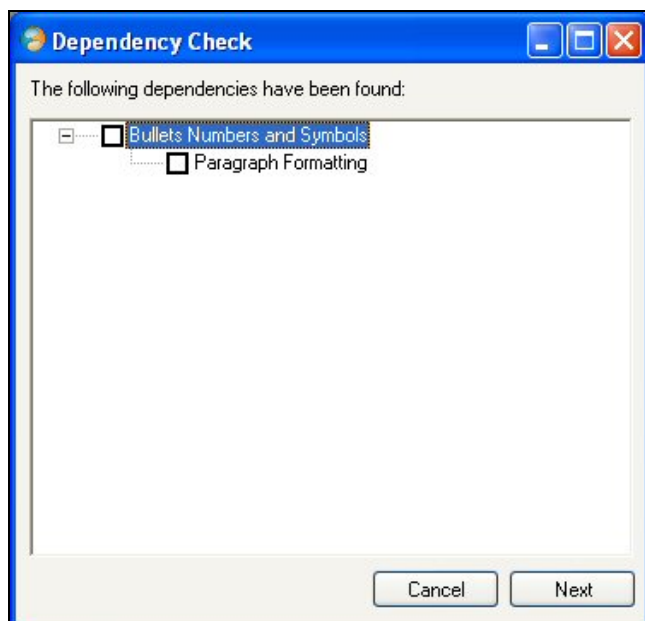
In the example illustrated above, 'Bullets Numbers and Symbols' has been included but not 'Paragraph Formatting'. The dependencies check screen advises that if the topic 'Bullets Numbers and Symbols' is included it is recommended that the topic 'Paragraph Formatting' is also included.

If all of the dependencies in the original selection are satisfied, for example if you selected all topics, on the products tab, this screen will not be displayed.

Dependency checking can be turned off completely with the **Check for Dependencies** checkbox on the Options Tab. If this remains unchecked **CoL8** will not carry out any dependency checks prior to the collation of your final document.

Having reviewed the recommended dependencies select any extra topics required by checking the box.

This is only a reminder and a recommendation – If you are happy with your original selections, it is not necessary to choose any of the dependant Topics.

Note: Clicking on the parent checkbox will select all of the dependencies for that Topic.

4.6.2. The Topic Order Screen

The Topic Order screen allows the arrangement and rearrangement of the Topic order within the final document. The Topics selected on the Options tab, together with any additional topics chosen during the dependencies check are presented as a list of radio buttons. Depending on the number of topics this may be displayed over a number of pages. As with the Topic section of the Main Screen there is a button that indicates how many pages are necessary to display the topic list and to show which page you have displayed
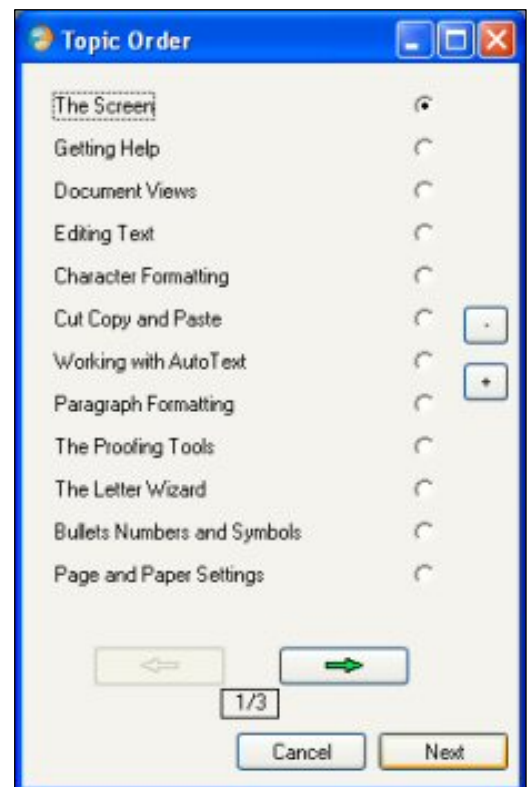

To change the position of a Topic, click the appropriate radio button and click on the + and - buttons to change the position

Moves the topic **down** the list i.e. toward the **back** of the document

Moves the topic **up** the list i.e. toward the **front** of the document

If you move a Topic between pages, the Topic Order screen will update to reflect the page. Once the Topic Order is correct click next to continue the document creation process.

The Topic Order screen will not be displayed if the check box **Display Order Screen** on the Options Tab has been un-checked.

4.7. The SmartFields Screen

CoL8 uses SmartField technology in order to produce dynamic data within a document. This allows for the personalisation of a document such as a contract, a last will and testament or even a story.

A SmartField can contain any piece of text including:

Names
Addresses
Dates
Times
Locations
Client Names
Supplier Names

You can also if required, include complete sentences.

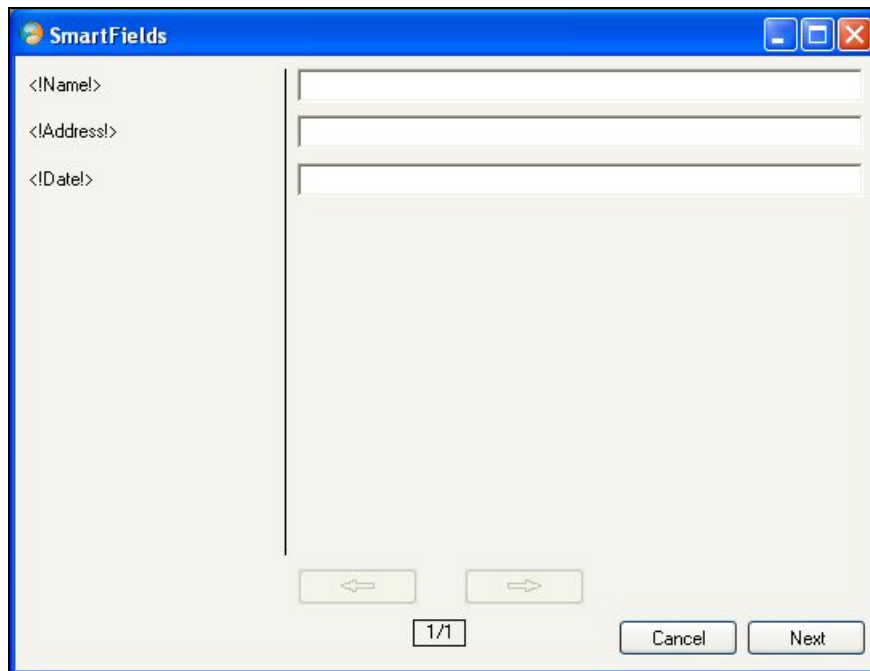SmartFields are denoted by an identifier or tag name enclosed within angle brackets and exclamation marks such as:

<!client name!>

<!Address!>

The SmartField names can be a combination of upper and lower case, letters and numbers and can include spaces.

If a Product contains SmartFields the SmartFields Screen is displayed after the Topic Order screen.

To add the text to be contained in your final document, simply type it in the appropriate text box. When **CoL8** compiles the document the SmartField tags are replaced by your input text.

SmartFields are created in the product by the Administrator using the Administrative Toolkit. The document specific information is then added during the compilation of each document.

As with all other screens in **CoL8**, if there are more SmartFields than will fit onto one screen, they are listed on multiple pages. Any additional pages are accessed using the navigation buttons.

To continue the compilation process, click on "Next".

## 4.8. The Confirmation Screen

The Confirmation Screen displays a brief summary of the options you have chosen within **CoL8** before you actually compile your Product.

The confirmation screen will show you the order the Topics are in and which, if any, additional sections have been chosen. Confirming this selection will move you directly into the compilation process, cancelling it will return you to the Main Screen.

If you do not wish to see a confirmation screen, this can be turned off by removing the checkmark from the **Display Confirmation Before Compiling** checkbox on the Options Tab.

4.9. Compiling Your Product

As the Product compiles, **CoL8** displays a bar that displays the progress of the collation.
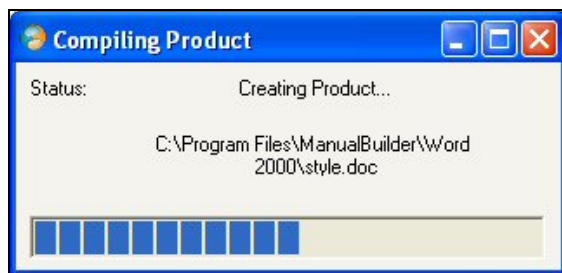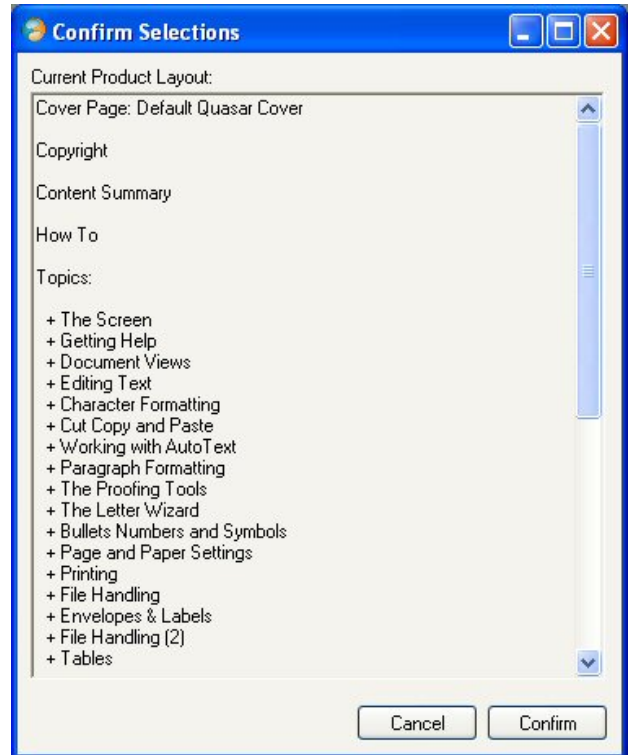
Immediately above the progress bar the file in use is displayed, this shows exactly what stage the compilation process is at.

Once the compilation is complete three options are available:

View Product

Return To **CoL8**

Exit.

View Product - This option will open the file you have just created in Microsoft Word and then return to the Main Screen so that you can begin to compile another Product.

Return To CoL8 - this option will return you to the Main Screen ready for you to compile another Product.

Exit – This option will save the document as the file specified in the Output Document textbox on the Options Tab and close down **CoL8**.

Note: If you create another Product with the output document left as the default, any file that already exists under that name will be overwritten.

If you are viewing a Product and you restart the compilation process with the same filename as the output document, the Product you are viewing will be closed automatically before the new file overwrites it.

5. Reference Information

5.1. CoL8 System Requirements

CoL8 3.0 System requirements are:	**CoL8** Administrative Toolkit system requirements
- x86 PC running the Windows 98, NT, Me, 2000 or XP Operating System - Genuine Intel Pentium II 233Mhz+ or AMD Duron & Athlon 466Mhz+ - At least 64Mb RAM, 128Mb Highly Recommended - 30Mb Hard Drive Space - Microsoft Word 97, 2000, 2002 (XP) or 2003 - Adequate access to any file storage area where modules are to be kept. This may be on a local or network file system. This file system should have the relevant permissions necessary to read and/or write to files where necessary. - It is recommended that you have your display set to 16bit (High Colour) or greater and a resolution of at least 800x600. **CoL8** will run in lower resolutions, but for optimum use, resolutions of 1024x768 or above are recommended.	- x86 PC running the Windows 98, NT, Me, 2000 or XP Operating System - Genuine Intel Pentium II 233Mhz+ or AMD Duron & Athlon 466Mhz+ - At least 64Mb RAM, 128Mb Highly Recommended - 30Mb Hard Drive Space - Microsoft Word 97, 2000 or XP - Adequate access to any file storage area where modules are to be kept. This may be on a local or network file system. This file system should have the relevant permissions necessary to read and/or write to files where necessary. - It is recommended that you have your display set to 16bit (High Colour) or greater and a resolution of at least 800x600. **CoL8** will run in lower resolutions, but for optimum use, resolutions of 1024x768 or above are recommended.

6. Other reference and help sources

6.1. CoL8 Web Site

The **CoL8** web site at www.col8.com contains a number of reference presentations and documents as well as a frequently asked questions section. Please refer to the web site as a source of additional marketing and support information regarding **CoL8**.

6.2. CoL8 User Guide

This is the **CoL8** User Manual. A significant portion of the information contained in this user manual may be accessed via the user guide section in **CoL8**.

6.3. CoL8 Offline Demonstration

It is recommended that you review the **CoL8** offline demonstration presentation prior to using **CoL8** for the first time.

Demonstration of CoL8

in a PowerPoint show

You may either follow this link or find the link on the downloads page of the CoL8 web site at www.col8.com

6.4. CoL8 support

Please contact your **CoL8** reseller/distributor for your first line support, however, in the event that you need additional support **CoL8** support is here to help. email: CoL8@CoL8.com Please have your client ID available when you telephone **CoL8** support.