

**Oracle® Insurance IStream**

Oracle Toronto Office Technical Writer's Guide

Release N.N

**Part ANNNNN-NN**

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# Chapter 1

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## Overview

Welcome to the Oracle *Technical Writer's Guide*. This guide is a valuable resource for the documentation team, and anyone else who needs to create content.

This chapter describes

- *Document Conventions* on page 14
- *Who This Guide Is For* on page 15
- *Guide Contents* on page 16
- *An Overview of Technical Communication* on page 17
- *Additional Resources* on page 21

## Document Conventions

### Tips, Notes, Important Notes and Warnings

Tip: A **Tip** provides a better way to use the software.

Note: A **Note** contains special information and reminders.

Important: An **Important** note contains significant information about the use and understanding of the software.

Warning: A **Warning** contains critical information that if ignored, may cause errors or result in the loss of information.

### Other Document Conventions

- Microsoft Window names, buttons, tabs and other screen elements are in bold, for example: Click **Next**.
- paths, URLs and code samples are in the Courier font, for example:  
`C:\Windows`
- values that you need to enter or specify are indicated in the italicized Courier font, for example, *server\_name*
- values that are optional are indicated with square brackets, for example [reserved]

## Who This Guide Is For

This guide was written to help technical writers, technical and support personnel, management and anyone else who wants to improve the quality of their written and published materials. If you have been assigned writing or documentation responsibilities, this manual is a helpful reference and instructional guide. By following its suggestions and standards, you will achieve consistency and be able to improve your documentation, no matter how complex.

Although primarily for technical writers, this guide is aimed at *anyone* who is developing any type of content or documentation. This includes both internal documentation and external documentation that is released publicly. It is also for anyone who is interested in how documents are created, managed and updated.

## Suggestions and Comments

If you feedback, suggestions, or comments for this guide, please contact Andrew Brooke, extension 3374.

Important: This document is a continual work in progress. It is constantly being edited, updated and improved. Ensure that you have the latest version!

## Guide Contents

This guide includes the following chapters:

- The *Style Guide* on page 23 describes the various styles, formats, principles and word uses in our documentation. It is useful even if you are not a technical writer, but want to produce content that is effective and consistent.
- *Templates* on page 75 describes the templates used by the documentation department.
- *Document Types* on page 85 describes the various documents we create.
- *Document Elements* on page 95 describes the common elements of our documents.
- *Documentation Process* on page 105 describes how documents are created, updated, reviewed, and delivered.
- *Documentation Tools* on page 147 describes the tools that the documentation department uses.
- The *Glossary* on page 197 includes various technical terms that are used in the development, QA and documentation departments.
- *Assorted Information* on page 201 contains information that does not fit neatly into any other chapter.



## An Overview of Technical Communication

Technical communication, also known as *technical writing* or *information development*, is the process of interpreting and converting complex technical information into a format that a typical end user of the product can use and understand. However, the *ultimate* purpose is to lower support costs by ensuring that our clients can easily obtain and understand the information they need to effectively use our products.

Although technical writers cannot directly increase sales, they can still add to a company's bottom line by:

- providing excellent documentation and thereby increasing the value of the product in the customer's eyes
- lowering expenses by reducing the calls required to technical support

### The Importance of Technical Communication

Technical communication is critically important in any business that has information to convey, and is particularly important in software development. We are in the business of creating document management solutions. Because of this, our own internal and external documentation must be of the highest quality. Our customers will have little faith in us if we publish manuals that are difficult to read, hard to use, and unattractive.

Therefore, our customers and potential clients look to us to take the lead in developing superior documents, manuals, and written materials. From the simplest brochure to the most complex technical manual, our publications must be consistent in look and in style.

Style, however, is never a substitute for content. If the substance of your publication is thin, there is no redemption in the customer's eyes even if it's the most elegant manual they've ever seen.

### Using Standards

This guide is about defining and using *standards*. Standard practices are the secret to success in the design and writing of technical publications. As you develop standards, you'll find that your documentation improves. This is because you are imposing consistency on what can sometimes be a wildly inconsistent process. It saves you time because you don't have to keep making the same decisions over and over. You have already done the groundwork that goes into making such decisions, and you have a formalized reference that you can consult if questions arise.

Because the approval and review processes are often quite long, standards can significantly save time. The documentation staff knows what decisions have already been made about text, punctuation, grammar, usage and so on. The reviewers know what the company policy is on these issues, and can therefore review all documentation against these standard criteria. The sometimes time-consuming discussions of how to say things in the "company way" have already

been completed, and won't bog down the documentation approval process when time is critical.

## Information Development vs. Application Development

Information development has much in common with application development, also known as *programming* or *coding*. In fact, they both must be treated in similar ways and with equal importance; documentation must be considered as *part of* the final, released product.

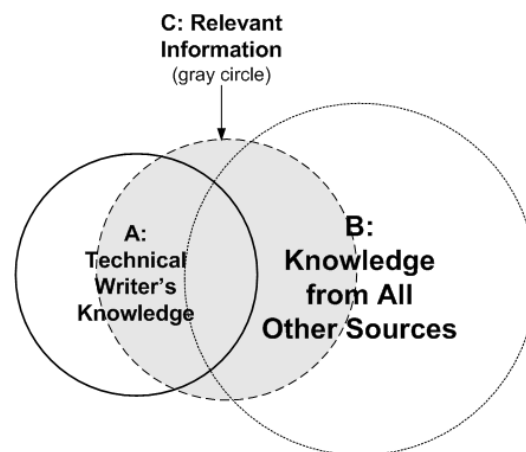
In both information development and application development,

- development proposal, plans and schedules must be created and followed
- enhancement requests and defects must be entered, prioritized, and tracked
- testing and re-testing must be done
- the product manager or business analyst has the final say on the released item, although the developer will advise them appropriately

## Finding the Relevant Information

Much of the technical writing process does not actually involve writing, but reading, interviewing, researching, and testing. A technical writer acts as a *data miner*, acquiring product knowledge and information from a wide variety of sources, including the various product experts, customers, and internal technical documents. As a result, the technical writer acquires a certain quantity of knowledge about the product, while at the same time, there is much information that the writer is not aware of, but which may exist in these other sources.

The following diagram illustrates this visually:



In this diagram

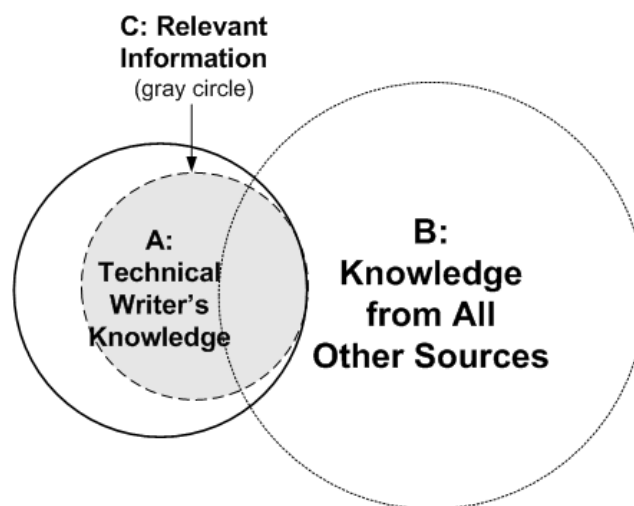
- the left circle (circle A) represents the technical writer's knowledge of the product

- the right circle (circle B) represents the product knowledge from *all* other sources, including people and documents
- the gray center circle (circle C) represents the product knowledge that is actually *relevant* to the end user, and which should be in the documentation

As this diagram shows,

- most of the information from the other information sources, and some of what the technical writer knows, is not relevant to the documentation
- there is some overlap between what the technical writer knows and the other information sources
- there is some relevant information that the technical writer does *not* know, but that is in the other sources
- there is some relevant information which *neither* the technical writer knows or the other information sources contain

*The last two points are the main points.* If you have properly researched and documented a product, there should be very little (if any) relevant information that is either missing, or that you do not know. Your mission as a technical writer, therefore, is to minimize or eliminate any missing relevant information from your documentation. That is, you need to ensure that you know all the relevant information and that it is present in the documentation. When you do, the overview of the documentation changes to:



Notice that in this diagram, there is no relevant information that exists outside of the two spheres of knowledge, or outside of the technical writer's sphere.

## Ethical Guidelines

As technical communicators, we observe the following ethical guidelines in our professional activities.

## Legality

We observe the laws and regulations governing our professional activities in the workplace. We meet the terms and obligations of contracts that we undertake. We ensure that all terms of our contractual agreements are consistent with the STC Ethical Guidelines.

## Honesty

We seek to promote the public good in our activities. To the best of our ability, we provide truthful and accurate communications. We dedicate ourselves to conciseness, clarity, coherence, and creativity, striving to address the needs of those who use our products. We alert our clients and employers when we believe material is ambiguous. Before using another person's work, we obtain permission. In cases where individuals are credited, we attribute authorship only to those who have made an original, substantive contribution. We do not perform work outside our job scope during hours compensated by clients or employers, except with their permission, nor do we use their facilities, equipment, or supplies without their approval.

## Confidentiality

Respecting the confidentiality of our clients, employers, and professional organizations, we disclose business-sensitive information only with their consent or when legally required. We acquire releases from clients and employers before including their business-sensitive information in our portfolios or before using such material for a different client or employer or for demo purposes.

## Quality

With the goal of producing high quality work, we negotiate realistic, candid agreements on the schedule, budget, and deliverables with clients and employers in the initial project planning stage. When working on the project, we fulfill our negotiated roles in a timely, responsible manner and meet the stated expectations.

## Fairness

We respect cultural variety and other aspects of diversity in our clients, employers, development teams, and audiences. We serve the business interests of our clients and employers, as long as such loyalty does not require us to violate the public good. We avoid conflicts of interest in the fulfillment of our professional responsibilities and activities. If we are aware of a conflict of interest, we disclose it to those concerned and obtain their approval before proceeding.

## Professionalism

We seek candid evaluations of our professional performance from clients and employers. We also provide candid evaluations of communication products and services. We advance the technical communication profession through our integrity, standards, and performance.

## Additional Resources

There are a wide variety of additional guides and resources available.

### Writing and Style Guides

- **The Microsoft Manual of Style for Technical Publications** – This guide covers general and computer-related terms and design and interface elements and is in an online help format. It is located at:

T:\Miscellaneous\Other style guides\Microsoft Style Manual

Note: You may need to copy this file to your local system to properly view it.

- **The Chicago Manual of Style**
- **The Elements of Style: Strunk & White**
- **The Elements of Grammar**
- **The Elements of Editing: A Modern Guide for Editors and Journalists**
- **Managing Enterprise Content**

### Product and Documentation Information

On our network, there are many other documents and resources that describe our various products and documents. See *Network Resources* on page 108 for more information.



## Chapter 2

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## Style Guide

This chapter describes the standard practices and guidelines for our documentation. It applies mainly to the technical writing department, although anyone who is developing documentation can use it.

The goal of this style guide is to create consistency throughout all our documentation, including training manuals, user guides, Read Me files and Release Notes. Anyone who wants to convey information will benefit from adhering to accepted standards of style and use.

## Style Guides

This section describes style guides in general and their importance

### Style

*Style* is not only the flair with which you write and design your publication; it encompasses all the decisions you've made about how you will express your ideas. It includes grammar, punctuation, spelling, layout and design, and the flow of content. It is a set of guidelines that helps you create consistently usable documents or products that are also enjoyable to use.

### The Importance of a Style Guide

Authors need style guides to maintain decisions about use, style, and design for each documentation project. A style guide is a collection of the particular rules or standards, which describe the characteristics of the documents or projects that you develop. That's why internal standards and style guidelines are so important—they specify the style of expression to be used within the organization. The style guide helps ensure consistency across publications in a group, and maintains standards throughout the company.

Every document implicitly asks questions about style and design. How do we show code samples in text? How do we alert readers to cautions or tips? What spelling are we going to use for new words? How will we represent our product name in type? Will we capitalize filenames or use bold or italics? Style decisions also include how to word user feedback messages and dialog boxes, menu items, and error messages.

In addition, standards help to promote accuracy and consistency. The craft of technical writing is one of ensuring that information is conveyed in an accurate and clear manner. By using standards of style and usage, and adhering to rules that make the expression of technical information clear and consistent, you will improve the quality of your documentation.

### Styles and Templates

It is important to use consistent styles in your documentation. That is, a Heading 1 style in one document should appear the same in all documents. Styles are enforced by using a common template in the style guide. It is important that all of your related documentation use the same template, to enforce a common “look and feel”.

For information about the FrameMaker template, *Templates* on page 75.

### Company Standards

On a larger scale, a formal style guide sets company standards across projects and teams. By referring to the style guide early in the documentation process, the development personnel can save time and avoid having to make changes later on.



## General Writing Principles

When you've designed the document correctly, and laid it out in an attractive and inviting manner, it just looks right. There is nothing in the document to distract or confuse the reader. Important items are front and center; less important items are less prominent. In this way, the user doesn't have to go hunting to find the information that they need. Everything flows in a logical way.

### Documents as Clear as Glass

You can think of an effective document as being like a glass bowl.



The *content* of the bowl is the information the user needs to do their job. The bowl itself is clear, allowing the user to easily see the contents (the information). Nothing distracts or gets in the way of the user finding and understanding the information they need.

To sum up, an effective document must

- be useful, meaningful, relevant, and practical
- be easy to use, navigate, read, and follow
- contain all the required information, and no unnecessary information

A good document must have *the eight C's*, that is, the document must be

- **C**lear
- **C**oncise
- **C**onsistent
- **C**omplete
- **C**orrect
- **C**omprehensible
- **C**redible

*and*

- **C**omprehensive

The following sections describe the properties, principles and general guidelines that you should follow to create effective documentation.

## Accuracy

Accuracy is of the utmost importance. Customers must be able to trust that our documentation reflects the truth, or they will not use it.

In technical writing, accuracy is more important than presentation, however the way you present something can affect how the information is perceived. Information that is subject to misinterpretation, or multiple interpretations, leads to inaccuracies.

The more that you can verify yourself that something is true, the more accurate your document will be. This is especially true when documenting user interfaces and their procedures. At all times, you must try to replicate what the user sees, and then write what you experience. If you can do it, understand what you are doing, and then write about it, you will create accuracy.

## Anthropomorphism

Avoid terms that anthropomorphize, that is, that give the computer or software human characteristics.

**Incorrect:** Tracker knows when the filing has been submitted and can then process it.

**Correct:** Tracker processes the filing after it has been submitted.

## Circular Definitions

Circular definitions use the term being defined as part of the definition, resulting in no real definition at all. Avoid them, especially in glossaries!

**Incorrect:** The **Sort** command sorts your data.

**Correct:** The **Sort** command arranges your data in alphabetical order by last name.

## Clichés, Jargon and Slang

Do not use clichés, jargon or slang. These include such trite, overworn words or phrases as

- across the board, action item
- at the end of the day, buy-in
- core competencies, customer centric
- cutting edge, going forward
- leverage, mission critical
- paradigm shift, state of the art
- synergistic, take it offline, turn-key

If you can't think of a fresh, imaginative way to express an idea, it's better to express it in literal terms.

**Incorrect:** The Print module leverages the printer driver.

**Correct:** The Print module uses the printer driver.

## Completeness vs. Complexity

It should be obvious that documentation must be complete for it to be accurate and useful. All the information that a user may require needs to be in the document. However, if there is too much information, it can make the document more difficult to navigate, and make it more difficult for the user to find the information they are looking for.

Good documentation is a delicate balance between providing all the information that the user requires, but not so much that they are overwhelmed with unnecessary information. As Einstein said, *everything should be made as simple as possible, but no simpler.*

Evaluate the breadth and depth of information in your user guide. It's best to strike a balance between a slew of topics or a few topics that require substantial drill down to reach the meat of the information. Users seeking help do not want to have to choose from among too many choices, or keep clicking until they find what they are looking for.

## Connotation

While the literal or explicit meaning of a word or phrase is its denotation, the suggestive or associative implication of a word or phrase is its connotation. Words often have similar *denotations* but quite different connotations. Therefore, you might choose or avoid a word because of its connotation, especially if it is a negative *connotation*.

**Incorrect:** Abort the process.

(Words such as *abort* have a negative connotation, so you should therefore avoid them.)

**Correct:** Stop the process.

## Consistency

Consistency in terminology and wording is important. Use only one word or phrase to describe the same thing. Do not use it to describe different things. Do not use different words or phrases to describe the same thing. For example, do not alternate between *choose* and *select*.

Also be consistent in your sentence structure. Users may think that a sentence worded differently means something else.

## Critical Information

Critical information is that information important to the operation of the product or the success of the user's time spent with the software. It is essential, needed by everyone, or immediately useful. It should be near the top or root level of the TOC. That means that any user should not have to click too far to get to the

information. Additional information that is nice to know or more explanatory can be further down your document.

## **Cross-References**

Create an appropriate number of cross-references. You'll need to achieve a balance between a maze of links that gets the user lost, or a clear network of interrelated topics and ideas.

## **Ease of Use**

The layout and design of a document goes a long way in helping the reader. A properly designed document means the difference in your manual being used or ignored. Know this: if your document is not easy to use, read and follow, it may as well have never been written at all.

A document that is easy to use will have

- a clear and complete table of contents
- meaningful, descriptive headings
- good chunking of information
- useful cross references
- an extensive index

## **Fonts (Type Faces)**

Fonts are very important to readability. We take our visual cues based on size, weight, and typeface style, so when you write a document, you need to pay strict attention to this.

The templates (discussed in *Templates* on page 75) have been carefully designed and refined to maximize readability. However, if you are not a technical writer, and are creating your own template, keep the following principles in mind.

## **Type Face Hierarchies**

In documentation, you often must differentiate among menus, commands, files, fields, parameters, products, manuals, and instructions in the same paragraph. You'll need to determine a hierarchy of typefaces to use in each publication. The recommended levels and style names are

- Chapter
- Heading1, Heading2, Heading3, Heading4
- Body
- Bullet
- Numbered

You should also have styles for Notes, Tips, Warnings, and so on.

## Type Sizes and Fonts

It is important to use a standard size and font consistently for all your headings and body text. The good thing about a style guide and a template is that you don't have to worry about remembering the exact font or the appropriate type size.

If you are creating your own template, heading levels should be between 12 and 36 points, and should use the Arial bold font. The ideal body text format is 11 or 12 point Times Roman.

**Important:** As tempting as it may be, avoid using other fonts. Arial and Times Roman have withstood the test of time, and are the clearest and most legible fonts available.

## Informality

Software programs can intimidate some users. Documentation can bring users some sense of comfort by being somewhat informal. *Informal* does not mean using slang; it means using a business style of writing that is approachable for the reader and easy for them to relate to.

You need to speak to your audience, not the program. Answering end user questions like *how do I do it*, *why would I use this*, and *when do I need to do that* are much more important than program related questions like *how does it work*, and *what are the variables that bring this about*.

However, you need to be careful about being too informal also, as thing can lead to wordiness, and makes the document appear unprofessional. You therefore need to balance formality and informality.

**Note:** In general, training documentation is less formal than standard end user documentation such as user guides.

### Example:

**Incorrect (too informal):** Let's say you want to print a document. This is very easy! All you need to do is click on the **File** menu at the top of your screen. From there, you click the **Print** option. Within a few seconds, a fully printed sheet should emerge from your printer.

**Incorrect (too formal):** The **Print** function resides in the **File** menu. Select this option to produce a permanent hard copy of your file.

**Correct (just right!):** To print your document, choose **File > Print**.

See also *Contractions* on page 50.

## Level of Formality

Some dictionaries indicate whether a word is formal, informal, vulgar, or obscene; most often, however, your own sensitivity to the language should be sufficient to guide you in making the appropriate choice for a given context. Be aware, however, that achieving an appropriate level of formality is as much a question of choosing *less* formal as it is of choosing *more* formal words. As the *Strunk and White Style Guide* points out

*“Avoid the elaborate, the pretentious, the coy, and the cute. Do not be tempted by a twenty-dollar word when there is a ten-center handy, ready, and able.”*

## Layout

The document layout (or format) applies to the positioning of the text and graphics on the page, the page size, the margins, the size and typeface use for the fonts, and so on. A good format invites the reader to explore the document; a poor format repels the reader.

## White Space

White space is the area of blank space around text, including the space between paragraphs and a pages margins. Ensure that your format includes plenty of white space. Resist the temptation to cram in as many words as possible onto a page!

### Related Topics

- *Lengths of Sections* on page 30.
- *Readability, Chunking and Headings* on page 31
- *Structure* on page 32

## Lengths of Sections

There are no absolute rules about how short or long a section should be. However, here are some general guidelines to strive for:

Section	Minimum Length	Maximum Length
Chapter	5 pages	50 pages
Heading1	1-2 pages	10-15 pages
Heading2	1/2 page	2-9 pages
Heading3	1/3 page	1 page
Heading4	1/4 page	1/2 page

### Related Topics

- *Readability, Chunking and Headings* on page 31
- *Structure* on page 32

## Navigation

Most users do not read guides linearly, from start to finish. They zoom in on topics randomly. Therefore, each chunk of data must be able to stand on its own. You should, however, provide a means for a user to go to a higher level or related topic, without having to click back up through a series of screens they've either already seen or which are of no interest.

## Notes and Warnings

Use **Notes**, **Tips**, **Important** and **Warning** as necessary. They help keep the reader informed of particularly important information, and break up the text.

## Oversimplification vs. Over-technicality

When you are trying to write for a non-technical audience, there is danger in oversimplification, that is, dumbing down the information, making it inaccurate.

At the same time, you must avoid being too technical or complex in your writing and terminology. You have to balance these two constraints, and write at the level of the *typical*, or *average* user. Your writing should be simple enough that the user will understand it, without being too simple. It also must be technical enough for the user without being overly-technical.

## Positive Writing

State things positively; that is, tell users what they *can* do rather than what they *can't* do. The positive form of a statement is also often more concise and straightforward than the negative.

**Incorrect:** Do not turn off your computer without saving your work first.

**Correct:** Save your work, then turn off your computer.

## Planning

A well-thought-out design can save you time and effort. Use a flow charting program such as Visio to help you organize your ideas, or just put them on paper. One chapter should ideally flow after the next, and should mimic the overall workflow process.

Procedures, explanations, definitions, examples, references and navigation should all be covered in your guide. Each category has its own specifications for design, look and feel, and content, as well as its own place in the logical flow of the guide.

## Readability, Chunking and Headings

### Readability

Readability means how easily your document can be read, followed and understood. A major factor in readability is the organization or “chunking” of the information in the document and the white space that surrounds the text.

## Headings and Chunking

A document with well-organized heading levels over small bytes of information, surrounded by ample white space will be very readable. The last thing your reader needs is to have to interpret the importance of a section because the heading levels don't display a hierarchy. Also, endless streams of text can be overwhelming and will quickly discourage your user. Information organized into small chunks leaving lots of room for white space are easy for the eye to follow and for the mind to digest.

## Navigation and Chunking

Users should not be required to click away along lengthy paths, or scroll or scan to find the information they need. By chunking your data into manageable bites, you can cover one topic in its entirety at one time. You will need to balance the tendency to include more than one idea in a topic, and having too many topics when some are legitimately related.

Remember, today's users have shorter attention spans and need bursts of information rather than blocks of prose to read through. You need to provide information in quickly digestible pieces. Users want to find the answers quickly so they can get back to what they were doing.

## Related Topics

- *Layout* on page 30
- *Lengths of Sections* on page 30
- *Structure* on page 32

## Structure

Your guide should be well organized and structurally sound. The structure should present the easiest path to the answers a user may seek. Group similar topics together, and use standard terminology.

## Table of Contents (TOC)

The Table of Contents reflects the structure of the document. It is the critical starting point for each user. If they can't find what they want right away, or can't understand the logic in the document structure, your guide is effectively useless.

In your TOC, there should be no more than 10-12 subheadings below any heading. If you have more, you need to reorganize your topics.

Note: It is very important that the table of contents are agreed upon before writing the body of the document to ensure that the chapters contain logical and related topics.

## Related Topics

- *Layout* on page 30
- *Lengths of Sections* on page 30



- *Readability, Chunking and Headings* on page 31

## Sentence and Paragraph Length

Keep sentences and paragraphs short. Sentences should be no more than two lines, and make one brief statement of fact. If you can state the idea just as well in two short sentences, do so rather than adding commas, colons, and semi-colons.

Paragraphs should be information bytes, not lengthy diatribes on the procedure to follow. Be careful not to describe things in the opening paragraph that the step-by-step procedures will cover. Avoid paragraphs that are more than 8-10 lines.

## Spelling

Use American (U.S.), not British or Canadian, spelling.

Canadian/British Spelling (Do not use)	American Spelling (Always use)
centre	center
cheque	check
colour	color
grey	gray
honour	honor
lable	label

## Succinctness

Simple and direct expression is best. Strive to eliminate phrases that clutter your message rather than enhance it.

## Task Perspective

Write user guides from a *task* or *goal* perspective, not based on the structure of the application. Tell the user explicitly what they need to do. Explain it from a how-to perspective instead of simply a list of functionality.

**Incorrect:** It is important to check the status of the file. (*This doesn't tell the user what to do.*)

**Correct:** Ensure that you check the status of the file.

## The User Interface and Documentation

When you are documenting a user interface, you will undoubtedly discover usability issues. Discuss these with the appropriate people, or better still, log a defect.

Always keep in mind that the interface should be designed so that as little documentation as possible is required. Do not hesitate to give suggestions that

will make our products easier to use and follow. Often this involves writing or changing instructions, field names, field descriptions, and messages that will actually appear in the interface.

## Eliminating Field Descriptions in the Documentation

Ideally, the user interface should be self-documenting. This is particularly true when it comes to field descriptions. All field descriptions should appear in the user interface. This eliminates the huge task of trying to maintain these field names and descriptions separately in a document, thereby creating duplicate work.

If fields are already described in the user interface, they do not need to be described again in the documentation. If they are not described in the interface, ask if the UI can or should be changed so that the descriptions *do* appear.

## Voice

Use the *active* voice. It forces you to specify who or what is doing the action, and is therefore less likely to be misunderstood. The active voice is also natural because it's the one that people usually speak or write in.

**Incorrect (passive):** The form is updated. (*It is not clear who or what is updating the form. Is it a person? A process? The software?*)

**Correct (active):** Tracker updates the form. (*Now it is clear what is doing the action.*)

## General Terminology

Technical industries are full of jargon, slang, buzzwords and other favorite words. In our efforts to be thorough, we sometimes resort to overwriting and the use of wordy phrases and redundancies.

Correct terminology includes

- *Using Preferred Terms* on page 35
- *Distinguishing Similar Words* on page 40
- *Technical Abbreviations* on page 42
- *Locating Incorrect Words* on page 43

### Using Preferred Terms

The following table lists words and phrases that you should not use, and suggests the correct choice or other alternatives.

Tip: Search this document to find a specific term you need more information about. Not all terms are listed in this table.

#### Related Topics

- *User Interface Terminology* on page 44
- *User Interface Elements* on page 59

Do Not Use	Use Instead/Guidelines
<i>abort</i>	<i>stop, end</i>
<i>all right</i>	<i>alright</i>
<i>alot</i>	<i>a lot</i>
<i>amongst</i>	<i>among</i>
<i>and/or</i>	<i>and</i> or <i>or</i> ; do not use both. If all the items listed are possible choices, use <i>or</i> .
<i>appears, is displayed</i>	<i>opens</i>
<i>approximately</i>	<i>about</i>
<i>as</i> (when indicating a reason)	<i>because</i>
<i>at present</i>	<i>presently</i> or <i>currently</i>
<i>besides, in addition, moreover, furthermore</i>	<i>also</i>
<i>big, sizeable</i>	<i>large</i>

Do Not Use	Use Instead/Guidelines
<i>CD, CD-ROM, install CD, installation CD</i>	<i>installation package</i> We rarely ship our products on CDs; in most cases the files are downloaded by our customers. You can use the term <i>CD</i> only if you are certain that the product is being shipped only as a CD. If this is the case, refer to it as <i>product name CD</i> , for example, the Tracker CD.
<i>checkbox</i>	<i>check box</i>
<i>choose</i> vs. <i>select</i> (an item from a menu, dialog box or any other UI element)	These terms are practically synonymous, however for consistency, use <i>click</i> . Use <i>select</i> only when indicating a choice from a drop-down list. <b>Examples:</b> Click <b>File</b> > <b>Print</b> . In the <b>Paper</b> drop-down list, select the paper you want to use.
<i>click on, click in</i>	<i>click</i>
<i>desired, you want</i>	<i>necessary, required, specific</i>
<i>dialog box</i>	<i>dialog</i>
<i>e.g.</i>	<i>For example</i> , or, if the example is complex and takes up one or more lines, use a heading.
<i>either</i> (when indicating more than one stated choice or possibility)	Avoid using <i>either</i> : it is usually superfluous. <b>Incorrect:</b> You can send the file to <i>either</i> the printer or fax machine. <b>Correct:</b> You can send the file to the printer or fax machine.
<i>e-mail</i>	Do not include the hyphen: use instead: <i>email</i> . (In the past, a hyphen was used, however now that this is a common term, a hyphen is no longer necessary.)
<i>et al.</i>	use instead English phrases such as: <i>and others, and so on</i> or consider actually listing out the other items, if there are not too many
<i>etc.</i>	<i>and so on, or such as</i> , or reword sentence so that <i>etc.</i> can be removed
<i>fill in</i>	<i>enter, complete, select</i>
<i>fine</i> (when indicating acceptability)	<i>acceptable, correct</i>
<i>he, she, he/she</i>	Do not use <i>he</i> or <i>she</i> when describing users, because such language is considered sexist. Instead use <i>you, user</i> or the generic <i>they</i> as appropriate.

Do Not Use	Use Instead/Guidelines
<i>hopefully</i>	Do not use this word: it means “with hope”, not “it is hoped that”. Also, the word <i>hope</i> should never appear in your documentation.
<i>icon</i>	Use only for informational symbols, not for buttons that contain a symbol: see <i>Buttons</i> on page 44.
<i>i.e.</i>	<i>that is,</i>
<i>if you want to</i>	Sometimes you may need to use this phrase, but you should avoid using it; it is often superfluous and redundant. You can usually replace it with the single word “to”.
<i>in</i> (a user interface element)	<i>on</i> <b>Examples:</b> On the <b>Print</b> dialog box, On the <b>Options</b> screen,
<i>irregardless</i>	<i>regardless</i>
<i>in order to</i>	This can usually be replaced with “to”. <b>Incorrect:</b> <i>In order to print the file, render it first.</i> <b>Correct:</b> <i>To print the file, render it first.</i>
<i>in which</i>	<i>where</i>
<i>is displayed</i>	<i>opens</i>
<i>issue</i> (when indicating a problem)	<i>problem or limitation</i>
<i>listen</i> (when indicating a system monitoring for certain activity)	<i>monitor, check for</i>
<i>log off, logging off</i>	<i>log out, logging out</i>
<i>login, log-in, log on</i>	<i>log in, logging in</i>
<i>machine</i>	<i>computer, system, server</i>
<i>may</i>	Use <i>can</i> not <i>may</i> . Users do not need to ask permission. We need to empower them by telling them what they can do, not belittle them by telling them what they <i>may</i> do. <i>May</i> implies the program has the authority, while <i>can</i> implies the user <i>has</i> the authority.
<i>middle</i>	<i>center</i>
<i>MS, MicroSoft</i>	<i>Microsoft</i>
<i>native, original application</i>	These are acceptable terms for programs that can use this particular MIME or file type. <b>Example:</b> The application opens using its native file format.

Do Not Use	Use Instead/Guidelines
<i>nor</i>	Using <i>or</i> , <i>and</i> , (and so on), reword as necessary: <b>Incorrect:</b> <i>You cannot view nor print the file.</i> <b>Correct:</b> <i>You cannot view or print the file.</i> <b>Incorrect:</b> <i>It cannot be updated, nor is it a link to the item.</i> <b>Correct:</b> <i>It cannot be updated, and is it not a link to the item.</i>
<i>numerous</i>	<i>many</i>
<i>obsolete</i>	Do not use as a verb. <b>Incorrect:</b> <i>This manual obsoletes the previous version.</i> <b>Correct:</b> <i>This manual supersedes (or replaces) the previous version.</i>
<i>on the fly</i>	Reword as necessary, for example: <b>Incorrect:</b> The system creates the filename on the fly. <b>Correct:</b> When the system creates the file, it automatically assigns it a file name.
<i>once, when</i> (when meaning <i>after</i> )	<i>after</i> <b>Incorrect:</b> Once you have printed the file... <b>Correct:</b> After you have printed the file.
<i>on-line</i>	<i>online</i>
<i>help</i> or <i>online help</i>	<i>online Help</i> (as per Microsoft style guide)
<i>over</i> (when describing a quantity)	Do not use <i>over</i> to describe quantities, for example: The application can process over 10,000 pages an hour. Use instead: <i>more than</i> .
<i>penultimate</i>	<i>ultimate, ideal, superior</i>
<i>percent, percentage</i> (when describing a portion of a total)	Avoid using these words because they often result in wordy sentences. Try using instead: <i>portion, number, quantity, share, more</i> <b>Incorrect:</b> A greater percentage of your documents can be processed using the new system. <b>Correct:</b> More of your documents can be processed using the new system.
<i>performance</i> (noun)	This word suggests speed. Only use to imply <i>faster</i> .

Do Not Use	Use Instead/Guidelines
<i>persist</i>	<p>Avoid using where possible, because it is vague. You can use it in certain technical descriptions to indicate that an item or data remains constant throughout a process and is brought forward.</p> <p><b>Incorrect:</b> <i>Generated documents and templates are persisted as files.</i></p> <p><b>Correct:</b> <i>Generated documents and templates persist as files.</i></p>
<i>please</i>	<p>Overusing <i>please</i> is obsequious. You are not begging your user to take an action, simply offering a choice or making a suggestion. However, in <i>Release Notes</i>, you can use <i>please</i>, because it is a marketing document.</p>
<i>practicable, pragmatic</i>	<p>Avoid using these words: try <i>practical</i> instead.</p>
<i>preceding</i>	<i>previous, last</i>
<i>prior, prior to</i>	<i>before</i>
<i>really</i> (when indicating actuality)	<i>actually, in fact</i>
<i>the reason is because...</i>	<i>the reason is that</i>
<i>recommend</i> (as it <i>we recommend</i> or <i>it is recommended that</i> )	<p>Avoid using any form of <i>recommend</i>: it is as vague as <i>should</i> or <i>may</i>. Reword the sentence to be active and certain.</p> <p><b>Incorrect:</b> We recommend that you export the file in .pdf format.</p> <p><b>Correct:</b> Export the file in .pdf format.</p> <p><b>Incorrect:</b> A 40 GB hard drive is recommended.</p> <p><b>Correct:</b> Ensure you have at least a 40 GB hard drive.</p>
<i>(s)</i>	<p>It is often confusing to add (s) at the end of word. If a procedure typically involves more than one item, use the plural, otherwise use the single. In general, be consistent!</p> <p><b>Incorrect:</b> Select the file(s) to print.</p> <p><b>Correct:</b> Select the files to print. (<i>if you typically view just one page at a time</i>)</p> <p><b>Incorrect:</b> Select the page(s) to view.</p> <p><b>Correct:</b> Select the page to view. (<i>if you typically view just one page at a time</i>)</p>
<i>server machine</i>	<i>server</i>

Do Not Use	Use Instead/Guidelines
<i>should</i>	<p>Avoid using <i>should</i>, as it creates uncertainty. A user must <i>do</i> something or <i>not do</i> something. To say they <i>should</i> or <i>may</i> do something is confusing.</p> <p><b>Incorrect:</b> <i>You should back up your system before upgrading.</i></p> <p><b>Correct:</b> <i>Back up your system before upgrading.</i></p>
<i>since</i> (to indicate <i>because</i> )	<p><i>because</i></p> <p><b>Incorrect:</b> Since you need the latest version, you have to connect to the database.</p> <p><b>Correct:</b> Because you need the latest version, you have to connect to the database.</p>
<i>thus</i>	<i>therefore</i>
<i>towards</i>	<i>toward</i>
<i>type in</i> (a value or data)	<i>enter</i>
<i>utilize, usage</i>	<i>use</i>
<i>very</i>	<p><i>Very</i> is a <i>very</i> overused word! Avoid overusing modifiers by selecting specific, self-modified nouns and verbs. For example, replace <i>very different</i> with <i>unique</i>.</p>
<i>whether or not</i>	<i>whether</i>
<i>wherever, whenever</i>	<i>where, when</i>
<i>who</i>	use only in the subject case
<i>whom</i>	avoid using; if you must use, use it only in the objective case
<i>within</i>	Avoid using - use <i>in</i> where possible
<i>wish</i>	<i>want</i>

## Distinguishing Similar Words

The following list describes similar words (many of them similar sounding) that have different meanings. Be sure that you pick the right word in your documentation.

- *affect* means to have an influence or produce an effect on;  
*effect* means to bring about or accomplish
- *assure* means to make a someone confident of something;  
*ensure* means to make sure something happens; *insure* means to issue an insurance policy



- *beside* means next to;  
*besides* means in addition to
- *between* describes a relationship involving two things;  
*among* is used when there are three or more objects  
**Examples:** The system manages communication *between* the proxy and server. Communication *among* the objects is handled by the server.
- *complement* means to complete or bring to perfection;  
*compliment* means to praise something
- *continuously* refers to actions which are uninterrupted: *You need to let the server run continuously from 6:00 PM to 3:30 AM.*;  
*continual* actions need not be uninterrupted, only repeated: *You should continually check that the latest file has been uploaded.*
- *farther* and *further* are practically synonymous:  
*farther* refers to physical distance;  
*further* refers to an extent of time or degree.

Unless you are referring to distance, use *further* for consistency.

- *fewer* means a lower number of;  
*less* means a lower quantity of  
**Examples:** You will need *fewer* printers, and *less* toner to generate the documents.
- *imply* means to suggested something without explicitly stating it;  
*infer* means trying to arrive at a conclusion based on evidence
- *it's* means *it is*: avoiding using *it's*;  
*its* is the possessive form of *it*

For example, the following sentence is grammatically correct:

*It's important to check the status of the file.*

However, you should avoid using *it's* if possible.

**Acceptable:** *It is important to check the status of the file.*

**Better:** *Check the status of the file.*

- *many* means a greater number of;  
*much* means a greater quantity of  
**Examples:** You will need *many* printers, and *much* toner to generate the documents.  
In addition, *more* can mean a greater number *or* quantity of something!  
**Examples:** You will need *more* printers, and *more* toner to generate the documents.
- Use *preventative* as an adverb and a noun: *You need to preventatively maintain the server to ensure it will function.*

Use *preventive* when speaking of something that serves to prevent, as in *Preventive maintenance will ensure the server will function.*

- a *principle* is a fundamental truth or guiding belief; *principal* means the first in rank or importance
- *proceeding* means to continue or is an action or conduct; *preceding* means coming before  
Avoid using *preceding*. Use *previous* instead.
- *that & which*:  
If you are specifying something that is part of a larger group, use *that*.  
If you are specifying something that is *not* part of a larger group, use *which*.  
In other words, *that* specifies and identifies something, *which* amplifies something: *I drove the car that had the largest engine. I enjoyed the ride, which was quite bumpy at times.*  
*Which* usually is preceded by a comma, whereas *that* is not.  
There are two exceptions to this rule:
  - When a sentence contains the conjunction “that,” it is preferable to use “which” to introduce a subsequent relative clause, even if it is a restrictive clause.  
*Many writers have argued that the distinction which we have been discussing is trivial.*
  - Euphony may override the that/which convention.  
*It was a sparsely furnished flat which she had rented.*
- *unique* means one-of-a-kind: don’t say *more unique, really unique or very unique* or any other superlatives or descriptive words.

## Third-Party Product Names

The correct spelling of outside software vendor names includes:

- Livelink (only the first L is capitalized)
- Microsoft - always use with Microsoft products: for example, use *Microsoft Word* and not just *Word*
- WebSphere – note that the S is capitalized - the full name is IBM WebSphere

## Technical Abbreviations

Use the these abbreviations for the following technical terms. Follow the capitalization of each term.

- KB – kilobyte –  $2^{10}$  (1,024) bytes (often incorrectly written as kB; the prefix “k” means 1,000, which is rarely the case when referring to memory size)
- MB – megabyte –  $2^{20}$  (1,048,576) bytes
- GB – gigabyte –  $2^{30}$  (1,073,741,824) bytes

- MHz – megahertz, the speed of a processor (exactly  $10^6$  cycles per second)
- RAM – Random Access Memory, for example: 512 MB RAM
- URL – Uniform Resource Locator; a standard method of Internet addressing (use all capitals)

## Locating Incorrect Words

Some words in your document will be incorrect but spelt correctly, so your spell-checker won't detect them. To resolve this, as soon as you recognize a problem word, put it on the list of words to double-check, and before releasing the final draft, search for these words.

Problems words include

- existing / exiting
- filing / fling
- now / not
- pint / print
- work / word processor

## User Interface Terminology

This section describes the specific word and phrases that describe the various elements in a user interface (UI).

### Related Topics

- *Using Preferred Terms* on page 35
- *User Interface Elements* on page 59

### General Terms

The Microsoft Manual of Style details the proper names for most user interface terms. The main ones to know are

- **field**
- **dialog**
- **drop-down list** – any field in which you must select a specific value from a list
- **check box** – check boxes are *selected* or *cleared*
- **screen** – use sparingly: it only describes the part of an application that fills an entire screen
- **login screen** - the screen used to log in to the application
- **page** – use this to describe a screen in a web based application
- **tab**
- **window** – avoid using because this term is vague: use page or dialog if possible

### Indicating UI Paths in Short Form

Often a user will have to drill down several menus or dialog boxes to complete a procedure. Although you could spell out each step explicitly, it can be easier and simpler to use a short form.

In the short form, you separate the name of each UI element that the user must click with a space, followed by a greater than sign (>), followed by a space.

### Example

In Word, click **Format > Paragraph, Line and Page Breaks > Tabs > Set.**

### Buttons

When referring to buttons, the word “button” is often redundant. Simply say, for example: “Click **Modify**” instead of “Click the **Modify** button.”

However, when referring to buttons that have no words, but only an icon or symbol, then you *must* use the word button, and show a screenshot of the button for example:

Click the Create New Document button .

Note: The name of the button should be in mixed case and match the tooltip that appears for this button. Do **not** call these button *icons*. Use the term *icon* only to refer to informational symbols.

## Specifying Locations of UI Elements

Where appropriate, you can specify the location of a UI element to help guide the user, for example

- On the left side of the screen...
- In the upper right corner of the page...

Note that if the location of an item changes, the documentation will have to be updated accordingly. It is therefore critical that both the documentation and training departments are made aware of all UI changes.

## Main Page

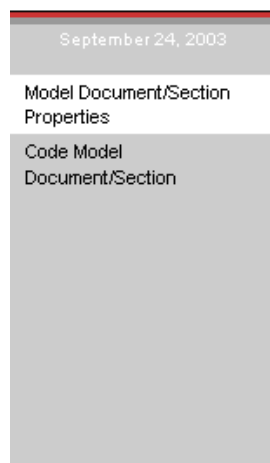
All screens in a web-based product are called pages, reflecting the fact they are *web pages*.

The main areas of a page are the **main section** and the **tree**. The tree may be called different things, such as *package explorer* or *explorer tree*.

## Other Page Elements

Specific objects in the tree should be called by their actual names, for example, packages or model documents.

Some applications also have a navigation bar that runs along the left side of the main window when the tree is not displayed.



## Assorted Elements

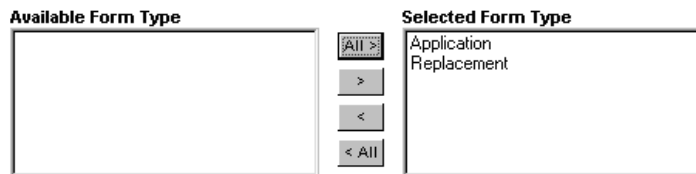
### Selecting Field Values

Some fields contain a *selection button* that you can use to quickly select and enter specific values into the field.



When you click the selection button, a select pane is displayed. The values from which you can choose are listed in the left column (**Available Form Type**). The values you have currently selected are listed in the right column (**Selected Form Type**).

Select one or more Form Type for this Form.



The buttons in this pane are called *selector buttons*. A graphic of the button should be included within the document to clearly identify the button.

### Sorting Lists

In some lists, you can sort the contents of the list by clicking the *column heading*. This will display a sorting icon next to the heading name.

A *sorting icon* pointing up indicates the values in the column are sorted in ascending order.



A sorting icon pointing down indicates the values in the column are sorted in descending order.



### Entering Dates

The *calendar function* is used to enter a date into a field. The calendar is displayed by clicking the *calendar button*.



### Table Links

Some tables contain *links*. When referring to a link, only use the name of the link itself. Don't use the word *link* because it is redundant.

For example, in the following table, you would say

- Click the **State Short Name** to view the State details.
- Click **Delete** in the row containing the State you want to delete.

State Short Name ^	State Full Name	Approved	
<a href="#">AK</a>	Alaska	No	<a href="#">Delete</a>
<a href="#">AL</a>	Alabama	Yes	<a href="#">Delete</a>
<a href="#">AR</a>	Arkansas	Yes	<a href="#">Delete</a>

## Punctuation Guidelines

Proper punctuation is essential in producing professional looking documentation. Incorrect punctuation can make an entire document look sloppy.

### Ampersand

While not officially punctuation, the ampersand (&) should only be used between two items that are part of a set, and not used as a terminal conjunction.

#### Examples:

- **Right:** black & white negative
- **Wrong:** green, red & blue

### Apostrophes

To form the possessive of a singular noun, use an apostrophe and an “s,” except when the singular form of the word ends in an *s* or *z* sound, in which case, use only the apostrophe.

#### Examples:

- FrameMaker’s online Help
- Windows’ help

Note: Avoid using the possessive case: see *Possessive Case* on page 54.

### Colons

Use a colon at the end of a sentence that introduces a list. Do not use a colon to introduce a screen capture or in *any* headings. Do not use a colon if the introduction is not a sentence.

### Commas

Although the comma is an effective mark of punctuation for separating thoughts and phrases in your writing, avoid overusing it. You don’t want to break up the flow of a sentence unnecessarily, resulting in choppy thoughts rather than a smooth, uninterrupted flow. Try just using commas where you would pause to take a breath when reading the sentence out loud. If you don’t have a reason to use a comma, leave it out.

#### Comma Before *And* or *Or* (the serial comma)

For clarity, use a comma before the words *and* or *or* when there are more than two items in the phrase. This adds a necessary pause and helps the reader “digest” all the options. It also eliminates any confusion regarding if the last two items are somehow “grouped” together separately from the first – a comma indicates they are not.



**Correct:** The tasks an administrator can do include: printing a file, creating a document, and deleting a record.

**Correct:** You can save your changes, continue working on your file, or cancel your changes.

## Commas Between Predicates

(from Edward Johnson, *The Handbook of Good English*)

“We’ll check the books, and let you know next week” justifiably uses the comma to make it clear that the adverbial phrase “next week” modifies only “let you know”, not “check the books.” Often a comma is helpful to counter the tendency of modifiers to link themselves to the wrong word or phrase.

“He left, and mixed a tray of drinks” justifiably uses the comma to keep the first verb from momentarily seeming to share the object “a tray of drinks” with the second verb. Verbs joined by “and” are likely to be perceived as having equal effects on the rest of the sentence containing them.

“He left the room, and a moment later reappeared with a tray of drinks” justifiably uses the comma to indicate a lapse in time. “He left the room, and reappeared with a tray of drinks” is even more justifiable, since the explicit time-lapse indication “a moment later” isn’t there. If the sentences were spoken, we would probably hear a pause after “room” in the first sentence and would almost certainly hear a pause in the second.

“A moment later he left the room, and reappeared with a tray of drinks” also justifiably uses the comma; without it, the reappearance would seem instantaneous.

“He is doing well, and will rise to the top if he keeps it up” justifiably uses the comma to separate predicates that are quite different in significance--one is a statement about the present and the other is a prediction. When the verbs in a compound predicate are indifferent tenses, as they are in the example, a comma is often justifiable. Somewhat similarly, “He was not doing well, and was eaten by a bear” has a justifiable comma; the verb in the first predicate is active, the verb in the second predicate passive.

“He had little money, and was deficient in looks as well” is justifiable because the second predicate, “was deficient in looks as well,” is being presented as a parenthetical construction. The comma after “money” could be eliminated, but the sentence would then have a different effect; the second predicate would no longer seem a humorous addition but just a second fact.

## Comma Splices

Be careful of “comma splices,” or a run-on sentence. Always separate sentences by a period or semicolon, not a comma, or rewrite so it form one logical sentence.

**Incorrect:** Update the file, it resides on the server.

**Correct:** Update the file. It resides on the server.

**Correct:** Update the file residing on the server.

Some of the other uses for commas are

- between items in a series
- between lengthy introductory phrases and clauses
- between two clauses separated by conjunctions

## Contractions

Contractions include words such as *can't*, *won't*, *wouldn't*, *shouldn't* and so on. In general, you should avoid using contractions in formal documentation. Although they can create a more informal tone, they can make the document seem less professional.

## Ellipsis

An ellipsis indicates that there is something left out and has exactly three dots. However, there's an actual character for it rather than just typing three periods: type Alt-0133 ... An ellipsis should have a space before it and a space afterwards. A period must still follow an ellipsis if it is at the end of a sentence.

If a menu command contains an ellipsis in the program, leave it out in the documentation.

**Incorrect:** From the File menu, click **Print...**

**Correct:** From the File menu, click **Print**.

## Hyphens and Dashes

### Hyphens

Consult the dictionary to see if a word contains a hyphen.

Use hyphens to join words that make up a compound adjective, for example:

- multi-line, single-line
- client-server
- medium-sized
- long-distance

Use hyphens before standard prefixes such as *anti-*, *pro-*, *self-* and *mid-*.

The numbers twenty-one through twenty-nine, thirty-one through thirty-nine, and so on are hyphenated, whether used alone or as part of a larger number, should the larger number for some reason be spelled out.

Do not use hyphens to separate different elements or phrases in a section: use an en dash instead.

Generally, hyphens can help the reader comprehend a word or phrase, even if the hyphen may not technically be required, for example *four-year plan*, *first-class stock*. However, don't use a hyphen for words that can be better expressed as either one or two words, for example, *file server*.

## En Dashes

Use separate different elements or phrases in a section. You typically use it to separate an item from its description or definition.

### Example:

- **First name** – the client’s first name
- **Last name** – the client’s first name

Type Alt-0150 to insert an en dash.

In an HTML file, type `&ndash;` to insert an en dash.

## Em Dashes

The em dash is longer than the en dash. Use an em dash for parenthetical interruptions—such as this one—in the middle of a sentence.

### Examples:

- **Avoid:** Em dash: **System Operations — Printing a File**
- **Correct:** En dash: **System Operations – Printing a File**

Type Alt-0151 to insert an em dash.

In an HTML file, type `&mdash;` to insert an em dash.

## Parentheses

The types of parentheses are

### Square Brackets [ ]

Square brackets are used with the default paragraph character style to indicate an optional item: for details, see *Code Font* on page 57.

### Round Brackets ( )

Use round brackets to set off a phrase that is somewhat relevant to the main idea of the sentence, but not critical to it.

**Example:** When printing a file (which requires network access), ensure that you have selected the correct document.

Avoid using parenthetical statements such as these too much. They lengthen the sentence and can be confusing, because the reader must hold a thought while reading another fact.

### Angle Brackets < >

These are rarely used and appear mostly in XML tag code examples: `<tagname>`

## Other Parentheses

Avoid using any of the following parentheses:

- Braces { }
- Single Chevrons < >
- Double Chevrons « »

## Placement of Punctuation Beside Parentheses

When the information within the parentheses makes up a complete sentence, the punctuation belongs *inside* the parentheses.

**Example:** (For more information, see *Printing Documents* on page 12.)

When the information within the parentheses does *not* make up a complete sentence, the punctuation belongs *outside* the parentheses.

**Example:** *User Roles* on page 32 describes the various types of users (Writer, Author, and Administrator).

## Periods

A period is necessary when you have completed a thought. It gives the reader a chance to pause, to digest what you've just written, and then to move smoothly to your next thought.

Note: Ensure that you have only one space (not two) after each period. Double spaces after a period are a relic from the typewriter age.

See also *Placement of Punctuation Beside Parentheses* on page 52.

## Quotation Marks

Quotation marks (single or double) should be avoided altogether, because their use is almost impossible to standardize. Often they are wrongly used to denote or set off special items or phrases. Instead, use the font format styles described in this *Formatting Guidelines* on page 57 and *Character Formats* on page 80.

### Example:

**Incorrect:** Click "Print".

**Correct:** Click **Print**.

**Incorrect:** The main file is called a 'master document'.

**Correct:** The main file is called a *master document*.

## Quotation Marks and Substitute Words

Don't use quotation marks to surround a word that's close to what you want. Instead, pick the right word.

**Incorrect:** Hypertext links provide “jumps” between related topics and information.

**Correct:** Hypertext links let you move quickly between related topics and information.

**Incorrect:** Writer acts as an “assistant” in creating your documents.

**Correct:** Writer helps you create your documents.

## Smart Quotes

Be sure to use *smart quotes* (“ ”), also called *curly quotes*, rather than straight ones. The exception is in code examples, which should use straight quotes.

**Smart quotes:** “abc” – ‘def’ – client’s

**Straight quotes (in code examples only):** "C:\path" 'file.txt'

## Semicolons

You can use semicolons to connect two short sentences, but use them sparingly. They can end up creating very long sentences. Consider breaking up the sentence into smaller sentences, or rewriting the entire sentence

**Acceptable:** IDM prints whatever is between the double quotation marks; if there is nothing, then nothing prints.

**Alternate:** IDM prints whatever is between the double quotation marks. If there is nothing, then nothing prints.

## Slashes

There are two types of slashes:

- / forward slash: it leans forward, to the right
- \ backward slash: it leans backwards, to the left

Because people confuse them, always include the symbol in parentheses after the phrase.

**Example:** Enter a backslash (\).

Don’t use a slash to indicate an *either/or* choice, for example, *and/or*, *he/she*, *employees/contractors*.

Don’t use a slash to replace *and*, for example, *Open/save the file*. Use either *and* or *or*, whichever is appropriate.

Only use a slash to express a combination, for example, *client/server application*, *employer/employee relationship*, *on/off switch*.

## Grammar Guidelines

### Abbreviations

Use abbreviations only when necessary. If you must use them, use words instead of symbols, such as *no.* instead of #. See also *Technical Abbreviations* on page 42.

### Acronyms

Spell out the acronym the first time you use it, unless it is sufficiently common that all readers will understand it. For example, you do not need to spell out IBM as International Business Machines.

Do not use an apostrophe to form the plural of an acronym. Use it only to indicate possession:

**Incorrect:** The six CPU's must be present on the system.

**Correct:** The six CPUs must be present on the system.

**Correct:** The CPU's chipset is the ATX100.

### Gerunds

A gerund is the *-ing* form of a verb, for example, *saving*, *printing*, *deleting*. Your chapter titles and headings should contain verbs if possible, and if so, they should be in a gerund format.

**Incorrect:** Save Your File, Print a Report

**Correct:** Saving a File, Printing a Report

Words like *Understanding* and *Working with* are vague, because they don't tell the user what they will do. Either pick a different gerund, or exclude it altogether.

**Vague:** Working with Model Documents

**Better:** Creating and Printing Model Documents

**Alternate:** Model Documents

### Possessive Case

Avoid using the possessive case if possible, because it can cause confusion:

**Incorrect:** The system will update the database's customer's record.

**Correct:** The system will update the customer record in the database.

**Correct:** The system will update the database record of the customer.

However, when common usage seems to indicate the possessive form, you can use the possessive.

**Correct:** You can print the client's document.

## Prepositions

A preposition links nouns, pronouns and phrases to other words in a sentence. It usually indicates the temporal (time-based), spatial or logical relationship of its object to the rest of the sentence as in the following examples:

- The file is **on** the computer.
- The **Name** field is **below** the screen title.

## Ending Sentences With Prepositions

It is a myth that you cannot end a sentence with a preposition. In fact, trying to avoid ending a sentence with a preposition often results in awkward wording:

**Incorrect:** Select the folder in which you want to place the file.

**Correct:** Select the folder you want to place the file in.

## Split Infinitives

In a split infinitive, an adverb is inserted between the *to* and the verb, for example:

*to boldly go*

In general, try to avoid split infinitives. In some case, they are acceptable and even preferred, because rewording them would lead to more awkward sentences or misplaced emphasis:

**Acceptable (split infinitive):** To quickly open the file...

**Awkward:** To open the file quickly,

**Acceptable (split infinitive):** To better understand this...

**Awkward:** To understand this better...

## Subject-Verb Agreement

Be sure to have the subject agree with its verb. Both must be singular or plural.

**Incorrect:** The master section and subsection prints to the printer.

**Correct:** The master section and subsection print to the printer.

## Subjunctive Mood

When a verb shows something that is implied but not actually true, it is in the *subjunctive* mood. Do not use the subjunctive mood in documentation.

**Incorrect:** If you had required a larger document, then you would have used the other printer.

**Correct:** If you require a larger document, use the other printer.

## Tense

Use the present tense, because it is simpler and more direct.

**Incorrect:** Click **Print**. The Print dialog will open.

**Correct:** Click **Print**. The **Print** dialog opens.



## Formatting Guidelines

This section describes the font formats and the specific words, phrases and syntax you can use in your documentation.

### Bolding

**Bold** all UI element names. For details, see *User Interface Elements* on page 59.

If a term does not appear in the UI, it should not be bolded because it is being referred to in a generic sense, for example: form, model document, generated documented, tree, and so on.

### Bullets

When listing a set of requirements or options, use a bulleted list. You can introduce the list with a colon, but do not use a colon in any headers.

#### Correct

To start Author Workstation you need

- the program installed on your machine
- a user ID and confidential password

### Code Font

Use the *code* font for paths, file names, commands that must be entered, text that the user needs to type or any type of code sample.xx

Use *code italics* to indicate values or parameters that the user actually needs to enter. Use underscores instead of spaces in these. This helps indicate and clarify that it is one single value, and not two or more. For example, *user\_name* is less confusing than *user name*.

Use square brackets [] in code examples to indicate an optional item or value, but assign the **Default Font** character style to the brackets so that they will appear in Times Roman. This distinguishes the brackets from the text that must actually be typed. Note this is also the Microsoft standard.

To generically indicate the folder where an application is installed, use *product\_name\_install\_folder*

### Examples

*ABC\_install\_folder*

The default folder is C:\ABC\_product\users\bin\

Click setup.exe.

setup *user\_name* [*division*]

(In the last example: *name* represents the name that must be typed, and *division* is also a value that must be typed but is an optional parameter.)

## Cross-References

### Simple Cross-Reference

A simple cross-reference is a single sentence in the following format:

For (*description of topic*), see *Topic Title* on page NN.

**Example:** For more information, see *Installing IDM* on page 10.

If you need to refer the reader to another document, italicize the name of the other document, for example:

**Example:** For information about how to install IDM, refer to the *IDM Installation Guide*.

However, where possible, direct the reader to a specific topic and page:

**Example:** For information about how to upgrade IDM, refer to *Upgrading IDM* on page 73 of the *IDM Installation Guide*.

See also *Cross-References to Other Books* on page 149.

### List of Cross-References (Related Topics)

If you need to list more than one cross-reference, preface them with a **Heading4** entitled *Related Topics*, then add the cross-references below as a bulleted list. Do not add any descriptive text to the cross-references.

**Example:**

#### Related Topics

- *Creating a File* on page 12
- *Printing a File* on page 32

### File Extensions

When referring to file extensions, do not use an asterisk (\*). Use a period followed by the 3 letter extension in lowercase, for example:

- You can import a .doc file
- The application uses .txt files.
- The program exports a .clg file.

### Heading Numbering

In some cases, especially in installation guides, you can use numbered headings to break procedures up into stages, main steps (Step A, Step B...) and then numbered steps.

## Italics

Use italics sparingly to emphasize something, especially if you are trying to distinguish two similar things that may be easily be confused:

**Example:** You need to upload the file to the *primary* server, not the secondary server.

You can also use italics the first time that you define a proper term:

*A model document is...*

## Naming Directories and Files

Use the courier font when naming directories and files; it helps to distinguish them.

**Examples:** C:\INSHARE, normal.dot, master.clg, manual.pdf

## Lists

Avoid periods and initial caps in lists unless they are complete sentences.

## Page Breaks and Keep With Next

Select *Keep with Next* if a topic is near the bottom of a page and would be split in two without a page break.

## Page Numbering

To ensure that the PDF page number matches the actual number displayed on the page, the numbering begins on the cover page.

## Related Topics

Related topics should be listed in order of their page number.

## Side Styles: Notes, Tips, Warnings & Important

Avoid using more than 2-3 side styles per page.

## User Interface Elements

**Bold** all UI elements to distinguish and identify them. The spelling and capitalization must match exactly what actually appears on the screen.

UI elements include menus, Web pages, modules, buttons, fields, window and pane names, screen and dialog titles, options, sections, commands, tabs, buttons and icons.

Capitalize and bold keyboard key names, such as **Enter**, **Esc**, **Ctrl**, **Alt**.

## Document a Step with a Button

Use the following example to document a button:

### To print a document

1. Ensure the printer is on.
2. Click the print button.



### Related Topics

- *Using Preferred Terms* on page 35
- *User Interface Terminology* on page 44

---

## Capitalization Guidelines

This section describes the guidelines for capitalization.

For the capitalization guidelines of UI elements, see *User Interface Elements* on page 59.

### Headings

The first and last words and all nouns, pronouns, adjectives, verbs, adverbs, and subordinating conjunctions (*if, because, as, that*, and so on) are capitalized.

Articles (*a, an, the*), coordinating conjunctions (*and, but, or, for*), and prepositions, regardless of length, are lowercase unless they are the first or last word of the heading. The *to* in infinitives is also lowercase.

### Examples

- Linking Files with Objects
- Creating a New Record
- Printing Files and Documents

The exception is in procedural headings (Heading4 in FrameMaker), which have an initial capital only, for example, *To print a file*.

For wording guidelines for headings, see *Gerunds* on page 54.

### Product Names

All company, product and trademarked names have initial caps, for example:

- Assembly Server
- IStream Author
- IStream
- Microsoft (not MicroSoft or MS)
- Queue Manager
- Request Builder
- Service Manager
- Tracker Enterprise
- Worker Agent

See also: *Changing the Product Name* on page 133.

Products with mixed case names include:

- WebLogic
- WebSphere

## **Role Names**

Role names have initial caps: Administrator, Author, Drafter, Submitter, Business Analyst, Reviewer, Publisher, and so on.

## **Other Proper Terms**

Most other proper terms should be in lowercase letters, unless otherwise noted below. If a product name is part of the term, it must still have an initial capital.

### **Examples of Other Proper Terms**

- attachment definition
- business unit
- IStream document, component definition
- distribution job
- explorer tree
- file system, form
- InfoSource
- key data
- letter definition, letter explorer
- master section, model document
- package
- repository, role
- section
- URL
- user, user profile
- Web
- Web browser
- Workgroups

## Numbering Guidelines

### Date and Time

Write dates and other periods of time as follows:

Incorrect	Correct
April 15 <sup>th</sup>	April 15
20th century	twentieth century
30s and 40s	thirties and forties, '30s and '40s
1960's and '70's	1960s and 1970s
In June, 2006, ...	In June 2006...
8:14 am	8:14 AM

### Fractions, Decimals, and Percentages

You can use any of following formats to describe portions of numbers:

1/4, .25, 25%. However, you should be as consistent as possible.

For simple fractions such as x/2, x/3, x/4, up to x/9, spell out the fraction:

**Example:** One third of the files will be uploaded.

If the numerator is greater than one, add a hyphen:

**Example:** Three-fifths of the file size is unused.

Use percentages to indicate a relative change in something:

**Example:** After applying the patch, the file size is reduced by 20%.

### Large Numbers

Express very large numbers in numerals and words.

**Incorrect:** 4,800,000, 4 million 800 thousand

**Correct:** 4.8 million

### Small Numbers

Spell out numbers from zero to nine. Use numerals for numbers 10 and greater.

## Writing Procedures

Procedures are one of the most critical areas of a document. Often, a user is under pressure to quickly locate and complete a specific task. It is therefore vital that each task is clearly titled and that each step accurately reflects the user experience.

Most procedures have more than one step, and you must therefore use a numbered list. If a procedure contains only one step, write it as one sentence using the Body style.

### Elements of a Procedure

A procedure topic is made up of:

- a top level procedure heading: usually a Heading1, Heading2 or Heading3
- a description or introduction to the procedure
- a procedure subheading
- the actual procedure

### Procedure Heading

The procedure heading must be clear, simple, direct, explicit and in a gerund format, for example: *Modifying Groupings*.

### Procedure Description

Every procedure should have at least a minimal description of what the procedure is, who can complete it (if only users with certain roles have access to the task) and what the procedure will do. Any important information or consequences for the procedure should also be noted. Use **Notes** and **Warnings** as necessary.

### Procedure Subheading

The name (or title) given to a procedure is critical.

Use the Method style in a procedure subheading. Use mixed case and no gerund, for example:

---

**Method: Print a file**

---

### Goal and Action Order

In the first step of a procedure, always state the goal or result of the procedure, followed by a comma, and then first action the user must to do complete the first step. The following example indicates the importance of this goal/action order:

**Fatal:** Click the red wire to detonate the bomb.

**Non-fatal:** To detonate the bomb, click the red wire.



Users will often read the first part of a step and ignore the rest. That's why it's important to state the goal or result of the procedure first.

## Giving Feedback

Indicate what the result of an action will be after a particular step, even if it seems obvious. For example:

1. To print a file, click **File > Print**.

The **Print** dialog box opens.

Do not use a number in a step that describes a result.

## Heading and Text Consistency

Important: Ensure that all of the elements in a procedure are consistently worded, that is

- the main heading
- the description
- the procedure subhead
- the final step of the procedure indicating the result

### Example

In this example, notice how all the words marked in blue are *consistently* worded. Variations in the wordings of any of these elements will confuse the reader.

### Printing a File (*Main Heading*)

You can **print a file** using any connected printer. (*Description*)

---

### Method: **Print a file** (*procedure subhead*)

---

1. Ensure that there is paper in your printer and that your printer is turned on.
2. Open the file you want to print.
3. Click **File > Print**.

The **file prints**. (*procedure result*)

## Documenting Alternate Steps

If there is more than one way to complete a step, separate each instruction and result with the following line:

– *OR* –

Apply the ***Bold Italic*** character style if this procedure will be used in online help.

For example:

4. Select **Print** to print the file.

The file prints.

– *OR* –

Select **Save** to save the file.

The file is saved to your system.

## Entering Special Characters

To indicate the inclusion of a non-alphanumeric character (any character or symbol other than a letter or number), include the symbol in parentheses in the phrase.

### Examples:

- Type a backslash (/).
- Ensure that you include a dollar sign (\$) in the variable name.

The exception to this is if the character itself is a type of parenthesis, in which case, no extra parentheses are needed:

**Example:** Ensure the filename is in square brackets [].

## Entered Data or Values

Use the courier font to indicate values or data that must be typed, entered or selected within a user interface:

### Examples

- In **Server Port**, enter 3044.
- From the **Printer** drop-down list, select HP Laserjet.
- In the **Database name** field, enter MS105.DBS

This font is used because it clearly distinguishes between the number 1 and the letter “l”, and between the number 0 and the uppercase letter O.

## Giving Examples

Give examples often. They clarify and reassure our readers they are on the right track.

## Examples of Examples

- In **Path**, enter the complete path in which you want to install the application, for example C:\IStream\Writer
- In **Grouping Name**, enter the new grouping that you would like to display, for example, **Region**.

## Right and Wrong

If there is a good chance of the user doing something the wrong way, give an example the wrong way, followed by the right way. Preface each example with **Incorrect** and **Correct**. Bullet each example if they are short.

### Example

Ensure that your password includes at least one letter, one number and one special character

- **Incorrect:** jason
- **Correct:** jason8%

If you have many related incorrect and correct examples, put them in a table.

## Using Graphics

This section describes the various types of graphic files you can work with.

### Screen Captures

Screen captures help ensure users they are in the right screen, and offer an excellent visual guide. However, be careful not to use too many, because this bloats the document, making it more difficult to navigate. It also alienates the power users who don't need so many visual clues.

Keep in mind that software is dynamic and continually changes. The more screen captures you have, the more you will have to update in each release. Therefore, only use screen captures where they add value to the relevant text. Note that extra training material geared toward novice users will have more screen captures than the product documentation.

In general, use screen captures in *Overview* chapters that describe the overall layout and elements of an application. Avoid them in Installation Guides, because the installation process itself is a Wizard that should be self-descriptive.

Ensure that the content and context of the graphic is relevant, and that the data in the graphic is realistic yet made up. Ensure no actual company or person's name is displayed.

Use the TIF format in your captures. JPEG produces a "mottled" effect.

Leave the cursor out of the screen shots, unless you are indicating something to be selected from a menu.

See also: *Poor or Missing Graphics* on page 172.

### Truncating Screenshots

Some screenshots are too long to fit on one page. For these long screens, use the Wave edge effect to indicate the screenshot is truncated. Use the following Wave Edge settings:

- **Effect size:** 8
- **Apply to:** lower edge only (select only the down arrow button)
- **Shadow depth:** 17
- **Position:** lower right
- **Outline width:** 0

Note: Scroll down to the bottom of the Wave Edge settings pane and click **Save as default settings** to save these settings.

### Scrolling Screenshots

To capture a window that is bigger than a screen, use the scrolling capture. This is especially useful when you are trying to get the best resolution for large windows that will not be printed (e.g. for online help or e-learning).

1. Display the large window as wide as possible while showing the capture area. (Acrobat was used successfully, set to screen width).
2. Set Snagit to Scrolling > Custom Scrolling.
3. Set the scroll delay to 500ms.
4. Start the screen capture.
5. Left-click and drag to select the visible portion of the window.
6. Release the left mouse button.
7. Click the scroll-down button in the application's window.  
Snagit will slowly scroll the window down while building the capture.
8. Click anywhere to stop the scrolling and finish the capture.
9. Save the file.

See also:

- *Snagit* on page 175
- *Inserting Graphics Into Word* on page 185

## Cartoons/Clip Art

Cartoons and clip art are usually not appropriate in technical documentation.

## Size and Alignment

The size of a graphic is determined by how large it needs to be to serve its purpose. For example, if it needs to indicate what all the buttons are in a given window, the screen shot should be big enough so that the button labels can be read.

Alignment of the graphics is critical in ensuring a clean, coherent layout. Align small graphics at the left text margin. Large graphics that are wider than the left text margin allows can extend into the white space of the left margin as necessary. Graphics in a procedure should line up with the text (use Body2 style in FrameMaker).

For large graphics in FrameMaker, set the anchored frame to

- below current line
- centre
- floating

## Borders, Captions, and Annotations

Borders are usually unnecessary for most graphics and screen shots.

Captions are a useful tool but can make the document seem overly technical, so be careful not to overuse them.

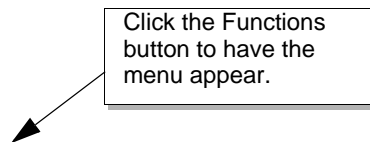
Annotations (text that labels the different parts of a graphic) are crucial to make the most of a graphic or screen shot. Keep them well separated from one another,

with lines pointing directly to that which they describe. Use 10-12 point Arial, and the second or third line width selection FrameMaker.

^^Andrew to add standards for:

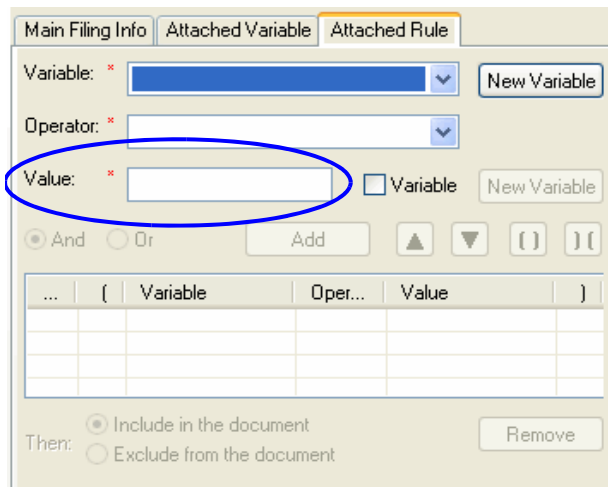
- text in boxes
- alignment of boxes
- types of arrowheads - 90/16/12 filled
- arrow arms, color of arrow head/arms and background
- highlight graphics (circles, boxes), drop shadows

Copy the following grid (table) to create a callout box with a drop shadow.



Ensure the annotation is clearly visible and legible. Remember, your user has the actual screen in front of them—the screen shot is meant to be just a close representation.

To indicate a particular UI element, use a 1.5 point blue oval.



## Adding a Border in FrameMaker

Although borders are usually not necessary, if you *do* need to add one around a graphic, here are the steps:

1. Click the graphic itself (*not* the anchored frame that is around the graphic).

2. Click the triangle near the upper right corner of your screen to display the **Tools** pallet.
3. Click the dotted square button in the left column to apply the border. Ensure that the pen pattern is set to solid. If it has a black box appears next to the dotted square button.
4. The stripped button sets the pen width: .5 to 1 point is usually enough.
5. The rainbow button sets the color: ensure this is black to black.
6. The white, grey and black semicircles button sets the tint (the shade of the line). Ensure this is 100%.

## Visio

Use flowcharts and diagrams to graphically illustrate a process, a workflow or the elements objects. Use fairly large Arial fonts (10-18 pt.), bold the more significant elements and use thick lines. If your graphic is fairly large and has to be shrunk to fit on the page, all the fonts and lines will shrink accordingly. Therefore, you need to ensure all the elements are properly sized.

Note: See *Embedding (Importing) File Objects* on page 150 for information about importing Visio files into Frame.

## Using Tables

Use a table to present a series of parallel data in a logical format. Don't use a table if a graphic, list or text would work just as well.

Unless the text is a UI element or proper term that needs capitalization, don't use initial capitals in a table. Also do not use periods, unless you have a complex table that contains complete sentences.

### Example

Option	Description
State Value	the name of the State
State Code	the State Code
LOB Value	the Line of Business name

### Tables and Page Breaks

If a table appears to be breaking too soon:

1. Click anywhere in the table.
2. Press **Ctrl-T** to display the **Table Designer**.
3. In the bottom-right corner, set **Orphan Rows** to 1.



## Writing Error Messages

As information developers, we are often asked by development to help write error messages.

At a minimum, an error message must

- clearly state what the problem is  
*and*
- explain how to fix it or suggest further action

Note: Do not use exclamation marks in error messages.

An error message should not state what the software can't do, or how severe the error is.

### Example

- **Incorrect:** Critical Error – Correspondence can't complete the request. Letter generation failed.
- **Correct:** The Letter Definition you selected has been deleted. The letter was not generated. For help, see the Knowledge Base.

### Examples of Well-Written Error Messages

- Enter a number greater than zero in the Number of Copies field.
- Enter a name in the Name field.
- Select an item from the Type drop-down list.
- Enter a valid date in the Termination Date field.
- The Number of Copies must be numerical, greater than zero, and not null.
- A Component Definition needed for this letter is not available. The letter was generated without this Component. For help, see your Correspondence Administrator.
- An error occurred while retrieving data from the data source. The data source is not available. The letter was saved, but was not released for distribution. For help, see your Correspondence Administrator.

Tip: Spell check your errors in Word.



# Chapter 3

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## Templates

The chapter describes the standard FrameMaker template that the Technical Writing team uses. This template ensures a consistent look, feel, and structure throughout all our documentation. This helps us to convey a professional image to our customers.

This chapter describes:

- *Setting Up Chapter Numbering* on page 76
- *Paragraph Styles* on page 77
- *Character Formats* on page 80
- *Conditional Text* on page 81
- *Tables* on page 82
- *Colors* on page 83

**Important:** Avoid overriding any aspect of this template, including paragraph and character styles, page layouts, headers, footers and so on, because this will cause variations in the template. The only override you can use without explicit permission is the *Keep with Next* feature: see *Keeping Paragraphs Together* on page 154.

**Important:** Any overrides to the headers or footers must be approved by the Business Analyst.

## Setting Up Chapter Numbering

This file is set up so that the chapter number will correctly increment by one for all your chapters. This requires that the chapter numbering be changed for your first chapter:

### To set up chapter numbering for your first chapter

1. In the Frame file itself, select **Format > Document > Numbering > Chapter** and change the **Chapter #** to 1.

In the book file, right click the chapter and select **Numbering > Chapter** and change the **Chapter #** to 1.

Note: Your **ChapterNumber** style should be tagged as **Print** conditional text if you are using your FrameMaker book to generate online help.

### To make this chapter an Appendix

- change the **ChapterNumber** style to **AppendixNumber**

A *Glossary* chapter is identical to a regular chapter, except that it uses the **GlossaryItem** and **GlossaryDefinition** styles throughout.

## Paragraph Styles

### Heading Styles

**ChapterNumber** and **Chapter Title** are at the beginning of each chapter.

**Heading1** (shown at the top of this page) begins at the top of a new page. It marks the start of a major section in a chapter. Ensure there is some body text after every **Heading1**.

### Stage 1: Heading1N

Use the Heading1N style for stages in install and tech guides.

### Heading2 Style

A **Heading2** is always preceded by a **Heading1** and its body text.

Ensure there is some body text after every **Heading2**.

### Heading3 Style

A **Heading3** is always preceded by a **Heading2** and its body text.

Ensure there is some body text after every **Heading3**.

Note: **Heading1**, **Heading2** and **Heading3** sections will appear as **separate** Help topics and TOC items in a generated Help project. Keep this in mind when structuring the hierarchy of your projects.

### Heading4 Style

A **Heading4** is always preceded by a **Heading3** and its body text.

Also use **Heading4** for **Related Topics** lists. Special formatting is required: for details, see *List of Cross-References (Related Topics)* on page 58.

---

### Method: Method Style

---

Use the method style before any procedure. Using the singular, gerund format, with an initial cap, for example:

- Printing a file
- Submitting a filing

### Heading Guidelines

- Do not following a heading immediately with another heading. Always include some body text immediately after a heading

- Do not skip headings. That is, do not go directly from a **Heading1** to a **Heading3** or **Heading4**
- Follow the guidelines when naming **Headings** and **Chapters**: see *Gerunds* on page 54.

## Body Styles

**Body Style:** The body style is used for the main body text in your document.

Use **Body2** to indent to the second level.

Use **Body3** to indent to the third level.

Use **Body4** to indent to the fourth level.

## Number Styles

1. Use **Numbered1** for the first step in a procedure.
2. Use the **Numbered2** for the second and subsequent steps in a procedure.
  - a. Use **NumberedA** for the first sub-step in a procedure step.
  - b. Use **NumberedB** for the first and subsequent steps in a procedure step.
    - a. Use **NumberedAsub** for a step within a substep.
    - b. Use **NumberedBsub** for subsequent steps within a substep.

**Step A:** Use **StepA** for the first major section of a complex procedure.

**Step B:** Use **StepB** for the subsequent major sections of a complex procedure.

Note: The **StepA** and **StepB** styles are used extensively in our installation guides.

## Bullet Styles

- Use the **Bullets** style for the top level bullet.
  - Use the **Bullets2** style for the second level bullet.
    - Use the **Bullets3** style for the third level bullet.

## Side Styles

The following side styles insert a bold word into the left margin:

Example: Use **SideExample** to indicate an example.

Example: Use **SideExampleCode** to indicate a code example.

Tip: Use **SideTip** to indicate a better or easier way to use the software. Do not use a tip to describe a *fact*; use it only to describe a specific *action*.

Note: Use **SideNote** for special information, facts, and reminders.

Important: Use **SideImportant** to describe significant information about the use and understanding of the software.

Warning: Use **SideWarning** to describe *critical* information that if ignored, may cause errors or result in the loss of information.

Note that the sentences in a side style must be complete sentences, and must therefore start with a capital, and end with a period.

Use the StepA and StepB styles in complex procedures.

**Step A: Lorem ipsum dolor sit amet, consectetur lea adipiscing elit. Mauris placerat rhoncus nisl a**

**Step B: Lorem ipsum dolor sit amet, consectetur lea adipiscing elit. Mauris placerat rhoncus nisl a**

Use Step B after step A.

## Assorted Styles

Callout - used for text callouts

## Code Styles

For use see, *Code Font* on page 57.

```
C:\Windows\Win.ini
```

Use the code online style for code that has an extremely long line length.

## Character Formats

The character formats apply to specific characters:

- **Bold** – required only for online help projects
- ***Bold Italic*** – required only for online help projects
- `Code`, **Code Bold** – use these format to format parts of a sentence; if an entire sentence is in the courier font, use the Code paragraph styles instead: see *Code Styles* on page 79 for use rules. For use see, *Code Font* on page 57.
- [Hypertext](#) – use this format in cross-references for which you do not want to display the page number; this format is used in our glossaries
- *Italics* – required only for online help projects
- No spelling – use this format to disable spellcheck for specific text
- Sidebar – this format mimics the font used in the style sides
- SMALL CAPS – you would not normally select this; it is used “behind the scenes” in various master pages

Note: Avoid overriding character formats, because this will cause variations in the template.



## Conditional Text

Conditional text is a powerful feature in FrameMaker that allows you to mark text as being a certain type or *condition*. You define the name of the condition, and can create as many conditions as you need. You then choose to hide or display text that has a certain condition.

The following list describes each condition. Note that not all documents have all these conditions.

- Use the **Internal** condition for specific internal notes, questions and comments, such as areas of the document that you need to follow up on and the date or version of the current draft. (Mark each note with a double carat (^) so that you and the reviewers can easily locate them. Don't forget to hide this text before you release the final draft!
- Use the **Online** condition to mark text that should be included only in the online Help.
- Use the **Print** condition to mark text that should be included only in printed manuals (PDFs).
- Use the **External** condition to mark text in a common section that appears in both training and external documents that should be included only in external documents, for example, User Guides.
- Use the **Training** condition to mark text in a common section that appears training and external that should be included only in the training document.

### Conditional Text Restrictions

When multiple conditions are applied to text, they are logically or-ed. Which means that as long as you have selected *any* condition to display, the text will be displayed, and not hidden. Since this is usually not the desired result, you have to create conditions that combine two other conditions. Carefully plan your conditions before creating them!

In a text inset, ensure that the end of document marker is unconditional, or you may get an error. If all the entire contents of an inset are conditional, make the text inset itself conditional, and not the actual text in the inset.

### Hiding and Displaying Conditions

Important: Please note the following points:

- Before publishing a final PDF, ensure that you have selected the correct text to hide and display, and that you have turned the condition indicators off.

Note: Tracker documents have particularly complex conditional text settings. Before you generate any Tracker PDF or online Help file, double-check that you have selected the correct conditions to hide and display. Also ensure that you have selected the correct book, because certain books apply only to certain Tracker versions. For details, see *Displaying Conditional Text* on page 117.

## Tables

There are only two tables in the template.

Note: If your document will be used in online help, ensure that the table is within a body paragraph tag. Other tags may cause the table text to shrink in size.

### Basic Table

Use this table in most cases. You can override the left and right indents as necessary to make the table wider.

Use the <b>TableHeading</b> for each heading	<b>TableHeading</b>
Use <b>TableText</b> for text in the table.	TableText
<ul style="list-style-type: none"> <li>Use <b>TableTextBullets</b> for bulleted text in the table.</li> </ul>	
TableText	TableText

### Contact Info Table

Use this for the **Contact Information** section, or wherever you need a table with no lines.

Tabletext	Tabletext
Tabletext	Tabletext

### Basic Table with Bullets and Vertical Headings

The following table is a basic table with bullets and vertical headings:

	text	text	text	text	text	text
text	●	●	●	●	●	●
text	●	●	●	●	●	●
text	●	●	●	●	●	●
text	●	●	●	●	●	●

## Colors

Select **View > Colors > Definitions** to see the list of colors.

The standard FrameMaker colors are:

- Black
- Red
- Magenta
- Cyan
- White
- Green
- Blue
- Yellow
- LightGray

**LightGray** is the only custom colour in the template. It is a 10% screen of black, and is used in table heading rows. This color is only in chapter files: it is not in the cover, index or TOC files.

You should delete any colors that are not in this list.

Avoid adding any custom colors if possible, because it makes it more difficult to maintain standard templates.



# Chapter 4

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## Document Types

The types of documents we work on include:

### External (Product) Documents

- *User Guides* on page 86
- *Installation Guides* on page 87
- *Technical Guides* on page 89
- *ReadMe Files* on page 90
- *Release Notes* on page 91
- *Addenda* on page 92

### Training and Internal Documents

- *Training Documentation* on page 93
- *Internal Documents* on page 94

This chapter gives a high level overview of these documents, including their standard content. For detailed information about common *elements* in most of these documents, including the TOC and index, see *Document Elements* on page 95.

Note: For information about the list of current documentation projects, see *Documentation Projects List* on page 106.

## User Guides

A *User Guide*:

- describes a product and how it works
- includes a description of the general product layout and elements
- shows how to use the product
- describes all the screen and fields in the product
- includes all the procedures a user can perform in the product

Because readers include non-technical users, you need to take extra care to ensure they understand all of the product concepts and procedures.

Note: The *User Guide* forms the contents on the *Online Help*, for projects that require *Online Help* as part of the product.

Warning: If the FrameMaker files are being used to create online help, ensure that the filenames do not contain spaces, because these will cause problems with the help files. All FrameMaker book files also cannot contain spaces in their filenames.

### Context-Sensitive Help

Context-sensitive help is available in some of our products by the pressing the **Help** button within a specific screen. You need to work with the developers to ensure that the correct file is displayed, and test the build to verify this.

## Installation Guides

An *Installation Guide* describes how to install, set up, configure and upgrade an application. It is generally for advanced users such as system administrators, database managers and other MIS personnel.

### Documenting Software Requirements

Software requirements are listed in both the *Installation Guide* and *Release Notes*, but in different degrees of detail.

The *Release Notes* contain specific version and service pack (SP) numbers, whereas the *Installation Guides* do not.

The reasons for this are:

- we can release another version of the product on new platforms without having to change the *Installation Guides*
- we can support additional platforms on the existing release and don't have to worry about the *Installation Guide* being inaccurate

### Examples

Release Notes	Install Guide
Windows 2000 Server SP4	Windows 2000 Server
Oracle 8.1.6	Oracle
Microsoft SQL 2000 SP3	Microsoft SQL 2000
Microsoft Word 97 (version 8.0) SR-2b	Microsoft Word 97

Note: In the *Installation Guide*, including the following note near the top of the *Requirements* section:

For specific versions supported, please refer to the *Release Notes*.

Note: Review the PRD and the *Product Release Matrix* to determine which software versions are supported. The *Product Release Matrix* is located at:

T:\Current Info\Products\Product Matrix.doc

### Documenting Different Installation Scenarios

The scenarios you may need to document include combinations of:

- different operating systems
- different databases (Oracle and SQL)
- different configurations: some applications may be installed separately or together with others on various servers

You need to be clear about which specific combinations you will document. Documenting many scenarios can be complex and redundant, therefore you should only document the most common ones.

## **Documenting Upgrades**

You also need to clearly define the specific *upgrade* scenarios that you will document. There can be many different combinations based on the product versions and paths, including whether users can skip a version.

For example, can you upgrade directly from version 3.1 to 3.3, or do you need to upgrade to 3.2 first, before upgrading to 3.3? This information should be in the PRD.

You also need to define for which operating systems, databases and configurations you will document upgrade procedures, as described in *Documenting Different Installation Scenarios* on page 87.



## Technical Guides

There is a wide variety of technical guides that we maintain, including:

- Administrator's Reference Guides
- Technical Guides
- Toolkit/SDK Guides

The challenge in document these guides is that, unless you are familiar with the content, it is difficult to verify its accuracy. In general, work with the SMEs to gain as much high level understanding of the content as you can. The more you know about the content and its meaning, the more accurately you can document it.

## ReadMe Files

See the current ReadMe template for the general format and special considerations. Generally, ReadMe files contain only basic information about the contents of the installation package. More detailed information is in the *Release Notes*.

Important: **Do not include any client company names in the Readme file.**

Warning: Any hidden, internal or conditional text will appear in the Word file if hidden text is enabled in Word. Use a Word macro to delete any hidden Word text.

### ReadMe Files in FrameMaker

Most ReadMe files are set up in FrameMaker and use standard text insets. To properly save the FrameMaker file as an RTF, save it in Microsoft RTF 1.3 format.

### Cumulative Patch ReadMes

Some patch or hotfix ReadMes will include all the updates from the previous set of patches or hotfix. If so, the current, last ReadMe should list the previous issues resolved in reverse chronological order, as follows:

This patch addresses the following issues:

Patch 4: Description - Date

(Description of issues fixes)

Patch 3: Description - Date

(Description of issues fixes)

etc.

## Release Notes

*Release Notes* are an important document, because they include marketing information that highlights the features of a new release or product.

Work closely with the BA and product manager when developing the *Release Notes*. Often they will develop most or all the *Release Notes* themselves, but you still need to ensure that the grammar, spelling, formatting, layout and wording are all correct.

*Release Notes* contain all or most of the following sections:

- **General Information:** describes the product at a high level and its main features and benefits; the BA or product manager should supply this section.
- **Supported Platforms:** do not say *Installation Requirements*; this section may also include products that are no longer supported

Note: Review the PRD and the *Product Release Matrix* to determine which software versions are supported. The *Product Release Matrix* is located at:

T:\Current Info\Products\Product Matrix.doc

- **New and Enhanced Features:** a high-level description of the main changes to the product
- **Known Issues and Limitations:** descriptions of the current problems: include the ClearQuest tracking numbers as hidden text, along with any internal comments, so that this section can be tracked and updated as necessary in each release. You will need to develop the wordings for these issues, and work with the BA or product manager to ensure they are appropriate.
- **Installing Product name:** an optional section that includes critical installation and upgrade information
- **Documentation:** an optional section that includes a list of the documentation

See also *Complete the Final Release Notes* on page 139.

## Addenda

An *Addendum* is used if a new version of a product is created containing new features that require a detailed explanation, and there are no plans to re-release the entire documentation set. (This often happens in minor releases.)

An Addendum describes the new features, including any limitations that are not going to be fixed until a subsequent release of the product.

After the *Addendum* is released with the product, you will need to carefully transfer the contents of the Addendum into the relevant locations of the affected guides. You will probably need to further rewrite and edit the text to ensure it fits properly with the existing material, and flows logically into it.

Note: *Addenda* is the plural form of *Addendum*.

## Training Documentation

Training documentation includes:

- detailed training manuals
- course overviews, which are posted to the web
- high level PowerPoint files

Important: Training documentation generally has a more informal tone than external documentation. It also uses a different FrameMaker template.

### File Formats and Location

Most training files are currently in Word format or PowerPoint format, and are located at:

S:\CUSTSPRT\TRAINING

However, the Tracker training material *has* been converted to FrameMaker. The advantage of the FrameMaker format is that it allows for easy text reuse by using text insets among the training and external documents. Therefore, one of the technical writing department's long term goals is eventually to convert all Word files to FrameMaker.

## Internal Documents

In addition to the various external documents, occasionally you will need to create or review an internal document. Although the standards for these documents are not as high as our external documents, you should still strive to follow the guidelines in this *Writer's Guide*. The document should have a good introduction or overview that describes who and what the document is for. The information should be clear and logically organized. All necessary overviews and procedures should be included.

Important: On the cover of any internal document, and on the footer of each page, ensure that you indicate the document is for *Internal Use Only*.

# Chapter 5

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## Document Elements

This chapter describes the common elements in most documents. It includes information about;

- *Variables and Names* on page 96
- *Cover* on page 97
- *Table of Contents* on page 98
- *Chapter* on page 99
- *Glossary* on page 101
- *Appendix* on page 102
- *Index* on page 103
- *Naming the FrameMaker Files* on page 104

Note: For a high level overview of the different *types* of documents, see *Document Types* on page 85.

## Variables and Names

FrameMaker variables allow your documents to be easily reused and updated.

All documents contain the following variables:

### Product Names

The product name is made up of these two separate variables to allow modularity. There are times when we don't want to include the first part of the name in the text.

- **Product** is the general category or *family* and is usually `IStream`.
- **Product2** is the actual name of the product.

Tip: Where possible, always use the variable instead of typing out the product name. This way, if the product name ever changes (as it often does), the name will automatically be updated when you do a mass import of the product name variable. The Publisher (formerly Doc Services) documentation was updated this way.

See also: *Changing the Product Name* on page 133.

### Version

The version number of the product. This changes in each release.

### Document

The name of the document. Standard names include:

- User Guide
- Administrator's Guide
- Installation Guide
- Technical Guide
- SDK
- Addendum

### Month and Year

These two variables are the month and year in which the product is to be released. They are used in the cover page only.



## Cover

The cover easily identifies the document. It includes the copyright information, for which there are two standard text insets: one for all products, and an additional one that is inserted below the first, and is for Tracker products only.

Use the cover page template to create your cover. Name the file

0 Cover . fm or 00 Cover . fm.

## Table of Contents

Use the TOC template to create your TOC. TOCs usually display only to the Heading 2 level topics. However, if you need the extra detail, and it will not make your TOC too large (that is, more than 10-12 pages), you can include Heading 3 topics.

Name the TOC file 0 TOC . fm or 00 TOC . fm.

### Related Topics

- *Readability, Chunking and Headings* on page 31
- *Structure* on page 32
- *Creating a TOC Proposal for New Documents* on page 110
- *TOCs – Adding Step Numbers* on page 157

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## Chapter

*Chapters* make up the main body of your document.

Include a brief introduction to set the tone for the chapter. Provide a bulleted cross-referenced list of all the Heading1 topics in that chapter, unless such a list would be excessively long: more than 10-12 items. Introduce this list use the following text:

This section includes describes:

Try to word your Heading1's so that they will fit with this introductory sentence. If you cannot, use the following, more generic sentence instead:

This section includes contains the following topics:

### Overview Chapter

The first chapter is named 01 Overview.fm or 1 Overview.fm and includes these sections in this order:

#### First Page

The first page welcomes the user to the guide and gives a brief overview of the product, the guide, and its intended audience. As with all chapters, it includes a bulleted cross-referenced list of all the Heading1 topics in that chapter.

The standard opening line in are documents is:

Welcome to the *Product Book Name*.

#### Document Conventions

Use the *Document Conventions* text inset.

#### Overview of *Product*

Contains a high-level description of the product; you can use the full product name as the title for this section.

Always include this section in a user guide, where it should describe the main features of the product.

#### *Product* Documentation

Lists and describes all of the documentation supplied with the product; use the common text inset for the product.

#### Using the Online Help

Use the *Using the Online Help* text inset in *User Guides* for which you are also supplying online help

## Password Guidelines

Use the standard text inset: *Changing Your Password*.

Here is some additional information about these guidelines:

- You can configure the maximum and minimum length, though the database (currently) enforces a max of 32 (this could be changed without affecting the code)
- You can configure whether the password needs non-letters (numbers and special characters count as non-letters; basically anything not a-z)
- You can configure whether the password needs to be mixed case.
- If your password needs non-letters and mixed case, it needs to be a minimum of three chars, even if the minimum is configured to one or two.
- Passwords can contain spaces. Passwords can, in fact, contain any characters that the web browser can transmit to the server.
- Passwords don't need to be different than the user id. This is not configurable.
- You can configure whether USERNAMES can contain spaces, and their maximum length, but not whether they are case-sensitive (they are insensitive).

## Glossary

A *glossary* is an important reference for our readers. It defines all the technical terms used in the document. Cross-reference the first occurrence of a definition if it is used within another definition, using the `Hypertext` character format.

Name the Glossary file `9 Glossary.fm` or `99 Glossary.fm`.

## Appendix

Use an *appendix* to store any information that does not conveniently or appropriately fit into any of the other chapters. This includes highly technical or rarely used information. Ensure that your appendices are numbered using letters, not numbers, that is: Appendix A, Appendix B, and so on.

Avoid having more than 4-5 appendices. Consider consolidating them into fewer chapters.

Give the Appendix file a self-descriptive name, prefixed with one or two digits, for example, 11 App A DTD.fm.

## Index

An index is one of the most important parts of any document, because it is usually the place that users turn to first to find the information they need. A good index saves users time, and helps them get the information they need without having to call customer support.

Remember that each user will search using different words or terminology. One user may look under *printing*, *preview* for a topic while another will search for *view*, *print preview*. Think about all the different ways a topics could be searched for, and build this into your index. Redundancy is better than having an index that is too thin. Index as much as possible, but restrict your index three levels of extrapolation.

Name the Index file 9 Index.fm or 99 Index.fm. to ensure that it appears at the bottom of the file listing in Explorer.

Note: A PDF book containing an index that is more than one page should include the GroupTitlesIX para style in the PDF bookmarks. For information about how to set this up, or if this style is missing from your PDF setup, see *Paragraph Style Missing in PDF Setup Bookmarks* on page 162.

### Related Topics

- For information about how to format and create an index entry in FrameMaker, see *Indexing* on page 153.
- For information about how to use IxGen to create and manage your index, see *IxGen* on page 181.

## Naming the FrameMaker Files

Suggested filenames are given for each of the files described in this chapter. All filenames must be prefixed with a number to ensure that the correct file order is maintained, and to help identify the file.

- 01 Overview.fm
- 02 Working.fm
- 03 Options.fm

Note how the filename number corresponds to the chapter number.

Here is a summary of the filenames:

- 00 Cover.fm
- 00 TOC.fm
- 01 Overview.fm
- **Body chapters:** 02 *Filename*.fm, 03 *Filename*.fm, 04 *Filename*.fm and so on.
- **Appendix:** *NN App A Filename*.fm, where *NN* is the number following the last body chapter
- 99 Index.fm

### Filename Number Prefix

In the above list, the filenames have a two-digit prefix. This ensures that the 01 to 09 numbered files appear in Windows Explorer before the number 10 file. Although you could use a single digit if you have less than ten files, the advantage of using two digits is that it gives room to grow should your document ever include more than nine body chapters.



## Chapter 6

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# Documentation Process

This chapter describes the entire documentation development process, from conception and planning, through to reviewing, editing, and delivery. It is important that all technical writers follow this process to ensure that all reviewers have a consistent and predictable procedure to follow.

## Overview

All documents *must* go through specific stages and procedures before they can be officially released. Writers and reviewers must follow the specific guidelines and processes from the planning stage, through to the reviews and final release.

### Tracking Tasks and Information

Throughout the development process, it is important to document and track all your required tasks, and to note any important information, including:

- meetings
- required changes
- important dates
- specific things to know about the product and its releases and documentation
- **dependencies:** Do you need information from a developer before you can proceed? Document when you asked for this information, and when it's needed.

Keeping track of this information not only helps streamlining your practices, but it is a record of what happened on the project. You'll find this helpful in your project post-mortem, and it's invaluable if you run into a problem. By referring to your notes, you will be able to determine where the problems occurred and who was involved. This helps you duplicate your successes, too.

Some of this information will be in your documentation plan, however in addition to this plan, you can use the following tools to stay on top of your projects:

See also *Tracking Changes, Problems, and Information* on page 115.

### Documentation Projects List

The T drive contains a `Documentation` folder that contains `Documentation.xls`, the documentation status list. (The S drive contains a copy of the original file that is on T drive.)

This is an important spreadsheet that lists all current and future documentation projects, sorted roughly in chronological order by end date. It includes the following information:

- product name and version
- document name
- documentation freeze date and gold date
- notes and status
- owner – the technical writer assigned to this particular document

Managers and the technical writing team review this spreadsheet regularly to get a quick, high level view of the status and workload for all the projects. Its helps ensure that the work is evenly distributed and that all projects are on schedule.

Tip: Use the drop-down arrows at the top of any column to filter the list.

Important: It is *critical* that you update this regularly when new information becomes available. If the status, dates, names or any other aspect of your projects change, you must update this spreadsheet right away so that everyone is aware of the changes.

## Microsoft Outlook

Microsoft Outlook has a number of handy ways to track your tasks, including:

- marking emails with a *follow-up* flag: all emails marked as such with be displayed in the **For Follow Up** folder, sorted by flag color
- organizing your emails into subfolders
- creating **Tasks**, **Notes** and **Calendar** appointment entries

Note: Create tasks or appointments to act as reminders for all your critical dates. These include dates when you expect drafts to be returned or required information to be given to you, based on your doc plan schedules.

Important: Do not attach files to meeting requests because this takes up unnecessary space on our servers.

Tip: You can access your Outlook email online from the following URL:  
<https://webmail.whitehilltech.com>

Set **Client** to **Premium** and **Security** to **Private Computer**.

## Word Processors

For more complex information that you need to keep track of, use Word, WordPad or NotePad to centralize and track the information you need. Create informational documents about your documentation, and include everything that you think you might need to know that is not already in your doc plan.

Note: Many of the folders on T drive have ReadMe or other informational files. Consult and update these files as necessary.

Important: **Avoid storing any notes, files, reports or any other informational documents locally.** Instead, keep them in the respective Info subfolder on the T drive. This ensures that all writers can access and review these documents. **Only store files locally that are not relevant to the documentation.**

## Network Resources

Our source, reference and other files are stored on various network drives.

Warning: **If you delete a file from any other network drive, it does NOT go to your Recycle Bin! Therefore, please use extreme caution when deleting files from any network drive!**

### The Tech Writers' Drive (T Drive)

The *Tech Writers'* drive (or *T drive*) is our main working location. We store all our current documentation source files and related information on this drive. This drive is available *only* to the technical writing team; no one else can access it.

The T drive is mapped to `T:\\Torfs02\\tech_writers`

Important: When working on FrameMaker files on the T drive, ensure that you have enabled file locking: *Locking FrameMaker Files* on page 154.

### File Backup

Files on the T drive (as on all network drives) are backed up by the MIS department on a regular basis. However, you should always make copies of files before changing them, especially if there are major changes. This allows you to easily revert to an earlier version.

MIS will restore an old backup on request: see *MIS Department* on page 211.

### Informational Files

The root of T drive, its main folders, and many of its subfolders contain various WordPad (.wri) files that describes the folder's contents or contain current information about the respective product or document in which the file is located. You should look through these files regularly to learn the latest about a product and its documentation, or the contents of a certain folder.

Important: This guide does not contain current information about any product or document. As described in the previous paragraph, this information is in the various informational files on the T drive.

For descriptions of some of the general information on the T drive, see *Assorted Information* on page 201.

The T drive has a `Network files` folder that contains shortcuts to other network resources, described next.

## Other Network Drives: N and S

### N Drive

The N drive is the main development drive. It contains the `Development` and `Released` folders in the `N:\\InSystems Software` folder. Post documentation

drafts that are in development to the corresponding product `Development` folder. You will then later move them to the `Released` folder, that contains the final, released files.

The N drive is mapped to: `\\fpsmar02\N-Drive$`.

## S Drive

The S drive is a location for storing files that everyone in the company can access. It contains most of the training material documentation, and the documentation list (described in *Documentation Projects List* on page 106). It is also a convenient place to store large, temporary files that you need to distribute to others. Do not store any FrameMaker source files on this drive.

## Personal Backup Drive: X

The X drive is your personal, private drive that only you can access. Ensure that you have backed all your personal documents to this drive. These are usually the files in your `My Documents` and `My Favorites` folder.

**Note:** Keep only *personal* or *private* files on your hard drive and X drive; files that the other technical writers do not need to see. All documentation, technical writing, company, product, and informational files and notes should all be in the appropriate T drive locations.

**Tip:** To quickly and easily back up your personal files, create a single briefcase on your X drive and call it **Backup**. Then, copy your `My Documents` and `My Favorites` folders to this briefcase. Now, whenever you update this briefcase, all your personal documents and favorites will automatically be backed up in one step, instead of two.

## Stage A: Researching the Project

Before doing any writing or editing, and even before creating the documentation plan, you must clearly think about and carefully plan your documentation projects.

You need to determine:

- the changes required to existing documents, including what topics are going to be covered
- the scope and structure of any new documents: see *Creating a TOC Proposal for New Documents* below
- how much detailed is required
- the audience for whom the documents are intended; *know your audience* are words to live by

Note: Careful planning at this early stage will save you much time and grief later. Remember: no one *plans to fail*, they simply *fail to plan*.

### Gathering the Information

The documentation you need to research and then later use to complete the documentation plan and the actual documentation includes:

- Design Documents
- Requirements Documents (PRD)
- Scope Documents
- Specifications Documents
- **Use Cases:** These are a valuable way to help you determine the information the user needs to have. They explicitly spell out every step required to complete a procedure. Much of the information in use cases may not be relevant: your challenge is to identify what *is* relevant and ignore the rest.

### Creating a TOC Proposal for New Documents

You first need to create, review, edit and get approved a proposed table of contents, before developing any content. A TOC represents a high level structure or outline that includes:

- the main topics, including the chapters, appendices and Heading1 and Heading2 topics
- the location of the topics in the guide
- the hierarchy of the topics

After creating the proposed table of contents, get it formally approved by the main owner of the document, specified in your doc plan. This helps ensure that your structure is solid and that the proposed chapters and headings are correct and in a logical sequence.

For more information about what makes an effective TOC, see:

- *Readability, Chunking and Headings* on page 31
- *Structure* on page 32
- *Table of Contents* on page 98

After you have completed all your initial research and pre-planning activity, you are ready to create the documentation plan.

## Stage B: The Documentation Plan

### Step A: Creating the Doc Plan

The Technical Writer works with the B.A. (Business Analyst), Product Manager and Development Manager, as well as the designated reviewers, to development the documentation plan. All of these individuals work closely together to finalize the schedules and the scope of the project. Should problems arise meeting dates, they must determine whether certain documentation requirements should be dropped, changed or postponed to meet the delivery date.

#### A proper documentation plan must include:

- a complete list of the documents to be included in the final release
- the designated owner and the primary, secondary and final reviewers for each document, as described in *Documentation Roles* on page 126
- estimates of the time required based on each PRD requirement
- detailed development schedules for each document

Note: A handy way to ensure you meet all your dates is to enter the critical ones as tasks in Outlook. They will act as reminders for you, especially for the dates on which you expect information or drafts to be given to you.

- the standard description of the review process: *The Documentation Review Process* on page 130

### Step B: Estimating a Project

Estimating the time it takes to complete a project can be difficult. As a start, find out how long it took to document the last release, then compare the volume of changes of the current release to the previous. Your estimate will be the number of *continuous working days* required for you to complete all the changes. It does not include the time required for others to complete their tasks, such as supplying you the material or reviewing the drafts.

### Guidelines for Estimating

Here are some rough guidelines that can help you estimate the total number of hours required:

- **To update existing material:** 1-2 hours per changed page
- **To create new material:** 2-4 hours per new page
- **To develop a new training course:** 7-10 hours per training course days

When estimating, keep in mind:

- the code freeze date equal the online help freeze date
- PDF files are usually complete two weeks before the Gold date
- ReadMe files and Release are usually complete one week (or less) before the Gold date



- a normal work week has about 30-35 effective work hours
- the fact that you may be working on different projects simultaneously
- vacations time and statutory holidays

Important: **When in doubt, always over-estimate.** Better to finish a project very early than a little late! Delays, surprises, new priorities, unexpected problems and various other factors often cause projects to finish late. Build in as much leeway as you can into your estimate.

### **Step C: Distributing the Doc Plan**

1. Review the initial draft of the doc plan with your manager (Veronica). You will need to confirm the scope, estimates and reviewers. Once the initial draft is finalized, on InCalligo, upload the draft to InCalligo.
2. Send out a meeting request to the reviewers and Veronica to review the draft and confirm the reviewers will be available during the specified dates. Include the URL to the doc plan on InCalligo in the meeting request. **Do not attach the doc plan (or any other file) to the meeting request!**

## Stage C: Add and Update the Content

For new or changed features, you need to create or update the content as necessary. If you get stuck, make an internal note that this section still requires work, and then move on to something else. For example, if you are having trouble writing about the benefits of a certain feature, move on to describe the actual steps in the procedure. You can always return to this section once you get the information you need.

For *new* documents, once you know how the document will be structured, you can start filling in the content. You need to decide the elements of each section and chapter.

**Warning:** If the FrameMaker files are being used to create online help, ensure that the filenames do not contain spaces, because these will cause problems with the help files. All FrameMaker book files also cannot contain spaces in their filenames.

### Backing Up Before Major Changes

**Important:** Before starting a project, make copies of the files and store them within a subfolder in your document. These backups may prove to be a real lifesaver if you need to restore the previous text.

### Using Virtual Machines (VMs)

A virtual machine (VM) is one of the main applications you will use to test and verify your documentation. A VM allows you to install or use the latest build of the application you are testing, in its own separate operating environment.

**Note:** For instructions on using VMs, see *Virtual Machines* on page 190.

There are two types of VMs:

#### Workstation

This is a *separate* VM which you copy over to your VM machine. It is the recommended type, because you can make any changes while working in the UI, without being concerned about corrupting anyone else's test environment. The only disadvantage is that it can take several minutes to copy over the VM files. It may also take some time to load the VM.

#### Console

This is a *shared* VM which you access from your VM machine. The advantage of this VM is that you do not need to install or copy any files. The VM itself is up and running on its own system, which you can quickly access. The problem is that others are also using this VM, which means that, unlike the workstation VM:

- you cannot add or change any data, preventing you from fully testing and documenting the application

- the VM is not always available, because it is being upgraded or being used by someone else

Therefore, you should use a console VM only if a workstation VM is not currently available, and even then, only temporarily until a workstation VM does become available.

## Submitting UI Defects

While you are using the VMs, you will probably notice various UI and usability problems. It is very important to log these into ClearQuest as defects, so that they can be addressed and tracked. Technical writers offer a unique outside perspective, and often give valuable usability feedback.

Note: Ultimately, as with all defects and documentation changes, the product manager and business analyst have the final say on which defects will be addressed and fixed.

## Tracking Changes, Problems, and Information

Throughout the entire documentation development process, you need a quick, simple and effective way to indicate and track areas that need further work, investigation or explanation. Simply insert a double carat (^) to indicate areas of text that need special attention, followed by a descriptive note.

Include in the internal note:

- a complete and thorough description of the problem, issue or information: write it clearly enough so that anyone with no familiarity with the document would understand it
- the person or people who were the source of the note, if not you
- the date you entered the note

Tag the entire note as internal text. Once you have addressed the issue, and assuming a record of it is no longer needed, you can delete the comment.

When you are later editing the document, or if a reviewer is reviewing it, they can easily search for these comments.

After an issue has been resolved, delete the double carats, **but leave the comment in**. This is so that reviewers will not have to review comments they have already addressed, but allows the comment to remain in the document in case there are any questions about it later. It also ensures all comments are in the final, internal PDF, which is kept permanently on file, as part of the historical record of the document.

When the document is ready for release, hide (but do not delete) any remaining internal comments. These include areas to be addressed in a future release.

Important: Add internal notes copiously throughout your document. They are *critical* in monitoring and tracking documentation issues and information.

Important: When making changes, you need to consider *all* the areas in the *entire* documentation set that could be affected by this change. This is especially true if there has been a major UI or functional change. Create superbooks that contain all the chapters and insets to search for all the terms that could be affected.

## Tracking ClearQuest Documentation Defects

Mark ClearQuest documentation defects with a hidden or internal note that includes the defect number. After marking the bug as *Fixed* in ClearQuest, you need to generate a new draft and distribute it. This allows QA to verify that the defect has actually been fixed, and that your changes are correct.

After you have completed all of your changes, you and another technical writer should review the document internally, before submitting it to the designated, external reviewers.

## Notating Sections to Review and Reviewed Sections

If you have a project which requires constant tracking of all sections that require reviewing, and all sections that have already been reviewed, use the following notations:

### Use this syntax to mark sections that require review:

**^^To review - Date - Writer's initials**

*(Changed section)*

**End**

### Example:

**To review - Mar 4 - AB**

This sentence has changed and requires review.

**End**

### Use this syntax to mark sections have been reviewed:

**^^Reviewed by (name/s) - Date - Writer's initials**

*(Reviewed section)*

**End**

### Example:

**Reviewed by John & Steve - Mar 4 - AB**

This sentence has been reviewed.

**End**

## Delaying Checking

Once you have finished writing or updating a section or chapter, do not try to check or proofread it right away. Work on the next change and forget about what

you have previously written. Editing and proofing while it's still fresh in your mind defeats the purpose. You need to walk away from it and return later without any bias. Returning to it another day gives the break and space you need to look at the content with fresh eyes.

## Displaying Conditional Text

When working with the drafts, ensure that you have correctly shown and hid the various conditional text.

Conditional text settings are particularly complex for Tracker. As a general guide, **Enterprise**, **Filing**, **LH** and **PC** conditions are shown for their respective documents, with the following exceptions:

- **Print** conditions are shown for the user guides and training docs only
- **External** is shown for the user guide and online help only
- **Internal** and **Tech writer** are always hidden in the final versions
- **Training** is shown for the training guides only
- **Answers** is shown for the teacher training guides only

## Tracker Conditional Text Tables

The following tables indicate which conditions to show and hide: (**S**=Show / **H**=Hide)

**User Guide**

<b>Condition</b>	<b>LH</b>	<b>PC</b>
External	S	S
Internal	H	H
LH	S	H
LH Print	S	H
Online	H	H
PC	H	S
PC Print	H	S
PC External	H	S
Print	S	S
Tech writer	H	H
Training	H	H

**Online Help**

<b>Condition</b>	<b>LH</b>	<b>PC</b>
External	S	S
Internal	H	H
LH	S	H
LH Print	H	H
Online	S	S
PC	H	S
PC External	H	S
PC Print	H	H
Print	H	H
Tech writer	H	H
Training	H	H

**Training – Student (PDFs)**

<b>Condition</b>	<b>LH</b>	<b>PC</b>
Answers	H	H
External	H	H
Internal	H	H

<b>Condition</b>	<b>LH</b>	<b>PC</b>
LH	S	H
LH Print	S	H
Online	H	H
PC	H	S
PC External	H	H
PC Print	H	S
Print	S	S
Tech writer	H	H
Training	S	S

### **Training – Teacher (PDFs)**

<b>Condition</b>	<b>LH</b>	<b>PC</b>
Answers	S	S
External	H	H
Internal	H	H
LH	S	H
LH Print	S	H
Online	H	H
PC	H	S
PC External	H	H
PC Print	H	S
Print	S	S
Tech writer	H	H
Training	S	S

## Stage D: Review the Draft Internally

While you are updating your documents, and before you submit them to your designated reviewers, you need to continually review your document following the checklist below and make any necessary corrections. After you have made all the changes you can, give the document to another technical writer to review. This helps ensure the document is in the best possible shape before the external reviewers see it.

### Documentation Review Checklists

There are two categories of things to check while you are working on your documentation: general areas and specific areas.

#### General Areas to Check

1. **General content** – Is the content useful, meaningful, practical, relevant, grammatically correct, clear, consistent and appropriate? Is there any duplicate content that should be merged or eliminated? Is any content still missing? Is there content that is already covered in all other guides or in the actual user interface that could be simplified or eliminated?
2. **Accuracy and Completeness** – Test new or changed procedures step by step using the actual application. Look for features that are explained clearly enough, or in enough detail, or not explained at all.
3. **Structure and flow** – Does each idea flow from the previous one and into the next one? Are there any gaps?
4. **Table of Contents** – Is the structure and hierarchy correct and meaningful? Are there any gaps in the hierarchy? Are the headings logically grouped within the chapters? Are the chapters in a logical order?
5. **Style** – Has the *Style Guide* on page 23 been extensively followed? Have the guidelines of good writing, terminology, punctuation, and formatting all been followed? Many of these guidelines are highlighted in the following steps.
6. **General format** – Check the blocks of text and lines. Are all the indents correctly spaced? Are the lines correctly spaced? Are the bulleted and numbered paragraphs complete? Are there any widows or orphans? Are any lines missing, incomplete or misaligned?

#### Specific Areas to Check

1. **Fonts** – Check the font format, type face, and font size. Check for all instances of filenames, directories, menu names, button names, and other screen selections. Are they correctly displayed as bold, italic, capitals, or mixed case?
2. **Headers** – Check the wording and continuity. Check that the headings accurately reflect the text on that page. Are they the correct level for the information they pertain to? Do they follow sequentially to the next one?



3. **Footers** – Check the page number, footer text, sequence, and continuity. All footers must be in the following format: **Product - Version Number - Document.**
4. **Graphics** – Are they correctly positioned? Does each graphic match the section of text in which it appears? Is each graphic accurate? Do the screen shots reflect the final user interface?
5. **Tables** – Are the tables correctly formatted? Do they break improperly? Does the heading row repeat on subsequent pages?
6. **Index** – Have you added or changed index entries for new or changed topics? Delay creating or updating the index until the final stages.
7. **Spelling** – After you have done checking all the above items, run the spell check to ensure that the main typos are caught before you pass it off to the reviewers.

After you and another technical writer have reviewed the document, and after you have made all the necessary changes, you are ready to assign the proper names to your draft files.

## Stage E: Create and Submit the PDF Drafts

Once a draft has been internally reviewed and is stable, you can prepare the it for your external reviewers. An external review involves the designated reviewers that you specified in your doc plan.

**Important:** Ideally you should submit the draft on the date specified in the documentation plan. If you have completed your draft early, it is tempting to submit it to the reviewers early, but avoid doing this if possible. Invariably, there will be additional changes that occur after you have submitted the draft, and it is important that the draft contain these changes!

Submit the draft using the email review process in Acrobat. This allows the reviewers to mark up the draft electronically.

### ReadMes and Release Notes

*ReadMes* and *Release Notes* are heavily reviewed and updated in a short period of time (in various group review meetings) near the *end* of the development cycle. You will therefore be submitting drafts of the various guides first, before working on the *ReadMes* and *Release Notes*. However, any work you can complete on the *ReadMes* and *Release Notes* ahead of time will save you time later, and helps to alleviate the extensive work required later.

## Draft File Formats

The following table shows the different kinds of draft formats you can create, their advantages and disadvantages, and when to use each. The formats are listed from most desirable to least.

Format of Draft	Electronic record of changes?	Can text be marked for deletion?	Locating changes in FrameMaker file	Use and Additional Information
Annotated PDF	Y	Y	moderate to difficult because page numbers and text can change	<ul style="list-style-type: none"> <li>requires Acrobat Reader 7 or Acrobat 7 Pro</li> </ul>
Word file converted from FrameMaker with track changes on	Y	Y	very difficult - page numbers are completely different	<ul style="list-style-type: none"> <li>most detailed and automatic record of changes, but is a duplicate of the FrameMaker file</li> <li>useful if there is a large quantity of changes and reviewer is willing to type them in</li> </ul>
Paper printout	N	Y	moderate to difficult because page numbers and text can change	<ul style="list-style-type: none"> <li>use only if no other format can be used</li> <li>easy to read and mark up</li> <li>fully portable</li> <li>sometimes hard to read handwriting</li> </ul>

## Including Review Instructions

Include the your review instructions in the review text message when submitting a PDF draft. These instructions are in text files located at:

T:\Tech comm\Guide\Common\

**Important:** To allow for each writer to customize their instructions, there is a separate TXT file for each writer. Therefore, if you *change* your instructions, please let the other writers know in case they want to incorporate your changes into their version.



## Stage F: The Review Process

The section on the next page describes the documentation review process. It is a text inset that is also used in the documentation plan, therefore our reviewers should be aware of this process, and are expected to understand and follow it!

### Parallel vs. Serial Reviews

There are two general types of draft review orders:

- **parallel reviews** – The same draft is reviewed simultaneously by the reviewers.
- **serial reviews** – The draft is reviewed by only one reviewer at a time. When all changes are finalized with that reviewer, the draft is given to the next reviewer, and so on.

Generally, serial reviews are preferred because they result in a simpler editing and update process. With parallel reviews, you may receive multiple or contradictory requests. This is less likely with serial reviews.

Parallel reviews do have one major advantage, though. Because the reviews are occurring concurrently, no time is wasted waiting for the first reviewer to complete their review of a draft before passing it on to the next reviewer.

## Documentation Review Process

This section describes:

- *Documentation Roles* on page 126
- *Types of Reviews* on page 128
- *The Documentation Review Process* on page 130
- *Adhering to Schedules* on page 132

Note: This section includes definitions for roles and types of reviews involved in the review process of both *product documentation* and *training material*. Although the term *documentation* is meant to apply to both types of material, not all review processes require all roles.

### Documentation Roles

The *roles* in the documentation review process are:

- *Technical Writer (TW)*
- *Training Developer (TD)*
- *Expert (EX)*
- *Primary Reviewer (IR)*
- *Secondary Reviewer (SR)*
- *Copy Editor (CE)*
- *Proofreader (PR)*

### Technical Writer (TW)

The Technical Writer:

- plans and develops documentation development and review schedules and continually monitors them
- solicits input from the reviewers and co-ordinates the reviews
- advises wording for error messages and other UI elements
- (when possible) produces the drafts and final documentation by creating new and/or modifying existing content
- usually performs the Copy Edit (a different Technical Writer is suggested for this function)

The Technical Writer is responsible for:

- ensuring that all required documentation updates are received from the reviewers
- ensuring that all documentation follows the standards specified in the *Technical Communication Guide*

- discussing potential changes in scope or dates with the product manager, working with the product manager as necessary to resolve
- keeping the development manager informed of major changes to the scope, or task scheduling problems that could impact the delivery dates
- delivering all documentation by the dates specified in the documentation plan

## Training Developer (TD)

In addition to the duties and responsibilities of the Technical Writer, the Training Developer also:

- conducts a detailed training design analysis
- determines the performance and learning objectives, and sequence
- prepares a concept draft of the training design
- designs the learning evaluation (process and content)
- designs the learning materials and media
- validate and pilots the training design (process and content)
- finalizes and produces the learning materials/media
- supports the implementation, and evaluates the organizational impact
- updates and maintains learning materials and media

## Expert (EX)

The *Expert* resolves any escalated issues arising from the Technical Writer and Primary Reviewer.

## Primary Reviewer (1R)

The *Primary Reviewer*:

- is the main contact person for the technical writer during the development of the document
- is a product expert, and may have specialized knowledge in a particular area of the product, or in a particular guide
- usually performs the Technical Review, the Business Review, or both, and the Instructional Review, if required
- co-ordinates the changes so that the same (or conflicting) changes are not submitted to the Technical Writer. Any unresolved issues are escalated to the Expert.

## Secondary Reviewer (SR)

The *Secondary Reviewer* provides valuable feedback on the documentation, often from a different perspective from the Primary Reviewer. They are often support or training personnel.

## Copy Editor (CE)

The *Copy Editor* performs copy editing on the documentation as well as proofreading. This role is usually served by a Technical Writer, preferably one who has not created/edited the document in the early stages.

## Proofreader (PR)

The *Proofreader* performs a final proofreading on printed pages. It should be done by someone who has not worked on the drafts. This is a role suitable for the Development Manager.

## Types of Reviews

A Primary Reviewer or Secondary Reviewer can conduct a *technical* or *business* review, or a combination of both.

Important: A reviewer performing a business review or a technical review must:

- supply any additional required content
- indicate if any current content should be changed or deleted

Primary Reviewer and Secondary Reviewer changes are marked on PDFs using commenting tools. Copy Editor changes should be made directly to the source document, if possible.

## Instructional Review

In an *instructional review*, the documents or e-learning are reviewed to ensure they meet the following criteria:

1. **Readability.** Written at the appropriate grade level for the audience, as determined from audience analysis.
2. **Vocabulary.** Use terms and vocabulary appropriate for the audience, as determined from audience analysis.
3. **Transitions.** The lesson ties previous topics to current topics.
4. **Conceptual framework.** The lesson contains these events of learning:
  - introduces the lesson in a way that relates the current lesson to previous and subsequent lessons
  - states the objectives
  - presents the content by introducing an overview of each topic, breaks the topic into component parts, and ties all components together in a summary



- checks often for understanding and extends feedback to learners
  - provides guided practice where applicable
  - allows independent practice
5. **Congruence.** There is a natural flow of information and relation between these elements:
- objectives
  - topics associated with the objectives
  - topics summarized
  - topics reviewed
  - topics tested, exercised
6. **Question format and feedback.** Questions are in the correct format and refer to the correct objective:
- quiz questions refer to a lesson objective
  - test questions refer to a terminal objective
7. **Mapping strategies.** All strategies are correctly mapped:
- processes
  - procedures
  - concepts
  - principles
  - facts
  - systems

## Technical Review

In a *technical review*, the document is reviewed to ensure that it is *technically accurate*. This includes carefully reviewing and verifying:

- all new or changed sections
- the procedures (Are all the required steps present and in the correct order?)
- the names of all user interface elements, including screen and field names
- all overviews and theoretical information
- the completeness and accuracy of the content (Is all the required information present? Is all the current information included needed? Does anything need adding, changing, or removing?)
- the technical accuracy of the document, for example: correct installation prerequisites, versions, system requirements, and configurations

## Business Review

In a *business review*, the document is reviewed to ensure that it is correct from a *business* user's perspective. This includes:

- checking the general layout, presentation, and organization of information
- ensuring that all high-level information is included and accurate
- checking for any missed or incorrect content not caught in the technical review
- checking the consistency and flow of information and terminology
- ensuring that the procedures are clear and easy to follow

## Copy Editing

In the *copy editing* stage, the document is checked for correctness and consistency in the following areas:

- grammar
- spelling
- punctuation and other mechanics of style
- use of terms
- heading levels
- placement of images

## Proofreading

In the *proofreading* stage, proofs of edited documentation are checked for correctness and consistency in the following areas:

- running headings and footers
- folios (page numbers)
- page breaks
- location of images
- table of contents

## The Documentation Review Process

This section describes the actual steps in the documentation development and review process as the documents move from First Draft (1D) to Second Draft (2D) to Final Draft (FD) to finished document. Some simpler documents will not require all stages of review.

1. The Technical Writer will update and develop the documentation based on:
  - the PRD
  - any relevant use cases or design specifications

- meetings with the Expert and various reviewers
  - text supplied directly by the Expert and reviewers
2. When the UI is stable, the Technical Writer begins documenting the UI changes, using a VM that they have configured. When possible, the Technical Writer will verify the steps in the installation guide. This will likely not be possible with complicated installation routines for Calligo or Tracker; Development, Support, and QA will need to verify these procedures.
  3. The technical writer will include various internal notes and questions within the drafts. These notes may include various documentation issues to be resolved and other internal information. Notes will be indicated with two carats (^ ^).
  4. The Technical Writer will submit the First Draft to the Primary Reviewer.

Note: In most cases, drafts will be formatted as PDFs with the ability to add comments with Acrobat Reader enabled. Release Notes and Readmes (documents released as RTFs) will be reviewed using Oracle Review, and all reviewers will mark necessary changes using Oracle Review during the review process. The following steps apply to PDF reviews.

5. The Primary Reviewer will carefully review the documents (or delegate someone else to do it) by performing a business and/or technical review, and mark changes and corrections on the PDF using commenting tools. Instructions are provided with the documents. The reviewer need not spend time correcting issues that will be edited in later stages of copy editing and proofreading.
6. After the Primary Reviewer has made and verified their changes, and satisfied the drafts are accurate and complete, they will send the marked-up draft back to the Technical Writer.
7. The Technical Writer will examine the changes and prepare a list of questions. The Technical Writer will then meet with the Primary and Secondary Reviewers to discuss the changes and resolve any issues. The Technical Writer will update the document and create the Second Draft document.
8. The Technical Writer will submit the Second Draft to the Secondary Reviewer. Drafts will be formatted as PDFs with the ability to add comments with Acrobat Reader enabled.
9. The Secondary Reviewer will carefully review the documents (or delegate someone else to do it) by performing a business and/or technical review, and mark changes and corrections on the PDF using commenting tools. Instructions are provided with the documents. Time should not be spent correcting issues that will be edited in later stages of copy editing and proofreading.
10. After the Secondary Reviewer has made and verified their changes, and satisfied the drafts are accurate and complete, they will send the marked-up draft back to the Technical Writer.

11. The Technical Writer will examine the changes and prepare a list of questions about them. Then they will meet with the Primary Reviewer and the Secondary Reviewer to discuss the changes and resolve any issues. The Technical Writer will update the document and create the Final Draft document.
12. The Technical Writer will submit the Final Draft to the Copy Editor for a copy edit and proofread. Changes that do not affect the technical or business meaning can be made directly without further review. If there are any changes required that could affect the technical or business meaning, the Copy Editor must check with the Expert before making the change.\
13. After the Copy Editor has made all required changes, they will proofread the document one more time, correct any problems, produce a finished document and submit it to the Proofreader.
14. The Proofreader, usually working from paper, will note any changes required (consolidated changes are fine) and submit them to the Technical Writer.
15. The Technical Writer will examine the changes, discuss any questions with the Proofreader, correct the document, produce a finished document for release, supply the final documentation files to the required locations.
16. After the Gold Date, the technical writer will check the FrameMaker, graphics and other product documentation source files into Subversion.

**Notes:**

- The schedule for producing/reviewing documentation will prioritize the user guide and other documents required in the build because the build is usually produced several weeks before the final PDFs are required.
- Throughout the review process, the Technical Writer may advise or consult with the Expert on certain documentation changes. However, ultimately the Expert will make the final decision on any changes.

**Adhering to Schedules**

The Technical Writer will work with the reviewers to ensure the drafts are reviewed and returned by the dates specified in the documentation plan.

If a reviewer is supplying content for a document, the reviewer must submit this content to the technical writer by the specified date.

**Important:** All dates will have been agreed upon when the documentation plan is developed. If a reviewer is later unable to meet a specific date, they must inform the Technical Writer.

Managers of reviewers should be kept informed of their employees' responsibilities for reviewing the documentation.

## Stage G: Edit the Drafts

After each draft is returned, you need to incorporate the edits. If you don't agree on some points, meet or contact the reviewer or owner as necessary. Try to bring all of your questions at once rather than one at a time!

**Important:** Often a reviewer will make an edit that could apply to other occurrences of the same text. If you suspect a change could apply elsewhere, do a careful manual search and replace for other instances of the particular text.

### Searching and Replacing

**Warning:** Be *extremely careful* when perform a search and replace, especially at the book level. The replace cannot be undone!

Confirm each change manually; never (or rarely!) click **Change All**.

Ensure you have the auto-backup featured enabled in Frame.

If you are just searching (and not replacing) copy and paste the text or format into the **Change** box so that if you accidentally click **Change** or **Change All**, the search item will be replaced with itself and will therefore not change.

### Changing the Product Name

If the product name changes, you will need to:

1. Reimport the product variable values: see *Product Names* on page 96.
2. Update the index entries. You should therefore avoid having index entries with the product name.
3. Update the book and PDF filenames with the new name.
4. Update the Help project filename with the new name, and regenerate the help files.

## Stage H: Complete the Final Updates

After you have made all your changes, read through your publication *once more*, as if you were reading a printed and bound book published by someone else. Don't spend too long working on any one particular document or section. You need to continually take breaks to bring fresh eyes to your work.

### Step A: Complete the Final FrameMaker Updates

1. Some documents have more than one book. Each book version contains different sets of FrameMaker files. Therefore, ensure that you have the correct FrameMaker book open.
2. Review every item in the *Documentation Review Checklists* on page 120.
3. Do a final search for all internal notes by searching for the double carat (^) and double percentage sign (%%) combinations. Update any as necessary, but do not delete them.
4. Add any new index entries to new topics.
5. Ensure that your super-book contains all the chapters and also *all* the text insets. If you're not sure if the super-book is up to date, manually add in all the insets; any files that are not already in the book will be ignored.
6. Apply the necessary conditions to the super-book, then spell check-it. Note that you will need to repeat this step for *each* set of conditions. Many typos and other problems only become visible when a certain combination of conditions are applied. Typical problems including spaces after sentences and extra or missing paragraph breaks, which can cause all sorts of layout and formatting problems.
7. In your main book file, select the correct conditional text to hide and display. This includes checking for PDFs that:
  - the **Print** condition is displayed
  - the **Online** and **Internal** conditions are hidden

For Tracker, see *Tracker Conditional Text Tables* on page 117

Note: Tracker documents have particularly complex conditional text settings. Before you generate any Tracker PDF or online Help file, double-check that you have selected the correct conditions to hide and display. Also ensure that you have selected the correct book, because certain books apply only to certain Tracker versions. For details, see *Displaying Conditional Text* on page 117.

8. Turn the conditional text indicators off.
9. Insert any required breaks to ensure that sections are not cut off mid way: see *Keeping Paragraphs Together* on page 154
10. Verify that all bulleted lists at the beginning of each chapter contain links to all Heading1 topics.
11. Regenerate the book. For troubleshooting info, see *Troubleshooting* on page 158 and *Text Insets* on page 155.

12. Check the page breaks.
13. Check the page numbers.
14. Verify that the TOC has no blank links.
15. Generate the PDFs.
16. Do a quick sanity check of the PDFs.

## Step B: Set Up the PDF Options

When creating the final PDFs, ensure you have the options in the **PDF Setup for Selected Files** dialog set up as follows:

1. On the **Settings** tab:
  - **PDF Job Options:** Standard
  - **Open PDF Document on:** Page 1
  - **At Zoom:** Fit Height
  - Select **View Generated PDF in Acrobat** check box
2. On the **Bookmarks** tab:
  - Select **Generate PDF Bookmarks**
  - Bookmarks Expanded through Level: **None** or **Default**
  - **Include Paragraph** - ChapterTitle, .Heading 1, ..Heading 2, IndexTitle, TOCTitle, and any other required styles
3. Ensure check box at top of **Tabs** and **Links** tabs are unchecked.

## Step C: Name the PDFs

Final PDF filenames must follow this format:

*Product\_Name\_N.N\_Guide Name.pdf*

where *N.N* is the version number.

Use sentence case - each word should start with a capital.

**Important:** As indicate above, all PDF files must contain the underscore character (`_`) in place of any spaces. (Problems occur when using filenames with spaces in Unix.)

Use the following standard guide names in your PDF files:

- Administrators\_Guide
- Install\_Guide
- New\_Install\_Guide
- Upgrade\_Guide
- Reference\_Guide
- Technical\_Guide
- User\_Guide

## Step D: Check the PDFs

Do a high-level layout check of the PDFs. Use Ctrl-l to do a full screen view or view 2 pages at a time.

The main things to watch for are:

- correct conditional text showing
- page numbers in sequence
- page numbers matching PDF page numbers
- body text running into heading text
- headers, footers and margins consistent – any inconsistencies will be quite visible in the two-page view
- graphics appear normal



## Stage I: Submitting Help Projects

You need to supply a single zip file of your entire Help project. Both web-based and desktop applications will unzip this file during the installation process. This means that the writer and development only have to check in or out, and keep track of, **one** file instead of **hundreds** of individual files.

For more information about WebWorks Publisher, see *WebWorks Publisher* on page 166.

**Important:** You should only generate a help project after completing the final steps described in *Complete the Final Updates* on page 134. This includes spell-checking the book and all its insets.

1. Open the Frame book and display the correct conditions. This includes:
  - hiding the **Print** condition
  - displaying the **Online** condition

For Tracker, see *Tracker Conditional Text Tables* on page 117.

2. Generate the Frame book. For troubleshooting info, see *Troubleshooting* on page 158 and *Text Insets* on page 155.
3. Open the WebWorks project .wdt file.  
Depending on the size of the project, it may take a few minutes to load.
4. Press Ctrl-P to display the **Project Properties**.
5. Click the **Conditions** tab.
6. Verify that the correct conditions are selected. Normally, they should be, but it's a good idea to double-check!
7. Click the **Output** tab.
8. Click the **Graphics** subtab at the bottom of the **Project Properties** dialog.
9. Ensure that all the **Current Mapping** values are **JPEG**. If they are not, click the **Current Mapping** column heading to highlight the entire column. Then, in the **Current Mapping** drop-down box, select JPEG.
10. Click **OK** to save these settings.
11. Press **Ctrl-A** to generate the output. The help files will be generated in the Output subfolder of the project. The HTML file that actually opens (launches) the help is always `help.htm`.
12. Open the `help.htm` to launch the help and randomly test the TOC and index.
13. Ensure there are no blank topics in the TOC.
14. Randomly test various cross-references.  
Once you have verified the Help project, you can deliver it to development.
15. Zip the contents of the **Output** folder into a single zip file. Ensure **Include subfolders** is selected when you create the file:

Important: The zip file only contains the **contents** of the **Output** folder, not the **Output** folder itself.

Also, you don't need to rename the **Output** folder, because it does not appear in, and is therefore not relevant to, the zip file.

16. If this Help project is for a web-based product, include the Help file for the login screen:
  - a. Copy the login help template file from:  
`T:\Misc\WWP template\login_help.htm.`
  - b. If this is a new product, marketing or product management need to supply a product description.
  - c. Ensure that you keep the filename as `login_help.htm`.
  - d. Ensure that development links `login_help.htm` to the **Help** link in the login screen.
  - e. Keep a backup copy of this file outside of your Output folder, in case you ever accidentally delete all the files in your Output folder.
17. Give the zip file the same name that was previously used by development.
18. Submit the zip file to development. For IDM and Publisher, check in the file using SVN: see *Tortoise SVN Version Control* on page 191. For all other products, simply place the files in a location that development can access.
19. Email the development leads to let them know file is in build.
  - **Tracker:** Chin Fong and Emil
  - **IDM, Writer:** Alex N., Dmitri
  - **Communicator & Publisher:** Boris

Important: Only after you have exhausted the potential for finding errors or omissions can you release it for public distribution.

## Stage J: Submit the Final Files

After all the reviews are done, and after you have made all your final changes and corrections, you can submit the final documents that will be part of the released product.

### Step A: Create the Final ReadMe Files

1. Verify that the folders described in the *ReadMe* file match the final directory structure that will be shipped.
2. Save the filename as `ReadMe.rtf`. However, if you have more than one ReadMe file on the same level, give each of them specific names in the following format:

*Product\_version no.\_specific\_name\_ReadMe.rtf*

#### Example:

- `IStream_Document_Manager_6.1_Toolkit_ReadMe.rtf`

See also *ReadMe Files* on page 90.

### Step B: Complete the Final Release Notes

1. Hide all track changes and internal notes in the *Release Notes*.
2. If any changes have been made, ensure that all occurrences of the same text have also been changed. This is especially true of operating systems, which can be listed or described more than once in the Release Notes.
3. Ensure the PDF settings for the Release Notes are followed: see *Step B:Set Up the PDF Options* on page 135.
4. Save the Release Notes using the correct filename format:

**`IStream_Product_Name_Version no._Release_Notes.pdf`**, for example:

- `IStream_Writer_4.3_SP1_Release_Notes.pdf`
- `IStream_Correspondence_1.2_Release_Notes.pdf`

See also *Release Notes* on page 91.

### Step C: Upload the Files

Place the final PDF files, the ReadMe and Release Notes to the location specified by development. They will then copy over the files to the `Released` folder.

The ReadMe and Release Notes go in the root, and the PDF files go in the `Manuals` subfolder.

Note: The final software applications are usually made available to our customers in the form of a download; we rarely issue a CD as was done in the past, but will do so upon request. Therefore, do not use the terms *installation CD* or *CD* in the ReadMe, Release Notes, Install Guides or anywhere else, unless you are certain

that the application will be shipped as a CD. Instead, use the term *installation package*.

## Stage K: Update the Training Course Description & Agendas

In addition to the product and training course documents, you may also need to update the training course description and agendas, especially if this is a major release.

The basic steps are:

1. Work with the trainer or primary training reviewer to update the descriptions and agendas and create a first draft. The trainer must approve this draft.
2. Submit the first draft to the Product Manager for review and final approval.
3. Work with the website manager (Farshid) to update the final draft for the website. All course descriptions are PDF files that are posted to our website.

Important: All training material should be complete as close to the gold date as possible.

## Stage L: Submit the Escrow Files

Our legal requirements specify that we must submit all our source code and source documentation (both product and training) to a third-party company called an *escrow agent*. The agent stores these files in the unlikely event that our company becomes insolvent. The files would then be given to whichever company has purchased our technology.

### To submit the escrow files

1. After the product has shipped, and the documentation is frozen, you need to immediately copy all the documentation product and training source files (FrameMaker files, graphics, and so on) to a separate location on the network.

The easiest way to do this is to copy the entire External and Training subfolders for that product. After copying the folder, delete any files that are not source documentation files. These include notes, PS and PDF files.

**Important:** It is important that you copy these files *immediately after* doc freeze, because this will allow you to make changes for the next release, without affecting the source files of the last release.

2. Create a single zip file of all the documentation files. Ensure that you select **Include Subfolders**.
3. Check the zip file in to the correct area using SVN. (For details, see *Tortoise SVN Version Control* on page 191.)

After the files are checked in, they are given to the escrow agent.

## Stage M: Submit Files to OTN

In this stage, you prepare and then submit files for OTN, the Oracle Technologies Network. This is the website where all Oracle documentation can be viewed by anyone - no logon is required. It is at:

<http://www.oracle.com/technology/documentation/index.html>

### Step A: Request a Part Number

1. Go to <http://docarch.us.oracle.com/cgi-bin/DocArch/entry.pl>
2. Click the **for non-ST writers** link.
3. Select the radio button for **Doc Library**.
4. Enter the title as:  
Oracle Insurance [name of application and version number].  
Example: Oracle Insurance Policy Administration V9.1
5. Select **Type** as **Online Documentation Library**.
6. Select the platform(s) that will run the applications supported by the documentation you are creating, typically just Windows 32-bit. You can select multiple platforms by holding down the **Ctrl** key.
7. Enter an e-mail address in the **Contact** box.
8. Enter the **Release** information (the release/version number). Note that you can't enter letters in the **Release Number** field, only the **Release Text** field. As a workaround, enter the FP or SP number as an extra digit, for example, enter 6.2 FP1 as 6.2.1.
9. Click **Submit**.

### Step B: Upload Project to DocArch

1. Create a zip file of all your files and include **index.htm**.
2. Name the file after the part number with an underscore, for example, **E14879\_01.zip**.
3. Go to: <http://docarch.us.oracle.com/cgi-bin/DocArch/entry.pl>
4. Enter the part number with underscore, for example **E14879\_01**.
5. Select **Documentation Library**.
6. Click **Begin New Apps Archive**.
7. In the **Uploading** screen, step 1, in the **Upload From** drop-down, leave **Disk** selected.
8. Browse to your zip file, then select it. Make sure you select the right one!
9. Click **Submit**.
10. The **Staging Console** screen will appear and list the progress of your upload.

11. You can click **Refresh This Console Display** to update the progress.
12. Once the upload is complete, you'll see a confirmation message that says, **Staging Successful**, followed by the part number.
13. Click the **Finalize Form Info** link at the bottom.
14. In the detailed uploading screen, enter any of the following info (if missing):
  - **Product title:** example: Oracle Insurance IStream Writer (no version number)
  - **Doc Library Title:** always enter **Online Documentation Library**
  - **Alternate Releaser's E-mail Address:** kenneth.weinberg *or* andrew.brooke  
(Note that you don't need to enter oracle.com in email addresses.)
  - **Part numbers in Doc Library:** enter the product number with dash, e.g. E14879-01.
  - In the **Externalization Category**, select **Document is current...**
15. On the next screen, select **Intended for OTN**.
16. You can click **Refresh this console display** to update the progress.
17. An **Archive Completed** link will appear when it's done. Click this link.  
The doc set is archived, but not yet released to the public.
18. You'll receive an email confirming the archive.

### Step C: Complete PDB Info

1. Click the link in the email (or go to: <http://stdoc-web02.idc.oracle.com:9999/pdb/> and search directly)
2. Click the **Find in PDB** button at the top of the screen.
3. Click **Edit**.
4. Leave the **Product Name** drop-down at **<Select>**.  
(Note that @oracle.com is *not* needed in the email addresses.)
5. **Primary writer:** andrew.brooke *or* kenneth.weinberg
6. **Alternate writer:** andrew.brooke *or* kenneth.weinberg
7. **Approver:** samia.imran
8. **Releaser:** your name!
9. **Product manager:** bryan.burr *or* debbie.marquette
10. Enter any value in the **Category** field, for example, 2009. This field requires a value to proceed.
11. Click **Submit**.

### Step D: Create Doc Part Release Template on PRG

This step actually creates a request to release our documents to the world.



1. Go to <http://prg.us.oracle.com>, select **Documentation** then select the **Documentation Part Release Template** link or simply go to:

[http://prg.us.oracle.com/doc/doc\\_release.htm](http://prg.us.oracle.com/doc/doc_release.htm)

2. In 1): ensure your email address includes oracle.com
3. In 2): enter the part number with a dash.
4. In 3): select the check box to confirm docs are archived.
5. In 4): select **Other Products**.
6. In 5): select **Online Documentation Library**.
7. In 6): select **No. (Is this document part included on an Online Documentation Library?)**
8. In 7) #1: select **Applications**.
9. In 7) #2: select **N/A**, then enter **Insurance** in the text box.
10. In 8): enter the part number only (with dash).
11. Click **Submit**.

You will receive an e-mail confirmation. After a few business days, your docs will be publicly viewable at:

<http://www.oracle.com/technology/documentation/insurance.html>

## Submitting Revisions

Only documents that are released into GSI (what is this?) can be revised.

## Checking the Status

You've archived a doc set and now want to check its status in DocArch.

You enter your **Part Number**, click **Documentation Library**, then click **Check Status**.

In the resulting page, you may set this field in the first row:

### **Externalized Doc Library Entry Point (Not Yet) - ViewExternal**

When you click the **ViewExternal** link, you'll get a page not found error because the link isn't active yet. Until this link is active, the documents cannot be posted to OTN.

A refresh is done every 6 hours or so. So if you've recently archived (or re-archived) a doc set, you may have to wait until the next day before it can be posted

## Stage N: Conducting a Project Follow Up

After the product is shipped and the dust has settled, it is useful to do a project follow up or post-mortem.

Questions you should ask yourself are:

1. What went right? What went wrong, and why?
2. What could have been done better? What did we learn?
3. Were all the dates met? Was there a last minute scramble to get changes in?
4. What happened that was unexpected and how did we deal with it?

In doing this review, always stay positive. Software development is a team effort and we don't have control over anyone else. Decisions are often made on the basis of budgeting, marketing, resources and many other factors. Therefore, talk or write about the problems in a neutral, factual manner, offering positive suggestions rather than just criticism.

## Chapter 7

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# Documentation Tools

This chapter describe the various tools that the documentation department uses to develop and maintain the documentation.

## FrameMaker

This section contains advanced FrameMaker procedures, facts, and tips. For basic use, read the *FrameMaker User Guide*.

Warning: If the FrameMaker files are being used to create online help, ensure that the filenames do not contain spaces, because these will cause problems with the help files. All FrameMaker book files also cannot contain spaces in their filenames.

### Cleaning Up Old FrameMaker Files

If you are working with older Frame files, you may notice that their templates are out of date and filled with unnecessary styles, format, graphics, and so on. Complete the following procedure to clean up the excess items.

---

#### Method: Cleaning up an older FrameMaker file

---

1. Delete all **Paragraph**, **Character** and **Table** styles.

Tip: To do a quick, mass delete of these styles, display the catalog, click **Delete**, press **Ctrl-E** until all the styles are gone, then click **Done**.

2. Delete all **Xref** styles. Keep clicking **Cancel** when prompted to convert the cross-references, then click **Done**.
3. Delete the **Graphics** reference page.
4. Delete the individual graphics that may appear on the last master page.
5. Delete any unused master pages.
6. Update the footers where necessary. You can cut and paste the correct ones from another file.
7. Search for any double-paragraph spaces (`\p\p`). You will need to manually delete the extra space: you can't replace it with `\p` because this may delete the paragraph tag setting.
8. Delete any used conditional text styles - in most cases, you'll only need **Online**, **Print**, and **Internal**.
9. Delete all color definitions except **LightGrey**. You may be getting a message saying that the color is in use - you can ignore this message. For more info, see *Colors* on page 83.
10. After updating one chapter file, and removing the old items from the other chapter files, you can mass import the formats into the other chapter files.
11. Search for incorrect legacy text: i.e., e.g., | instead of > in UI paths
12. Updating the Cover, TOC, and Index files is trickier, because they each have a unique setup. It is easier just to use the template files and copy and paste as necessary, and reimport the variables.
13. Ensure that the **BookType** paragraph style has been applied to the document name on the front cover.

14. In the appendices, ensure the **AppendixTitle** has been changed to **ChapterTitle**. Also ensure that the **Running H/F2 Header** in the master page is set to `<$paratext [ChapterTitle]>`.

## Cross-References to Other Books

You can add cross-references from one book to another, but do this rarely, because the link itself will not work in the PDF or help file. The heading and page number will be correct, but clicking the link does not automatically take the reader to the other book.

## Exporting a FrameMaker File to HTML

ReadMe files are in HTML format. When you save the Frame as HTML it also creates a CSS file. You therefore need to copy the contents of the CSS file into the main HTML file, enclosing the contents with `<STYLE></STYLE>` tags.

---

**Method: Assign a Frame character style to an XML Item Element that will have no formatting:**

---

1. Create a new character tag, but set all properties to **As Is**.
2. Click in the border of the page, not in the text frame.
3. Press **Ctrl+d** for a blank char designer.
4. Type a new name, then **Commands > New Format**. Apply as needed.

## Troubleshooting

### If bold is appearing as italic bold:

Click **View > Reference Pages** and find **C:Bold**. Next to it is EM. Change that to B instead, then rebuild your output. Change other C:BLAH as needed so that the next column reflects what you want.

### If an entire sentence is hyperlinked, instead of just the URL:

Select the words to make into a link. Apply a character tag to only those words. While they are still selected, insert the hypertext marker.

Then you have something like:

```
<Hypertext> [marker] www.oracle.com</Hypertext> [EndPara]
```

This text should not be hyperlinked - only the URL should be.

## Exporting a FrameMaker File to Word

Often you may be asked to supply one of our documents in Word format, typically so that it can be used as a base for a new document. Here is the best way to do this:

1. Save each FrameMaker file as a Microsoft RTF 1.6. You will end up with a set of RTF files.

2. In Word, open, copy and paste the contents of each RTF file into one large Word file.
3. In Word, save the file in .DOC format.
4. In Word, search and replace all hidden text with nothing. (All hidden conditional text appears as hidden text in Word and needs to be removed.)
5. In Word, to delete the index and other marker text, search and replace ^d with nothing.
6. Adjust the page margins to 1" all around.

Note: Saving the file from Frame as an .msw file, or saving a PDF in Acrobat as a Word file will not produce as good a result as the method describe here does.

## FileName Markers

Use IxGen to create filename-type markers for screen level Help projects. Replace all spaces with the underscore character(\_) and remove all question marks and other special character (non-alphanumeric) characters from the marker text.

## Generating and Updating Books

To speed up the updating or generation of a PDF from a book (especially a large one), open all the files in the book. This will allow FrameMaker to update the book without having to reopen each file.

## Hyperlinks

### To create a hyperlink

At the beginning of the destination text (where you want the jump to go to)

1. Click **Special > Marker**.
2. Change **Type** to: **Hypertext**.
3. Set **Syntax** to: **newlink name of link**

On the text you want to jump from:

1. Highlight words that are to be hyperlinked to source.
2. Select **Special > Hypertext**.
3. Select **Command > Jump to Named Destination** or **Open Document** if linking to a different file.
4. Enter **syntax: gotolink name of link** (if linking to same file) or **openlink filename.fm:link name** (if linking to a different file)
5. Click **New Hypertext Marker** button.

## Embedding (Importing) File Objects

In theory, FrameMaker supports embedding files with the following procedure:

**File > Import > Object >** select **Create From File**, select **Link**, then **Browse** to the file.

However for some unknown reason, this feature no longer works. This has been verified with all files types: text, Visio and Excel files. When you try to save a Frame file that contains an imported object, this error appears:

```
An internal error ocured while writing imported
graphics in this document. The file has been save but
has lost some image data.
```

For Visio, the workaround is to convert the object into a TIFF graphic and import it as a graphic instead of an object. Use the following settings when saving the Visio file as a TIFF:

- **Data compression:** LZW
- **Color format:** 16 color, or, there's no colors in diagram: **16 color grayscale**
- **Color reduction:** Adaptive
- **Resolution: Custom:** 150x150 for acceptable quality, 200x200 for higher quality

## Importing Tables From Word

### To import tables from Word into Frame

1. In Word, highlight the entire table.
2. In Frame, go to the location where you want to paste the table.
3. Select **Edit > Paste Special > Rich text format**.
4. Highlight the entire table and keep it highlighted for the remaining steps.
5. Press **Ctrl-T**.
6. Apply the **BasicTable** format to the pasted table.
7. Select **Table > Custom Ruling & Shading**.
8. In the **Apply Ruling Style**, select the first item in the list: **From Table**.
9. Click **Apply**.
10. Apply the **TableText** para tag to the entire table.
11. Insert a Heading row.
12. Copy the heading text into the Heading row.
13. Apply the **TableHeading** para style to the heading text.
14. Resize the table as necessary.

## Importing Word Documents Into FrameMaker

A major project of the documentation department is to eventually convert all the training material (most of which is in Word format) into FrameMaker. FrameMaker, besides being a much more versatile and stable tool than Word, also allows us to easily reuse text between the training and product documentation

Importing Word documents is a time-consuming process. The first step is to ensure the Word document is as “clean” as possible to simplify the conversion process.

## Step A: Prepare the Documents

1. Prepare any blank FrameMaker files that you will need to hold the content that you will be importing from Word. (Ensure you are using the current FrameMaker template)
2. Copy the Word document you’ll be importing and then open the *copied* file.

Warning: It is critical for the remaining steps that you work with a *copy* of the Word file, and not the original file!

3. In the Word document, replace all multiple paragraph breaks with one: replace `^p^p` with `^p` iteratively until none are left.
4. Replace page breaks (`^m`), section breaks (`^b`) and graphics (`^g`) with blanks.
5. Remove non-essential text from the headers: this is to avoid this text being brought into FrameMaker.
6. Delete any Table of Contents.
7. Replace double spaces after periods with single spaces: “. [space][space]” with “. [space]”.
8. Move text notes into main body of document.
9. If possible, ensure that the Word document uses at least the basic styles that correspond to the FrameMaker template: Body, Headings 1 to 4 and Bullets.

## Step B: Import the Word Document

There are several ways to import the Word file into FrameMaker. They are listed here in the order that you should try them.

### Recommended Method: Save Word File as RTF and Import

This is the most reliable method of importing a Word file.

1. Save the Word file as an RTF.
2. In FrameMaker, press **Ctrl-O** and select the Word file to open.
3. Click **Convert**.

FrameMaker will try to open and convert the RTF file.

If the conversion is successful, the contents of the Word file will appear in a *new* FrameMaker file.

4. Copy and paste the contents of the new FrameMaker file into the FrameMaker chapter that you prepared.

Note: You can also *try* opening the Word file directly in FrameMaker, without converting it to an RTF first, however this method often fails.



**Alternate Method: Copy and Paste from Word into FrameMaker**

1. In Word, select all the text to copy.
2. In FrameMaker, select **Edit > Paste Special > Rich Text Format**.  
If this fails, proceed to the next method.
3. Open the RTF file in FrameMaker using the same steps as Method 1 above.

**Step C: Complete the Conversion**

4. Do a quick check of the starting and ending text to ensure that all the text has been copied over from Word into FrameMaker.
5. Ensure all comments have been brought over: convert these to internal notes.
6. Reimport graphics as referenced files.
7. Repeat these steps for each Word document that you want to convert. You slowly build up a set of FrameMaker files, each with the contents from all the Word documents.
8. Create a book of the FrameMaker documents.
9. At the book level, do a careful manual search and replace of the paragraphs styles.
10. Do any final cleanup and text replacements.

**Indexing****General Format**

All entries are in lowercase, except for product and role names.

Use a maximum of 3 levels of indexing, for example

printing,

documents,

color

black and white

For actions, use gerunds, for example, *printing documents*.

For nouns, use plural where possible, for example, *documents, printing*

**Creating a “See” Index Entry**

Use the following syntax in the index marker text:

```
<$nopage>listed topic, <Italics>see <Default Para Font>topic  
to be referred to
```

**Example**

```
<$nopage>documents,<Italics> see <Default Para Font>model  
documents
```

creates this index entry:

```
documents, see model documents
```

**Creating a “See also” Index Entry**

Use a “see also” index entry as a secondary index entry, where there are other secondary that have page numbers.

Use the following syntax in the index marker text:

```
<$nopage>Topic1:<Italics>see also <Default Para  
Font>Topic2 [Topic1:aaa]
```

[Topic1:aaa] ensures that the see also link will be at the top of the list

**Examples**

```
<$nopage>Rule Library:<Italics> see also<Default Para Font>  
rules [Rule Library:aaa]
```

creates the 2 first lines of this index entry:

```
Rule Library
```

```
    See also rules
```

```
    Rules Manager, 10
```

**Keeping Paragraphs Together**

Use the **Paragraph Designer** (ctrl-M) > **Pagination** > **Keep With** > **Next Pg** check box and **Widows/Orphan Lines** fields to force a page break. Avoid using **Start** > **Top of Page** as this locks in the page break. If any of the previous content changes, this page break may no longer be necessary.

Generally, you should add a page break if a topic would be inconveniently broken up otherwise. This can include a break within a paragraph, a procedure or an example. Avoid using a page break if it causes 1/3 or more of the page to be blank.

Because the layout of a document is dynamic, only use this feature just before shipping the final document.

**Locking FrameMaker Files**

Because we access FrameMaker files on a common network drive, you need to ensure that you have enabled file locking. With this enabled, another technical writer cannot accidentally overwrite a file that you are currently working on.

**To enable file locking**

- In **File** > **Preferences**, select **Network File Locking**.

## Searching for Tabs and Returns

To locate a special character, enter the following text in the Find/Change box:

Tab	\t
Forced return	\r
End of paragraph	\p (lowercase)
Start of paragraph	\P (uppercase)

It can be useful to search these when cleaning up your documents. Most tab markers are not needed, and all forced returns (shift-Enter) should be replaced with proper paragraph breaks (Enter key).

## Shortcuts

- Character designer – **Ctrl-D**
- Paragraph designer – **Ctrl-M**
- Table designer – **Ctrl-T**
- Graphic wrap – **Esc M, P**

## Paragraph Rules

To add rules above or below headings:

In the Paragraph Designer, click **Advanced > Frame Above Pgf/ Below Pgf**.

Note: You will need the Chapter Reference page in the document to be able to select rules to appear.

## Removing Color Definitions

If you can't delete a color definition:

1. Save the file as a MIF file.
2. Delete the unwanted color definitions
3. Save the MIF file as a .FM file.

## Rotating Text

**To rotate text (for tables only)**

1. Select cell(s).
2. Click **Graphics > Rotate**.
3. Usually select the last 'A' character.

## Text Insets

A text inset, also called a text object, is a reusable section or “chunk” of text. It is enormously powerful way to reuse content within a chapter, a book, across several

books and even across books or documents of different types, including across product and training documentation. The power of a text inset is that changes only have to be made in one area, and these changes will automatically appear in all the documents containing (or referring to) this inset.

You can combine text insets with conditional text and variables to further customize them.

## Guidelines for Text Insets

### Size

The challenge when creating an inset is to make it an appropriate size. If you make the inset too large, this causes a problem if you only want to reuse part of the inset, although you can use conditional text to hide and display certain sections. Note, however that this will complicate your conditional text settings and use.

If you make the text inset too small, then you may end up with many insets, which can be difficult to maintain and manage. You need to strike the right balance, although generally it is much easier to add smaller insets together to form a larger section, compared to breaking a large inset apart into smaller pieces. The latter situation requires replacing the larger insets with the smaller ones.

### General Guidelines and Information

- Add internal comments to your text insets describing where they are used, especially if they are used in different books. Include the *long* filename variable in the comment, for example:

*(This T:\Tech comm\Guide\07 Software.fm section is common to the Admin Guide, Console Help and Publisher Admin training guides.)*

- Procedures are often good elements for reusing in the product and training documentation.
- When updating a book, avoid selecting to update the insets, because this can cause incorrect paragraph formatting to be applied to the text that immediately follows an inset. Instead, close and open each file to refresh the insets. Then, do a search for insets and verify that the paragraph formatting after each inset is correct. Use internal notes to indicate the correct formatting.
- Insets are updated *recursively*. That means if you have an inset containing another inset, when you update the second inset, the change will appear in the first (master) inset when the file is opened. However, in general, you should avoid having insets within insets, as this can make making changes much more difficult.

## Text Inset Types

There are two types of text insets: FrameMaker and NotePad (.txt).

The FrameMaker text inset is preferable, because

- it can contain any FrameMaker feature: paragraph and character formats, cross-references, conditional text, graphics, and even other text insets
- you can easily open or edit it by double-clicking it
- you can spell-check it

Note: The text inset will inherit the paragraph and character styles of the document it is in.

One disadvantage with FrameMaker text insets is that an extra line return is added after them. This can cause problems if the text inset is in a table or if you want it to be in a line of text, instead of in a paragraph all its own. In some cases, therefore, you would use a NotePad text inset instead.

A resolution to this problem is available below (see *Blank Lines Appear After An Inset* on page 158)

## Searching Text Insets

When searching text in a document or book, the FrameMaker find function will not search any text insets. The workarounds are:

- create a temporary super-book that includes all the FrameMaker text insets, as well as the book's regular chapter files: note that you cannot include NotePad files in a FrameMaker book
- generate a PDF and search it
- use the Windows Explorer search function: this will search both FrameMaker and NotePad files

## Repairing Broken Text Insets

If the filename or location of a text inset changes, then any references to the text inset will break. To fix this, you will need to manually reimport the text inset. Alternatively, if there's another file that has the correct inset, you can copy and paste this valid inset over the broken one. This is the quickest way to repair it.

## Text Insets and Conditional Text

In a text inset, ensure that the end of document marker is unconditional, or you may get an error. If all the entire contents of an inset are conditional, make the text inset itself conditional, and not the actual text in the inset.

## TOCs – Adding Step Numbers

This section describes how to customize the TOC to include step or stage numbers or letters. This is done in most of our installation guides. For a detailed reference, see the Tracker installation guides.

1. Right-click the TOC in the book file and select **Set up Table of Contents**.
2. Add the paragraph styles you want to include, usually **Step A** and **Step B**.
3. Click **Set**, then click **Update**.

The steps will be added to the TOC but will not appear in the correct format.

4. Make a temporary copy of the Tracker install guide TOC.
5. Delete all the paragraph styles from this copy except **StepATOC** and **StepBTOC**.
6. Import the two paragraph styles (**StepATOC** and **StepBTOC**) from the copy styles into your TOC.

Note: There is no autonumbering in these paragraph styles. The numbering is created using the TOC reference page as described in the remaining steps.

7. Open the second **Reference** page of your TOC (the **TOC** reference page).
8. Locate the following two lines: they should be at the top of the TOC reference page:  
`<$paratext> <$pagenum>`  
`<$paratext> <$pagenum>`

Note that the first line should have a paragraph format of **StepBTOC** and the second line a format of **StepATOC**.

9. Once you have located these two lines, delete them.
10. Copy and paste the following two lines into the end of the section containing the various lines and styles on the TOC reference page:  
`<$paranum> <$paratext> <$pagenum>`  
`<$paranum> <$paratext> <$pagenum>`

Important: Copy and paste the text *exactly* as it is here.

These lines create the required numbering and format for the TOC. Note that there is a tab before the `<$pagenum>` tag.

11. Regenerate the book.
12. Open the TOC and verify that the step number listings appear correctly.
13. Adjust the left indents of the **StepATOC** and **StepBTOC** paragraph styles as necessary so that they line up consistently with similar headings, usually **Heading2TOC**. Ensure the indents are the same for both **StepATOC** and **StepBTOC** styles.

## Troubleshooting

*Items are listed in alphabetical order.*

### Blank Lines Appear After An Inset

By default, a blank line will appear after an inset.

#### To remove the blank line after an inset

1. Click the inset to highlight it.
2. Select **Ctrl-M > Pagination**

3. In the **Format section**, select **Run-In Head--Default Punctuation**
4. Clear the contents of the **Run-In Head--Default Punctuation** field.
5. Click **Apply**.

The extra line return is removed.

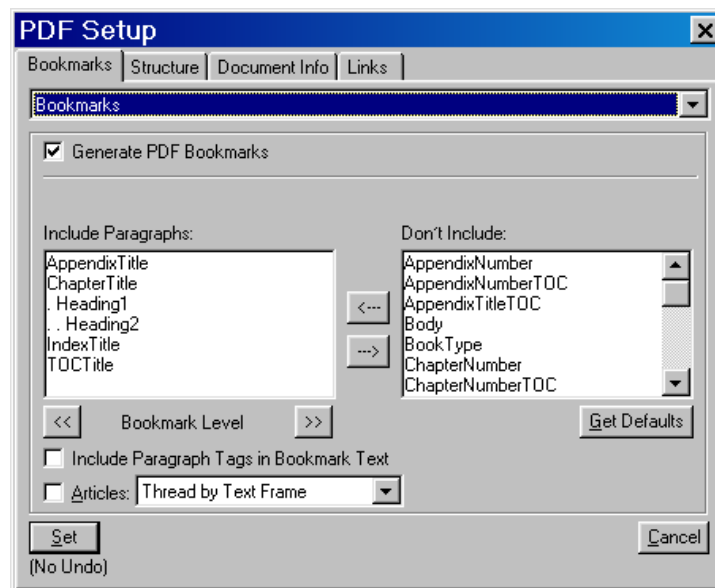
## Broken Cross-References Not Found

Sometimes when you generate a book, the error report indicates there are unresolved cross-references. However, when you click the hyperlinks in the book report to locate them, they do not appear. If this happens, search the book and all its insets for unresolved cross-references. If none are found, it is probably because Framemaker is reporting on a cross-reference to a topic that is conditionally hidden. (This is a known defect in FrameMaker.) You can therefore safely assume all the cross-references are correct for the particular conditionalized version of the manual you are generating.

## Chapter Numbers or TOC Bookmarks in PDF TOC

If chapter numbers or extra TOC bookmarks appear in the PDF TOC, complete the following steps

1. In the Frame TOC file, go to **Print > PDF Setup > Bookmarks**.
2. In PDF setup, the following styles should be selected and should appear in this hierarchy. This affects how the bookmarks appear in the PDF.



3. Print the TOC to a file and then save it to ensure the settings are saved.
4. If this doesn't work: In the **Reference** page of the TOC template, ensure the text in the last page (the **TOC** reference page) matches that in your TOC file.

The text starts with: `<$paratext> <$pagenum>` and ends with `openObjectId <$relfilename>:<$ObjectType> <$ObjectId>`.

The text is only a few lines: it's one of the things that controls what text appears in the Frame and PDF TOCs.

If these lines don't match those in *your* TOC file, copy them over from the TOC template file, replacing the lines in your TOC file.

See also: *Paragraph Style Missing in PDF Setup Bookmarks* on page 162.

## Chapter Numbers Missing in TOC

In the **Reference** page of the TOC file, ensure the text in the last page (the **TOC** reference page) includes `<$paranum>` — that is:

```
<$paranum> — <$paratext> <$pagenum>
```

Note: `<$paranum>` — should be **PrintOnly** for user guides that are also used for Help project, and should be unconditional for all other guides.

## Conditional Text Error

If when updating a book, you get the error

```
Condition indicator for <tag name> is inconsistent...
```

First try importing the conditional text tag formats from one chapter into all the files in the book. If you still get the error:

1. From one of the documents, find some text with the conditional text that is listed in the error message.
2. Select to **Edit Condition Tag** but don't make any changes.
3. Click **Set**.
4. Save the file and import its Conditional Text formats into the other chapters.
5. Update the book.

## Cross-References and Text Insets Broken

In theory, you should be able to cross-reference to a heading within a text inset, but for some unknown reason, this does not always work. When you regenerate the book, the cross-reference will break.

If after several attempts at generating a book, you are still getting the same broken cross-reference to a heading within a text inset, it means that the text insets update is causing the cross-references to break. To fix this, you will need to take the heading out of the inset and paste it into the main document, as follows:

1. Update the book.
2. Search the entire book and text insets for broken cross-references.
3. Move the heading which the cross-reference is pointing to out of the inset and paste it into the main document, just above the inset.
4. Relink the broken cross-reference to the heading you just moved.
5. Regenerate the book and test.



## General Instability

If FrameMaker acts erratically or slowly, or in general appears unstable:

1. Close all open applications
2. Delete all the temporary files you can from the following folder:  
C:\Documents and Settings\*your login name*\Local Settings\Temp

Note: You may need to restart your computer before you can delete your FrameMaker temporary files (FM\*.tmp).

3. You may also need to delete your Windows temporary files located in  
C:\WINDOWS\Temp.

## Headers or Footers Incorrect

If the wrong header or footer appears, complete the following steps:

1. Complete the procedure described in *Chapter Numbers Missing in TOC* on page 160.
2. Check that the `Version` variable is not named `Version No.` and that it contains only the version number.
3. Check that the TOC master page left and right header is **Contents**.
4. On body chapters, check that the variable definition for the **Running H/F 2** header on the **Left** master page is `<$paratext [ChapterTitle] >`
5. Again on body chapters, check that the variable definition for the running **Running H/F 1** on the **Right** master page is:
  - For guides that use the `Heading1` style (most guides use this style):  
`<$paratext [Heading1] >`
  - For guides that use the `Heading1N` style (usually install guides containing numbered stages):  
`<$paranum[Heading1N] > <$paratext [Heading1N] >`
6. Delete the **ChapterTitle** master page from the **Index** template. The first page should use the **Cover** master page.

Tip: If each chapter shares the **exact** same layout, then for each book, fix in one chapter, then import Variables and Page Layouts into other chapters.

## “Missing Fonts” Error

If you get a *unavailable fonts* error when opening a file, try this:

1. In **File > Preferences**, deselect **Remember Missing Font Names** then click **Set**.
2. **Save and Close** the file.
3. **Open** the file.

4. Click **File > Preferences**, select **Remember Missing Font Names** then click **Set**.

The next time you open the file, you should not get the missing font error.

## Headings After a Text Inset are Incorrect/Blank Lines in TOC

Sometimes after you update a text inset, the paragraph tag of the text immediately following the text inset incorrectly changes to the paragraph style of the first heading in the inset. This can cause blank lines to appear in the TOC when you generate the book.

For example, a text inset starts with a **Heading1**. After the inset, there is some body text. When you update the inset, the body text is converted to **Heading1**.

### To fix a text inset

1. Open the inset and ensure that there are *no* paragraph breaks at the end of it.
2. In the main document, enter a thin space (**Esc space T**) at the beginning of the line that immediately follows the text inset. The following example shows this:

### Sample Inset - Heading 3

This is a text inset.

*<- A thin space has been added here, at the very beginning of this line.*

Update the inset to verify that the paragraph style of the text following the inset does not change.

### Fixing Consecutive Insets

If you have an inset that follows another inset, and the incorrect paragraph heading is being applied to the second inset when you update the insets, try the solution described above. If this fails, insert a paragraph return after the first inset and assign the **Tiny** paragraph style to it, for example:

### Sample Inset - Heading 3

This is a text inset.

## Line Spacing Incorrect

If the line spacing or other formatting appears erratic or inconsistent, highlight the text and reapply the **Default ¶ Font** character style, and if necessary, reapply the assigned paragraph style.

## Paragraph Style Missing in PDF Setup Bookmarks

When you are trying to save or print a book as a PDF, a paragraph style you want to include may be completely missing from the **PDF Setup > Bookmarks** tab.

Normally, FrameMaker detects all the paragraph styles in your book. However sometimes FrameMaker is unable to detect certain paragraph styles in the generated documents: that is, in the TOC and Index files.

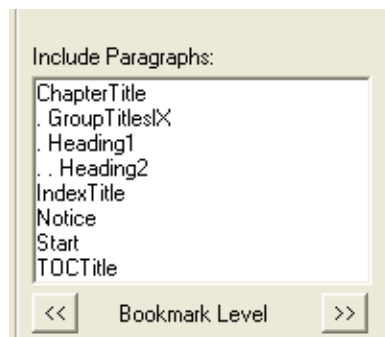
Specifically, in larger documents where the index is more than one page, it is helpful to include the `GroupTitlesIX` paragraph style in the PDF. This creates lettered subheadings (A, B, C and so on) below the Index TOC heading in the resulting PDF file.

If the `GroupTitlesIX` paragraph style is missing, then complete the following steps:

1. Import the `GroupTitlesIX` paragraph style from:
 

```
T:\Tech comm\Selective files\Para formats\
GroupTitlesIX.fm
```

 into a regular chapter file of the book, typically chapter 1.
2. Update the book.
3. Prepare to save the book as a PDF.
4. In **PDF Setup > Bookmarks**, ensure **GroupTitlesIX** is in the **Include Paragraphs** list.
5. Use the **Bookmark Level** buttons to set **GroupTitlesIX** as a “level 2” PDF bookmark level (`.GroupTitlesIX`). The dialog box should appear as:



See also: *Chapter Numbers or TOC Bookmarks in PDF TOC* on page 159.

## SideHead Margin Does Not Appear

The sidehead margin is needed to correctly indent Side para styles such as **SideNote**. If you don't see the side margin, delete the text in the page, then add it back. This should “reset” the master page to the correct layout.

## View Only Documents – Changing to Edit

If you open a FrameMaker document and are unable to make changes to it, it's probably because it's in “view-only” mode. In this mode, the filename appears in the title bar in square brackets, for example `[02Admin.fm]`.

To make the document editable again, simply click the **Toggle View Only** button on the toolbar. It's the eighth button from the left and looks like this:



# Adobe Acrobat

## Printing PDFs with Comments

There are several ways that you can print PDF files which contain comments.

1. With the PDF file open, click **Ctrl-T**.
2. Choose a layout and page size:

**If the pages have many comments:**

- a. Select **Documents and comments with connector lines on single pages**.
- b. Change the **Paper size** to 11 x 17.
- c. Set the **Font Size** to **Large**.
- d. On the **Print** dialog, click **Properties > Paper** and select a **Paper Size** of **Ledger (11 x 17)**
- e. Ensure there is 11 x 17 in the outside tray of the printer before printing.

If there is only one comment on the page, you can use a regular page size:

- a. Select **Documents and comments with sequence numbers on separate pages**.
- b. Ensure the **Paper size** is **Letter**.
- c. Set the **Font Size** to **Medium**.

## WebWorks Publisher

This section contains advanced information about WebWorks publisher, which we use to convert FrameMaker files to online Help projects.

In August 2007, we looked into replacing this tool with the current version, named e-Publisher, which has two versions

- e-Publisher Pro is the main template development tool - the main writer would use this tool to create and manage the Help template
- e-Publisher Express allows the other writers to generate the online help only

e-Publisher is a tremendous improvement over WWP: a separate proposal draft has been created describing the advantages is at:

T:\Tech comm\Info & Theory\Solutions\E-Publisher\

Besides a much easier interface, the Help template can be centralized (using stationery) and the conditional text settings can be specified in the template and will correctly generate without having to adjust the conditional text settings in the Frame files, even with files that are insets.

Because of the merger with Skywire, any purchase decisions have been deferred for several months.

**Warning:** If the FrameMaker files are being used to create online help, ensure that the filenames do not contain spaces, because these will cause problems with the help files. All FrameMaker book files also cannot contain spaces in their filenames.

**Note:** For information on how to create and submit Help files, see *Submitting Help Projects* on page 137.

### Help File Names

Ensure that the name of your WWP Help file project is in the following format:

IStream Product Name.wdt

This will be the name that appears in the title bar in Internet Explorer when viewing the Help files. This name should match the name on the front cover.

**Important:** Do not use version numbers in the filename. This allows the Help file to be reused in a future release if there are no changes.

**Warning:** Only use letters and spaces in the filename. Do not use any special characters such as “&” - this will cause the help project to fail. Do not use underscores (\_) in the filename. Do not include any guide name in the filename, for example “User Guide” or “Online Help”. **Follow this format exactly!**

See also: *Changing the Product Name* on page 133.

## Zip File and Launch File Names

A Help files project is zipped into a single zip file. The zip file is usually `help.zip`. The launch file or index file is the HTML file that opens the online help. It is usually `help.htm`.

To change the help launching file may also requires renaming the original launch file in the support folder. This filename can also be set as follows:

1. Open the WWP project.
2. Click Ctrl D, **Pages** tab.
3. Click **Also generate a Frameset** with this page.
4. Change `index.html` to `help.htm`

However, this procedure may not be necessary. ^^AB to test and verify.

## IDM Context-Sensitive Help

Will eventually change launch files (Frameset files) to `help.htm`

IDM products include context-sensitive (screen level) help. Filename markers in Frame cause the specific HTML file to be generated with the correct name; these markers do NOT include `.HTML` file extensions.

A list of IDM context-sensitive help files is at:

`T:\Products\Doc Manager\Info\IDM screen level help.xls`

Note: The following products do not have screen-level help:

- Correspondence
- Publisher
- Tracker
- Writer

## Template

A WebWorks Help 3.0 template is maintained in the application.

This section contains various template info and fixes.

## Contents, Index and Search Tab Colors

To change the colors of the contents, index and search tabs, edit the following lines in `\Support\wwhelp\settings.xml`:

- **Default** colors are those of the two non-selected buttons
- **Selected** colors are those of the single, chosen (selected) button
- **foreground** - the color of the text
- **background** - the color of the box the text is in
- **border** - the color of the border of the box

```
DefaultColors foreground="red" background="purple" border="blue"
```



```
SelectedColors foreground="black" background="gray" border="orange"
```

## Email Address Link

To enable the email address link in the help template, edit the following line in

`\Support\wwhelp\settings.xml`:

```
<Email enable = "true" address = "[email address]" />
```

Note: This function does not appear to be working! No email button appears.

## Heading Colors

To edit the heading colors in the help template:

1. Click **Ctrl-D Paragraphs > Font**
2. With the **Name** highlighted, arrow down and adjust the color as needed.

Tip: Click **Preview** to see your settings.

## Customizing Link Colors

Edit the `document.css` file in the Support directory: the section at the top defines the link colors.



Note: There is another procedure in WWP's Help that describes how to customize link colors by editing Normal.asp., TOC.asp and Index.asp but you can disregard this as it does not apply to our template. These files do *not* contain link color info.

## Side Style Numbering

### To fix numbering of Side paras within numbered steps

1. Click **Ctrl-D > Paragraphs > Level**.
2. Select **Name > side**.
3. Select **Make relative to previous level**.

## Updating Year, Company Name and Copyright Logo

In \support\Normal.asp, replace &copy; with © and update year.

## Bold and Italics

For Help projects, be sure to use the **Bold** and **Italics** character styles. Manual bolding (ctrl-B) and manual italics (ctrl-I) will appear as plain text in your Help project.

## Splash Screen

The splash screen appears when you load a help file. It is stored at:

\Support\wwhelp\images\**splash.jpg**

From this location, it is output to:

\Output\wwhelp\images\**splash.jpg**

Note: Sometimes when you resize this image, it can cause it to stop appearing in the online help. Try resizing one time only from the original image.

## Template Issues

After investigating with Bernard A. at FrontRunner, it was determined that you cannot easily:

- change the highlighted colour of highlighted words found in a search
- change the font of *Type in word(s) to search for* in the Search tab
- change the size or style of the navigational letters in the Index tab

It was therefore decided to leave these items as is.

## Template Colors

The WWP template uses the Oracle colors: red and black

## Troubleshooting

### Bolding in Side Styles

To bold the first word in Notes, Tips, Warnings, and so on, this code is used:

```
<table border="0">
  <tr>
    <td width="25" valign="top">
      <p class="pBody">
        <b>${PGFNUMBER};</b>
      </p>
    </td>
    <td valign="top">
      <p class="pBody">${DATA};</p>
    </td>
  </tr>
</table>
```

### Chapter Numbers Appear in Help Topics

In Frame, ensure that the text in your **ChapterNumber** styles is tagged as **Print** and that you have hidden your **Print** conditional text.

### Chapter Numbers Appear in Help TOC

Ensure that the **\$paranum** text line is tagged as **Print** in the TOC Reference page:

```
<${paranum}> — <${paratext}>
```

Also ensure that you have hidden your **Print** conditional text.

### Empty Books in TOC

If empty books with no topics appear in your TOC:

1. Complete the procedure described in *Headings After a Text Inset are Incorrect/Blank Lines in TOC* on page 162.
2. Check that **Body** text always follows all your ChapterTitles and Headings 1, 2 and 3.
3. Regenerate the Help project and view the new TOC.

You can also try: **Ctrl-D**, **Level** tab, select **Make relative to previous level** for the TOC styles.

### Errors When Creating or Loading Projects

You may see an error or experience freezing when trying to create or load a project. These errors include:

- The application was unable to convert all of the documents

- FrameMaker encountered an error. FrameMaker was unable to generate the specified MIF file.
- The Wizard was unable to scan documents in *project name*.
- Problem accessing wwpfm7.dll.

If this happens:

1. Ensure the following lines are in your  
C:\Program Files\Adobe\FrameMaker7.2\maker.ini file:  
  

```
WWPPE6=Standard,WebWorks Professional Edition
Plugin,C:\Program Files\Quadralay\WebWorks Publisher
Professional Edition 7.0\bin\wwpro6.dll,all

WWPPE7=Standard,WebWorks Professional Edition
Plugin,C:\Program Files\Quadralay\WebWorks Publisher
Professional Edition 7.0\bin\wwpfm7.dll,all
```

Note: Both lines are needed - don't comment them out!

2. Open this registry key:  

```
HKEY_CURRENT_USER > SOFTWARE > QUADRALAY > WebWorks
Publisher Professional Edition > 7.0
```
3. Ensure that these subkeys have these values:
  - FrameMakerClass = FrameFamily7.0MdiFrame
  - FrameMakerPath = C:\Program Files\Adobe\FrameMaker7.2\FrameMaker.exe
4. If you're still getting errors, reinstall WWP.

## Heading4/Method Heading Displays in Wrong Font

If the procedural headings appear in the wrong font, it's probably because they use the Method style and have not been mapped to the WWP Heading4 style.

### To map the Method style to the Heading4 style

1. In WWP, click ctrl-P.
2. Click the **Mappings > Paragraph** tab.
3. For the **Method Source Style**, select **Heading4** as the **WebWorks Style**.

## HTML Files Have Wrong Names

If you are using context help in screens, you'll be using a Filename marker in FrameMaker to create a fixed HTML filename for the topic, so that the Help button can permanently link to it. Sometimes WWP may generate an incorrect filename - usually an "a" is added to the filename, for example, settingsa.html instead of settings.html.

The only known solution is to delete the help project, recreate a new one and regenerate.

## Numbering/Fonts Wrong

Ensure each paragraph is mapped.: Ctrl-P > Mappings > Paragraphs. Numbered styles are mapped to Smartlist1, 2 and 3.

Body within a numbered procedure will cause the numbers to restart in WWP. Change to Body2 or Body3.

## Wrong Conditional Text Showing

1. Click **Ctrl-P > Conditions** tab
2. Delete all the conditions.
3. Click **Apply**. WWP adds back any active conditions
4. Regenerate the project and test.

## Wrong Title Appearing/Page Error

Ensure:

```
WWHFrame.document.title = this.fHREFToTitle(ParamURL);
```

appears in:

```
\Support\wwhelp\wwhimpl\common\scripts\help.js
```

and that FrameMaker files have no spaces.

Note: If you need to rename the FrameMaker to remove the spaces, you will need to recreate the WWP project from scratch. WWP “remembers” the old Frame filenames even after renaming them!

## WDT Help Project Does Not Finish Loading

If your WDT file does not seem to finish loading in WWP, try clicking File > Properties to display the properties. This should clear the loading dialog.

## Poor or Missing Graphics

Ensure that all screen captures are in GIF or JPG format.

Map graphics in WWP as follows:

1. **Control-P**
2. Click **Output** tab, **Graphics** tab.
3. Click **Current Mapping** to highlight whole column.
4. Select **JPG**. (Any Imported by reference option fails for the online help instructions’ referenced graphics) Extensive testing has shown that JPG produces the overall highest quality for most screenshots, even those captured in GIF format.

## Mapping Options

- **GIF** – converts the contents of an anchored frame to GIF

- **GIFImportedByReference** – copies GIF from Frame with no changes
- **JPEG** – converts the contents of an anchored frame to JPEG
- **JPEGImportedByReference** – Copies JPEG from Frame with no changes

## Security Message in IE

To resolve a problem in which a security message appears when trying to load the Help under Windows XP, a special line of code called “Mark of the web” was added:

```
<!-- saved from url=(0013)about:internet -->
```

This line was added to:

- the help launch file, i.e.: help.htm
- Normal.asp
- Support\wwhelp\wwhimpl\version.htm
- all files in \Support\wwhelp\wwhimpl\common\html
- all files in \Support\wwhelp\wwhimpl\java\html
- all files in \Support\wwhelp\wwhimpl\js\html

The following files did not need updating:

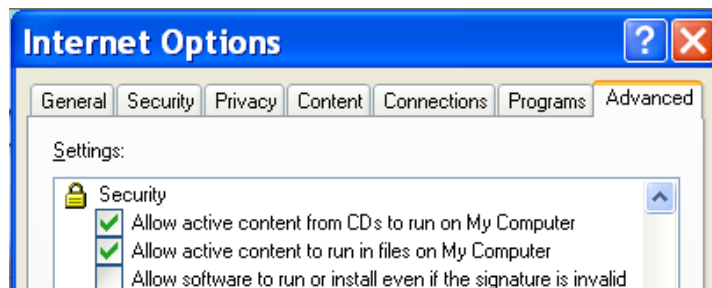
- files.asp
- Index.asp
- popups.asp
- TOC.asp
- topics.asp

This problem seems to occur only with Help files that are accessed locally. It does not happen with Help files accessed over a network. However, many of our products are indeed installed and assessed locally

### Alternate Solution

The above solution works but it is a complicate “hack” of the help files. An alternate solution is to change the security settings in IE:

1. In Internet Explorer, click Tools > Internet Options > **Advanced** tab
2. Scroll down to the Security section and select the following check boxes:



Important: We will need to confirm if it's OK to ask our users to do this if we no longer produce help files with the 'Mark of the web' fix.

## **Table Text is Too Small**

Ensure that the table is within a body paragraph tag. Other tags will cause the text to shrink in size.

Also note that text in a table that follows a Body2 or greater or Numbered style will shrink!

## Snagit

Snagit is a powerful screen capture and image editing utility.

You should set up custom profiles that automatically save the file to the working folder of your project, usually a *Product/graphics* folder, and in the correct file format (TIF).

### To set up a custom profile in Snagit8

1. Click the plus sign (+) in the upper right corner to create a new profile. (You cannot change the basic capture profiles.)
2. Select **Input > Region**.
3. Select **Output > File**.
4. Select **Output > Properties**.
5. Select **Image File > Always use this file format**, then select **TIF**.
6. Click **Options**, then select a **Subfile type** of **Packbits RLE RGB**.
7. Click **OK**.
8. Select **Ask for file name**.
9. Select **Use last used folder**.
10. Click **OK**.
11. In the **Profile settings** section at the bottom, look in **Options** and ensure that the mouse arrow is not selected and that the preview button (with the magnifying glass) *is* selected.
12. Click the disk button in the upper right corner to save the profile.
13. To set the hot key for a profile, right-click the profile name and select **Set HotKey**.

See also

- *Screen Captures* on page 68
- *Inserting Graphics Into Word* on page 185

## Snagit and VMs

You can do regional Snagit captures from within a VM, but not scrolling or object captures. Use the Snagit OneClick feature to easily access your capture profiles. From OneClick, you can select **Configure Snagit OneClick** to configure the display and other options for this feature.

Because you cannot use scrolling captures, if you need to capture a large screen, you will have to capture each segment and then use the Snagit editor to carefully merge them together.

## Graphic Resolution

^^ This section requires cleanup:

Consider the question, “What's the dpi of a photo that shows 710 x 493 megapixels?”

The image size is 710 by 493 pixels (not megapixels), which makes for a total image size of 350,030 pixels—but remember that each pixel is really three pieces of color information, one for red, one for green, and one for blue (look at your monitor under a magnifier to verify this!), so your total image size in bytes is 1,050,090, which is actually only slightly over a megabyte, since the measurements are really powers of 2 (a kilobyte is 1024 bytes and a megabyte is 1,048,576). But your file size, thanks to image compression, will most likely be less (JPEGs reduce files size with a kind of “this pixel is pretty much like that one” algorithm, and it gets sloppier if you want a smaller file size; TIFFs can have LZW compression added, which assigns values to every color actually used and can say “24 pixels of color 76” rather than having 76 pixels of the same 8-bit definition).

DPI, in spite of the common usage to refer to picture resolution, is not a measure of picture resolution; ppi is. Pixels per inch tells you, well, how many pixels per inch the picture is to be rendered at -- if you have a picture that's 720 pixels on a side, you can have it 10 inches wide at a rather “soft” (screen-resolution) 72 pixels per inch, or a much smaller 2.4 inches at a printing-suitable 300 pixels per inch. It's something you specify when you save the picture. For most printing, 300 ppi is good; if you have high-contrast black-and-white line art, 600 is better.

Not much need to go over 600 usually, because 600 dpi -- dots per inch -- is the usual output of a digital printing device (though some go up to 1200 or higher). What you print is made up of teeny dots of ink or toner, and there's no point in having a picture so sharp that the printer is trying to render two pixels with a single indivisible dot of toner. The other limiting factor is lpi - - lines per inch, which is the resolution of the halftone screen used in the print job.

Color gradations are normally produced in offset printing jobs by turning the smooth color into little dots of varying sizes. (These dots are usually in cyan, magenta, yellow, and black (CMYK), so if your picture right now is red, green and blue (RGB), it will have to be converted somewhere along the way to CMYK, though no need to do it yourself now, probably -- the production people can handle it to their own satisfaction.)

The number of *\_these\_* dots—which are made up of quite a few dots (as in dpi) of ink if digitally produced—is measured by lines per inch, which is how many lines of said dots go per inch. Newspapers tend to be around 85; magazines go more like 133, and it goes up from there, but not too far. I'll spare you the digression on dot gain and so forth...

As for your pictures, if you need them for print, find out what size they're to be printed at (or estimate), and scan them so that they will be about 300



ppi at that size. (So if your picture is 4 by 6 inches but it will be printed at 6 by 9 inches, you'll need it to be 450 ppi at scan size, then change the resolution—but without resampling to a different pixel dimension—to make 6 by 9 at 300 ppi.) Then save them as TIFFs if you can, because they lose quality if you save them as JPEGs. RLE packbits compression will work without loss.

## Viewlet Builder

This section gives e-learning course best practices and tips.

### Viewlet Builder

#### New Viewlets vs. Patched Viewlets – Deciding which to Use

When you are updating a Viewlet, you need to decide whether to patch the existing Viewlet or create an entirely new Viewlet. In general, I found that the extent of interaction with new UI elements was the most important factor in judging whether a Viewlet should be patched or recreated. Here are the steps that I followed:

1. Watch the original Viewlet all the way through. You may want to jot down some notes. While you watch, pay particular attention to the following:
  - the changes to the UI from the original
  - the extent to which the lesson would use any new UI elements. For example, if the new UI element is a button, is it clicked in the lesson, or is it just visible? Does the lesson interact with new UI elements often, or only once or twice?
  - screenshots. If you were to patch the Viewlet, would you need more than 5 or fewer than 5 new screenshots to do the job? What screenshots would you need?
  - information covered in the lesson, and the order in which it is covered. If you decide that you need to recreate the Viewlet from scratch, you can use this information as a guide for how to present the material.
2. Look at your information and make a decision. If the lesson interacts with new UI elements more than once or twice, and/or you would need more than 5 different new screenshots to update the lesson, you should probably recreate the Viewlet. This is a guideline only, and there will be exceptions. Do what makes the most sense to you.

#### Patching Viewlets – Helpful Tips

- It's a good idea to take all of the screenshots that you will need all at once, *before* beginning to patch the Viewlet. This will save you time later.
- Once you have all the screenshots, insert and position the graphics required on the first slide that needs updating.
- It's likely that at least a few of the slides that follow require identical graphics in the same positions as the first slide. You can copy all of the graphics at once from the first slide using **shift +click** to select them, and paste all of the items at once onto the slides that follow. Slides are instantly updated before your eyes. Amazing!

- You can repeat the process of pasting and positioning pictures if a slide requires different or additional graphics from the first updated slide.

## Recreating Viewlets – Helpful Tips

- Before you begin taking screenshots for the new Viewlet, think back to the original Viewlet and look at any notes you made while watching it. Determine a good spot in the lesson for any new content, and try to cover everything that the original covered, in the same order. This ensures that you won't miss any content and that you won't need to go back to take more screenshots later.
- Name the new Viewlet using the name of the original, followed by **new**.  
**Example:** brackets new.qvp. This way, you can retain a copy of the original for reference.
- You cannot open multiple Viewlets within one running instance of Viewlet builder. Instead, open two instances of Viewlet Builder so that you can have both the new and original Viewlet open. You can refer to the old Viewlet while you are designing the new one, and copy and paste text between the old and the new Viewlets (see below).
- Although you can't copy and paste balloon call-outs and notes between Viewlets, you can copy and paste the text *contained within* balloons and notes. This is helpful if you want to include an explanation from the original that is fairly lengthy.
- Once you are sure that your new Viewlet is finished, you can overwrite the original Viewlet with your new copy. This way, you don't have to worry about changing the source file names in FrontPage.

## Checking Your Viewlets

It's a good idea to have Internet Explorer open, and navigate to the page in the course that includes the Viewlet that you just updated. Verify that your changes are there, and that everything looks the way that you want it to look. Fix any errors before moving on to the next Viewlet. This will save you time and effort when you are doing a final check of the course, and will ensure that you don't miss anything.

## Dealing with Viewlet File Corruption

Each time you modify a .qvp file, Viewlet builder creates a file with the same name and a .qv~ file extension. When sorted by name, the .qv~ file is located just below the original .qvp file. You can rename the .qv~ file to recover a Viewlet when the original .qvp file is corrupt.

### To restore a .qv~ file, follow these steps:

1. Open up the folder where your Viewlets are stored.
2. Locate the file that you want to restore.

3. Change the name of the file, and change the file extension to .qvp. For example, you could change brackets.qv~ to brackets1.qvp.

You can now open the file in Viewlet builder.

## Microsoft FrontPage

### Helpful Tips

The quickest way to find out the name and location of a Viewlet is to right-click inside the Viewlet's anchored frame in FrontPage, and select **Page Properties...** The **Location** field shows you the location and file name of the Viewlet, while the **Title** field shows you the title that you gave the Viewlet when you published it in Viewlet Builder.

If you apply a background picture to all pages, you'll find that the background picture is applied to pages containing the flash files as well. If the background picture is visible behind the flash animation in Internet Explorer, you can fix the problem by following these steps:

1. In Microsoft FrontPage, right-click within the anchored frame that contains the flash animation. Select **Open Page in New Window**.
2. The page containing the flash file opens. On the menu for the newly opened page, click **Format > Theme...**
3. In the **Themes** dialog, clear the **Background Picture** check box.
4. Ensure that the **Selected Page(s)** radio button under **Apply Theme to:** is selected.
5. Click **OK**.
6. **Save** and **Close** the page. The picture should no longer appear behind the animation in Internet Explorer.

Keep in mind that you'll probably need to follow these steps for only a few of the pages that contain flash files. For most of them, the background picture will not be noticeable, even though it is still there.

---

## IxGen

IxGen is a Frame add-on utility that automates the process of creating and managing an index.

### Creating an IxGen Index

Use this procedure to create a editable index marker list. Only complete step B if you don't have any index entries in your document, and want to create new ones based on your headings.

#### Step A: Select the Frame Files You Want to Index

1. Open the Frame book.

**Important:** If the book contains any files that have text insets, you will also have to manually add all the inset files to the book. IXGen does not recursively add index markers to text insets. You can create a temporary book to do this.

2. Click **IxGen > Select Files**.
3. Select the files that you want index. Exclude the cover, TOC, and Index.
4. Click **Done**.

The selected files are now tagged as files to include in the editable marker list.

#### Step B: Add Index Markers to Selected Files

**Important:** Complete this step only if you do not have *any* index entries in your Frame files!

1. From the book file, click **IxGen > Markers from Para Tags**
2. Select the paragraph tags you want to index: usually Headings 1 to 3 suffice.
3. Click **Create**.

The index markers are created and inserted into your Frame files.

#### Step C: Create the Editable Index Marker List

1. From the book file, click **IxGen > Gen Editable Marker List**.
2. Ensure that only the **Index** type is under **Collect Markers of Type**.
3. Click **Generate**.

The Editable Marker List file is generated. Review the instructions in it.

### Using the Editable Marker List

To make changes to an index entry, just edit the last column. Use semicolons to separate entries and colons to create multi-level entries, just like in the regular FrameMaker index entry tool. Save the file when you are done so you can use it later.

Important: After making changes, click **IxGen > Apply Edited Marker List**, then update the book.

The complete IxGen manuals are on the tech writing drive at:

`\Misc\Tech writing apps\IXGen\Manuals\`

## FrameMaker Customizer

FrameMaker Customizer is a free, handy add-on to Frame that adds extra functions to the FrameMaker toolbar.

### To install FrameMaker Customizer

1. Unzip \Misc\Tech writing apps\FM Customizer\FM6CustomXpress.zip to:  
C:\Program Files\Adobe\FrameMaker6.0\fm\configui  
(CustomFMWin.pdf is the main user guide and has the complete install instructions.)
2. Back up the maker.ini in C:\Program Files\Adobe\FrameMaker6.0.
3. In maker.ini, add "configui" to the following two lines so they appear as:  
EquationDoc=fm\configui\equation  
ToolBarIniFile=fm\configui\fmtoolbr.ini

## Excel

### To compare cells

=EXACT (A1, A2)

### To freeze the top header row

1. Click the **2** in the first grey row on the extreme left, to select the second row.
2. Click **Window > Freeze panes**.

### To freeze the first column

1. Click the **B** in the second grey column on the extreme left, to select the second column.
2. Click **Window > Freeze panes**.

### To freeze both the column and row titles

1. Click the cell that is both just below the column titles and just to the right of the row titles, usually B2.
2. Click **Window > Freeze panes**.



---

# Word

## Shortcuts

- Update fields - ctrl-A, F9
- CTRL+M - Indent a paragraph from the left
- CTRL+SHIFT+M - Remove a paragraph indent from the left
- CTRL+T - Create a hanging indent
- CTRL+SHIFT+T - Reduce a hanging indent
- ^b - section break
- ^m - page break
- Repeat last command - record a macro

## Working with Word Graphics

### Inserting Graphics Into Word

**Important:** Do not copy and paste graphics into Word. As with FrameMaker, you should always link the graphic into the file. This has two advantages:

- it reduces the size of the Word file
- it keeps the graphic file separate, allowing you to easily redistribute or edit it

### To insert and link a graphic into Word

1. Click **Insert > Picture > From File**.
2. Highlight the graphic file.
3. Click **Insert > Link to File**.

The graphic is inserted.

See also:

- *Screen Captures* on page 68
- *SnagIt* on page 175

### Exporting Graphics from Word

Often you may need to export (or extract) a graphic in a Word file, and save it as its own graphics file, especially if you are converting the Word file to FrameMaker.

To do this:

1. Copy and past the graphic from Word into SnagIt.
2. If the image is not distorted, save it as a BMP, then complete the remaining steps:

3. In the **Save > Options**, select **16 colors (4 bit)** or **256 colors 8 bit**.
4. For **Subfile type**: select **compressed RLE**
5. Save it again as a TIF. This step is needed because TIF is our standard file format. Also, you may not be able to import the BMP file into Frame.

## Importing Word Files with Graphics into FrameMaker

If you open a Word file in FrameMaker, the linked graphics will be imported into FrameMaker, as linked, graphics files in their own frames. However, they will be distorted. It therefore may be easier to reimport the graphics into FrameMaker manually. This ensures the graphics will have the correct proportions.

## Miscellaneous

### To save a Word file as a PDF

1. Clean up the file and fix margins.
2. Select to print to Acrobat Distiller.
3. Before printing, clicking Properties in the Print dialog box.
4. For foreign language text: in Adobe PDF Settings, clear **Do not send fonts to Distiller**.

### To printing four pages per sheet

Set pages per sheet to 2. (Scale to paper size has no effect.)

### To specify which pages print

The page number that prints is the one stated in the lower left corner of Word, for example Page 7. It is not the actual page specified as N/N in Word.

### Restarting List Numbering

Sometimes when using Word, lists do not correctly begin renumbering. You can restart the numbering on a list of numbered paragraphs by using a LISTNUM field.

1. Add a field of the form `{LISTNUM \1 1 \s 0}` at the end of each list. (The `\1` flag gives the list level of the numbered style; this is not needed for a single level list.) Resetting the number to 0 at this point means that the next time the same numbered style is used, the numbering sequence will restart at 1.

You can insert the field at the end of the last list item, or in a separate paragraph that you add at the end of each list. You can create an AutoText entry for the formatted field to make it easy to insert manually, or you could provide a 'start list' macro that sets the style of the current item to the numbered style, and inserts the field at the end of the next previous paragraph of this style.

2. Format the field so that it will not print. Use a white font, especially if the field shading **View** option is set to **Always**, so the white number 0 shows up against the grey field shading. Alternatively, use a hidden font, so the field is visible when you **Show non-printing characters**, but takes up no space when hidden.

Note: You can use a named LISTNUM field where the name refers to the list template that is linked to the style. This allows the LISTNUM restart to refer explicitly to the numbering sequence to be restarted, so the position of the field is not important. However, this explicit reference depends on the name of the list template, and this name can sometimes be lost when styles are updated from template or when styled paragraphs are pasted between documents. To use named list templates to 'mix and match' LISTNUM fields and styles safely, you would need to reset the name on the list template linked to the style programmatically when required.

For other methods of restarting list numbering, see <http://word.mvps.org/faqs/numbering/ListRestartMethods.htm>.

## Internet Explorer

The page numbering code is  
&b&b&p of &P

## Windows

### Character Map

Use the Windows character map to locate and copy special characters.

You can also create special characters by pressing the Alt key and then entering the three digit character code. For example, the following combinations create a checkmark:

- Alt+214 in the ITC Zapf Dingbats font
- Alt+252 in the Wingdings font ✓

### Printscreen

Use **alt-Printscreen** to capture a selected item only.

## Virtual Machines

Before you can open a VM, ensure you have copied over the entire VM folder into your **My Documents > My Virtual Machines** folder.

Note: You do not need to copy any REDO files (files with REDO in the filename.)

### Opening a VM

#### To open a VMware Workstation

1. Open a VMware Workstation.
2. Browse to and open a VMX file.  
The VM displays as a tab.
3. Edit **Settings > Hardware > Memory**
4. Slide the pointer to the setting suggested by the person who supplied by the VM. (Setting vary for each VM.) If you later want to change this setting, you first need to close down the VM first before changing it.
5. User ID and password is always MIS, 1@insystems
6. For new VMs, select to install a new SID, give it any name, then restart.
7. Use **Ctrl-Alt** to exit full screen.
8. Use **Ctrl-Alt-Ins** to exit VM.
9. Click **Start > Shut down** to exit VM.
10. Click the red stop button and then X out to exit.

### Creating a Shared Folder

You can create a shared folder in your VM to copy files from your VM to your system, typically screenshots.

#### To create a shared folder in a VM

In the VM configuration:

1. Click the tab of the open VM (next to the **Home** tab.)
2. Click **View > Settings > Options > Shared Folders > Add**.
3. Run the **Add Shared Folder Wizard**.
4. Select a network location.

#### On the application running in the VM:

1. Go to **My Network Places > HostShared Folders on .host**  
(or **Entire Network > Entire Contents > VMware Share folders > host shared folders**)
2. The shared folder will appear. Create a shortcut to this folder

## Tortoise SVN Version Control

Tortoise SVN (Subversion) is an open source file version control system. We use it to submit:

- Tracker, Publisher and IDM files to development that are actually part of the build.
- escrow files for *all* documentation

Most of the files are zip files containing the online help, but we also submit text files and PDFs.

Tip: Ho and Mike Pozin are the main technical contacts for SVN.

### SVN File Locations

Files are stored in the following locations:

#### Documentation Escrow

<http://s-torsvn01/svn/Documentation/trunk>

#### IDM Toolkit and Online Help

<http://s-torsvn01/svn/Calligo6x/trunk/Calligo/Install/buildfiles/Documentation>

#### IDM Toolkit Samples PDF and Samples ReadMe Files

<http://s-torsvn01/svn/Calligo6x/trunk/Calligo/SDK/Samples>

#### Communicator Online Help

<http://s-torsvn01/svn/Pub/trunk/EDelivery/Console/onlineHelp>

#### Publisher Console Online Help

<http://s-torsvn01/svn/Pub/trunk/EDelivery/Console/onlineHelp>

#### Writer Online Help

<http://s-torsvn01/svn/Calligo6x/trunk/Calligo/Writer/Extrafiles/help.zip>

### Setting up an SVN Folder

Before you can update files, you have to complete a one-time operation called *checking out the files*. By doing this, you are creating a working directory on your local system where the files will be stored, and configuring these files so they are linked in with their copies on the repository (server).

---

#### Method: Setting up a checkout folder

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1. If necessary, obtain from development the location of the doc files on the repository.

2. Create a local, empty folder on your system where you will be storing all working files: the recommended location is `C:\Checkouts\Product name`. This will be the permanent location for these files, so plan it carefully and avoid changing it later.
3. Ensure this folder is open in Windows Explorer.
4. Right-click a blank area in the open folder and select **SVN Checkout**.
5. In the URL of Repository field, enter the folder path the SVN file location of the source files (see *SVN File Locations* on page 191.)
6. Specify a **Checkout directory**. Use the local folder that you created in step 2.
7. Click **OK**.  
The files are copied to your hard drive so that you can work with them.
8. You'll see the checked out files and folders have a green checkmark.
9. To verify your changes, go into the Repo-Browser location, and press F5 to refresh.

---

#### **Method: Update the files on the repository (commit changes)**

---

When you update, rename or delete files, you need to *commit* the files to ensure the changes are made on the repository.

1. Copy the updated files or folders to the checkout directory you created in the previous procedure.  
The changed files or folders now have red exclamation marks, indicating they have been changed and need to be committed.
2. Right-click the file or folder in the **Checkout directory** and select **SVN Commit**.
3. Add a message describing the changes, then click **OK**.  
The file has been checked in.

---

#### **Method: Restoring and Modifying Older Documentation Files**

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Sometimes you may need to update the files from a previous release. To restore, update and check back in the files:

1. In the Repo-Browser, locate the zip file you want to restore.
2. Right click the file, and select **Show Log**.
3. At the very top of the **Log Messages** dialog, right-click the older revision you want to restore, and select **Check out**.
4. Select a check out folder.



---

**Method: Restore old files without checking them out first**

---

If you just need to quickly look at an old version without checking it out first, complete these steps:

1. In the Repo-Browser, locate the zip file you want to restore.
2. Right click the file, and select **Show Log**.
3. At the very top of the **Log Messages** dialog, right-click the older revision you want to restore, and select **Save revision to...**
4. Select a folder to save the file.

---

**Method: Add a new file or folder**

---

You can add new folders and files to the existing structure.

1. In the Repo Browser, locate where you want to add the file or folder
2. Click **Add Folder** to add a folder, or **Add File** to add a file.

After adding a file, to add a description in the log to it

1. Right-click the file and select **Show Log**.
2. Right click the revision and select **Edit log message**.

---

**Method: Delete or rename files on the repository**

---

You can delete or rename files from your checkout directory.

1. In Explorer, right-click the file or folder.
2. Select **TortoiseSVN > Rename** or **Delete**.

The changes do not take affect until you commit the changes using the previous method above.

# ClearQuest Defect Tracking

## Documentation Defects

Do not reassign defects. Mark as **Fixed** (if you updated the documentation) or **Rejected** (if you did not do anything).

Using the **Internal** condition, add the defect number to the documentation where the fix was performed. Create a draft of the fixed document and save to a **Drafts** folder on N. In ClearQuest, include a note in the bug indicating that the bug was fixed and can be reviewed in the draft on N.

Assign **Symptom = Documentation Issue**.

### To reinstall ClearQuest on new system

1. Click **Start > Programs > Rational TeamTest > Rational ClearQuest > Rational ClearQuest Maintenance Tool**.
2. Click **File > Import Profile**.
3. Set the **File Name** in the **Import Profile Information** to  
`\\dbsmar_01\QA\cqprofile3.ini`
4. Click **Next**, then **Finish**.

### To configure automatic emailing

Your system (as well as everyone else's) should be configured for automatic email notification of defects. When this is enabled, when you or anyone else logs a defect and assigns it to you, you will be emailed the defect.

1. In ClearQuest, select **View > Email Options**.
2. Ensure **Enable Email notification** is selected.
3. Ensure **Email Provider** is SMTP.
4. Click **Next**.
5. Ensure **Outgoing SMTP Server** is `mail.internal.insystems.com`.
6. Enter your email address, then click **Finish**.

### To mount a VOB

You can mount a VOB to view an old build and possibly locate old documents.

1. Right-click *name\_Calligo* in the middle pane.
2. Select **Mount VOB**.
3. Choose a VOB.

The VOB also appears in the Z drive.

## DOS Commands

### DIR

DIR/X reveals 8.3 paths for example, MYDOCU~1 or FAVORI~1.

## General Troubleshooting

If an application is not working correctly, here are some general troubleshooting steps you can try:

1. Delete all temporary (.tmp) files on your system. FrameMaker, and Windows in general, are notorious for not properly cleaning up after themselves.
2. Shut down and restart your system: this can clear up all sorts of strange problems.
3. See if you have the same problem with another file, or on another system. Have someone else try to replicate the problem.

# Appendix 8

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## Glossary

This appendix describes various technical terms that are used in our products and in our industry.

### **Information Architecture**

The organization of information; the field which studies how to organize information most effectively to help people find and use the information. For instance, how should websites be organized? What is the best way to design website navigation? How should pages be labeled and identified?

The design of organization, labeling, navigation, and searching systems to help people find and manage information more successfully.

### **Information Design**

A broad term for the design tasks of deciding how to structure, select, and present information (inclusive of information architecture, information visualization, and information retrieval).

Focuses more narrowly on activities that support the architecture and planning, such as style guidelines, graphic design motifs, page design, and the information aspects of industrial design (labels, knobs, and other physical aspects of the user interface).

### **Information Development**

See *Technical Communication* on page 199.

### **Information Retrieval**

The field of study that examines how people find information and how tools can be constructed (such as search engines and catalogs) to help people find information. Studies examine how the organization of information affects its retrieval, the types of searches people do, the kinds of search queries people can make effectively, and what determines the relevance of retrieved information.

### **Information Planning**

Focuses on using the architecture for a specific division, set of products, or individual product.

**J2EE**

An acronym for *Java 2 Platform, Enterprise Edition*. A Java platform designed for the mainframe-scale computing typical of large enterprises. It was designed by Sun, IBM and others to simplify application development in a thin-client, multi-tiered environment. It creates standardized, reusable modular components and enables the tier to handle many aspects of programming automatically.

J2EE is platform-independent and is used to develop, build and deploy Web-based enterprise applications online. It consists of a set of services, APIs, and protocols.

**MQSeries**

MQSeries (the MQ stands for *Message Queue*) is an IBM software family whose components are used to tie together applications so that they can work together. This type of application is often known as *business integration software* or *middleware*.

MQSeries consists of:

- MQSeries Messaging, which provides the communication mechanism between applications on different platforms
- MQSeries Integrator, which centralizes and applies business operations rules
- MQSeries Workflow, which enables the capture, visualization, and automation of business processes

MQSeries allows programs to communicate with each other across all IBM platforms, Windows, VMs and a variety of Unix platforms. It provides a common API to which programs are written.

**OpenJMS**

An open-source messaging platform and implementation of Sun Microsystems's Java Message Service (JMS) API. The JMS API is a messaging standard that allows application components based on J2EE to create, send, receive, and read messages. It enables distributed communication that is loosely coupled, reliable, and asynchronous.

**Printer Control Language (PCL)**

A language (or set of command codes) that enable applications to control various HP printers.

**Regression Testing**

The selective re-testing of previously tested functions to ensure that software which has been changed to fix previous problems or otherwise updated does not inadvertently contain new defects. Also called *verification testing*.

**Sanity Check/Sanity Test**

The checking of software for completely stupid or obvious mistakes.

**Servlets**

Java programs that run on the server rather than on the user's computer as Java applets. Servlets can be developed to replace traditional common gateway

interface (CGI) scripts, and run much faster because all user requests run in the same process space.

**SME (Subject Matter Expert)**

Someone who has a good working knowledge of the subject matter to be documented. SMEs are usually designated as reviewers.

**Smoke Test**

The first run of a piece of software after construction or a critical change.

**SDK (Software Developer's Kit)**

Software provided by a software vendor to allow their products to be used with other products. It enables a programmer to develop applications for a specific platform. Typically includes one or more APIs, programming tools, and documentation.

**Technical Communication**

The process of taking technical and highly complex information and making accessible, relevant and comprehensible to those that need it. It involves systematically gathering, creating, analyzing, forming and organizing information.

Also known as *technical writing*, or its more accurate term, *information development*. For details, see *An Overview of Technical Communication* on page 17.

**Thin Client**

In client/server applications, a client designed to be especially small so that the bulk of the data processing occurs on the server.

Small computers in networks tend to be clients and not servers. Since the goal is to limit the capabilities of these computers to only essential applications, they tend to be purchased and remain *thin* in terms of the client applications they include.

**WebSphere**

An set of IBM products that implement and extend Sun's J2EE platform. It is a Java-based application and transaction infrastructure that delivers high-volume transaction processing for e-business. Provides enhanced capabilities for transaction management, security, performance, availability, connectivity, and scalability.

WebSphere allows customers to create and manage sophisticated business Web sites. The central WebSphere tool is the WebSphere Application Server

In addition to Java, WebSphere supports open standard interfaces and is designed for use across different operating system platforms.

**WebSphere Application Server**

A Java-based application server that supports servlets, JSPs and EJBs. Includes the Apache Web server. A customer can use it to connect to Web site users with Java applications or servlets.





## Appendix 9

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### Assorted Information

This appendix contains assorted information that does not neatly fit into any of the other chapters.

- *Product Information* on page 202
- *Technical Writing Dept. Information* on page 205
- *Projects & Solutions* on page 208
- *Patch Development Processes* on page 210
- *Company Info, Policies & Procedures* on page 211
- *Interviewing Tips with Students* on page 214

## Product Information

This section describes our various products.

### Product Names

The following

#### Tracker

Tracker automates the U.S. insurance industry's filing process. It helps identify and track critical activities, manage workflow, and automatically prepare and assemble required state filing documents.

Tracker has two main versions *Enterprise Edition* and *Filing Edition*. The Enterprise edition contains all of the Filing edition functionality but also adds:

- a web-based interface to allow external collaboration
- workflows
- statuses
- web reports

Tracker also has two sub-versions, representing different areas of the insurance industry:

- Life and Health (L&H)
- Property and Casualty (P&C) – includes home and auto insurance

#### Tracker Implementation

A Return On Investment (ROI) report is prepared for a prospective client, to explain the potential cost savings and payback period for implementing Tracker. Next, a Process and Design document is prepared. It analyzes the current company's workflow, describes how Tracker should be implemented, and may suggest changes to the company's work processes.

Several months later, a post-implementation audit is performed to indicate how successful the Tracker implementation was.

#### Admin Module

This is the main set up and administration area of Tracker. It includes:

- **Company Info** – address, phone number, NAIC codes, departments
- **Authorities** – the states that the company is licensed to sell insurance in; LOBs are associated with each state
- **Resources** – the specific users and their titles, such as actuary, officer, underwriter; note that these titles cannot be customized

## Custom Tables

These tables are used to customize certain values in Tracker. They include:

- **form types** – the particular forms and documents that will be used
- **LOBs** – Lines of Business, for example, Life, Health and Auto. These can be customized as necessary. New LOBs must be mapped to one or more existing LOBs. For example, a new “critical illness” LOB could be mapped to the existing life, health and disability LOBs.

Generally, unused values should be deleted after Tracker is set up.

## Legislation and Publications

Legislation and Publications are related but different items. Legislation applies to L&H insurance only. It represents new and proposed laws that will affect existing insurance products, and therefore will result in a carrier having to submit filings to reflect the new law. A Legislation entry usually applies to just one state and LOB.

You can add attachments and link filings to legislation.

Publications apply to P&C insurance. They are produced by regulatory bodies and advisory organizations such as the ISO (Insurance Services Office) or the NCCI (National Council on Compensation Insurance). Publications save the insurance companies from having to develop their policies from scratch. Companies simply select from the agency’s filings, knowing they are already certified by the state.

## General Filing Process

1. Create a new product.
2. Create a filing group and assign the product to it. (A product can have multiple filing groups.)
3. Add one or more filings to the filing group.
4. Add forms to the filing, for example, the policy form, coverage form, or application form.
5. Add any other attachments to the filing: these are supporting documents.
6. Check the Regulatory Specialist area for further info.
7. Generate the filing.
8. Send the filing to SERFF, if set up for this.

## Terminology

- **carrier** – an insurance company
- **COA** – certificate of authority; required by companies to sell insurance in a particular state
- **endorsement** – the P&C name for a rider
- **rider** – a supplemental benefit in a policy

- **rate filing** – a filing that describes a proposed rate change
- **rule** – the condition that applies to a rate, for example, if the state is California and the applicant is male, then apply a specific rate

Note: **Towne Insurance** is the fictional carrier name used in all Tracker documentation and screenshots.

# Technical Writing Dept. Information

## Senior Technical Writer - Job Description

### Major Duties and Responsibilities

- create, maintain and enhance all InSystems documentation projects including:
  - user guides and online help
  - technical, SDK and installation guides
  - ReadMe files
- ensure documentation is complete, consistent, accurate, useful, comprehensible and meaningful
- manage, co-ordinate and prioritize multiple projects simultaneously
- guide BA's, project managers and others regarding documentation “best practices”, including wording, content, overall document structure, any new documents required and appropriate locations for current or new information
- where possible, work with the actual applications to properly document all changes
- create documentation drafts describing all documentation requirements, assumptions, dates and reviewers

### Assorted Duties

- log defects for UI and usability issues found in the products, including field and dialog box names, on-screen instructions, and general UI design
- review and edit documentation created by others
- review and rewrite error messages
- resolve all documentation defects logged in ClearQuest
- use internal notes and comments to ensure documentation is “self-documenting” and to track all change requests
- effectively re-use text through the use of variables, conditional text, cross-references and reusable text objects
- maintain FrameMaker and WWP templates
- ensure all reviewers are aware of documentation review and freeze dates
- adhere to information development processes including the style guide
- ensure all change requests are completed and verified
- use ClearQuest to check in Online Help files
- maintain Technical Writer’s Guide

- maintain spreadsheet list of active documents

## Documentation Requirements and Assumptions

The senior technical writer uses the PRD and other documents to gain an overview of the changes, and where possible, to begin making the actual changes to the documentation.

Documentation defects logged in ClearQuest should be as explicit as possible and should contain the suggested new or changed text, and the affected guide names and page numbers. If this information is not provided, development time increases considerably.

Generally, the more detailed and specific the information that can be supplied to the writer, the lower the documentation development time.

The degree to which the writer can develop the documentation independently varies with each guide, as follows:

- **User guides and online help:** the writer can use the actual application to test and verify the UI changes. Assistance from developers or QA is occasionally required if the steps needed to view the changes are complex or require a specific configuration.
- **Installation guides:** if the writer can be given access to the installation application and supplied with *all* the required values needed to complete the process, the installation guide can be developed relatively independently.
- **Technical guides:** these include SDKs, APIs, Administrator and Tech guides: specific changes must be supplied directly to the writer. The writer will reword these changes and send them to the reviewers for verification.

## List of Technical Writers

Name	Extension	Title	Location	Start Date
Andrew Brooke	3374	Senior Technical Writer	Markham	March 17, 2003
Ken Weinberg	3508	Technical Writer	Markham	October 10, 2005

## List of Software Used

The minimum software applications required (for example, for student writers) are in bold.

<b>Software</b>	<b>Description</b>
<b>Main Tools</b>	
<b>Adobe Acrobat (full version) 7.08</b>	creating and editing PDF files
<b>Adobe FrameMaker 7.2</b>	main documentation development tool
<b>Quadralay WebWorks Publisher Professional 7.0</b>	creates online help from FrameMaker files
<b>Snagit 7.0 &amp; 8.0</b>	screen captures and image editing
<b>Visio Standard 2002 SR-1</b>	diagrams, flowcharts, and so on
<b>Misc. Tools</b>	
<b>Excel 2003 SP2</b>	for some documentation files and for planning
<b>IxGen 7.2</b>	index creation and management tool for FrameMaker
<b>Microsoft Project</b>	project management tool for some doc plans
<b>Tortoise SVN</b>	version control tool used to check in help files also used to check in final documentation source files for Escrow
<b>InCalligo</b>	intranet
<b>VMWare</b>	for accessing virtual machines
<b>E-Learning</b>	
<b>FrontPage 2003</b>	creates website, pages and navigation
<b>Qarbon Viewlet Builder 4</b>	creates Flash animated demos, quizzes and interactive exercises

## Projects & Solutions

This section describes various tool, project and long-term solutions that would greatly benefit the information development process.

### Structured Frame

We are investigating converting our documents to a structured format. This requires creating a proper EDD file and mapping our current para and character styles.

### Content Management System

Ideally, we should be using a proper content management system with these features:

- check-in and check-out of files with complete version control and file reversion ability
- workflow: ability for authors and all tech writers to directly review and comment on only the sections that have changed
- complete organization, identification and structure of text objects and elements - we need a system that can manage all our content and text objects so that we can easily reuse, identify and assemble these objects

Tools investigated to date include Siberlogic and AuthorIT.

As of Jan. 2007, Chris felt we needed more writers to justify such a tool.

### FrameScript

We should obtain FrameScript - a scripting language that would allow us to create custom applications and macros.

This would allow us to:

- move and consolidate graphics and text insets
- quickly hide and display the necessary conditions before generating a book
- replaced text with variables without changing the paragraph and character formatting
- strip out unused paragraph, character, condition, and cross-reference formats, and unused variables, and color definitions
- quickly change the top row of a table to a heading row
- automate the process of inserting a graphic by changing the anchored frame default settings.

### Consolidating Text Insets

We need a way to consolidate our various text insets into one folder.



Nov. 7, 2006: Bernard A. (bernard@publishingsmarter.com) indicated he could it would take him 4 to 6 hours to build and test.

## Patch Development Processes

### From Veronica - June 2006:

1. Dev. Team Lead is responsible for creating the patch and draft readme file. They will create the patch and put in under the `Development\product\version\patches` directory. Leave the folders and files as is. Do not zip anything.

We are going to take the cumulative approach for all patches. The folders can be called Patch 1, Patch 2 or Sp1, Sp2, and so on. The Readme file will have cumulative information which identifies the fix and Change point number.

2. Dev Team Lead will email the QA Team Lead (or QA person who is doing the testing) the path when it is ready for QA. If you need to communicate any information and risk that you don't want to go in the customer readme file, create a `internal_readme` for QA and internal consumption.
3. QA Team Lead will be responsible for functional and 'sanity' regression testing. QA Team Lead is also responsible for working with TW (BA, Dev Team lead if needed) to finalize the Readme and make sure it follows our standards.
4. When QA is complete, QA Team lead will move the files to the Released directory. QA Team Lead will send email with path of patch, path of test report and any special instruction to CS for release to customer.

Sometimes we make an exception and release to customer so that parallel testing can be done by customer as full regression is going on here. QA Manager needs to approve and QA Team Lead can email the files from Development folder to CS for early release. Patch only goes on Released directory after final QA.

5. Customer Support will be responsible for tracking which customers got the patch. They can also zip up the files if needed. They will also do a quick sanity before sending a patch out to the customer. All patches goes through Customer Support. Development does not give out patches to internal or external people.

## Company Info, Policies & Procedures

- Whitehill purchased InSystems June 6, 2006
- Skywire Software purchase Whitehill Sept. 2007

### Holidays

- Between March 22 and April 25 - Good Friday
- Monday before May 25: Victoria Day
- July 1 - Canada Day
- First Monday in August - Civic Holiday
- First Monday in September - Labour Day
- Second Monday in October - Thanksgiving
- December 25 & 26 - Xmas & Boxing Day

### MIS Department

To submit a request, email: MIS Requests.

The MIS department will restore backups on request: you need to specify the date and whether it is the morning OF or the morning AFTER.

### Work-Life Employee Assistance Program

The EAP (Employee Assistance Program) provides counselling, educational materials, and various other services and information. The website is:

- <http://www.lifebalance.net>
- **ID and Password:** rbceng

You can also find some interesting info from our *previous* EAP provider, FGI World:

- <http://www.fgiworldmembers.com>
- **Username:** insystems
- **Password:** tech001

### Vacation Tasks

#### Before going on vacation:

- back up all your files
- complete your timesheet
- change your phone message
- enable the Out of Office assistant

- set phone to *Do not Disturb*
- cancel your newspaper!

## Rebalancing RRSP Investments

These instructions describe how to rebalance your Standard Life RRSP Investments and change your investment instructions. You should rebalance your funds at least once a year.

### Step A: - Download a PDF file containing the current rates of return for *all* funds

1. After logging in, in the **Consult investment performance** section, click **rates and closing values**.
2. Click either **Go** button.
3. Scroll down and click **Merge selected PDF files into a new single file**.
4. Click **Save All**.
5. You're prompted to save a zip file. Click **Open** to open the zip file.
6. The zip file opens in WinZip.
7. Double-click the PDF in the zip file to open it.
8. Save the PDF.
9. Examine the rates of return for each fund. Based on these returns, you should rebalance your funds and change your investment instructions.

Note: Don't use the **Consult investment > Fund Performance and Fees** feature – it does not provide accurate numbers!

### Step B: Change Your Current Fund Balance

1. Click **Manage your Plans > Asset Rebalancing/InterFund transfer**.
2. In **DEFERRED PROFIT SHARING PLAN**, select **Employer Contributions** in the **Account** field, then click **Go**.
3. You have 2 options:
  - Select **Option 1 - Rebalance my assets** to automatically rebalance based on your instructions.
  - Select **Option 2 - interfund transfer** to transfer some or all of your funds to other funds. The simplest way to rebalance your funds is to select 100% of each fund in the **Transfer from**. Then, in the **Transfer to** section, select the funds you want, and the percentage for each.
4. Repeat these steps for **Structured RRSP**.

### Step C: Change Investment Instructions

1. Your investment instructions are the funds and amounts in which you want your contributions to be automatically invested.
2. Click **Manage your Plans > Investment Instructions**.

3. In **DEFERRED PROFIT SHARING PLAN**, select **Employer Contributions** in the **Account** field, then click **Go**.
4. Specify your investment instructions for future investments.
5. Repeat these steps for **Structured RRSP**.

## Submitting Receipts

**From HR:** Original receipts detailing the purchase must be submitted to support expense claims; credit card receipts and statements are not acceptable as they do not meet the requirements of the tax authorities. If credit card receipts and statements are submitted without original receipts, your expense report will be rejected and returned the originator in its entirety.

Send expense reports and receipts sent to Accounts Payable in Moncton.

## Interviewing Tips with Students

When interviewing students, you need to take a different approach compared to interviewing a seasoned professional. Typically, students do not have any work experience related to their field of study however they may have a variety of valuable experience from school, part-time jobs and/or volunteering. Below are some tips for interviewing students effectively.

1. Before you start the interview process, you need to determine what characteristics the ideal candidates would possess. These can include time-management, interpersonal, communications, technical, etc... Once you've determined what the ideal candidate look like, you can create an interview guide consisting of questions to address the various skill set.

The most effective type of questions is based on the individual's past experience and behavior in various situations. Below is an example of a behavioral question regarding time management:

*Tell me about a time you had to manage multiple priorities. How do you ensure you meet the various requirements on time and ensuring your quality of work?*

2. Include questions pertaining to the candidate's interest in our company. These questions can help you distinguish between the candidates and also gain insight to their personalities. Below are some sample questions:
  - Why are you interested in this opportunity?
  - Why do you feel We should hire you over other students?
  - What is your greatest achievement?
  - What do you consider your strengths / weaknesses?
3. Bring a copy of the student's resume to the interview. Before the interview commences, familiarize yourself with the individual's background and past experience. Use the information provided on the resumes to probe further into the candidate's background. You can also refer to their extra circular activities and how they have gained additional experience from them (i.e. team-building, leadership, etc...).
4. You should discuss with the student any school projects they have completed. This includes having them describe the team environments such as the size of the team and length of the project. You should also probe on how a team lead emerged within the team and how the team resolved conflict.
5. Keep notes while interviewing the students. Your notes are critical in comparing the students and determining who the suitable candidates are. It is also useful to rank the students as you see them. Below is a sample ranking guide:
  - 1 – Suitable candidate – would like to make an offer to this student.
  - 2 – Close match – has areas that need developing but would work out.
  - 3 – Has potential – offer only if last resort

- 0 – Not a match at all
- 6. It is important to keep your comments confidential and only discuss them with the internal hiring team. Do not disclose your comments about the students with other students and make sure your comments are put away and not left out visible.
- 7. Keep the interview light. Most students are very nervous and don't have much experience with interviewing. Try to make the student comfortable and relaxed by approaching the interview as a conversation and not grilling session. Each interview is only half an hour which doesn't give the student much time to calm down and present themselves in the best light.
- 8. Be prepared to answer questions. Most students will read through the corporate website in detail especially around the company background and products. They will ask questions. You need to ensure you answer their questions in a professional manner. If you don't have the answer, don't hesitate to ask for the individual's e-mail address and follow up with them within a couple of days after the interview. You should also provide the students with your business card. This allows them to follow up with questions as well.
- 9. Respect the time constraints. The interviews are scheduled for half hour slots. It is important that you start on time and complete the interviews within the allotted time. The students may have other interviews or commitments they must meet and running late will cause undue stress on the student and is unprofessional on your behalf.

## Technical Writer – Questions

Andrew Brooke and Brenda Meades developed the following list of questions for the technical writing student intern position (2006).

1. What do you know about Tech Writing? What skills do you have that would be beneficial to this position?
2. Time management has become essential in personal productivity. Give me an example of any time management skills you have learned and applied at school or work.
3. When gathering information for a document, how would you handle conflicting information from two different sources? Have you ever been in this type of situation in a team environment? How did you resolve the conflict?
4. What has been your most difficult task/responsibility that you've had to carry out to date?
5. What is your favorite course/least favorite and why?
6. What is your greatest achievement?
7. What are your career goals?
8. Why do you feel we should hire you over other students who've applied for this position?
9. Do you have any questions we can answer for you at this time?

Give business card and ask to have two sampled (different styles) e-mailed to us.



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